

# Managing Projects / Non-Associated Concerns

1. Click the hamburger menu, select **Service**, then click **All Projects**.
2. Use the brand dropdown to switch between brands.
3. Use the status dropdown to view projects by status:

| Status      | Meaning                                                                                                              |
|-------------|----------------------------------------------------------------------------------------------------------------------|
| All         | See all projects                                                                                                     |
| Completed   | See completed projects                                                                                               |
| Future Work | Projects that aren't completed; a technician has done work, but the issue isn't fixed and requires a follow-up visit |
| In Progress | Projects currently being worked with a technician on-site                                                            |

4. After selecting a status, adjust the date range to the dates you're looking for.
5. Use **Columns** to select which filter information displays. Click **Reset** to restore default filters.
6. Click the expand arrow icon to open a project.
7. To get an invoice, or to merge, split, or cancel a project, use the corresponding button next to **Resolve**.
8. To add another concern to the project, click **Concerns**, then **Add New Concern**.
9. Click the green **Resolve** button to close out a project.

# Managing Non-Associated Concerns

- Toggle over from **Projects** to **Non-Associated Concerns** in the **All Projects** tab.
- These are concerns that do not have a project attached.
- If a customer makes a service request on the customer portal, this is where it will live.
- Once you create a project for the concern, it will leave this list.

---

Revision #1

Created 2026-09-08 20:48:19 UTC by Kozy Operations

Updated 2026-09-08 20:50:30 UTC by Kozy Operations