

# Firm Central – Transcript

## How to Create and Use Tasks in Firm Central

Hi, my name is Lane, and today I'd like to show you some features from Firm Central.

Let's take a look at using tasks in Firm Central. Tasks play a crucial role for any legal professional; legal clerks, paralegals, or attorneys. This is particularly true for tasks associated with a specific case or matter. Firm Central's Tasks feature addresses this part of a firm's practice management. Tasks can be created from the Home page, or from within a specific matter.

Let's start by taking a look at creation from the Home page. After logging into Firm Central, click on the orange plus sign in the tasks widget to add a new task. Simply enter the name of your task. If necessary, use the smart search within the widget to select the client and matter with which the task should be associated, along with the due date. Then click Save. The task will now be viewable in the task widget. You can also edit, mark complete, or delete tasks from the Home page widget.

Tasks can also be created, modified, marked complete, or deleted, from a matters profile page. Simply click on Add a Task and enter the details relevant to that specific task.

Unlike the Home page widget, which displays all tasks associated with that specific user, the matter profile page only displays matter-specific tasks. Tasks are shared by everyone assigned to that matter, as a default setting, but can be easily flagged as private so that they are not viewable by other matter team members. Simply select that checkbox stating 'only I can view this task' at the time of creation, or modification.

On the Firm Central Home page, tasks can be printed or e-mailed so that you can view your tasks without being logged into Firm Central. Simply select your delivery method, e-mail, or print.

On both the Firm Central Home page, and Matter Profile page, tasks can be sorted by due date, or completion status. Matter team members will receive a notification on their Firm Central Home page when another member of the matter team has added a task to that matter. The name of the matter and notification is conveniently hyperlinked to that matter's dashboard.

Thanks for taking the time to learn about tasks in Firm Central.