

Recurring Orders Function

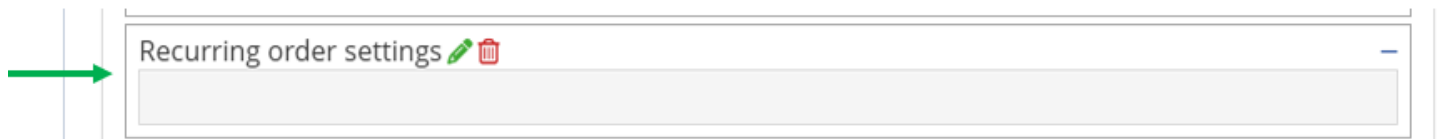
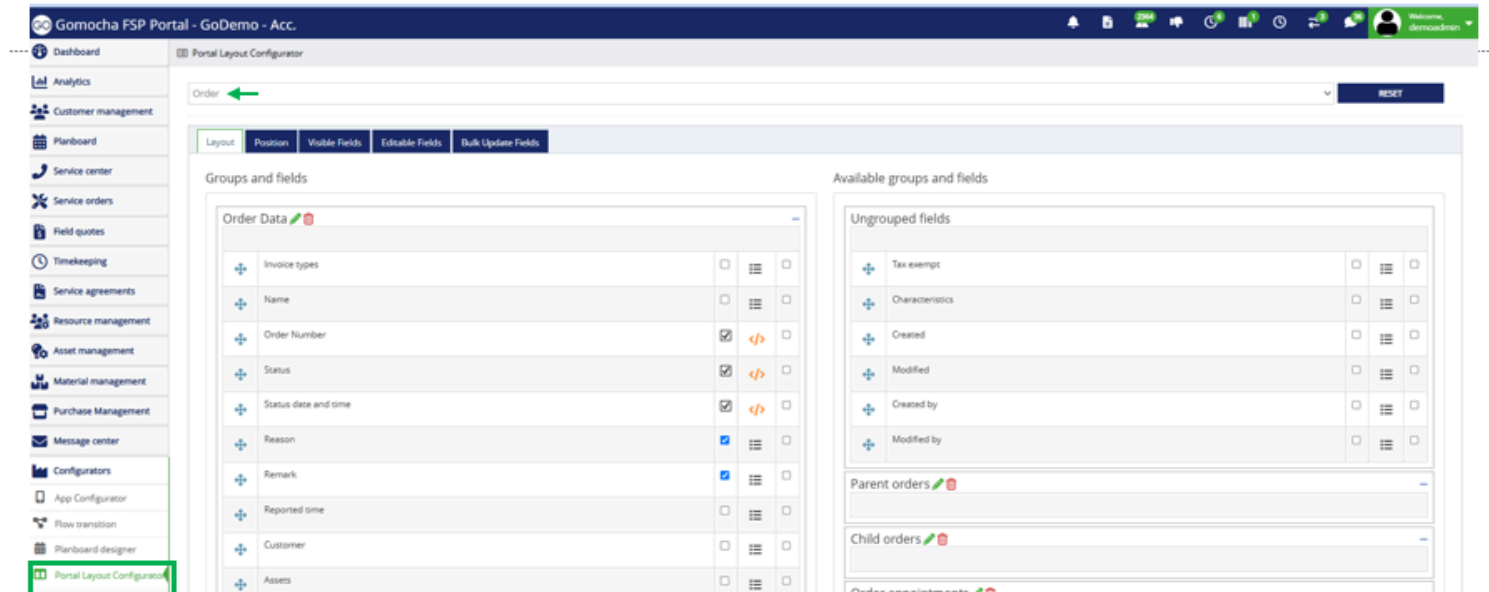
Last updated by | David Mishler Gomocha | May 7, 2025 at 10:23 AM GMT+2



How to Use the Recurring Order Function During Order Creation

Configuration

- From the **Portal** menu, go to **Configurators > Portal Layout Configurator > Orders**.
- Ensure **Recurring Order Settings** is moved to the active **Groups and Fields** section.



- Click the **Editable Fields** blue tab.
- In the **Activity Status** column labeled **Created**, ensure the **Recurring Order** field is included in the group of editable fields.

Layout Position Visible Fields Editable Fields Bulk Update Fields

Activity type	Activity status	Field name	Actions
Select Items...	To Be Rescheduled	Additional Address Info x Appointment Fixed? x Assets x Attachments x Cause x City x Contract x Country x Customer x Customer reference x Default warehouse for engineer x Description x Discussion x Engineer Fixed? x Engineer group x Engineers x Fixed timeslot x House Number x Internal remark x Latitude / Longitude x Override auto-added skills x Predefined addresses x Preferred engineer x Price agreed with customer x	
Select Items...	Awaiting Parts	Additional Address Info x Appointment Fixed? x Assets x Attachments x Cause x City x Contract x Country x Customer x Customer reference x Default warehouse for engineer x Description x Discussion x Engineer Fixed? x Engineer group x Engineers x Equipments x Fixed timeslot x House Number x Internal remark x Latitude / Longitude x Opening hours x Override auto-added skills x Predefined addresses x Preferred engineer x Price agreed with customer x	
Select Items...	Replanned By Customer	Opening hours x Override auto-added skills x Predefined addresses x Preferred engineer x Price agreed with customer x Price agreed with customer remark x Priority x Problem x Project Number x Quality code x Rates overview x Recurring order x RefToCustomTable x Region x Remark x Reported time x Reports x Scheduled start time / end time / duration x Skills x SLA start date / deadline / duration x Solution x State x Street x Warehouse code x Time x Zip Code x	
Select Items...	Parts allocated	Opening hours x Override auto-added skills x Predefined addresses x Preferred engineer x Price agreed with customer x Price agreed with customer remark x Priority x Problem x Project Number x Quality code x Rates overview x Recurring order x RefToCustomTable x Region x Remark x Reported time x Reports x Scheduled start time / end time / duration x Skills x SLA start date / deadline / duration x Solution x State x Street x Warehouse code x Time x Zip Code x	
Select Items...	Reserved	Additional Address Info x Appointment Fixed? x Assets x Attachments x Cause x City x Contract x Country x Customer x Customer reference x Default warehouse for engineer x Description x Discussion x Engineer Fixed? x Engineer group x Engineers x Fixed timeslot x House Number x Internal remark x Latitude / Longitude x Override auto-added skills x Predefined addresses x Preferred engineer x Price agreed with customer x	
Select Items...	Created x Rejected	Invoice types x Latitude / Longitude x Name x Opening hours x Order approver x Order text x Override auto-added skills x Predefined addresses x Preferred engineer x Price agreed with customer x Price agreed with customer remark x Priority x Problem x Project number x Project Number x Project Number x Quality code x Rates overview x Reason x Repeating order x RefToCustomTable x Region x Remark x Reported time x	

Usage and Results

- Go to **Service Center** and select the **Customer** or **Asset** you want to create an order for.
- On the **Order Creation** screen, do the following:
 - Select the **engineer** to be assigned the recurring order.
 - *Note: If no engineer is selected, the recurring orders will be created with the status "**Created**" and will not be automatically planned.*
 - Check the **Recurring Order** box.
 - *Note: Recurring order options will only appear if this box is selected.*

Order Registrations Customer Questionnaire Status history

Order Data **Address and contact data** **Order Planning**

Order Number: 2416159 : 1
 Status: Created
 Created: 8/21/2024, 11:29 AM
 Status date and time: 8/21/2024, 11:29 AM
 Reason: -
 Remark: -
 Reported time: 8/21/2024, 11:29 AM
 Customer: Gomocho
 Assets: Revolving door 12346: Revolving_door
 Contract: -
 Type: Maintenance
 Priority: -
 Override auto-added skills:
 Skills: Select Some Options
 Project Number:
 Customer reference:
 CANCEL

Street: Achtenweg 38
 House Number: 2 House number addition:
 City: Waardenburg
 Zip Code: 4181AE
 State:
 Country: Netherlands
 Region: Default
 Additional Address Info:
 Latitude: 51.8300598
 Longitude: 5.250637
 SELECT LOCATION

Engineer group: Engineer group
 Preferred engineer: -
 Engineers: GoTrainingAdmin GoTrainingAdmin
 Scheduled start date & time: 8/21/2024, 11:34 AM
 Scheduled end date & time: 8/21/2024, 3:34 PM
 Duration: 000:04:00
 Must be in days:hours:minutes
 SLA start date & time: 8/21/2024, 11:34 AM
 SLA end date & time: 8/29/2024, 11:34 AM
 SLA duration: 005:00:00
 Must be in days:hours:minutes
 Recurring order:
 Appointment Fixed?
 Engineer Fixed?
 Problem: -
 Cause:
 SWE AND PLAN SWE AND PLAN

Once the **Recurring Order** checkbox is selected, the **Recurring Order Settings** group will appear as shown above.

Order Registrations Customer Questionnaire Status history

Attachments

+ FILE LINK
 Select files... Drop files here to upload

Recurring order settings

Time zone: (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna
 Start time: 11:00 AM
 SLA days: 0 SLA hours: 4 SLA minutes: 0
 Pattern type: -
 Pattern type is required
 Recurrence start: 8/21/2024
 Recurrence end: 8/22/2024
 Use occurrences instead of end date: Occurrences:
 Contact

Filling in the Recurring Order Settings:

- Time Zone -Prefilled
- Start Time - time of day when the recurring orders will start
- SLA Days, Hours, Minutes- Fill in with needed SLA items
- Pattern Type- When the recurrence occurs: Options include Daily, Weekly, Monthly, Yearly
- Based on pattern type, user will need to fill in additional fields (example: every # of: Days, Weeks, Years)
- Recurrence start/end- When the recurring orders will start and end
- Use occurrences instead of end date- can use this option and select the number of times the order will occur. Eliminates end date option
- Save and Plan

Recurring order settings

Time zone
 (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

Start time
 11:30 AM

SLA days: 0 SLA hours: 4 SLA minutes: 0

Pattern type*
 Yearly

On*
 8/21/2024 Every*
 1 Year(s)

Recurrence start
 8/22/2024

Recurrence end
 8/23/2027

Use occurrences instead of end date Occurrences

SAVE AND ^ **SAVE AND PLAN**

Recurring order settings

Time zone
 (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

Start time
 11:30 AM

SLA days: 0 SLA hours: 4 SLA minutes: 0

Pattern type*
 Yearly

On*
 8/21/2024 Every*
 1 Year(s)

Recurrence start
 8/22/2024

Recurrence end
 8/23/2027

Use occurrences instead of end date Occurrences
 4

SAVE AND ^ **SAVE AND PLAN**

- After clicking **Save and Plan**, the user is redirected to the **Planboard**.
- Recurring orders will appear in the **Order Search** column with the **recurring order icon** and a status of **Planned**.
- Navigate to the date of the first order in the recurring series—this order will be planned for the selected engineer.

Planboard filters

Select Region: Select engineer status: Select Engineer: Select a subcontractor: 8 Of 8 Engineers

Select engineer skills: Select engineer groups: Select equipment characteristics: Select a crew:

Use engineer default region Available engineers Hide old orders

LOAD MORE APPLY FILTERS

08/22/2024 - 08/22/2024 12:00 AM 11:00 PM Start: 08/22/2024 12:00 AM End: 08/22/2024 1:00 AM Agenda Map Timeline

Aug 22 Thu

12 AM 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM 5 PM 6 PM 7 PM 8 PM 9 PM 10 PM 11 PM

Engineer

- Bastiaan Pierhagen
- David Mishler
- Dummy Dummydu...
- Dummy2 Dummyd...
- GoTrainingAdmin ...
- Guilherme Mendes
- John Phillips
- Nikoleta Sinikchivska

Order: 2416159-1 | Planned
Customer Name: Gomocha
Type: Maintenance | Planned
SLA: 8/22/2024 12:00 PM | 8/22/2024 04:00 PM

Order: 2416159-2 | Planned
Customer Name: Gomocha
Type: Maintenance | Planned
SLA: 8/22/2025 12:00 PM | 8/22/2025 04:00 PM

Order: 2416159-3 | Planned
Customer Name: Gomocha
Type: Maintenance | Planned
SLA: 8/22/2026 12:00 PM | 8/22/2026 04:00 PM

Order: 2416159-4 | Planned
Customer Name: Gomocha
Type: Maintenance | Planned
SLA: 8/22/2027 12:00 PM | 8/22/2027 04:00 PM

2416159-1
Gomocha
Maintenance | Planned

- Go to the **next date** in the recurring pattern to see that the order is already planned.
- In the example shown, the recurrence is set to **annual**, so each order appears **one year apart**.

Planboard filters

Select Region: Select engineer status: Select Engineer: Select a subcontractor: 8 Of 8 Engineers

Select engineer skills: Select engineer groups: Select equipment characteristics: Select a crew:

Use engineer default region Available engineers Hide old orders

LOAD MORE APPLY FILTERS

08/22/2025 - 08/22/2025 12:00 AM 11:00 PM Start: 08/22/2025 3:40 AM End: 08/22/2025 4:40 AM Agenda Map Timeline

Aug 22 Fri

12 AM 1 AM 2 AM 3 AM 4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4 PM 5 PM 6 PM 7 PM 8 PM 9 PM 10 PM 11 PM

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SLA: 8/22/2025 12:00 PM | 8/22/2025 04:00 PM

Order: 2416159-3 | Planned
Customer Name: Gomocha
Type: Maintenance | Planned
SLA: 8/22/2026 12:00 PM | 8/22/2026 04:00 PM

Order: 2416159-4 | Planned
Customer Name: Gomocha
Type: Maintenance | Planned
SLA: 8/22/2027 12:00 PM | 8/22/2027 04:00 PM

2416159-2
Gomocha
Maintenance | Planned