

First Recurring Work Order Appointment Moving

07/22/2024 8:26 am EDT

Dealer created a case informing us that when she created an appointment based recurring work order her first appointment was being adjusted. This is best explained with an example

1. From the Calendar created a recurring work order as shown below

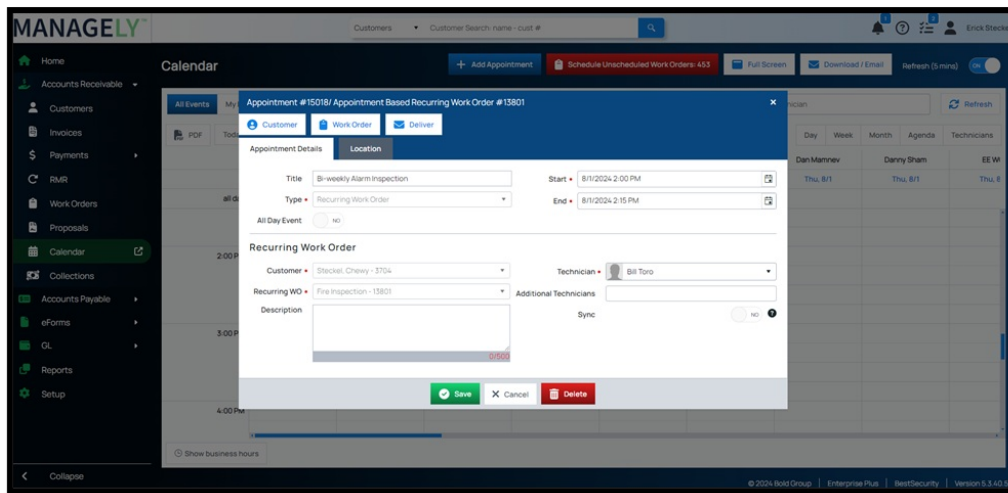
The screenshot shows the 'New Event' form in the Managely application. The form is titled 'Appointment Details' and includes the following fields and options:

- Title:** Bi-weekly Alarm Inspection
- Type:** Recurring Work Order
- Start:** 7/19/2024 2:00 PM
- End:** 7/19/2024 2:15 PM
- Repeat:** Weekly (selected)
- Repeat on:** Sun, Mon, Tue, Wed, **Thu** (selected), Fri, Sat
- Every:** 2 Week(s)
- End:** Never (selected)
- Occurrence(s):** 1
- On:** 7/19/2024
- Recurring Work Order:**
 - New WO?** Yes (checked)
 - Create new apt based recurring work order:** Yes (checked)
 - Customer:** Steckel, Cheryl - 3704
 - Site:** #1 Cheryl Steckel - 1940 Vancouver St.
 - System:** [Dropdown]
 - WO Type:** Fire Inspection
 - Salesperson:** Johnny Cage
 - Technician:** Bill Toro
 - Additional Technicians:** [Empty field]
 - Sync:** No (selected)

The form has a 'Save' button and a 'Cancel' button at the bottom.

2. Pushed the save button and you will receive a message that you have successfully created the appointment

3. You will notice that the Start date shifted from 07/19 to 08/01. The first appointment was set for a Friday and the recurring rule is set for every other Thursday. Because of this, Managely will automatically adjust the first appointment to stay in line with the recurring rule.



4. In the event you need the first appointment to be a different day than the recurring rule, create a miscellaneous appointment for the first appointment and then create your recurring work order