



Operations App Tutorial

A walkthrough of how to navigate the features within the operations app of Syniq Business OS.





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Overview Page

1. Productivity Chart
 - Team member vs. active assigned tasks
2. Job Distribution Chart
 - Job status breakdown (Active, completed, on hold, cancelled)
3. Business unit revenue
 - Revenue allocation by business units
 - When a single business unit is selected, this chart shows revenue allocation by job.

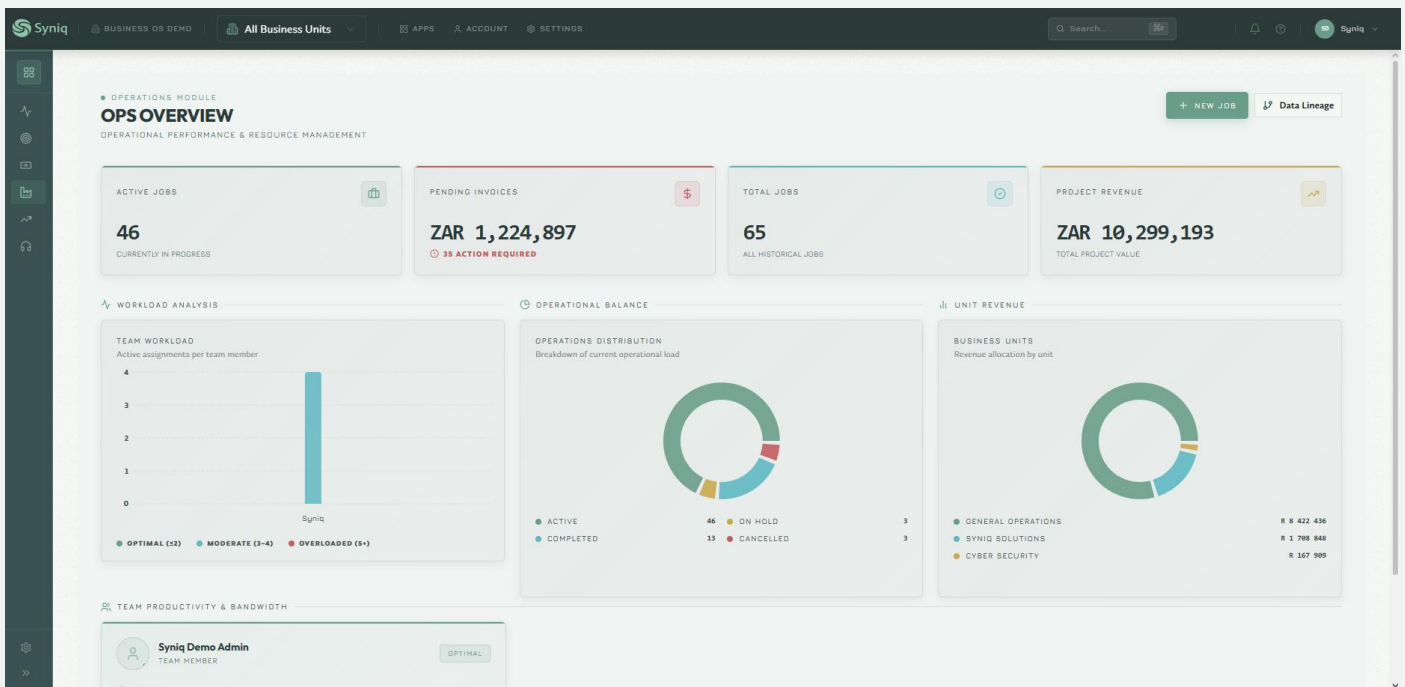


Figure 1: Operations Dashboard

How to Add a Client

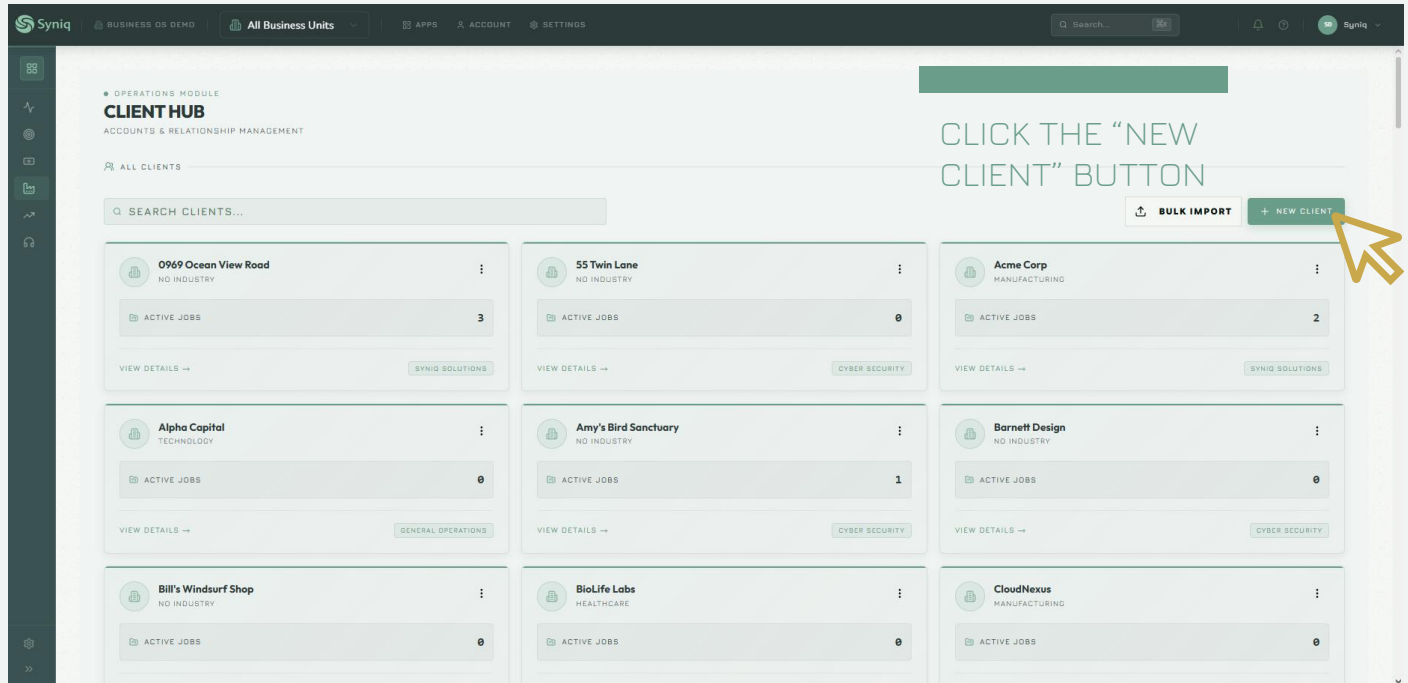


Figure 2: Add Client Step 1

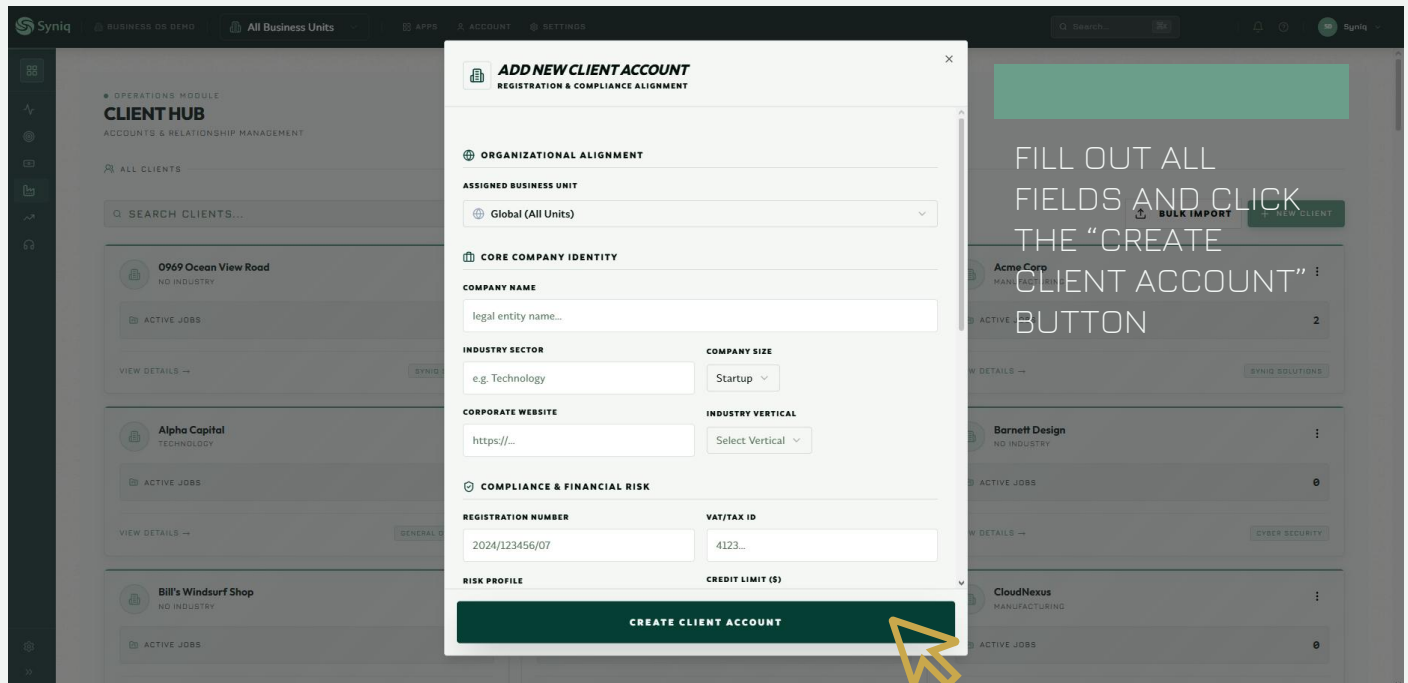


Figure 3: Add Client Step 2

How to Edit Client Details

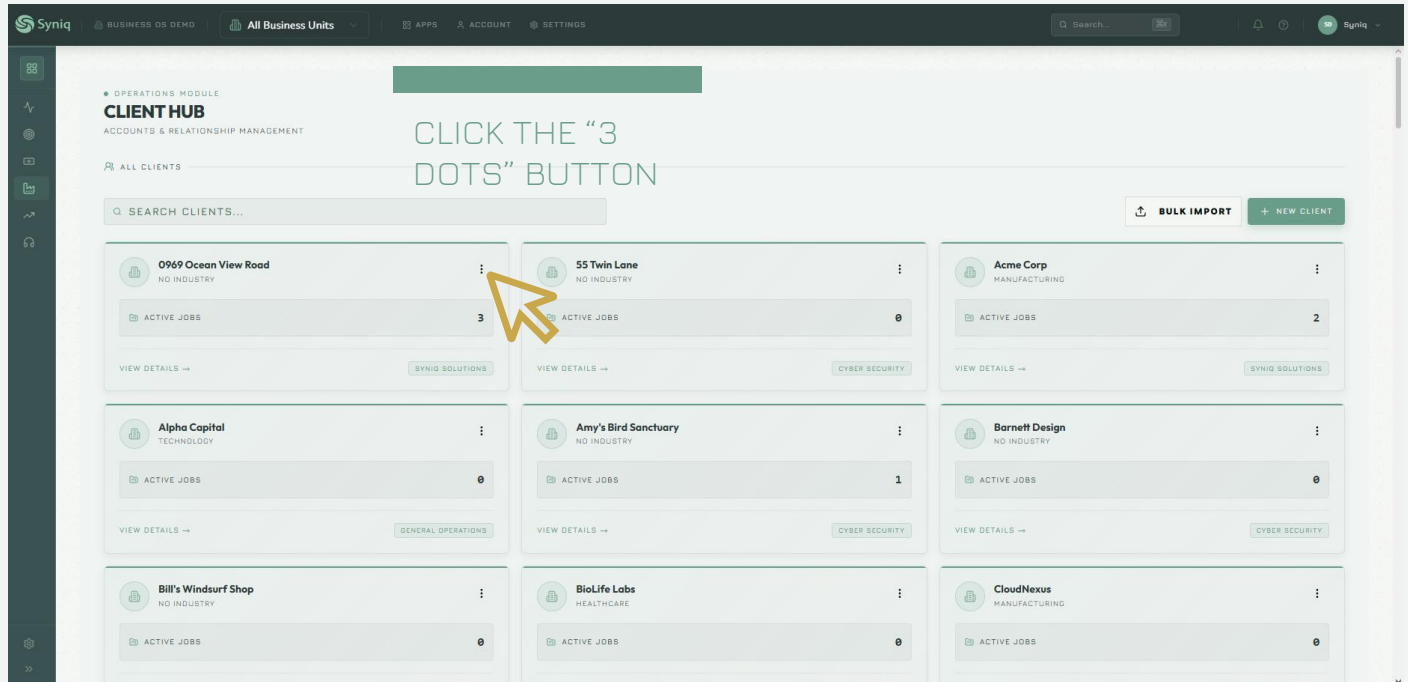


Figure 4: Edit Client Step 1

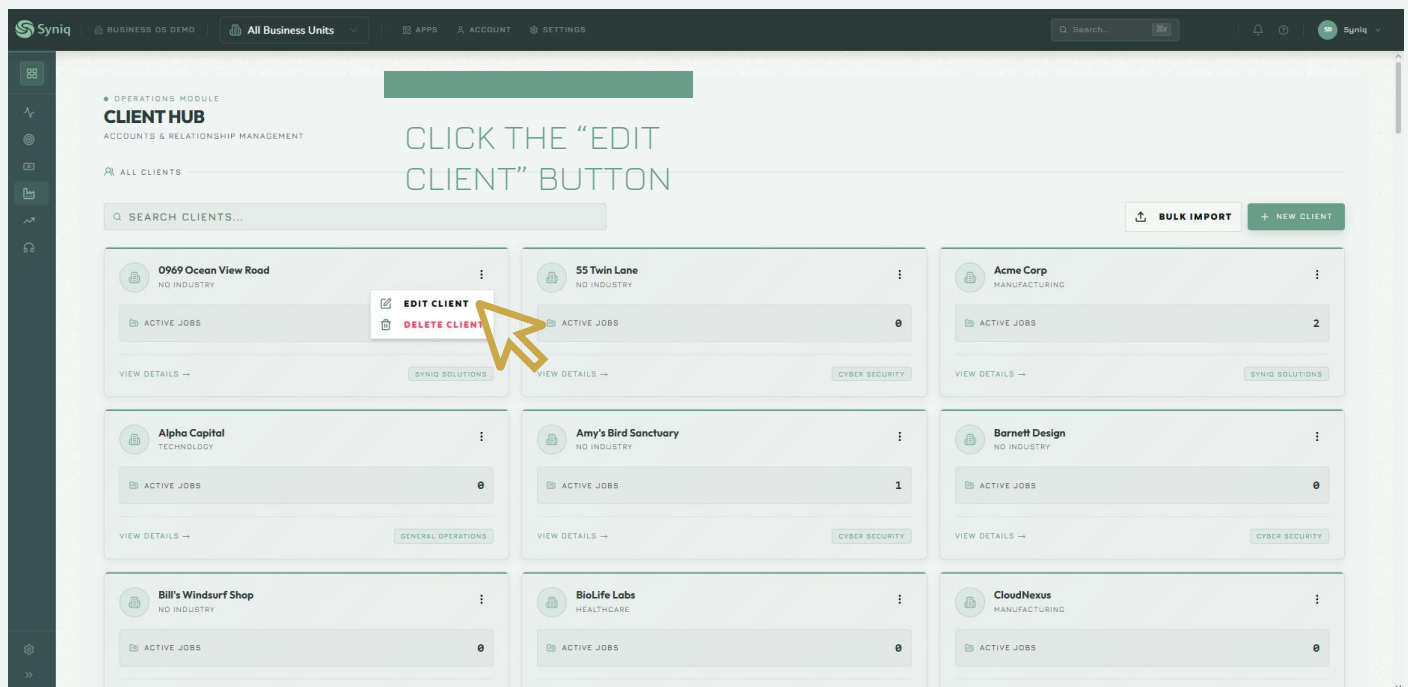


Figure 5: Edit Client Step 2

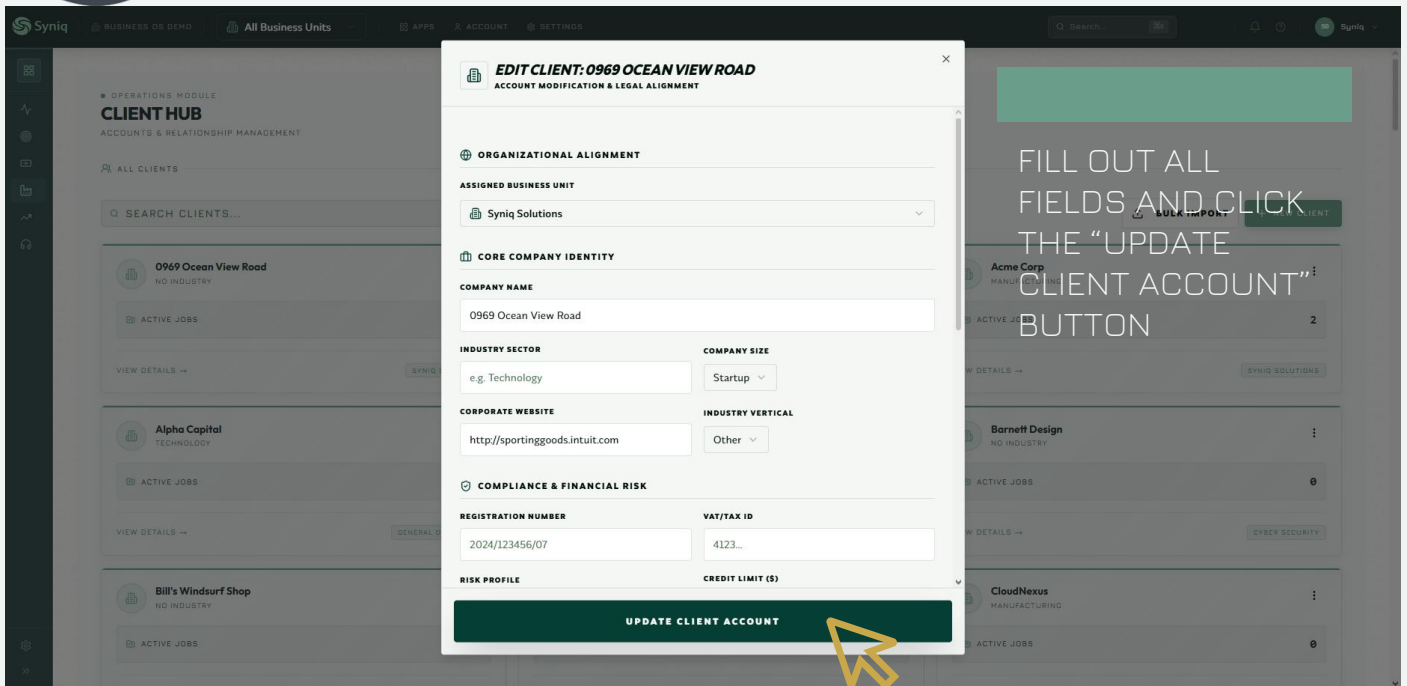


Figure 6: Edit Client Step 3

How to Delete a Client

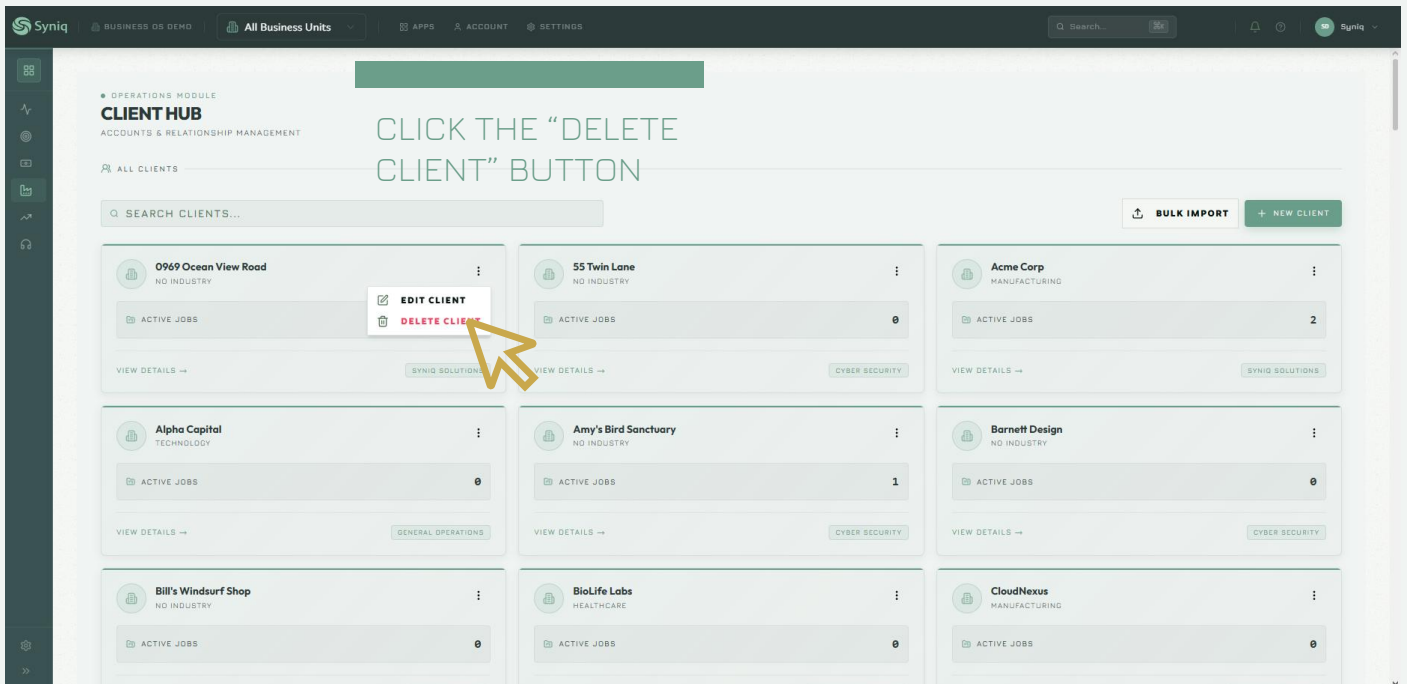


Figure 7: Delete Client Step

How to Add a Job

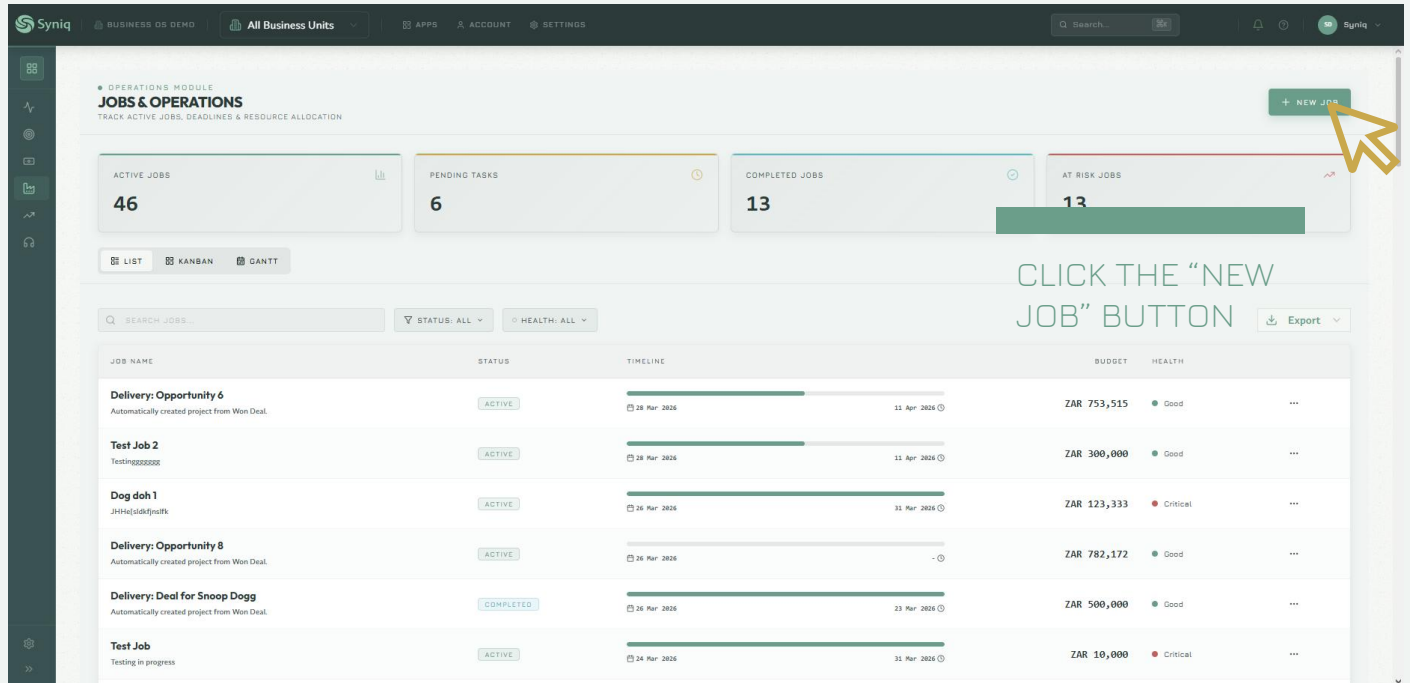


Figure 8: Add a Job Step 1

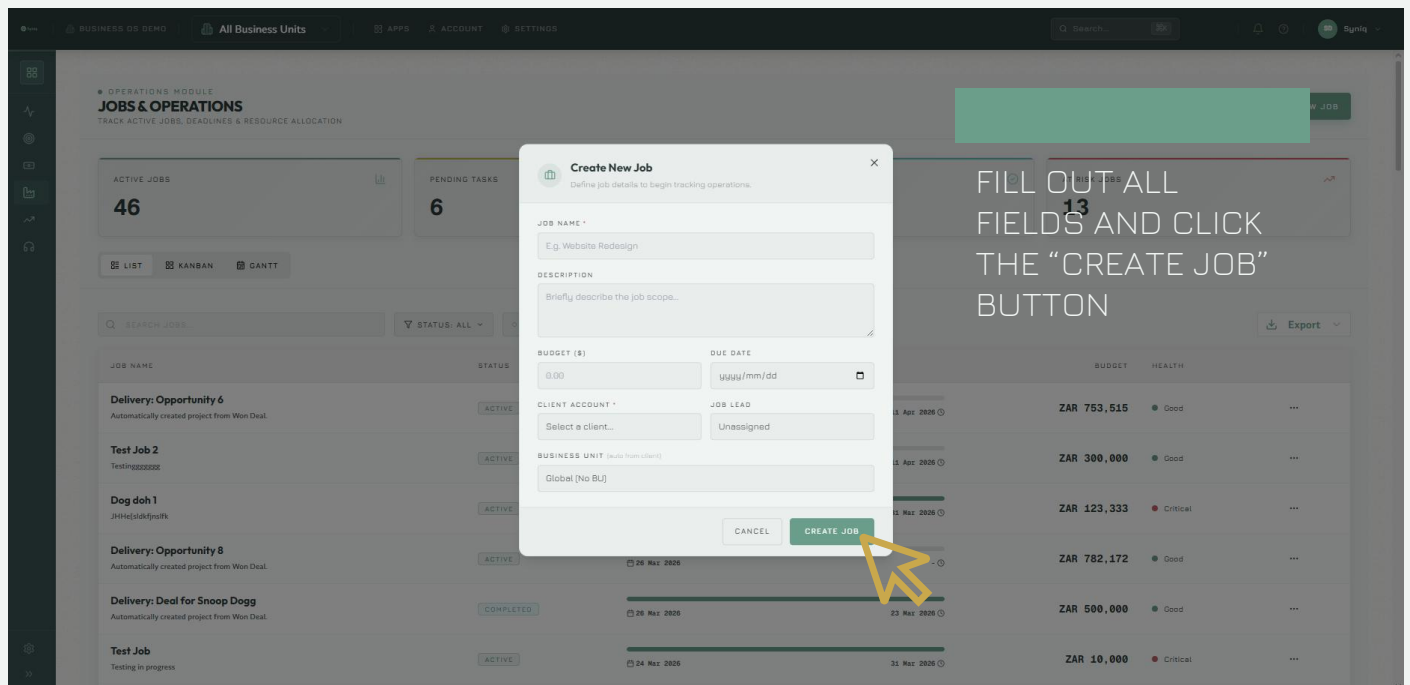
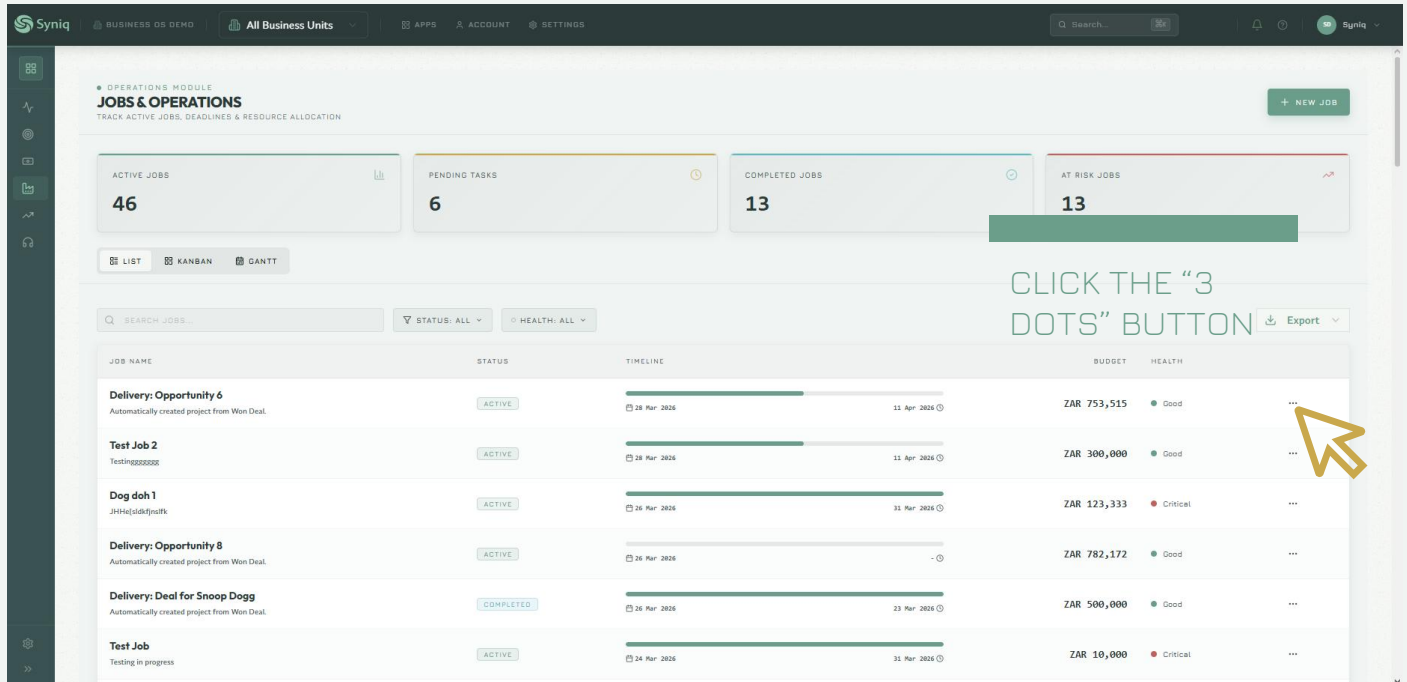


Figure 9: Add a Job Step 2

How to Edit a Job

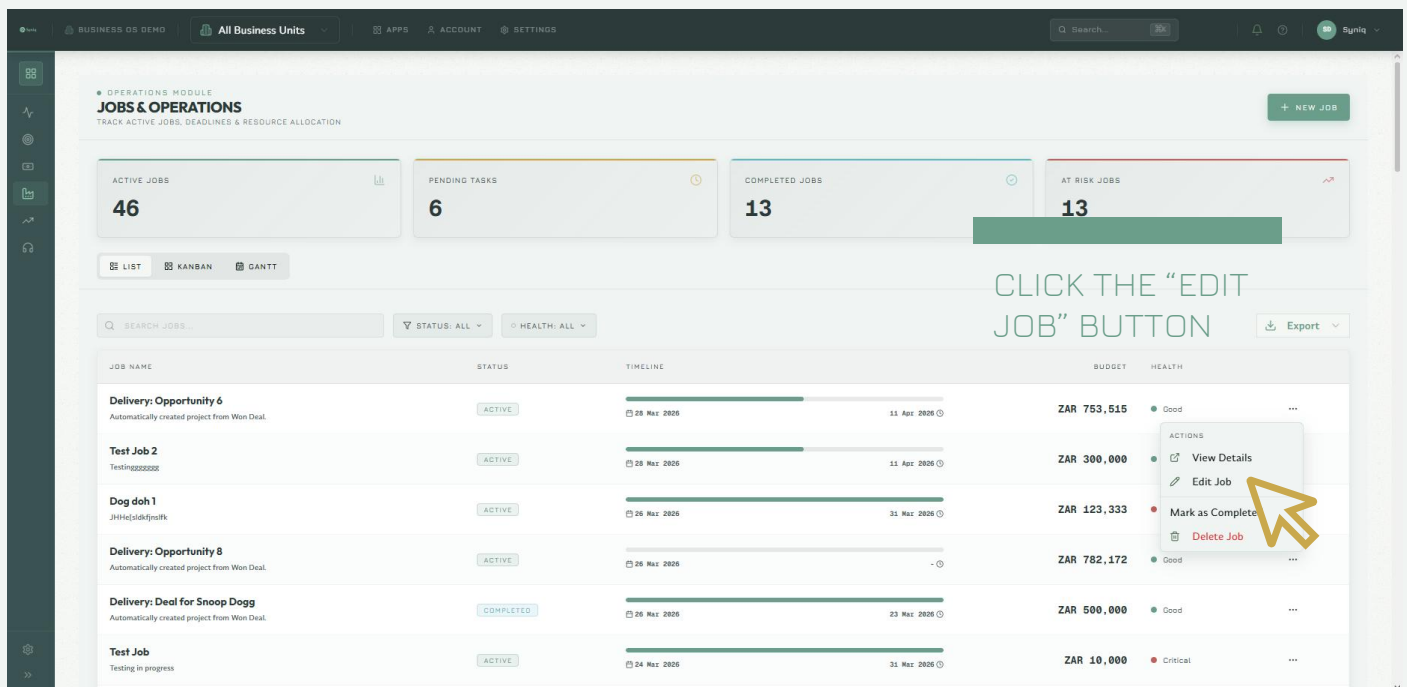


The screenshot shows the Syniq 'JOBS & OPERATIONS' dashboard. At the top, there are four summary cards: ACTIVE JOBS (46), PENDING TASKS (6), COMPLETED JOBS (13), and AT RISK JOBS (13). Below these is a table of jobs with columns for JOB NAME, STATUS, TIMELINE, BUDGET, and HEALTH. A yellow mouse cursor points to the three-dot menu icon on the right side of the first row, 'Delivery: Opportunity 6'.

CLICK THE "3 DOTS" BUTTON

JOB NAME	STATUS	TIMELINE	BUDGET	HEALTH
Delivery: Opportunity 6 Automatically created project from Won Deal.	ACTIVE	26 Mar 2026 - 11 Apr 2026	ZAR 753,515	Good
Test Job 2 Testing99999999	ACTIVE	28 Mar 2026 - 11 Apr 2026	ZAR 300,000	Good
Dog doh 1 JHHeJsdldjpsfK	ACTIVE	26 Mar 2026 - 31 Mar 2026	ZAR 123,333	Critical
Delivery: Opportunity 8 Automatically created project from Won Deal.	ACTIVE	26 Mar 2026 - -	ZAR 782,172	Good
Delivery: Deal for Snoop Dogg Automatically created project from Won Deal.	COMPLETED	26 Mar 2026 - 23 Mar 2026	ZAR 500,000	Good
Test Job Testing in progress	ACTIVE	24 Mar 2026 - 31 Mar 2026	ZAR 10,000	Critical

Figure 10: Edit Job Step 1



This screenshot is identical to Figure 10, but the three-dot menu for 'Delivery: Opportunity 6' is open, showing an 'ACTIONS' dropdown with options: View Details, Edit Job, Mark as Complete, and Delete Job. A yellow mouse cursor points to the 'Edit Job' option.

CLICK THE "EDIT JOB" BUTTON

Figure 11: Edit Job Step 2

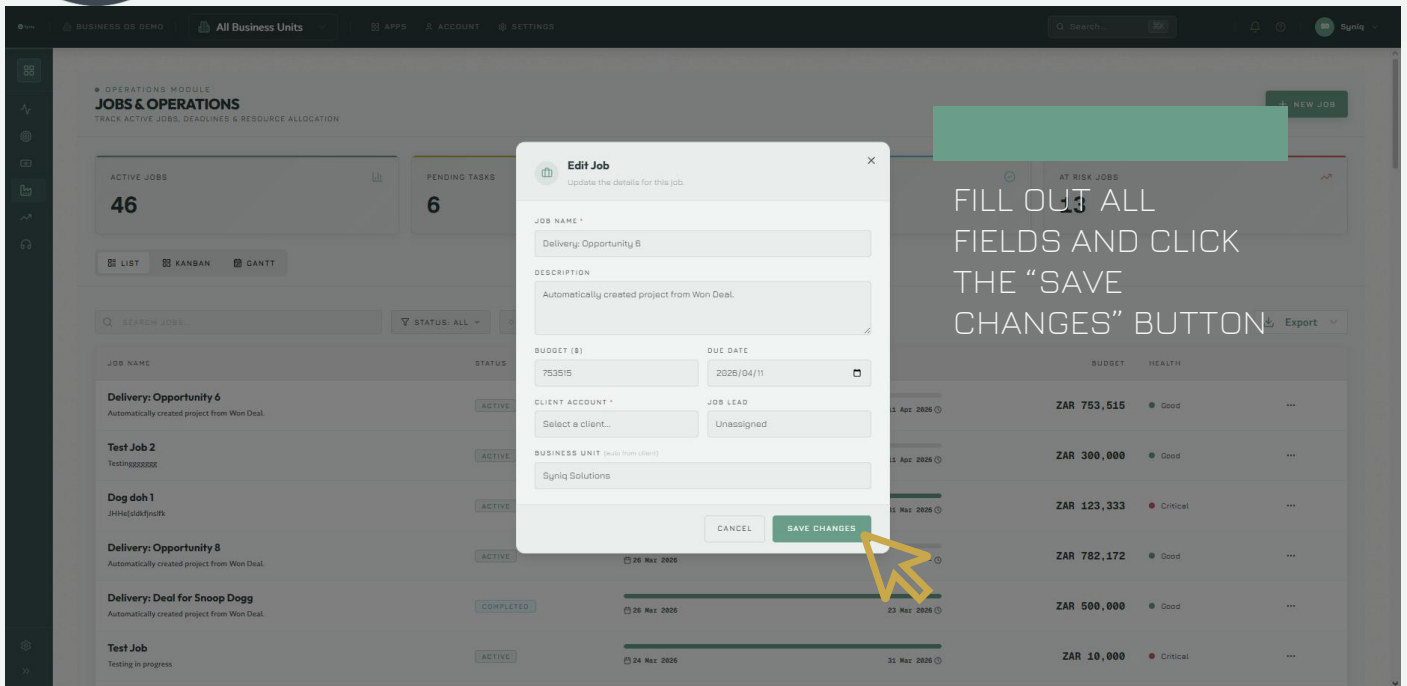


Figure 12: Edit Job Step 3

How to Delete a Job

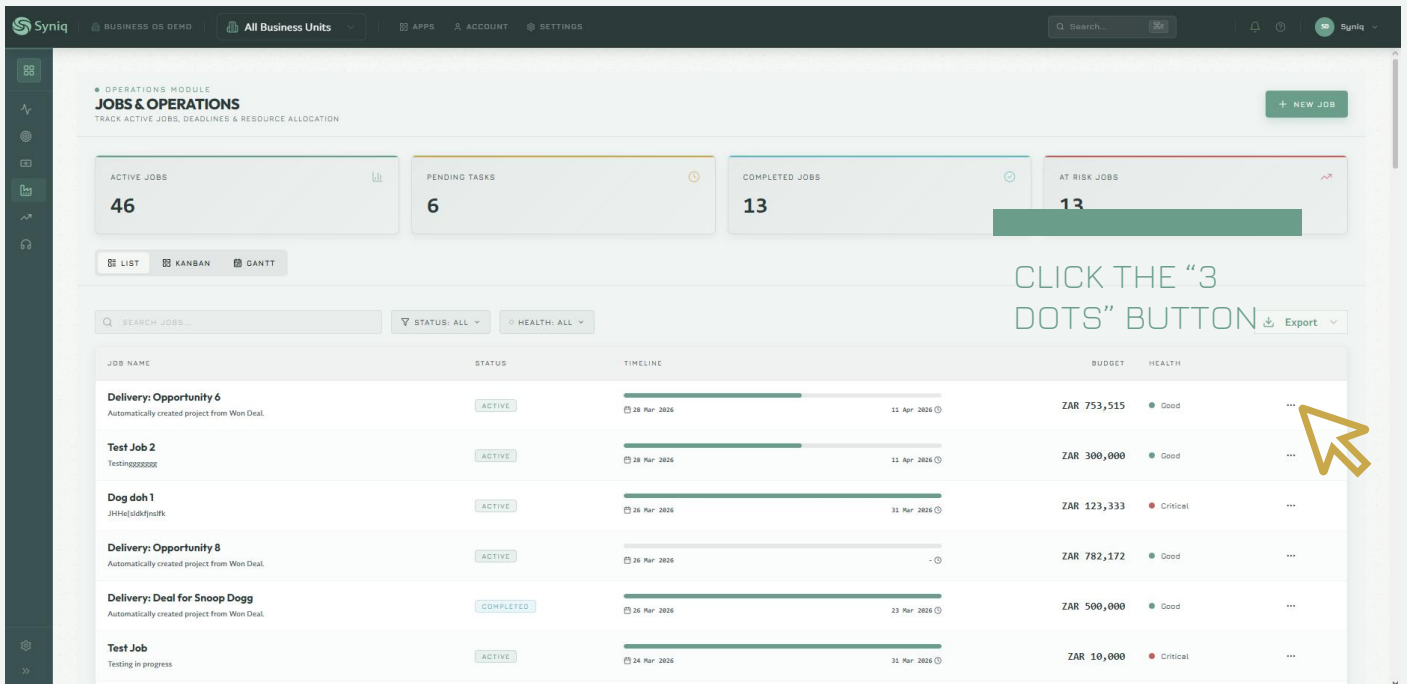


Figure 13: Delete Job Step 1

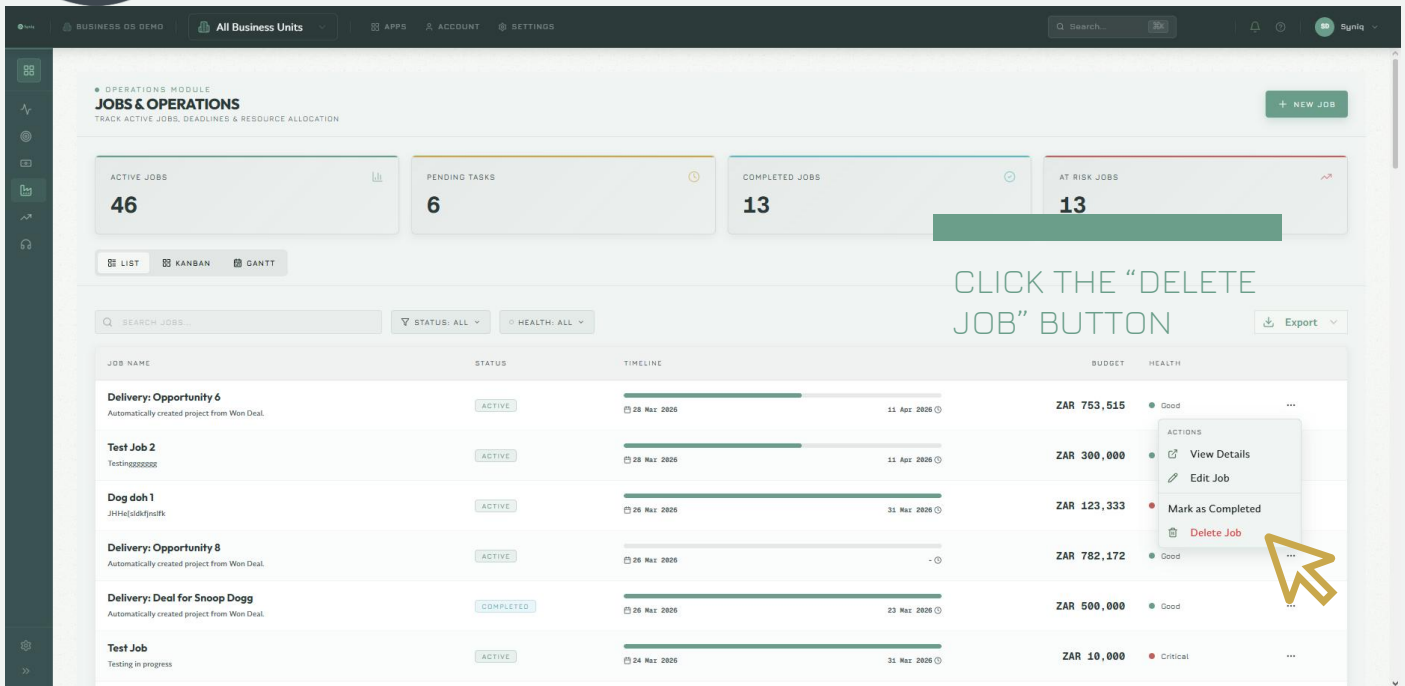


Figure 14: Delete Job Step 2

Job Detail

Enter this page by clicking on the row of the job you are interested in, or by clicking the “3 dots” and then clicking “View Details”

How to Add a Task

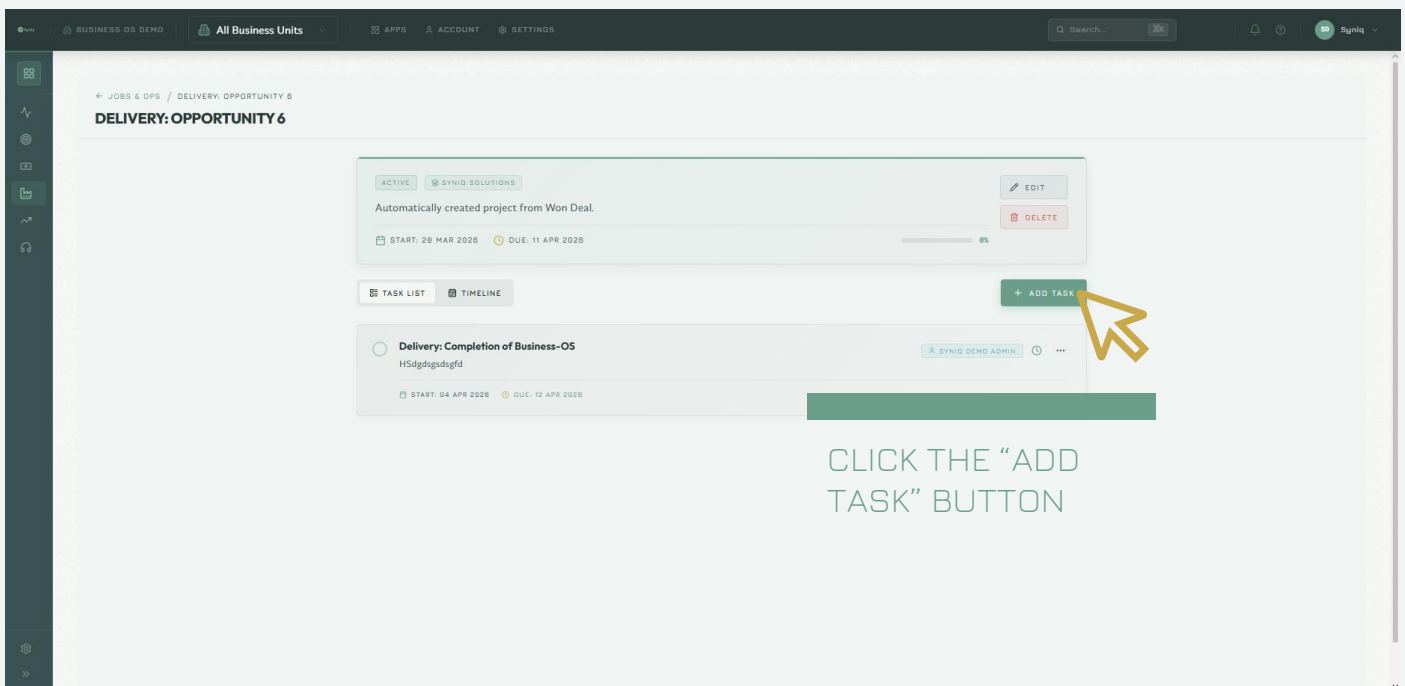


Figure 15: Add Task Step 1

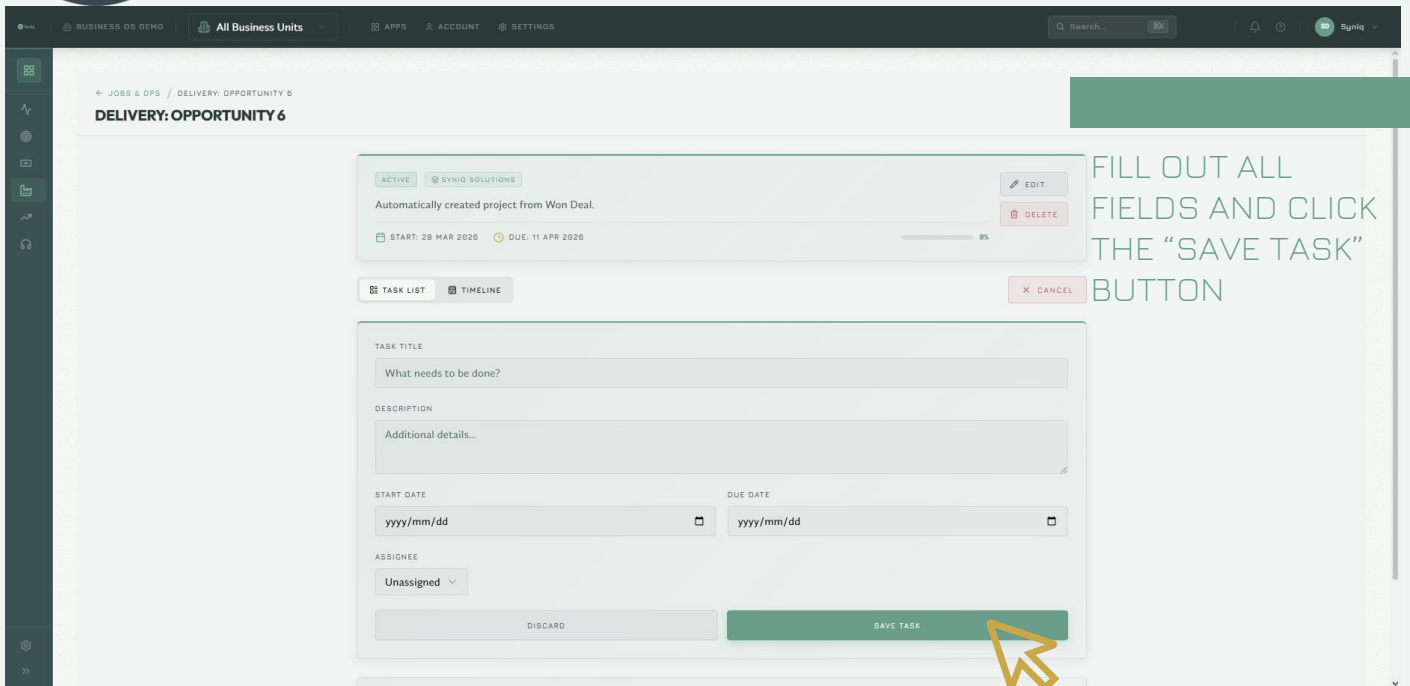


Figure 16: Add Task Step 2

How to Edit a Task

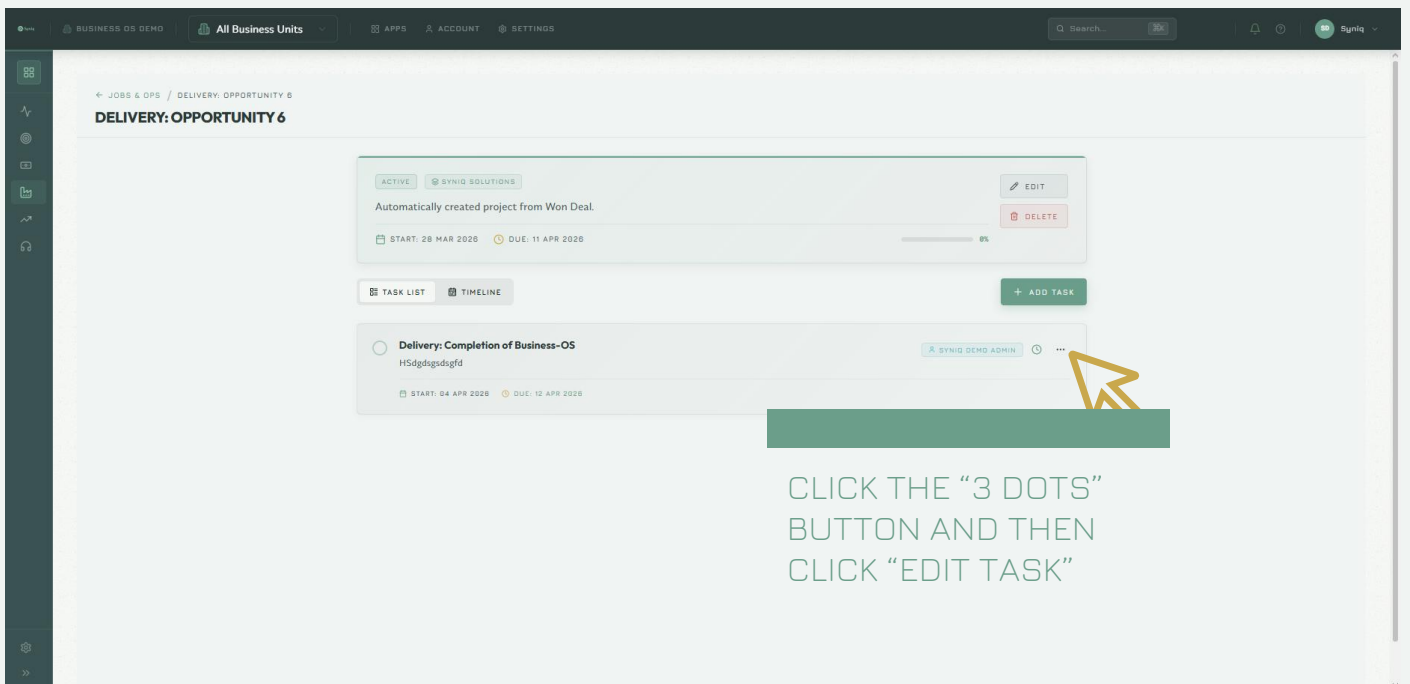


Figure 17: Edit Task Step 1

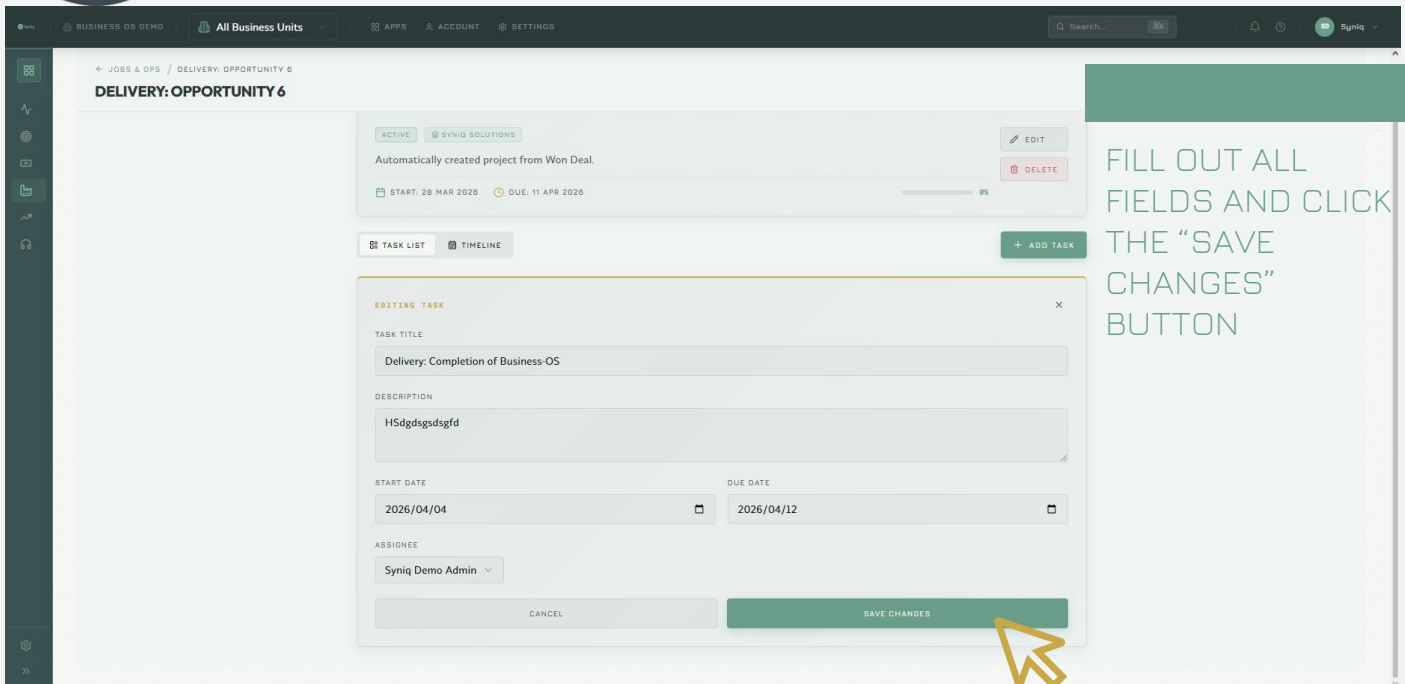


Figure 18: Edit Task Step 2

How to Log Your Work Hours

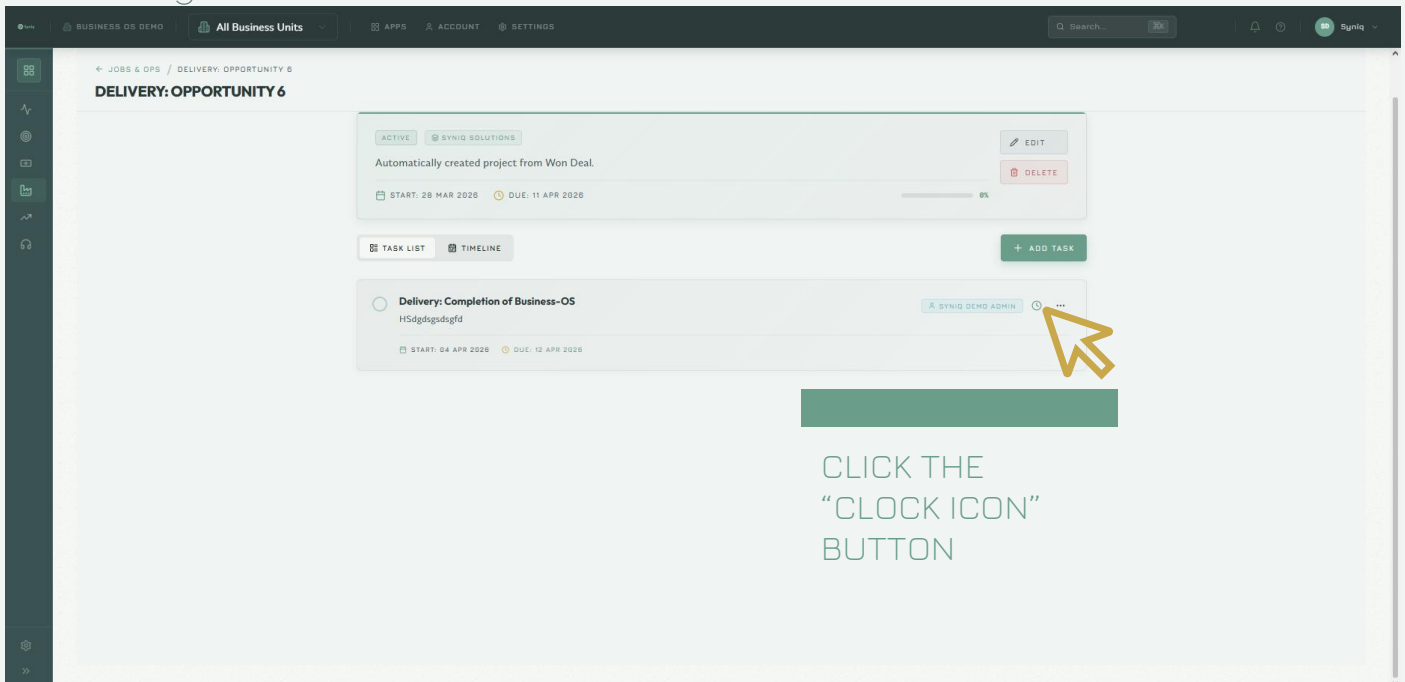


Figure 19: Log Work Hours Step 1

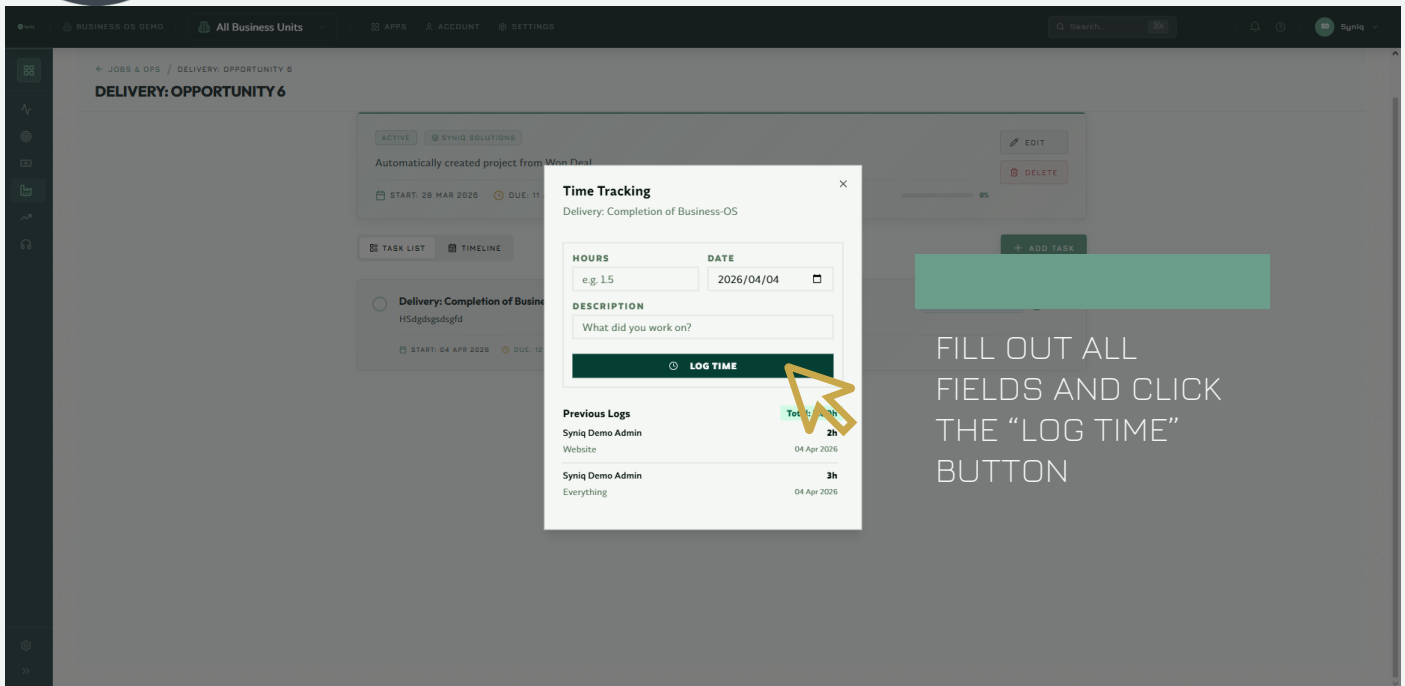


Figure 20: Log Work Hours Step 2

Team Page

How to Assign a Team Member to a Business Unit

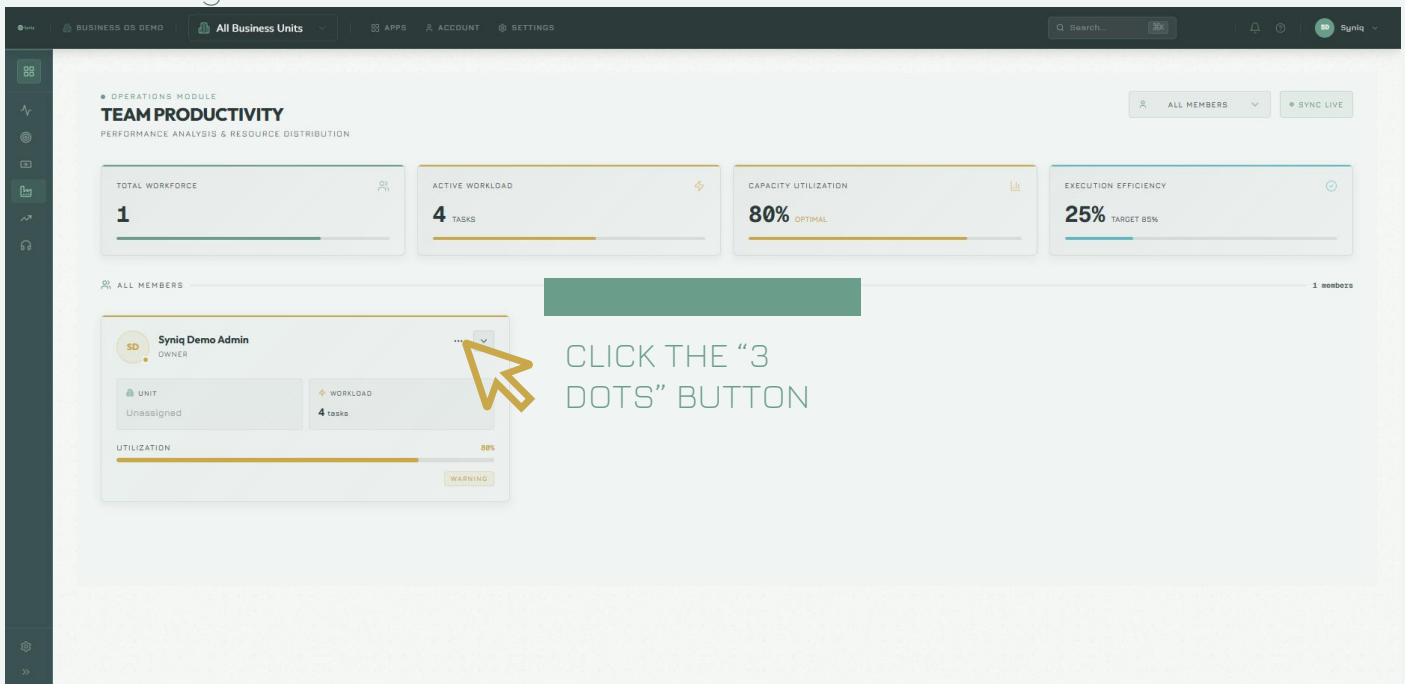


Figure 21: Assign Team to BU Step 1

The screenshot displays the Syniq dashboard interface. At the top, there is a navigation bar with 'All Business Units' selected. Below this, the 'OPERATIONS MODULE' is visible, specifically the 'TEAM PRODUCTIVITY' section. The dashboard features four key performance indicators (KPIs) in a row: 'TOTAL WORKFORCE' with a value of 1, 'ACTIVE WORKLOAD' with 4 tasks, 'CAPACITY UTILIZATION' at 80% (OPTIMAL), and 'EXECUTION EFFICIENCY' at 25% (TARGET 85%). Below these KPIs, a list of members is shown, with 'Syniq Demo Admin' (OWNER) selected. A context menu is open over this member, with the 'CHANGE BUSINESS UNIT' option highlighted by a yellow arrow. To the right of the dashboard, a green box contains the text: 'CLICK THE "CHANGE BUSINESS UNIT" BUTTON AND SELECT THE BUSINESS UNIT'. The dashboard also includes a search bar, a 'SYNC LIVE' button, and a 'WARNING' indicator at the bottom of the member profile card.

Figure 22: Assign Team to BU Step 2