

Add an Appointment for a Recurring Work Order

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On the Calendar page, click the **Add Appointment** appointment button at the top of the page. The New Event form opens.

New Event [Close]

Appointment Details

Title:

Type:

Start: [Calendar Icon]

End: [Calendar Icon]

All Day Event: NO

[Save] [Cancel]

- **Title:** Type a title for the appointment.
- **Type:** From the drop-down list, select Recurring Work Order. This expands the form showing additional fields.
- **All Day Event:** If the appointment will last from 8:00 AM to 5:00 PM, set this toggle button to YES.
- **Start:** Enter the start date/time.
- **End:** Enter the end date/time.

New Event [Close]

Appointment Details

Title:

Type:

Start: [Calendar Icon]

End: [Calendar Icon]

All Day Event: NO

Repeat: Never Daily Weekly Monthly Yearly

Recurring Work Order

New WO?: NO Create new appt based recurring work order.

Technician:

Customer:

Additional Technicians:

Recurring WO:

Sync: NO [Help Icon]

Description:

0/500

[Save] [Cancel]

- **Repeat:** If the appointment occurs on a periodic basis, click the appropriate button.
 - If you choose an option other than Never, the form expands to make additional selections:

Repeat Never Daily Weekly Monthly Yearly

Every Day(s)

End Never

After Occurrence(s)

On

Repeat Never Daily Weekly Monthly Yearly

Repeat on Sun Mon Tue Wed Thu Fri Sat

Every Week(s)

End Never

After Occurrence(s)

On

Repeat Never Daily Weekly Monthly Yearly

Every Month(s)

Repeat on

End Never

After Occurrence(s)

On

Repeat Never Daily Weekly Monthly Yearly

Every Year(s)

Repeat on

End Never

After Occurrence(s)

On

- **New WO?:** If you want to create a new work order for this appointment, set this switch to YES.
- **Customer:** Select the customer for the appointment.
- **Recurring WO:** Select the work order from the drop-down list.
- **Description:** Type a description for the appointment. This information displays on the calendar. Maximum of

500 characters allowed.

- **Technician:** Select a technician for the appointment.
- **Additional Technicians:** If this appointment applies to multiple technicians, click this to select additional technicians.
- **Sync:** If this switch is ON, the system will send an to the technician if someone changes this appointment.

For New WO?, if you selected YES, there are additional fields:

The screenshot shows a 'New Event' form with a blue header and a close button. The form is divided into two main sections: 'Appointment Details' and 'Recurring Work Order'.
Appointment Details:
- Title: Text input field.
- Start: Date and time picker (6/23/2026 1:00 PM).
- Type: Dropdown menu (Recurring Work Order).
- End: Date and time picker (6/23/2026 2:00 PM).
- All Day Event: Toggle switch (NO).
- Repeat: Radio buttons for Never (selected), Daily, Weekly, Monthly, Yearly.
Recurring Work Order:
- New WO?: Toggle switch (YES) with text 'Create new appt based recurring work order.'
- Technician: Dropdown menu.
- Customer: Dropdown menu.
- Additional Technicians: Text input field.
- Site: Dropdown menu.
- Sync: Toggle switch (NO) with a help icon.
- System: Dropdown menu.
- WO Type: Dropdown menu.
- Salesperson: Dropdown menu.
- Description: Text area with a character count '0/500' at the bottom right.
At the bottom of the form, there are two buttons: a green 'Save' button with a checkmark and a white 'Cancel' button with an 'X'.

- **Site:** (required) Select a customer site.
- **System:** Select a customer system (if needed).
- **WO Type:** (required) Select the work order type.
- **Salesperson:** (required) Select a salesperson for the work order.

When finished, click the **Save** button at the bottom of the form.