Recurring Work Order Setup

Last Modified on 05/05/2022 2:26 pm EDT

To setup a new Recurring Work Order, navigate to Accounts Receivable > Work Orders. Click on the Recurring Work Orders tab, and then click on the New Recurring Work Order button.

+ New Recurring Work O	der 🔅 Generate Recurrin	g Work Orders	Export to Excel	Custom Grid Layout
WO # : Site	:	Schedule :	Next Occurre 🕴 🚦	
2499 Roger Water	5	Appointment Bas	Dec 2, 2022	Delete
2567 Emily Wood		Semi-annual	Oct 3, 2022	Delete
2044 Soogi Boogi		Annual	Sep 11, 2022	Delete
2043 Jacob Silvia		Annual	Sep 1, 2022	Delete
2595 Best Security	,	Annual	Apr 4, 2022	Delete
2473 Alta		Appointment Bas	Jan 2, 2022	Delete

The New Work Order form is displayed. Select the Customer, Site, and System from the drop-down lists. Selecting a System is optional.

New Work Order		×
Customer •	Wood, Emily - 3719	v
Customer Site •	Emily Wood - 3719-01	•
Customer System	CCTV - CCTV	•
	Ok Cancel	

The New Recurring Work Order page will be displayed. Most of the fields in the header area will auto-fill with information from the customer, site, and system. There are six data entry fields to populate, two of which are required. Fields with a red bullet to the left of the field are required.

< New Recurring Work Order														
Wood, Emily - 3719														
Status		New	•	Туре •	Inspection	1-CCTV	•	PONumber	Purchase	Order	Sales	s Package		•
Site	•	#3719-01 Emily Wood - 45722 Cha	nd 🔻	Requested By	Requester	d By		Work Order Date	4/4/2022	E	Sen	vice Level	Time and Material Residential	•
System	۱ [CCTV - CCTV	•	Phone	(734) 258-4646		Technician			* Warehouse		•		
Тал	•	MI	•	Email	emilyLwoo	od@gmail.com		Salesperson •	Dan Brown	1	Schedule •		Annual	•
													Veekly	
													Monthly	- 14
										Quarterly				
Аррон	Appointments										Semi-Annual			
+ Add Appointment											Innual			
+ Add Appointment 2yrs														
													yrs	
Appt	#	Appointment Time	Last Activity			Status		Technician Est Length Billable Min			4 yrs			
No records available.											yrs			
								1	Appointment Based					
н	٠	Þ. H											0 - 0 of 0 items	

Data Entry Fields

- ***Type** Select the appropriate Work Order Type.
- Requested By Enter the name of the person requesting the work order (optional).
- **PO Number** If the charges will be billable and the customer has provided a purchase order number for billing purposes, enter that value here (optional).
- **Technician** If there is a preferred technician for the work order, make a selection from the list (optional). This will not schedule an appointment, just provide information to the person who will be scheduling appointments in the future.
- Service Level The service level will default from the System record. If the service level is different for the recurring work order, make the appropriate selection from the drop-down list.
- *Schedule From the drop-down list, select how often the recurring work order should generate.

When finished, click the Save button at the upper right of the page.