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Key Date - Outlook Calendar Task Creation

Adam Field - 2026-05-13 - [Comments \(0\)](#) - [Tasks](#)

How to Create a Calendar Entry from a Yao Task

This guide explains how to generate a calendar appointment from a task within the **Yao** system. This process allows you to store and track key dates in both your personal calendar and the **Yao** platform, providing a flexible way to manage any task which has an associated date.

Link to Video Guide: <https://youtu.be/Bwz6wAiv-ag?si=womeLxFMVBeCoko1>

Creating a Calendar Entry for a New Task

1. Navigate to the **Tasks** tab located along the top of the screen within your specific **Matter**.
2. On the right-hand side, click the blue **+ Task** button.
3. Enter a title for the task in the **Enter task heading** field.
4. Set a **Priority** for the task by selecting from the dropdown menu, which includes options such as **Urgent**, **Critical Date**, **Standard**, or **Low**.
5. Select the appropriate date using the **Due Date** calendar picker.
6. Use the **Assigned to** dropdown menu to select the individual who is responsible for the task.
7. In the bottom-left corner of the **Add new task** window, click the **Save to Calendar** button. The system will download an .ics file to your device.

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Add new task

Task heading *

Priority Status

Standard To Do

Category

Select category

Due date Estimate Time

05/May/2026 Choose time

Assigned to *

Adam Field

Description

Enter a description

* Mandatory fields

Upload from correspondences +

Save to Calendar Cancel Add

8. Open the downloaded file to save the entry into your personal calendar as an all-day event on the specified due date. Any text which you have entered in the **Description** field will be included in the calendar item.



9. Click the **Add** button to finish creating the task within **Yao**. The new task will now appear in your task list.

Creating a Calendar Entry from an Existing Task

1. Locate the task which you wish to add to your calendar in the **Tasks** list.

2. Hover over the task until the hyperlink appears and click on the **Task Heading**.

3. In the bottom-right corner of the task window which opens, click the **Save to Calendar** button.

 **Check in with Client Prior to Completion** 

Relative Dates Matter • #1113 ✕

PRIORITY
STANDARD

STATUS
TO-DO


CATEGORY
Simple

DUE DATE
10/May/2026

ESTIMATE TIME
0 min

ASSIGNED TO
Diddy Squater

Notes

No notes added yet. Click the edit icon to add notes. 

Notifications

Send notification when task is completed


When enabled, completing this task will create a notification for the matter

Comments

Add a comment...

Add Comment

No comments yet
Add the first comment above to start the conversation

 Save to Calendar

4. Open the downloaded **.ics** file to append the task information and dates to your calendar.