

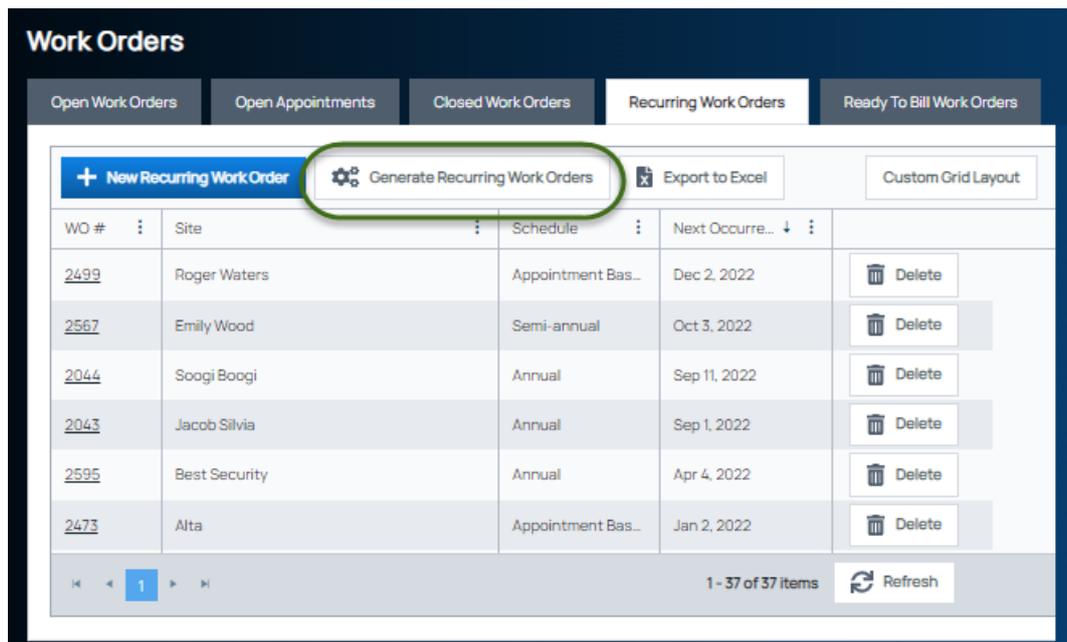
Generate Recurring Work Orders

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

The Recurring Work Order generation program creates work orders in bulk based upon the Recurring Work Order Setup records that are attached to a Customer's Site or System record.

Recurring Work Orders are typically generated once a month for work that is due to be completed in the following month to allow time to plan for the needed resources.

To generate Recurring Work Orders, navigate to Accounts Receivable > Work Orders, and then click on the Recurring Work Orders tab. Click the Generate Recurring Work Orders button.



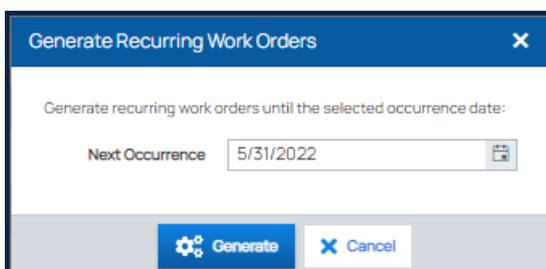
The screenshot shows the 'Work Orders' interface with the 'Recurring Work Orders' tab selected. The 'Generate Recurring Work Orders' button is highlighted with a green circle. Below the button is a table of work orders with columns for WO #, Site, Schedule, Next Occurrence, and a Delete button for each row.

WO #	Site	Schedule	Next Occurrence	
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

The Generate Recurring Work Orders dialog box is displayed. Enter the date for the next occurrence, and then click on the Generate button.

In a few seconds, a banner will appear at the top of your screen indicating how many recurring work orders were created. You can see these by clicking on the Open Work Orders tab.

Processing Recurring Work Orders is the same as regular Work Orders.



The dialog box titled 'Generate Recurring Work Orders' contains the instruction 'Generate recurring work orders until the selected occurrence date:'. It features a 'Next Occurrence' field with a date picker set to '5/31/2022'. At the bottom, there are 'Generate' and 'Cancel' buttons.