

Team OS — SOP

How this module works

Team OS is your HR and task-management hub — mark daily attendance, assign and track work on a Kanban board, review performance and productivity, run focused work sessions, and track team training, all in one place.

SECTIONS

● Team Today attendance for every active member, plus a quick profile view for each person.	● Tasks A drag-and-drop Kanban board — To Do, In Progress, Done — with priority, due dates, and lead links.
● Attendance Today attendance table and a monthly report with present, absent, half-day, and leave totals.	● Performance This month attendance rate, task completion rate, and a combined productivity score for every member.
● Productivity A ranked leaderboard by productivity score, with month-over-month change.	● Focus A Pomodoro-style focus timer — track deep-work sessions per member, optionally linked to a task.
● Training Track which training modules each member has completed, and add your own custom modules.	

STEP-BY-STEP WORKFLOW

- 1

Mark attendance for each team member every day — from the Team tab or the Attendance tab.
- 2

Create tasks and assign them on the Kanban board — drag a card between To Do, In Progress, and Done as work moves along.
- 3

Check the Performance and Productivity tabs to review how the team is doing this month, and spot who needs support.
- 4

Use the Focus tab to run a Pomodoro session when someone needs to track deep, uninterrupted work.
- 5

Track training completion on the Training tab — add a custom training module any time a new topic comes up.
- 6

Click AI Team Brief for an instant, plain-English summary of team health, top performer, and who needs attention.

CONNECTIONS

●  Leads A task can be linked to a lead — click through to that lead page straight from its Kanban card.	●  Calendar Setting a due date on a task automatically creates a matching Calendar event — no manual entry.
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● **Staff Portal**

Each member 4-digit PIN, set from their profile, is what they use to log into the separate Staff Self-Portal.

● **Invoice**

The Sales Person dropdown on every invoice pulls from Team OS active members — keeping a member active or inactive here controls whether they can be picked there too.