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Use the planner boards

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Track staff tasks on a board with columns for each stage.

In the side menu, select **Team Planner**.

The boards

- **Operations:** day-to-day team jobs.
- **Recruiting:** your recruiting pipeline.

The columns

1. **Triage:** new cards waiting to be sorted, marked **Inbox**.
2. **To do:** ready to work on.
3. **Doing:** in progress.
4. **Done:** finished.

Drag a card to move it. Select + **Add column** to add your own column.

Views and filters

On the left, under **Views**:

- **Entire Board**
- **Assigned to Me**
- **Completed**

Under **Filters**, narrow by **Task Type**, **Priority**, **Due Date** and **Assigned To**.

At the top, search with **Search tasks...**, change **Sort by**, or switch between **Board** and **List**.

