

This document is provided free of charge by Horton Press. You may view, download, and share the original. You may not edit, remove, or add information to this document, or redistribute altered versions.

Create and assign a task

Revision 2026-10-10

Add a task to the Team Planner, give it an owner and a due date.

Create a task

1. In **Team Planner**, select + **New Task**. Or select + **Add task** at the bottom of a column.
2. Fill in **Title**.
3. Pick the **Bucket** (column), **Priority** and **Due** date.
4. Pick **Assignees** and add **Labels** or **Notes** if you like.
5. Select **Create Task**.

Change or finish a task

1. Select **Open** → on the card.
2. Change what you need and select **Save**.
3. To finish it, drag it to **Done**.

Tasks that came from a team note or an event have **Open linked item** → to jump back.

See your own tasks

Under **Views**, select **Assigned to Me**. Select **Completed** to see finished tasks.
