

# New Recurring Work Order Appointment

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## Recurring Work Order

If you would like to set up recurring work order appointments select "Recurring Work Order" from the dropdown box in the "Type" field.

The screenshot shows a software interface with a calendar on the left and an 'Event' dialog box in the center. The calendar displays a schedule for Tuesday, July 12, 2016, with an appointment for 'Inspection' at 7:00 AM. The 'Event' dialog box is open, and the 'Type' field is set to 'Recurring Work Order', which is circled in purple. The dialog box contains the following fields:

- Title: Inspection
- Type: Recurring Work Order
- Start: 7/12/2016 8:45 AM
- End: 7/12/2016 9:00 AM
- Repeat: Never
- All day event:
- Customer: Grossman, Matt - 1028
- Site: Brian Lattman - 4 Cypress Drive, AL
- System: Burglar Alarm-555
- Description: Burglar Alarm Inspection
- Tech: Barbie Savani
- Sync:

## Fill Out Fields

Title

Fill out the appointment title

Start

Select the date and time the appointment is starting

End

Select the date and time the appointment is ending

All Day Event

If you check this box, the technician's entire day will be blocked out as busy on the calendar.

Repeat

If you would like the work order to recur, select the repetition frequency from the dropdown box. A series of fields will appear.

Repeat Every

Select how frequently you would like this event to repeat. For example if you select weekly in the repeat field, then

choose to repeat every 2 weeks, the meeting be scheduled every other week.

Repeat On

Select which day you would like the event to repeat. This does not apply to daily events.

End

Select if you would like this event to end after a certain number of occurrences or after a certain date.

Create Appointment Based Recurring Work Order.

CHECK THIS BOX. You will be creating a new recurring work order based on this appointment.

Customer

Select the customer you would like to link this appointment to.

Site

Select the site you would like to link this appointment to.

System

Select the customer system you would like to link this appointment to (if applicable).

Description

Enter a description of the recurring appointment.

Tech

Enter a technician for this appointment.

Sync

Check this box if you would like AlarmBiller to automatically notify attendees if appointments are changed.

**Save**

Click "Save" in the bottom right corner to continue.

## New Recurring Work Order

This will take you to the page for the new recurring work order you created. Many of these fields will be prepopulated based on what you entered in the calendar fields but can be overridden. Click "Save" in the upper right corner to continue.

## New Recurring Work Order: Matt Grossman - 1028

[Customer](#) [Save](#)

**Site:** #3 Brian Lattman - 4 Cy...  
**Tax:** CUY - 7.850%  
 4 Cypress Drive  
 Monroe Township, AL 08831  
 Requested By  
 (555) 555-5555  
 barbie.savani@richmond.edu  
 Purchase Order Number

**System:** Burglar Alarm-555  
 Panel Type: test  
 Location: Side Door  
**Service Level:** T&M  
**Base:** \$75.00 **Labor:** \$60.00  
**Increment:** 15 min. **Bill After:** 30 min.  
**Warranty Labor:** Expired: 7/11/2015 | One Year Warr...  
**Warranty Parts:** Expired: 7/11/2015 | One Year Warr...

**Type:** Inspection  
**Status:** New  
**Salesperson:** Brad Solomon  
**Technician:** Oliver Astra  
**Schedule:** Appointment Based  
 burglar alarm inspection  
226 characters remaining

Appointments | **Work Order History**

Appt #	Title	Start	End	Recurrence	Next Occurrence

The will take you to the recurring work order details page. Click "Calendar" on the top of the screen to go back to the calendar. Your recurring work order will appear at the date and time you scheduled it highlighted in yellow.

Today Monday, July 18, 2016 Day Week Month Agenda Technicians PDF

	Oliver Astra Mon 7/18	Sam Clyde Mon 7/18	Ethan David Mon 7/18	Lorena Mobley Mon 7/18	Unassigned Salesperson Mon 7/18	Barbie Savani Mon 7/18	Brad Solomon Mon 7/18	Ian User Mon 7/18
all day	MISC.		MISC.					
7:00 AM								
8:00 AM						RecWO#1409 Savani, Barbie Inspection, Mon		
9:00 AM								

## Generate Work Order for a Recurring Work Order Appointment

To create a work order (that you can turn into an invoice) for a recurring work order appointment, double click on the recurring work order appointment and click "Edit Current Occurrence".

**Edit Recurring Item** ×

Do you want to edit only this event occurrence or the whole series?

Edit current occurrence
Edit the series

## Generate Work Order

Click "Generate Work Order" at the top of the page.

New Appointment #0 / Appointment Based Recurring Work Order #1409

View System **Generate Work Order** View Recurring Work Order Customer Manager

**Customer:** Matt Grossman - 1028  
**Site:** Brian Lattman - 3  
**System:** Burglar Alarm - 555

4 Cypress Drive  
Monroe Township, AL 08831  
(555) 555-5555 ext: Map

Title: Inspection  
Type: Recurring Work Order  
Start: 7/18/2016 8:00 AM  
End: 7/18/2016 8:30 AM  
All day event:

Description: Burglar Alarm Inspection  
Tech: Barbie Savani  
Sync:

Save Cancel

Click "Ok" on the confirmation prompt that appears.

## Notification Confirmation

Select if you would like to notify the technician (by email and text message), the customer (by email), both, or neither of the appointment being generated.

## Work Order Details

The work order details page for this newly generated work order will appear.