



## Manage complex projects and workflows efficiently.

Manage your work, where you work. With Tasks from NetDocuments, users can track customized workflows within workspaces to monitor team members' activities and progress from one convenient location.

After adopting Tasks, professionals will have a clear view into a matter's status by easily visualizing which steps have been completed, and which are missing—helping your teams spend less time 'following up' and more time producing.

### Increase Your Team's Efficiency With These Intuitive Features:

#### Customize Work Stages

Create custom stages that fit the matter, your team, and the firm's workflow.

#### Protect Against Burnout

Easily filter task assignments to ensure work is balanced between professionals to avoid overloading anyone.

#### Organize Your Week

*My Tasks* gives you a view into your personal tasks and due dates across every matter you're assigned to.

#### Centralize Task Content

Copy or link any content contained within the matter to a task for quick access, reference, or discussion.

#### Solve Problems Quickly

Use discussion threads within a task to provide updates or solve challenges in context of the work being done.

#### Reduce Planning Time

Task dashboards may be duplicated within a matter or matter type in order to decrease the time spent building new boards.

### Say Goodbye to Burnout

Attorneys everywhere are facing increased pressure to deliver more in less time, while maintaining meticulous attention to detail, which can quickly lead to employee burnout. Take a look at how Tasks helps you stay organized so your teams can provide clients with world-class legal services more efficiently than ever.

## Customized Staging and Views

We understand not all teams work the same. Tasks is flexible enough to match how you work best.

### View Options

Tasks may be viewed in a board or list format at a team level, and a list format at a personal task level. Both boards and lists will provide insight into assignee, due date, tags, and stage of the task at a glance.

### Customize Stages

Create stages for work based on what works best for the matter, your team, or the firm. Stages will show up in both the board and list views.

### Sort & Filter

Tasks may be sorted and filtered based on a number of criteria such as assignee, due date, tag, status, task list, and more.

## Intuitive Task Structure

Tasks takes the guesswork out of who is doing what and when.

### Assignees

Tasks may be assigned to a one or multiple users. Assignee choices are listed based on matter access.

### Sub-Tasks

Within a task, multiple sub-tasks may be listed. Additional individuals to the Task Leader may be assigned to these sub-tasks.

### Tagging

Create custom tags that offer an added layer of insight into a task's category or status.

### Estimated Time

Anticipate the billable hours each assignment will provide to aid in budgeting.

### Details and Discussion

Use the details and discussion areas to add important information to a Task, ask and answer questions, and provide updates.

### Add Content

Copy or link any content within the assigned matter to easily collaborate on documents or track completion and delivery.

**Discover how built-in, intuitive task management  
can increase your team's efficiency.**

Schedule a demo to learn more about Tasks from NetDocuments today.  
[netdocuments.com/demo](https://netdocuments.com/demo)