

Tasks: assign, link, follow

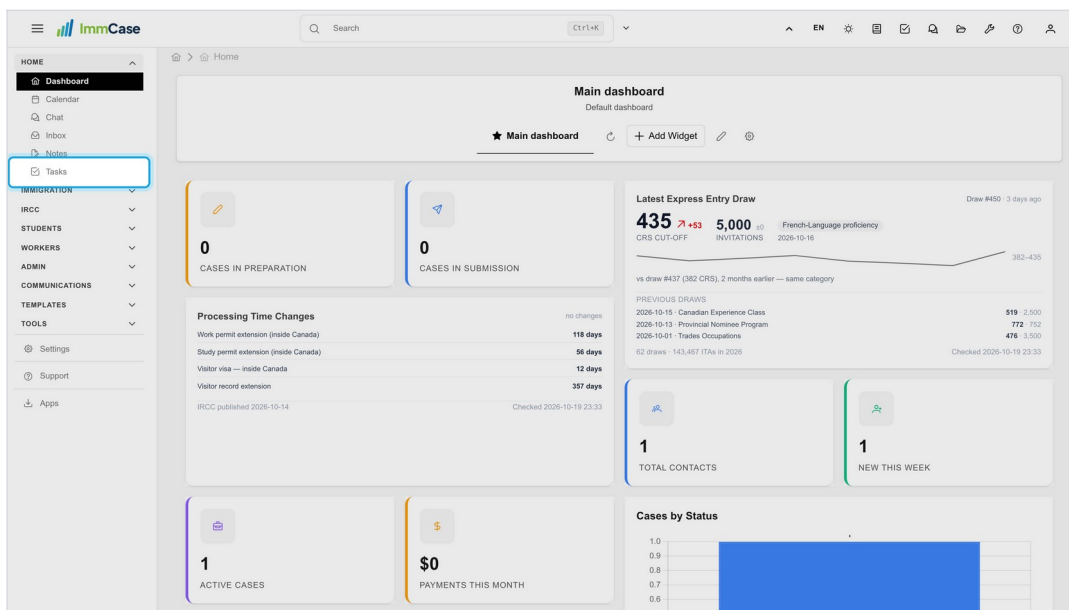
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Tasks are the to-dos of the firm. Each task can have a priority and a due date, be **assigned** to anyone on the team and be **linked** to a client or a case, so it shows up on that record too. Follow them in a list or on a **Kanban board**.

The firm, its staff and the client («Daniela Ruiz») in this guide are **fictional**.

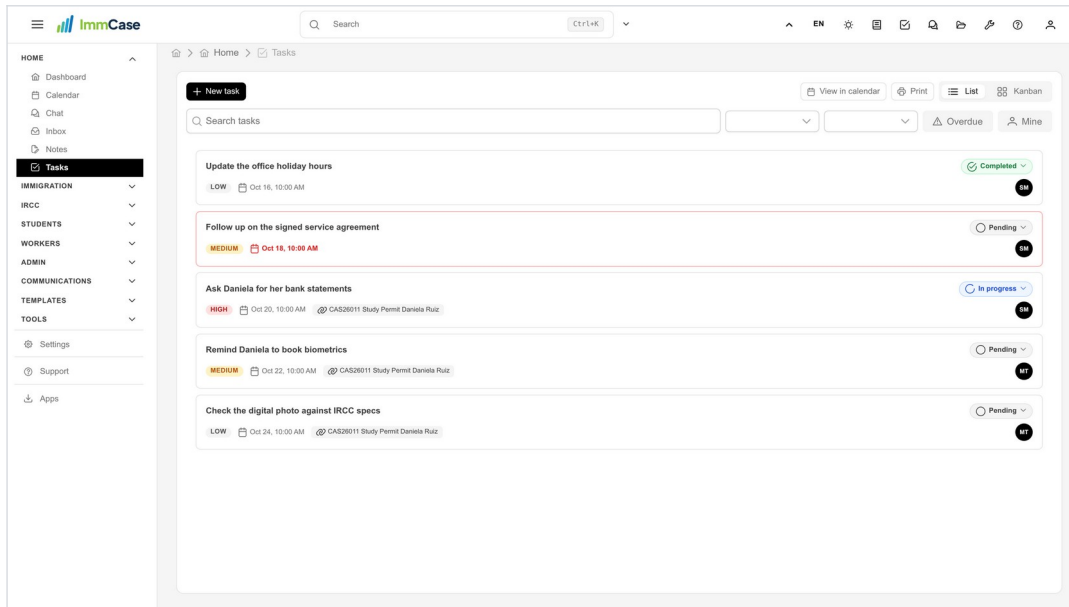
1. Open Tasks

In the left menu, open **Home** and click **Tasks**.



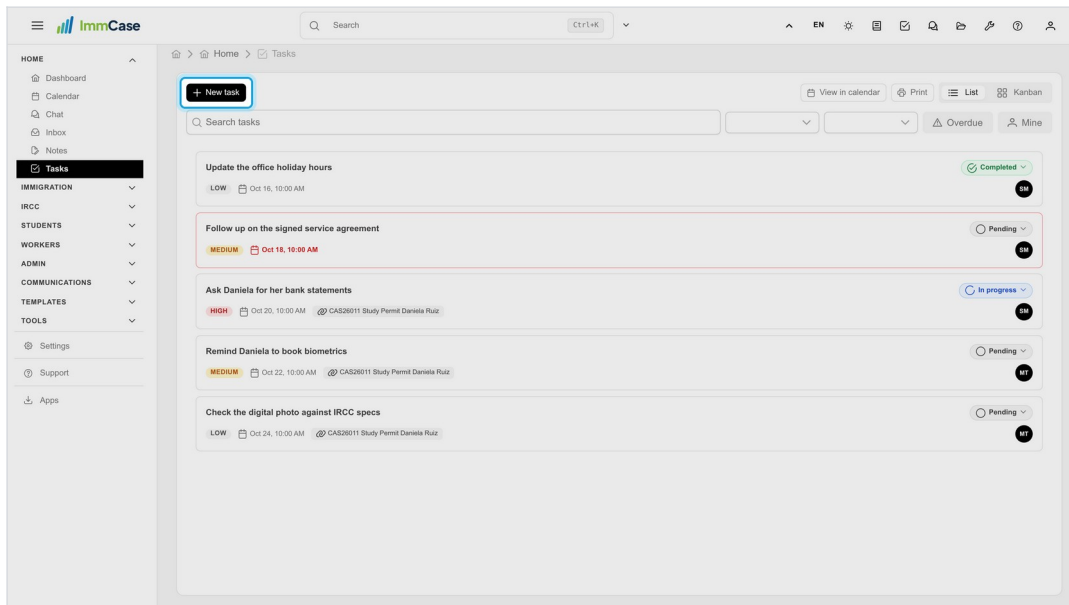
2. The firm's tasks

Each task shows its **priority**, its **due date** (red when it is late), the record it belongs to and who it is assigned to.



3. New task

Click **New task**.



4. What needs doing

Type the **title**. Add details in **Description** if the person doing it will need them.

New task

TITLE
Prepare the study permit forms

DESCRIPTION
IMM 1294 and the family information form, from Daniela's profile.

STATUS
Pending

PRIORITY
Medium

DUE DATE
YYYY-MM-DD HH:mm

ASSIGNED TO
Unassigned

Tip: type the date and time directly, e.g. 2026-04-29 18:30

5. Priority and due date

Pick a **Priority**, then a **Due date**: choose it in the calendar or type it.

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Search

Home > Tasks

+ New task

Search tasks

Update the office holiday hours
LOW Oct 16, 10:00 AM

Follow up on the signed service
MEDIUM Oct 18, 10:00 AM

Ask Daniela for her bank statement
HIGH Oct 20, 10:00 AM

Remind Daniela to book biometric
MEDIUM Oct 22, 10:00 AM

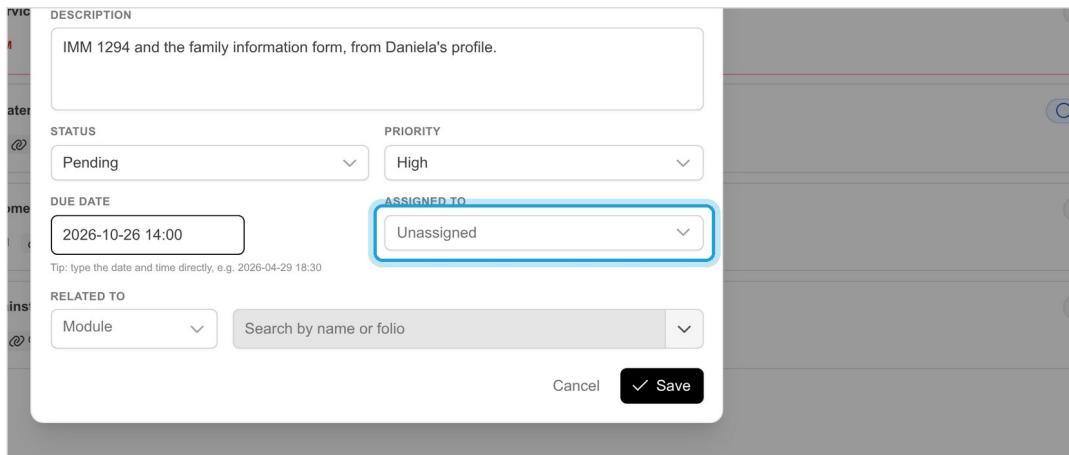
Check the digital photo against
LOW Oct 24, 10:00 AM

Calendar modal:
October 2026
2026-10-26 14:00

Task details:
DESCRIPTION
IMM 1294 and the family information form, from Daniela's profile.
PRIORITY
High
ASSIGNED TO
Unassigned
RELATED TO
Module
Search by name or folio
Cancel Save

6. Assign it

In **Assigned to**, choose who will do it. Leave it **Unassigned** to keep it for later.



DESCRIPTION

IMM 1294 and the family information form, from Daniela's profile.

STATUS: Pending

PRIORITY: High

DUE DATE: 2026-10-26 14:00

ASSIGNED TO: Unassigned

RELATED TO: Module

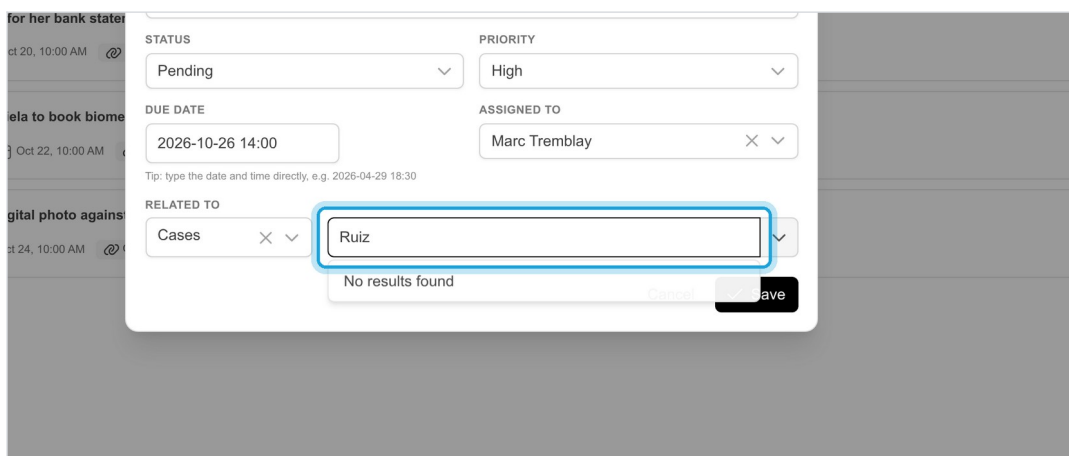
Tip: type the date and time directly, e.g. 2026-04-29 18:30

Search by name or folio

Cancel Save

7. Link it to the case

In **Related to**, pick the kind of record (here **Cases**), then search by name or folio. The task will also appear on that case.



STATUS: Pending

PRIORITY: High

DUE DATE: 2026-10-26 14:00

ASSIGNED TO: Marc Tremblay

RELATED TO: Cases

Tip: type the date and time directly, e.g. 2026-04-29 18:30

Search by name or folio

No results found

Cancel Save

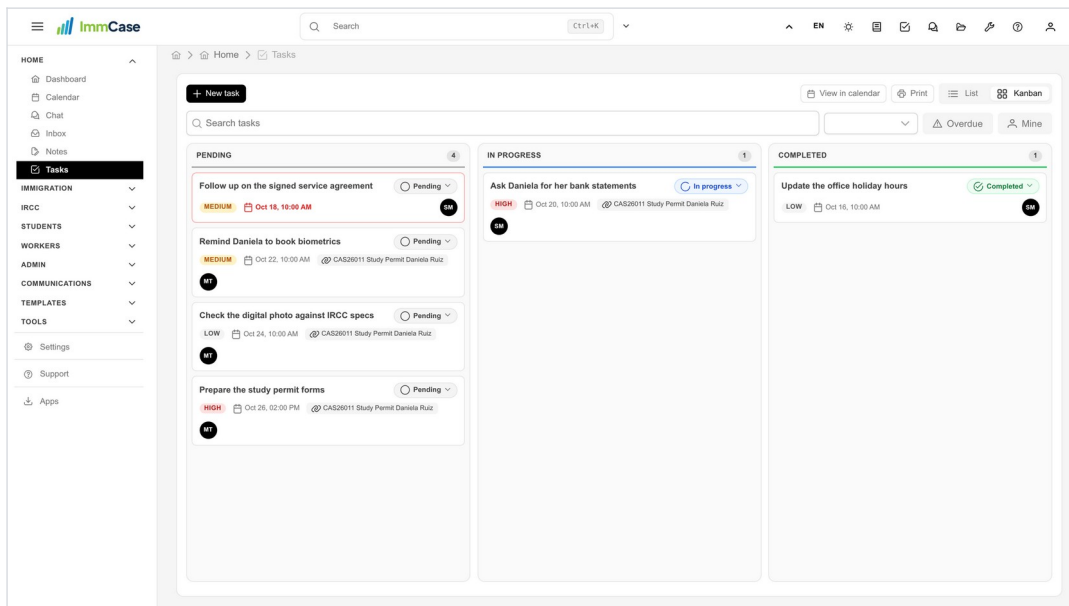
8. Save

Check the task and click **Save**.

The screenshot shows a task editing form. At the top, there's a dropdown menu with 'night' selected. Below it, the 'ASSIGNED TO' field is set to 'Marc Tremblay'. The task title is 'CAS26011 Study Permit Daniela Ruiz'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a blue rectangular box.

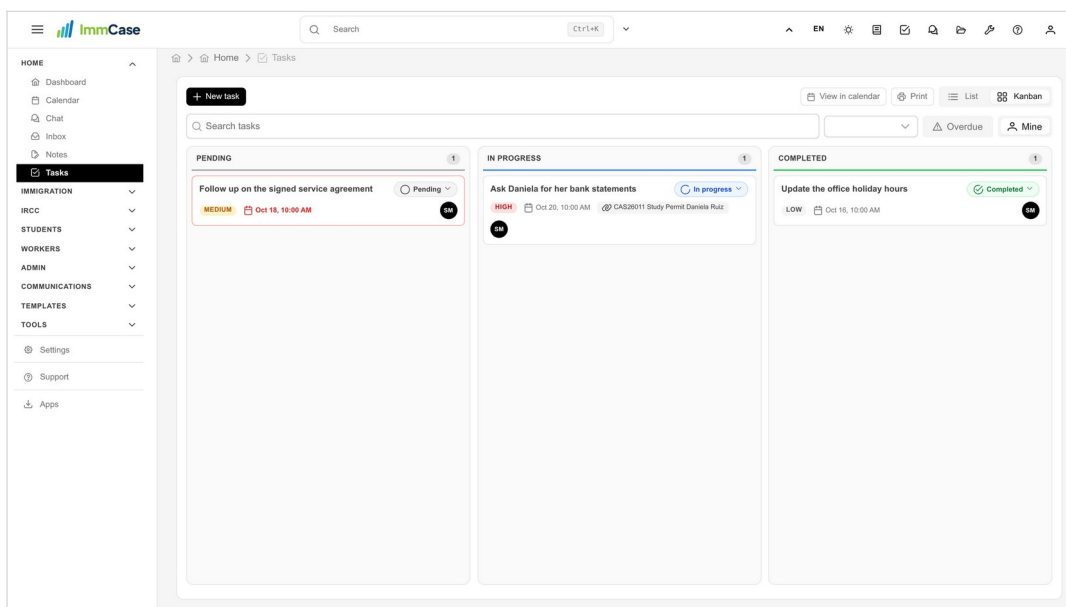
9. The Kanban board

Click **Kanban** to see the tasks by status: **Pending**, **In progress**, **Completed**. Drag a card to another column to change its status.



10. Only mine

Mine shows only the tasks assigned to you; **Overdue** only the late ones. Use them together to see what you owe today.



Good to know

- **From the case itself:** the case's **Tasks** panel has an **Add** button that creates a task already linked to that case.
- **From anywhere:** the check-box icon at the top of every screen opens the same New task window.
- **See them on the calendar:** **View in calendar** shows tasks on their due dates.

Questions: hello@immcase.com.