

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.

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.

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.

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 date as needed.

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