

How to Manage the Task Board

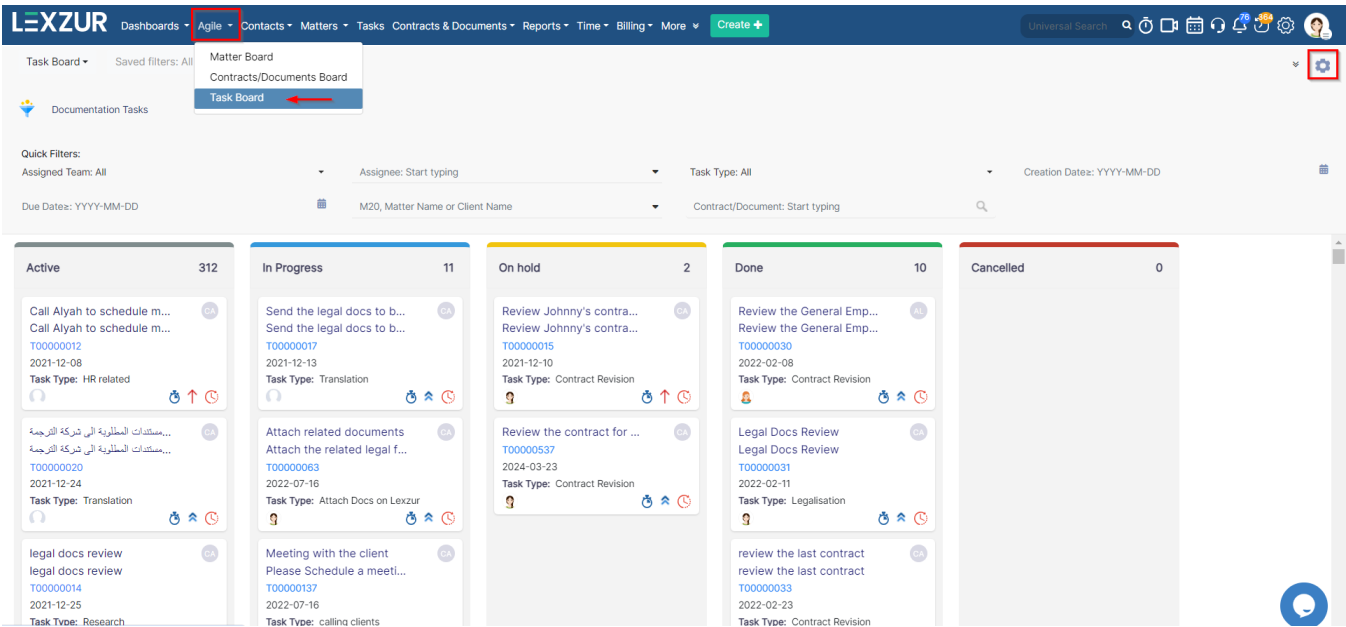
Objectives

- Monitor your team's performance

Steps

In LEXZUR, managers can use Kanban Boards to have a 360-degree view of Task statuses. This Board can perfectly give an idea about the overall activity of the team, the work progress, and the status of the Tasks being handled.

The Color Coding of Task Priorities is shown on the Board to better assist the user in building schedules and action plans. For instance, Critical Tasks are in red, Medium Priority Tasks are in blue, and so on.

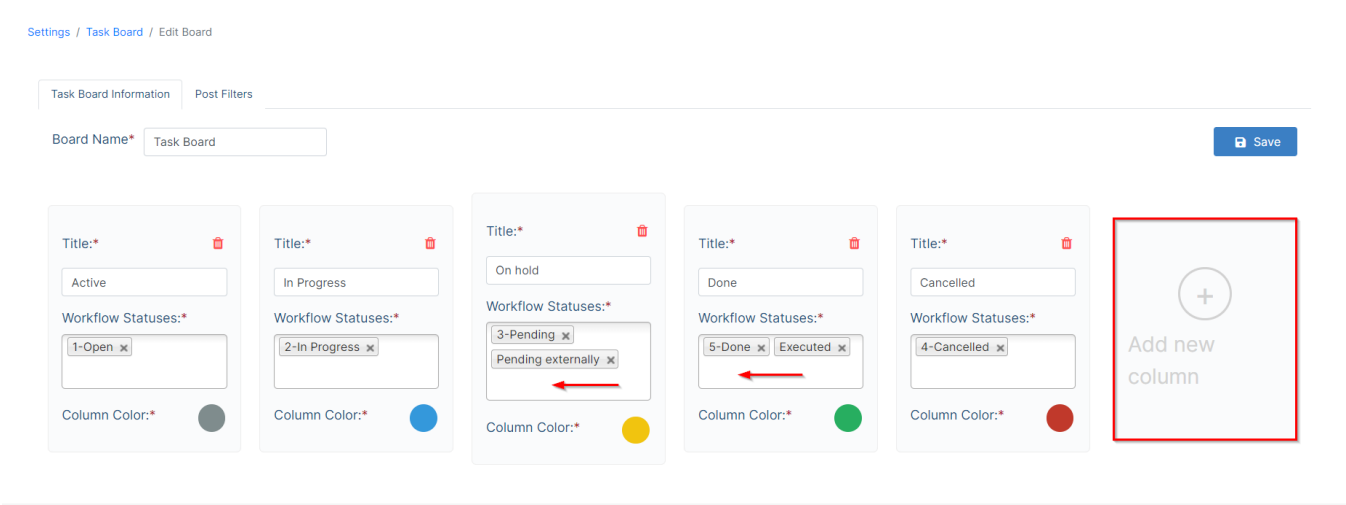


Columns in the Task Board can hold one or more Task Status, and can be named as desired in an easily configurable interface.

The Task Board supports up to 6 columns. Task Boards also have post-filters that can be accessed using the filter-like shape.

A Kanban board has great functionality that allows dragging tickets through columns in order to swiftly update the Status. Tasks in a Task Board have depicted in the form of draggable tickets, in which the user can drag and drop a Task to the desired column in order to change the Status directly from the Board.

Columns that have 2 or more Statuses are divided to give a section to every Status.



The Board has quick filters for Assigned Team, Assignee, Task Type, Arrival Date, Matter, Due Date, and Creation Date. These Filters can be saved under Filter Names using the Save Filter hyperlink.

Filters can then be managed from the action wheel on the top right of the Board.

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Task Board ▾ Saved filters: All ▾

[Save Filter As](#) Reset ▾ ⚙️

Quick Filters:
 Assigned Team: All ▾ Carolina Robinson ▾ Task Type: All ▾ Creation Dates: YYYY-MM-DD
 Due Dates: YYYY-MM-DD M20, Matter Name or Client Name Contract/Document: Start typing 🔍

Active 83

In Progress 2

On hold 2

Done 7

Cancelled 0

Research Research T00000037 2022-04-13 Task Type: To-Do

calling Adam T00000047 2022-06-03 Task Type: calling clients

Attach related documents Attach the related legal f... T00000063 2022-07-16 Task Type: Attach Docs on Lexzur

Meeting with the client Please Schedule a meeti... T00000137 2022-07-16 Task Type: calling clients

Review Johnny's contra... Review Johnny's contra... T00000015 2021-12-10 Task Type: Contract Revision

Review the contract for ... T00000537 2024-03-23 Task Type: Contract Revision

Legal Docs Review Legal Docs Review T00000031 2022-02-11 Task Type: Legalisation

review the last contract review the last contract T00000033 2022-02-23 Task Type: Contract Revision

C Cancelled

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!