Service Board Overview

Accessing the Board

- Click the hamburger menu, then click **Board**

Table View

- This is the default view
- Shows the technician's name and job order
- Jobs are grouped under each technician by day, with van assignments and technician recommendations shown inline.
- A ticket table search that finds nothing keeps the search box on screen so you can correct it.

Calendar View

- Use this to add daily activities and work orders
- Example: an emergency job comes in and needs to be scheduled
  - Choose the customer
  - Choose the date
  - Type in the concern
  - Add labels as needed (e.g., “No Hot Water”)
- **All Techs vs. Scheduled Today** toggle: view all technicians, or only those scheduled for that day
- **Calendar** button: selects the date
- Customer cards show the customer's details, an icon for each kind of label with its count, and colored lines for labels. Hover the account to see visit details and the full label list.
- Cards show the customer's latest visit update and the full concern text. Only active labels are offered.

Projects View

- Shows the list of projects technicians are working on
- Filter by **Brand** and by **Status** (Completed, In Progress, Future Work: anything not yet completed)

Changing the Layout

- Click the horizontal arrows on the left to switch to vertical view, with technicians listed across the top

- In vertical view, technician names stay pinned at the top while you scroll.

Reassigning or Rescheduling a Job

If an appointment runs long and the next job needs a different tech:

- Click the ticket for the other job
- Change the technician (and the date, if needed)
- A job finished ahead of its scheduled date stays on the date it was scheduled.

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