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. To move a project and its equipment to another location for the same customer, use the move option on the project overview.
10. 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.

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