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.

Use the planner boards

Revision 2026-10-10

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**.

© 2026 Horton Press — All rights reserved
Learn more and see other program tools and resources at **www.hortonpress.com**