Recurring Work Order Setup

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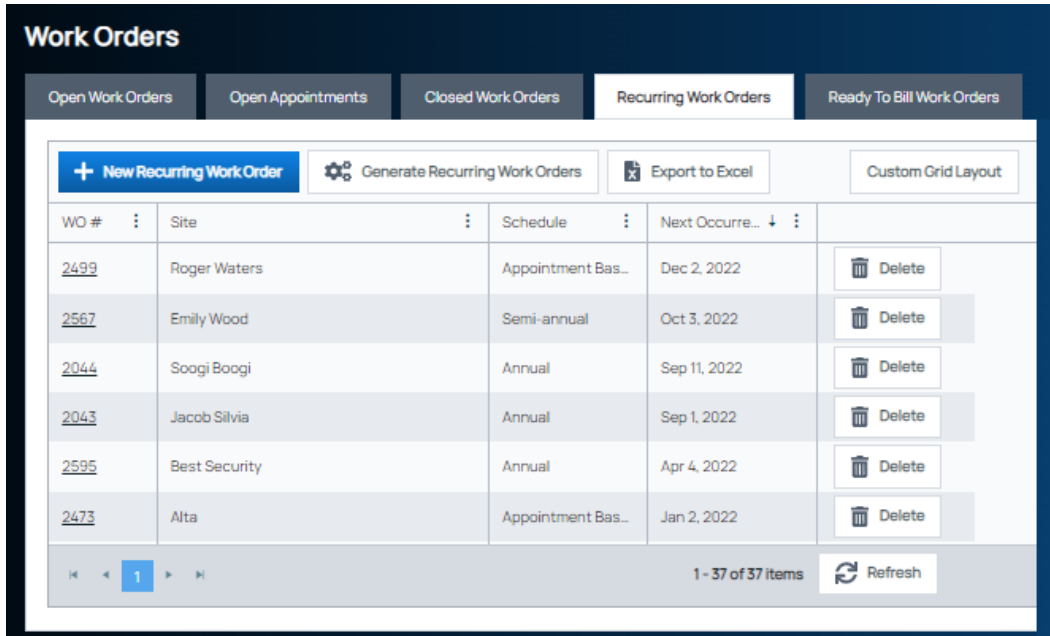
The New Work Order form is displayed. Select the Customer, Site, and System from the drop-down lists. Selecting a System is optional.
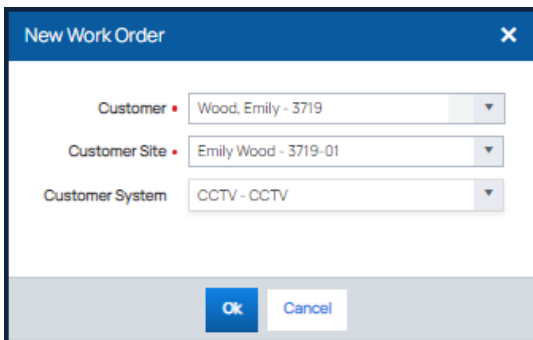
The New Recurring Work Order page will be displayed. Most of the fields in the header area will auto-fill with information from the customer, site, and system. There are six data entry fields to populate, two of which are required. Fields with a red bullet to the left of the field are required.

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.