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.

/ork Orders									
Open Work Orde	ers Open Appo	intments Closed W	fork Orders Rec	urring Work Orders	Ready To Bill Work Orders				
+ New Rev	curring Work Order	Cenerate Recurrin	g Work Orders	Export to Excel	Custom Grid Layout				
WO # :	Site	:	Schedule :	Next Occurre ↓					
2499	Roger Waters		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				
н н 1	► H			1 - 37 of 37 items	Refresh				

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 🔮 Emily Wood 😨 Cctv - Cctv														
Status	• [New	•	Туре •	Inspection-C	CTV •	PON	mber	Purchase	Order		Sales Packag	e	•
Site	•[#3719-01 Emily Wood - 45722 Cha	nd 🔻	Requested By	Requested By		Work Orde	Date	4/4/2022			Service Leve	l • Time and Material Residentia	•
System		CCTV - CCTV	•	Phone	(734) 258-4646		Tech	nician			* Warehouse		e	•
Тах	•	MI	•	Email	emilyLwood@	nilyLwood@gmail.com		erson •	Dan Brown		* Schedul		e Annual	•
									Weekly					
													Monthly	- H
Appoin	tmo	oto											Quarterly	
Appoint	Appointments								Semi-Annual					
													Annual	
+	+ Add Appointment 2yrs													
										3 yrs				
Appt	Appt # Appointment Time Last Activity			Sta	atus	Technicia	1		Est Length Billable Min 4 yrs			4 yrs		
No records available.										5 yrs				
									Appointment Based	_				
×	H 4 F 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.