

Set Up Recurring Work Orders

Setting up recurring work orders in the Sytewise platform is easy to do and keeps your recurring work up to date with minimal input.

Recurring work can be anything from grease trap maintenance to air conditioner filters. For our purposes we will use a work order for conducting the Annual Fire Alarm Inspection.

To set up recurring work orders:

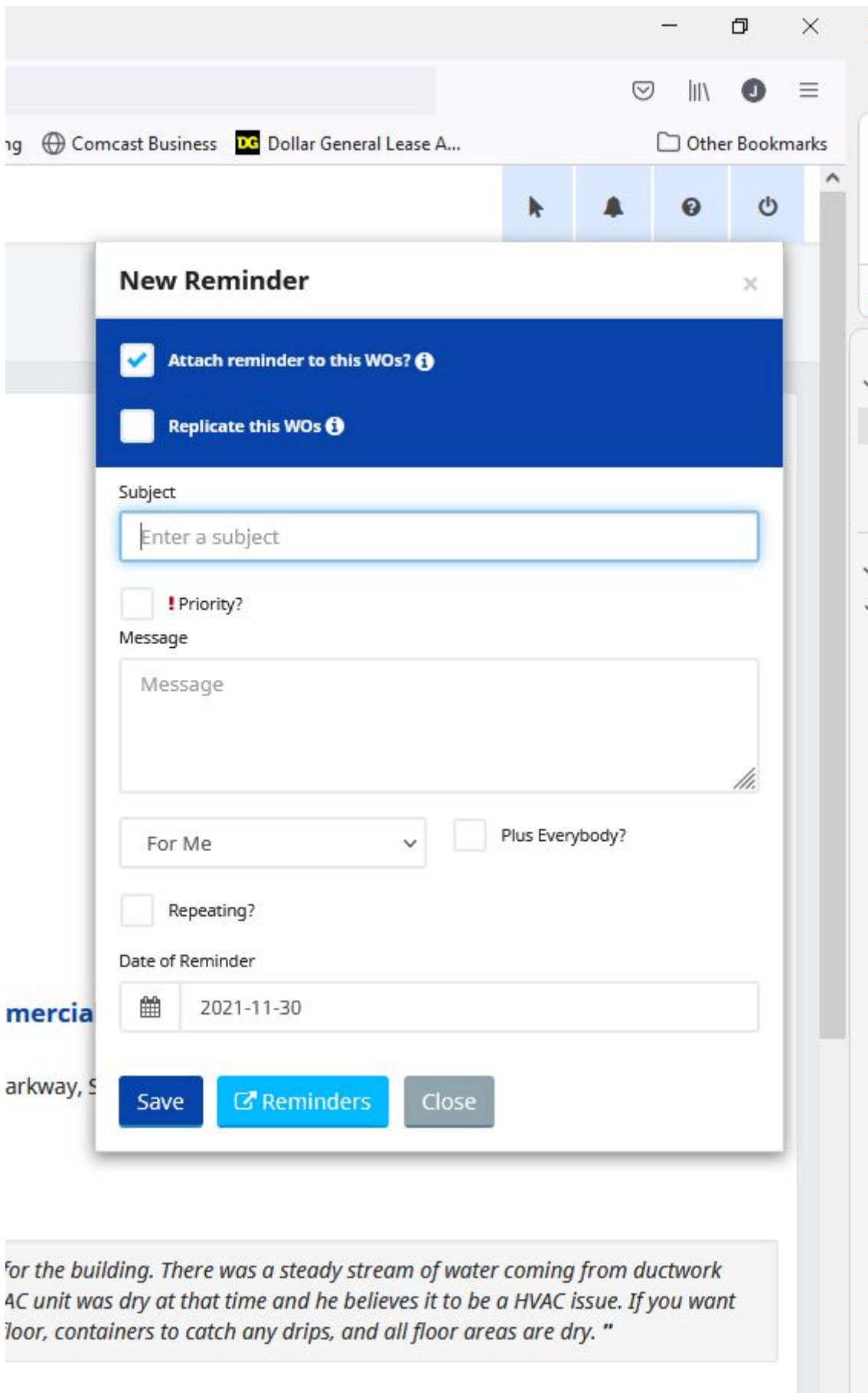
- Select a Work Order you would like to replicate
- Click on the Reminder Bell in the Upper Right Corner
- Click on the Check Boxes to Attach a Reminder and Replicate a Work Order
- Add a Subject and Message Note about the work order
- Click the Checkbox for High Priority if desired
- Choose a recipient for Reminder from the list of Sytewise Users
- Click the Repeating Check Box to establish as Schedule for the Work Orders to Repeat
- Choose the Beginning and End Date of the Reminders. Forever equals 100 Years.
- Select your Repeat Time Frame of Day, Week, Month, or Year
- Click Save

Select a Work Order you would like to Replicate

This can be any work order. It can be Open or Completed. It can be past due. It doesn't matter. When selecting a work order make sure you look at the Special Instructions to make sure they will be appropriate over time. If you have a lot of information about special dates or times that won't be applicable in the future, it would be better to start with a new work order. Make sure your special instructions are going to be evergreen for any future work order they will be part of.

Click on the Reminder Bell in the Upper Right Hand Corner

Select the Reminder Bell at the Top Right Hand Corner of your browser and the New Reminder Modal will Appear. Once the Reminder Modal opens, click on the check boxes to **Attach Reminder to this WO** and **Replicate This WO**.



Add a Subject and Message Note about the Work Order

Once you have selected the check boxes for Attaching and Replicating the Work Order, Type in a Subject and Message about the work order. This is a note to you or another person that will be tracking this Work Order in the Future. Any Special items to remember as you go about getting the work completed. This is not the work order instructions to your vendor. Those are already in the work order you selected.

New Reminder ✕

Attach reminder to this WOs? ⓘ

Replicate this WOs ⓘ

Subject

Annual Fire Panel Inspection

! Priority?

Message

Call ADS to get the Annual Inspection Done on the Fire Panel

For Me ▾ Plus Everybody?

Repeating?

Repeating

Starts 📅 2021-12-15 📅 Ends 2121-12-15

Repeat Forever?

Daily Weekly Monthly **Yearly**

Repeat every year.

Every Years (interval)

Save Reminders Close

Check the box for Priority

This may be a simple item, but it will help work orders stand out in your work order list. It will also help you notice important items that may only come up once a year. All items are important. I usually add this to time sensitive items that may cause additional expense if they aren't handled in a timely manner. You can use it however best suits your workflow.

Choose a recipient for Reminder from the list of Sytewise Users

Every Sytewise System User is a potential candidate to receive the Reminder you are creating. The default will always be to the creator of the Reminder. You can select another user, or Select All users. If you opt to send the Reminder to Everyone it show up on everyone's Reminder List until one User completes the reminder activity. Then it will drop off of Everyone's list.



Click the Repeating Check Box to establish as Schedule for the Work Orders to Repeat

Once you Select the Repeat Check box you will see two boxes for a Start Date and an End Date for Reminders (and Work Orders) to be scheduled and created. Reminders created today will show up the next calendar day. Choose your Starting Date and Ending Date for the recurring work orders. If you want them to recur indefinitely then select the Forever Check Box. That will immediately set the reminders to last for 100 years.

Select your Repeat Time Frame of Day, Week, Month, or Year

The calendar for reminders is very flexible. You can select a daily reminder for something, or make a weekly reminder for every Tuesday, or every Third Tuesday. You can select a Monthly Schedule to have reminders and work orders recur on a specific day of the month, or every other month. Yearly reminders are great for those annual inspections that show up again before you know it. That being said, best practice is to factor the amount of lead time you need for this work order into the reminder date. The work order will be generated on the date you select. Make sure that date gives your Vendor enough time to get the work on the books and completed by your deadline. I try to give my Fire Panel inspectors at least a couple of weeks to respond. Your lead times may be different.

Repeating
A Repeating reminder will repeat every day, or every interval of days you select. If you enter a 1 the reminder will show up every day. If you enter a 3 it will show up every day.

Starts	Ends
 2021-12-15	 2121-12-15

A Weekly Schedule is much the same. Select the days of the week you would like the reminder to occur and then select the number of weeks in between each reminder. This is great for work orders that repeat every other week or on specific days of the week regardless of the number of monthly visits. Any Weekly Service Schedule is perfect for this.

The **Repeating** schedule is great for events that occur on specific days of the month, every month, regardless of the day of the week.

Annual **Repeating** for those inspections or reports that need to be done every year. Send a Work Order out to get your Annual Sprinkler or Backflow inspections on the calendar before your Vendor gets backed up. You can also set multi year reminders and work orders for specific Contractual Work or Lease Sensitive Items. I have tenants that require repaints every 5 years. Asphalt repairs or striping are other good uses of the multi year reminder. If you have new staff, they may not know when the parking lot in front of Kroger was last striped. Sytewise remembers and can remind them that this is the year to get it done.

Starts _____ Ends _____

Annual **Repeating**

Starts _____ Ends _____

Repeat every year.

Click Save

Every 1 Years (interval)

Save Reminders When

29 30 31



Of course you must hit save to complete the work. Once you click Save your Reminder can be found on the Reminders Page. When a


What happens Next?

Once your reminder is in the Sytewise System your calendar takes over. Every morning the Reminder System looks for actions that are to be completed today. When that happens you will have a Notification icon telling you how many reminders or actions that are current in your Reminder and Actions List.

The reminder will have an Action Button that says Create Work Order. Select this button and a duplicate of the original work order is made. Look at the work order, Make whatever changes you like. Change the text. Change the Vendor. Once you are done, click on the Send Work Order button and you are done.

If the Reminder is attached to the work order, the Action Button will say Create Work Order. If it is attached to a Survey, the Action Button will say Create Survey.

Thoroughbred Village 1 Roof Cleaning is due (Set: 13 Nov 2021)  

The  icon will delete this instance of the recurring Work Order, but future Work Orders will still be created. To Edit the Reminder Settings for your Work Order Reminder, click on the Pencil button.

You can always edit the reminder settings for the work order . If you want to go from quarterly

filter changes to every two months. Change it in the settings. If you want to Change the Vendor for all future work orders, you can do that in the Settings.

Revision #4

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