



Redbrick
Practice Management

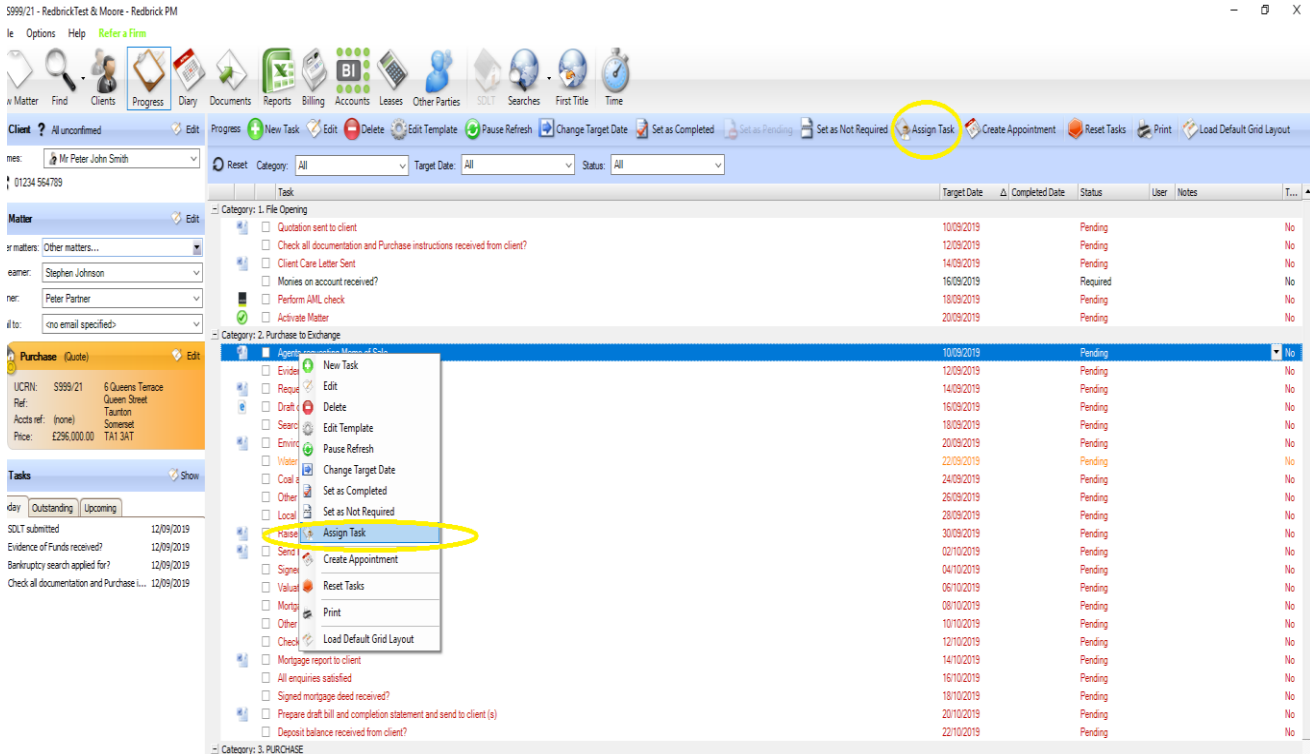
Legal Case Management

Task Assignment

Task Assignment

In the **Progress Screen** select the task (*click once to select highlight in blue*) that you would like to assign.

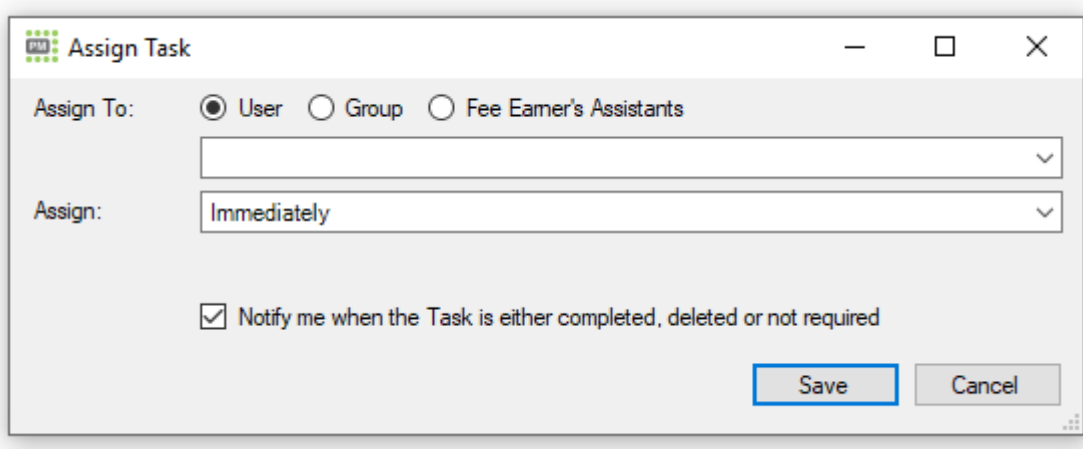
You can then either use the right click function to bring up the options or use the 'Assign Task' button as shown below.



The screenshot shows the Redbrick PM software interface. The 'Assign Task' button in the top toolbar is highlighted with a yellow circle. A context menu is open over a task row, with the 'Assign Task' option also highlighted in a yellow circle. The task list shows various tasks with columns for Target Date, Completed Date, Status, User, and Notes.

Task	Target Date	Completed Date	Status	User	Notes
Quotation sent to client	10/09/2019		Pending		No
Check all documentation and Purchase instructions received from client?	12/09/2019		Pending		No
Client Care Letter Sent	14/09/2019		Pending		No
Monies on account received?	16/09/2019		Required		No
Perform AML check	18/09/2019		Pending		No
Activate Matter	20/09/2019		Pending		No
Agents instructs Mortgage	10/09/2019		Pending		No
Ends	12/09/2019		Pending		No
Reqs	14/09/2019		Pending		No
Draft	16/09/2019		Pending		No
Search	18/09/2019		Pending		No
Envis	20/09/2019		Pending		No
Wait	22/09/2019		Pending		No
Coal	24/09/2019		Pending		No
Other	26/09/2019		Pending		No
Local	28/09/2019		Pending		No
Send	30/09/2019		Pending		No
Sign	02/10/2019		Pending		No
Value	04/10/2019		Pending		No
Mortg	06/10/2019		Pending		No
Other	08/10/2019		Pending		No
Check	10/10/2019		Pending		No
Check	12/10/2019		Pending		No
Mortgage report to client	14/10/2019		Pending		No
All enquiries satisfied	16/10/2019		Pending		No
Signed mortgage deed received?	18/10/2019		Pending		No
Prepare draft bill and completion statement and send to client (s)	20/10/2019		Pending		No
Deposit balance received from client?	22/10/2019		Pending		No

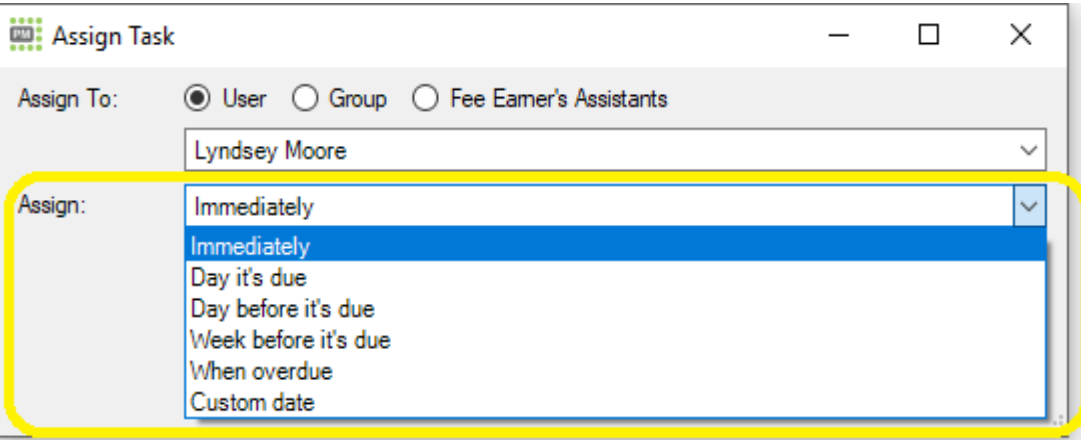
Click 'Assign Task' brings up options as to who you would like to assign the Task and allows you to set when you require the task to be dealt with.



The 'Assign Task' dialog box is shown with the following options:

- Assign To:** User Group Fee Eamer's Assistants
- Assign:** Immediately
- Notify me when the Task is either completed, deleted or not required

Buttons: Save, Cancel



Assign Task

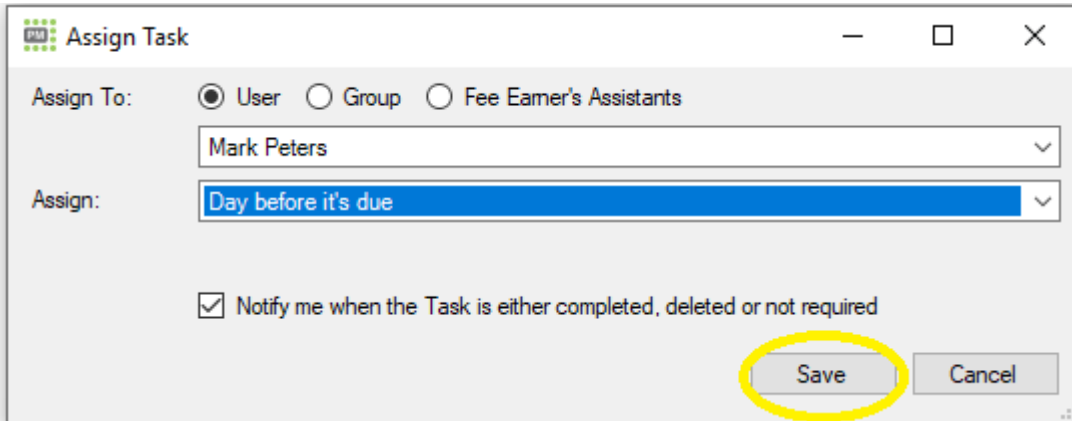
Assign To: User Group Fee Eamer's Assistants

Lyndsey Moore

Assign: **Immediately**

- Immediately
- Day it's due
- Day before it's due
- Week before it's due
- When overdue
- Custom date

Once you have made your selection click save.



Assign Task

Assign To: User Group Fee Eamer's Assistants

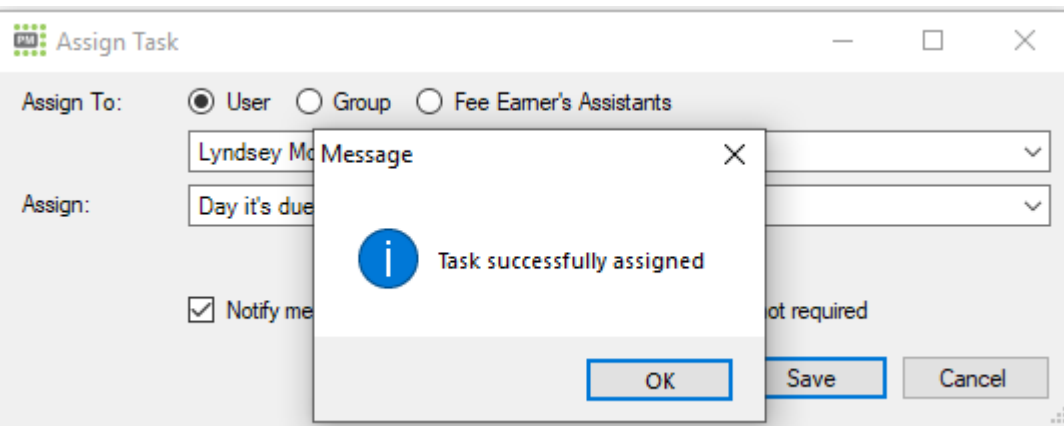
Mark Peters

Assign: **Day before it's due**

Notify me when the Task is either completed, deleted or not required

Save Cancel

A message will confirm the task has been assigned.



Assign Task

Assign To: User Group Fee Eamer's Assistants

Lyndsey Moore

Assign: **Day it's due**

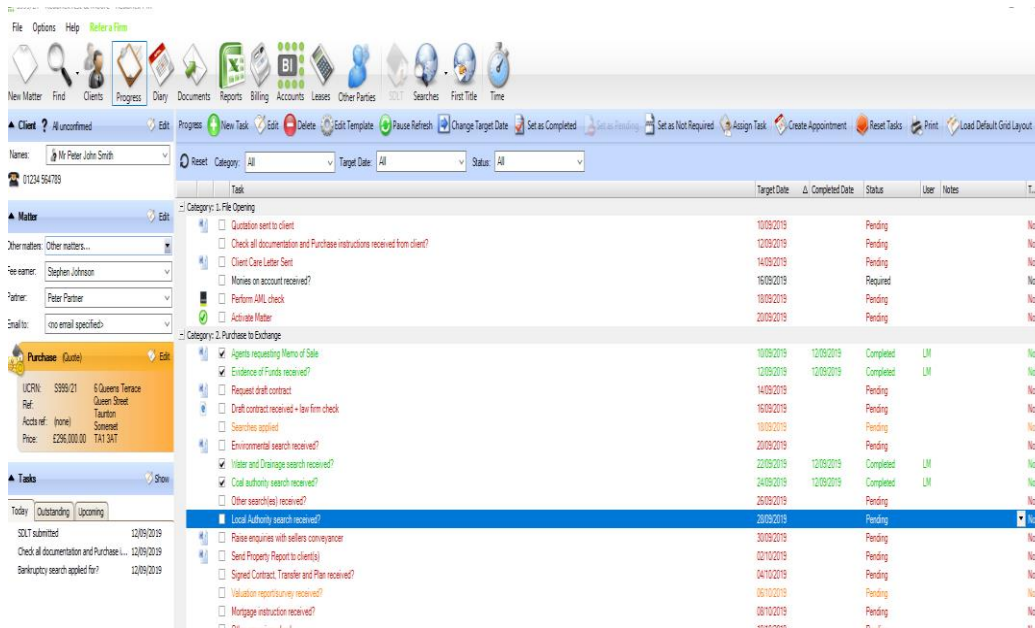
Notify me when the Task is either completed, deleted or not required

Message

i Task successfully assigned

OK Save Cancel

A Task that has been assigned will show as **Orange** in the **Progress** screen.




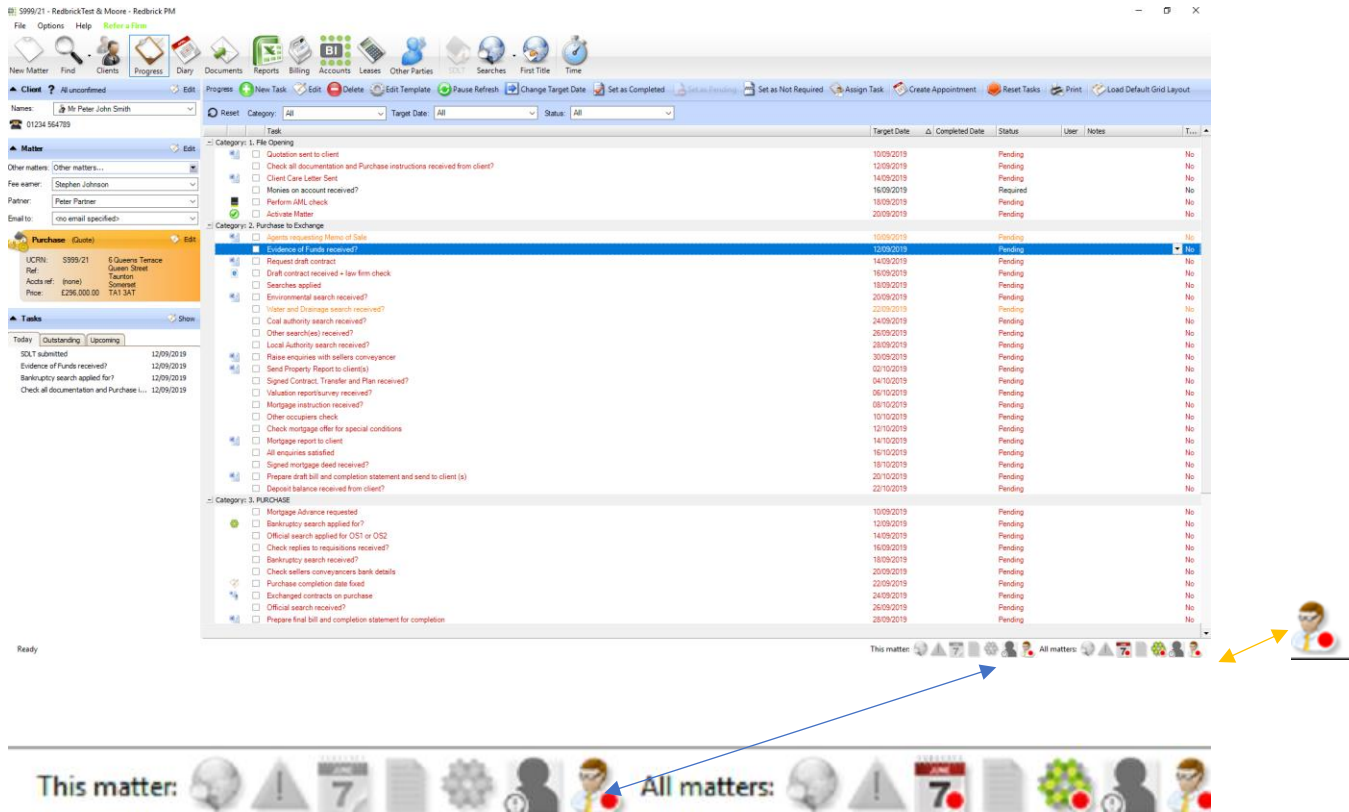
The screenshot shows the 'Progress' screen for a matter. The main table lists tasks with columns for Target Date, Completed Date, Status, User, and Notes. The task 'Local Authority search received?' is highlighted in orange, indicating it is assigned. Other tasks include 'Agents requesting Memo of Sale', 'Evidence of Funds received?', 'Request draft contract', 'Draft contract received - law firm check', 'Searches applied', 'Environmental search received?', 'Water and Drainage search received?', 'Coal authority search received?', 'Other searches received?', 'Paired enclosures with sellers conveyancer', 'Send Property Report to client(s)', 'Signed Contract, Transfer and Plan received?', 'Valuation report(s) received?', and 'Mortgage instruction received?'.

Task	Target Date	Completed Date	Status	User	Notes
Quotation sent to client?	10/09/2019		Pending		No
Check all documentation and Purchase instructions received from client?	12/09/2019		Pending		No
Client Care Letter Sent	14/09/2019		Pending		No
Monies on account received?	16/09/2019		Required		No
Perform AML check	18/09/2019		Pending		No
Activate Matter	20/09/2019		Pending		No
Agents requesting Memo of Sale	10/09/2019	12/09/2019	Completed	LM	No
Evidence of Funds received?	12/09/2019	12/09/2019	Completed	LM	No
Request draft contract	14/09/2019		Pending		No
Draft contract received - law firm check	16/09/2019		Pending		No
Searches applied?	18/09/2019		Pending		No
Environmental search received?	20/09/2019		Pending		No
Water and Drainage search received?	22/09/2019	12/09/2019	Completed	LM	No
Coal authority search received?	24/09/2019	12/09/2019	Completed	LM	No
Other searches received?	26/09/2019		Pending		No
Local Authority search received?	28/09/2019		Pending		No
Paired enclosures with sellers conveyancer	30/09/2019		Pending		No
Send Property Report to client(s)	02/10/2019		Pending		No
Signed Contract, Transfer and Plan received?	04/10/2019		Pending		No
Valuation report(s) received?	06/10/2019		Pending		No
Mortgage instruction received?	08/10/2019		Pending		No

The user who assigned the task gets notification if the task is completed fully, or if the user marks the task as not required or deletes it from the matter.

They **DO NOT** get notification if the user who has been assigned the task ticks the task but cancels the triggered action. The system marks the task as complete, but it stays in orange.

The user who has been assigned the task will receive a Notification  to tell them a task has been assigned to them. Notifications will show at the bottom right of the screen.



The screenshot displays the Redbrick PM software interface. The main window shows a task list for a client named 'Mr Peter John Smith'. The tasks are organized into categories: '1. File Opening', '2. Purchase to Exchange', and '3. PURCHASE'. A table of tasks is visible, with columns for 'Task', 'Target Date', 'Completed Date', 'Status', 'User', and 'Notes'. A notification icon (a person with a red dot) is shown in the bottom right corner of the software window, with a yellow arrow pointing to it. Below the software window, a taskbar shows 'This matter:' and 'All matters:' sections, each with a notification icon. A blue arrow points from the notification icon in the taskbar to the notification icon in the software window.

Task	Target Date	Completed Date	Status	User	Notes
Quotation sent to client	10/09/2019		Pending		
Check all documentation and Purchase instructions received from client?	12/09/2019		Pending		
Client Care Letter Sent	14/09/2019		Pending		
Monies on account received?	16/09/2019		Required		
Perform AML check	18/09/2019		Pending		
Activate Matter	20/09/2019		Pending		
Agente requesting Plans of Sale	10/09/2019		Pending		
Contract of Funds received?	10/09/2019		Pending		
Request draft contract	14/09/2019		Pending		
Draft contract received + law firm check	16/09/2019		Pending		
Searches applied	18/09/2019		Pending		
Environmental search received?	20/09/2019		Pending		
Valuer and Drainage search received?	22/09/2019		Pending		
Coal authority search received?	24/09/2019		Pending		
Other searches received?	26/09/2019		Pending		
Local Authority search received?	28/09/2019		Pending		
Raise enquiries with sellers conveyancer	30/09/2019		Pending		
Send Property Report to client(s)	02/10/2019		Pending		
Signed Contract, Transfer and Plan received?	04/10/2019		Pending		
Valuation report/survey received?	06/10/2019		Pending		
Mortgage instruction received?	08/10/2019		Pending		
Other occupiers check	10/10/2019		Pending		
Check mortgage offer for special conditions	12/10/2019		Pending		
Mortgage report to client	14/10/2019		Pending		
All enquiries satisfied	16/10/2019		Pending		
Signed mortgage deed received?	18/10/2019		Pending		
Prepare draft bill and completion statement and send to client (s)	20/10/2019		Pending		
Deposit balance received from client?	22/10/2019		Pending		
Mortgage Advance requested?	10/09/2019		Pending		
Bankruptcy search applied for?	12/09/2019		Pending		
Official search applied for CSD or OSL	14/09/2019		Pending		
Check replies to requisitions received?	16/09/2019		Pending		
Bankruptcy search received?	18/09/2019		Pending		
Check sellers conveyancers bank details	20/09/2019		Pending		
Purchase completion date fixed	22/09/2019		Pending		
Exchanged contracts on purchase	24/09/2019		Pending		
Official search received?	26/09/2019		Pending		
Prepare final bill and completion statement for completion	28/09/2019		Pending		

User Assignments

Details Dismiss

Notification	Matter	Title	Body
New Assignment	S... 6 Queens Terrace...	S999/21: A Task has been assigned to you by Mrs Lyndsey Moore	S999/21: The Task 'Agents requesting...
New Assignment	S... 6 Queens Terrace...	S999/21: A Task has been assigned to you by Mrs Lyndsey Moore	S999/21: The Task 'Water and Drainage...

Close

Details

Notification: New Assignment

UCRN: S999/21

Matter: 6 Queens Terrace, Queen Street, Taunton, Somerset, TA1 3AT

Title: S999/21: A Task has been assigned to you by Mrs Lyndsey Moore

Body: S999/21: The Task 'Agents requesting Memo of Sale' was assigned to you by Mrs Lyndsey Moore

Notification Time: 12:38 on Thursday, 12th September 2019

Close

If you have any queries on Redbrick please either contact your dedicated Business Consultant or our Support team.



Support

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Or Access our Client Area for support and additional resources:
<https://www.redbricksolutions.co.uk/client-login>