New Recurring Work Order Appointment

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.

Fill Out Fields

Title

Fill out the appointment title

Start

Select the date and time the appoitment 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 tecnician 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.

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.

Generate Work Order for a Recurrring 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 an click "Edit Current Occurence".

Gererate Work Order

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

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.