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.

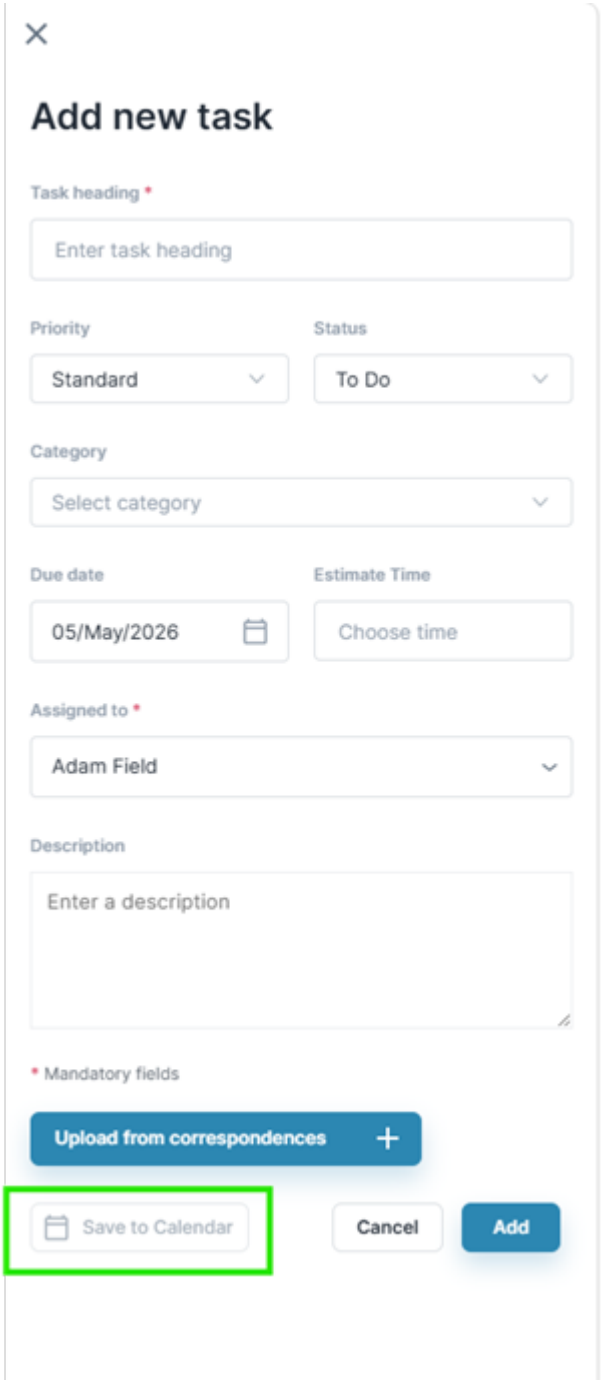
3. Enter a title for the task in the **Enter task heading** field.

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.



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.

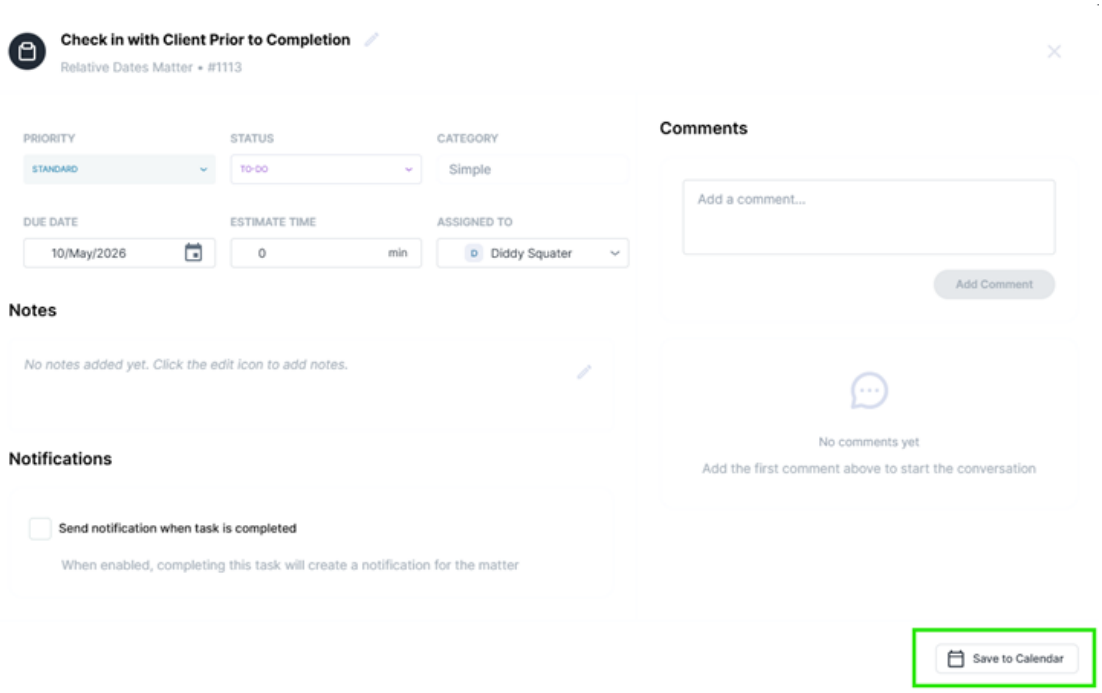
9. Click the **Add** button to finish creating the task within **Yao**. The new task will now appear in your task list.

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.



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