How to Guide-Recurring Work Orders

- Overview of Recurring Work Orders
- Entering a Recurring Work Order
- Schedule a Recurring Work Order
- Viewing your Recurring Work Orders
- Stopping work orders from recurring



Overview

Accelerator's Recurring Work Order (RWO) feature allows you to setup a work order that recurs at a frequency you schedule. Common types of recurring work orders

include: weekly appliance cleaning, monthly inspections, quarterly high dusting, or a monthly work order that needs to be invoiced on a recurring basis.

Accelerator will **create your work order 4 days before the next due date**. You can schedule the work order to notify you via email if you wish to be reminded. Note: Reminders are setup in administration, you will need your system administrator to setup.



To enter a new Recurring Work Order, click Recurring Work Orders from the Work Order tile

Step 1: Enter the Recurring Work Order

Entering a Recurring Work Order

Recurring Work Order

These are the fields of the recurring work order record that can be edited.

Description *	Weekly Appliance
Service Location*	Research Center
Contact Name	Peterson, Sean 🦉 🖃
Sales Person	Little Rich 🖉
PO Number	
Work Description	Clean appliances each Friday.
Service*	Appliance Cleaning
Quantity*	1
Rate*	\$95.00
Overhead	(select)
Total Rate	\$95.00
Floor	
Space	

- 1. Enter a DESCRIPTION that describes the work order
- 2. Select the LOCATION where the work is being performed
- 3. Enter the CONTACT if needed
- 4. Enter the SALES PERSON, this allows you to view Your RWO
- 5. Enter a customer PO Number if needed
- 6. Enter the WORK DESCRIPTION. If invoicing, this will be sent on the invoice.
- 7. Select the appropriate SERVICE that best describes the work
- 8. Enter the QUANTITY to calculate a price if billable
- 9. Enter the RATE (QTY X Rate = Price)
- 10. OVERHEAD is used if you are marking up the price
- 11. TOTAL RATE is the QTY X Rate
- 12. FLOOR and SPACE are optional, they will be included on your printed work order

T		T
Wo	rk Orders	P
NEW	WORK ORDER	
ACTI	E WORK ORDERS	
RECU	RRING WORK ORDE	RS

Schedule a Recurring Work Order

Step 2: Schedule the Recurring Work Order

Cab	- di		
SCII	ea	uie	

Week Number	✓ 1 ✓ 2 ✓ 3 ✓ 4 ✓ 5						
Days Of Week	🔲 Sun 🔲 Mon 🔲 Tue 🔲 Wed 🔲 Thu 🗹 Fri 🔲 Sat						
Months	✓ Jan ♥ Feb ♥ Mar ♥ Apr ♥ May ♥ Jun ♥ Jul ♥ Aug ♥ Sep ♥ Oct ♥ Nov ♥ Dec						
Work Order Start Date	11/2/2018						
Sub Contractor Payout							
Invoice Amount Per Service	\$175.00						
Assign Type	Employee 🔻						
Employee	Tom Carlin Сапсеl ОК Delete Cancel Сапсеl						

1. Schedule the WEEK you want the Work Performed

- 2. Enter the DAY(s) of the week the RWO should be created
- 3. Select the MONTH(s) needed

4. Enter the DATE of the 1st Work Order (this should be the Same Day and Week Selected above)

5. Enter a customer PO Number if needed

6. If paying a Sub contractor, enter the PAYOUT AMOUNT

- 7. The INVOICE AMOUNT is calculated from the work order
- 8. You can ASSIGN the RWO to a Sub contractor or an Employee
- 9. ACTIVE tells Accelerator that we should continue to create Recurring Work Orders



View Recurring Work Orders

You can view all Recurring Work Orders by Selecting Operations Management, Work Orders, **Recurring Work Orders**

Service Location List	
Work Orders	Work Order Sales
(Jobs) Contract Services 🔸	Active Work Orders
Schedules and Calendar >	Recurring Work Orders
Equipment & Supplies +	Complete Work Orders
Log Book	Work Order Location
Service Loca	Work Order Margins
	Work Order Calendar
	New Quick Work Order
NEW ACCOUNT	Reports

Recurring Wo	ork Orders							
This is a list of recurring	work order .							
Quick Find P Edit Report Z					View:	Recurring Work Or	rder 👻	
Service Location	Service Location Number	Description	Sales Person	Work Description	Amount Branch	PO Number	Contact Name	Active
TSG Main	n/a	Weekly Appliance	Bob Brown	appliance cleaning	\$75.00 Lehigh Valley	9999	Robert, Brown	Yes
ACC North Building	4490909	Weekly Appliance Billed monthly	Bob Brown	Appliance cleaning weekly	\$75.00 n/a	637263	Easwaran, Linga	Yes
Research Center	56778899	Weekly Appliance	Little Rich	Clean appliances each Friday.	\$95.00 Philadelphia - Center City	n/a	Peterson, Sean	Yes
Tech	n/a	Monthly Inspections	n/a	Complete cleaning and compliance inspections	\$0.00 n/a	n/a	Brown, Robert	Yes
Tech 3	n/a	Invoice for Weekly Restroom Detail Cleaning	Bob Brown	Sanitize floors, sinks, urinals. Polish bright work in men's and women's restroom.	\$175.00 n/a	A8910	Bowman, Richard	Yes
Carson Center	n/a	Monthly Microwave Cleaning	Michael E Pope	Deep clean microwave	\$65.00 n/a	n/a	Pope, Mike	Yes
Lehigh Admin Building	n/a	Quarterly High Dusting	Bob Brown	High dust entrances, atrium, fitness center	\$450.00 Lehigh Valley	n/a	Stanley, Richard	Yes

- 1. Create a filter by hovering over any BOLD column label
- 2. Create a Report, send to Excel or PDF
- 3. Open a recurring work order by Clicking on the Service Location

Stopping Recurring Work Orders

Recurring Work Orders can be turned off by making Them INACTIVE.

Select: Operations Management, Work Orders, Recurring Work Orders

accelerator cc>>> Home Account Adm	ininstration - Sales -	Operations Management - Quality Control	I - Invoicing -	Accelerator Resource Management + Reports + Administration +		in	han Bara	
Home > Operations Manager Recurring Wo	ment > Work Orders > Recurring	Work Orders						
This is a list of recurring Quick Find	work order .	ew Report -				View:	Recurring Work O)rder ~
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ACC Nr Select		Weekly Appliance Billed monthly	Bob Brown	Appliance cleaning weekly	\$75.00 n/a	637263	Easwaran, Linga	Yes
Resean 🧊 Edit	56778899	Weekly Appliance	Little Rich	Clean appliances each Friday.	\$95.00 Philadelphia - Center City	n/a	Peterson, Sean	Yes
Tech Ve X Delete	n/a	Monthly Inspections	n/a	Complete cleaning and compliance inspections	\$0.00 n/a	n/a	Brown, Robert	Yes
Tech Ventures	n/a	Invoice for Weekly Restroom Detail Cleaning	Bob Brown	Sanitize floors, sinks, urinals. Polish bright work in men's and women's restroom.	\$175.00 n/a	A8910	Bowman, Richard	Yes
Carson Center	n/a	Monthly Microwave Cleaning	Michael E Pope	Deep clean microwave	\$65.00 n/a	n/a	Pope, Mike	Yes
Lehigh Admin Building	n/a	Quarterly High Dusting	Bob Brown	High dust entrances, atrium, fitness center	\$450.00 Lehigh Valley	n/a	Stanley, Richard	Yes

- 1. Hover over the RWO you want to stop. Click on the Down Arrow and Select Edit
- 2. Uncheck the Active button

