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

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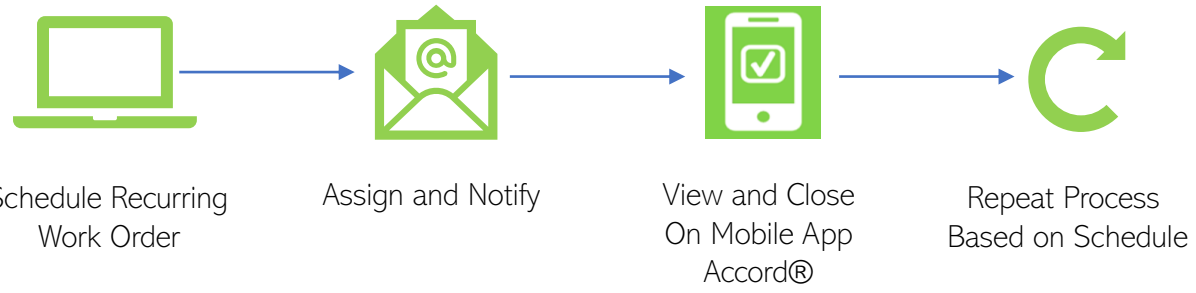
Overview

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.



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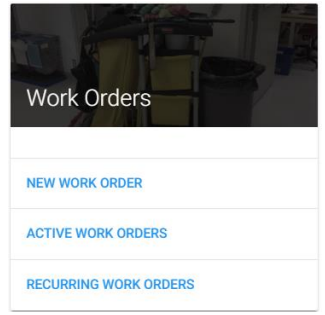
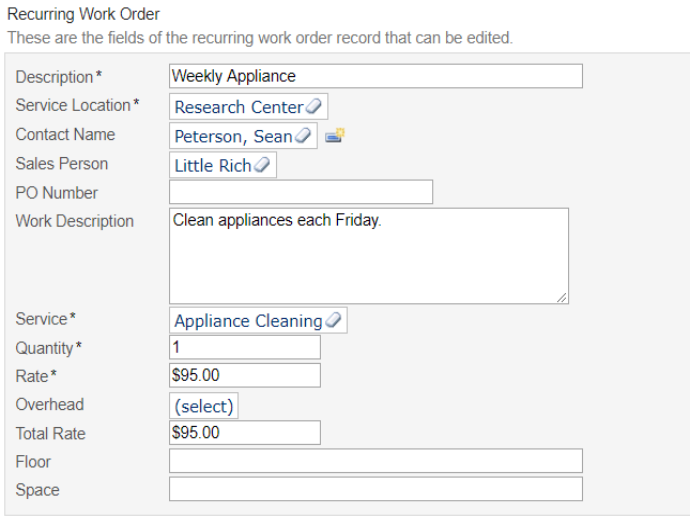
Entering a Recurring Work Order

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



Step 1: Enter the Recurring Work Order



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

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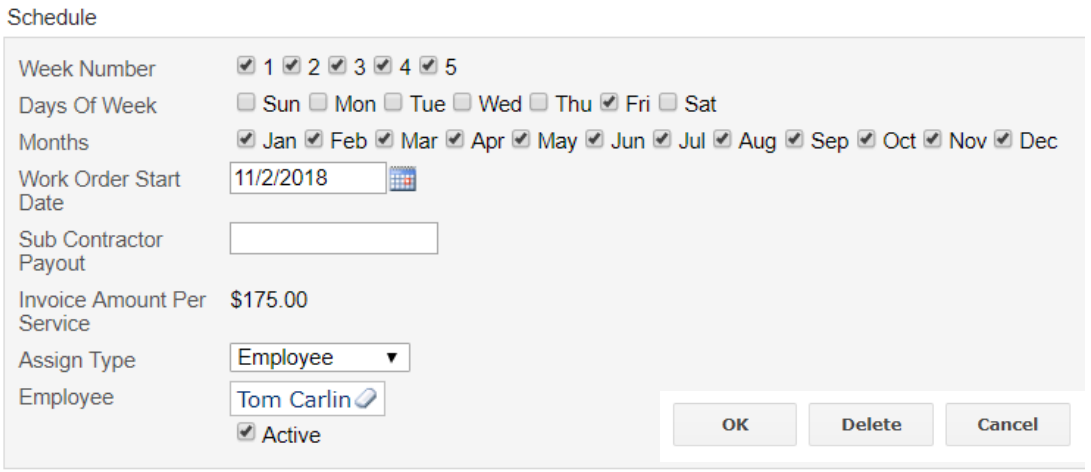
Schedule a Recurring Work Order

Step 2: Schedule the Recurring Work Order



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

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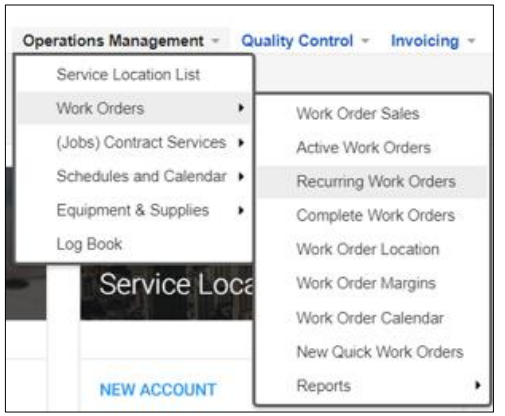
View Recurring Work Orders

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



Recurring Work Orders

This is a list of recurring work order .

Quick Find | New | Edit | Report | View: Recurring Work Order

1 2 3

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 V	n/a	Monthly Inspections	n/a	Complete cleaning and compliance inspections	$0.00	n/a	n/a	Brown, Robert	Yes
Tech	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

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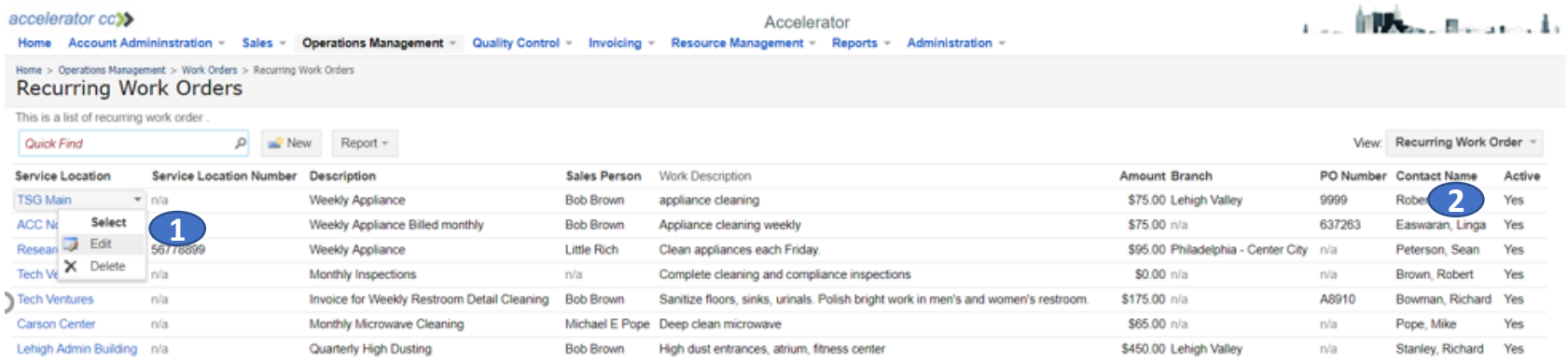
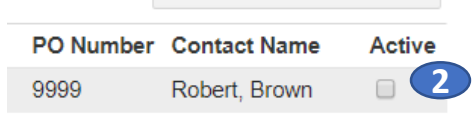
Stopping Recurring Work Orders

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

Select: Operations Management, Work Orders, **Recurring Work Orders**



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



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