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Turn action items into tasks

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Add follow-ups to a note and send them to the Team Planner board.

Add an action item

1. Open a note in **Team Notes**.
2. Type in **Add an action item…** and select **Add**.

Open items show as a badge on the note, for example "1 open."

Send action items to the Team Planner

When **Team note action items** is turned on, each action item also becomes a card in the **Triage** column of the Operations board. It shows **On Team Planner**. Finishing the card or the action item keeps both in step.

Turn it on or off

1. Open **Settings**, then **Planner Settings**.
2. Check or uncheck **Team note action items**. It's on by default.
3. Select **Save planner settings**.

On the same page, **Completed recruiting forms** and **Event checklist items (auto)** add cards from other parts of the app. Only the team owner can change these settings.

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