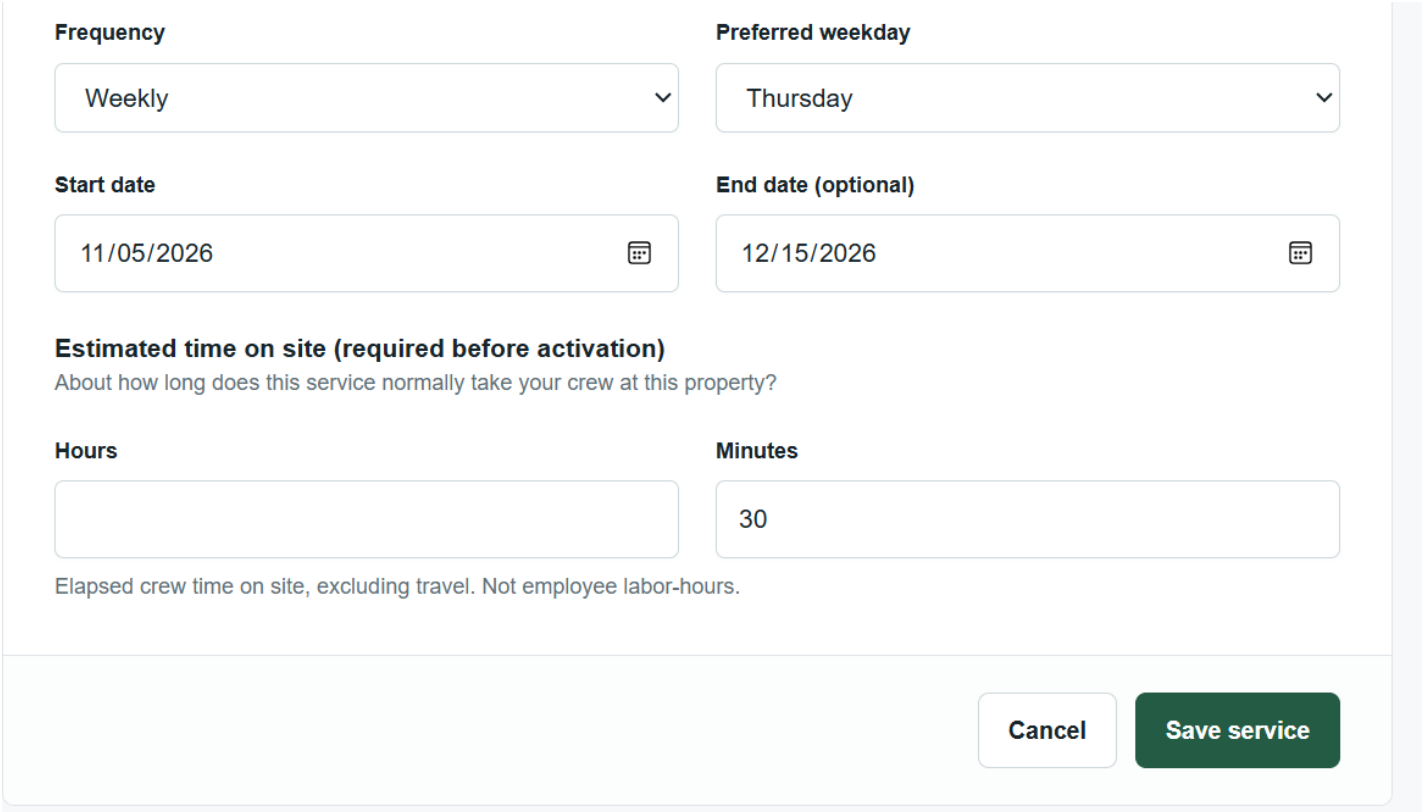
Adding a Recurring Service

Add work you already provide without creating an estimate. A saved draft must be activated before visits are generated.

Save the service draft

1. Open Customers, select the customer, then select Add existing service on the correct property.
2. Enter Service name, Description, Quantity per visit, Unit price ($), and Unit label.
3. Choose Frequency: Weekly, Every 2 weeks, or Monthly. Choose Preferred weekday where shown, Start date, and an optional End date.
4. Enter Estimated time on site in Hours and Minutes, then select Save service.



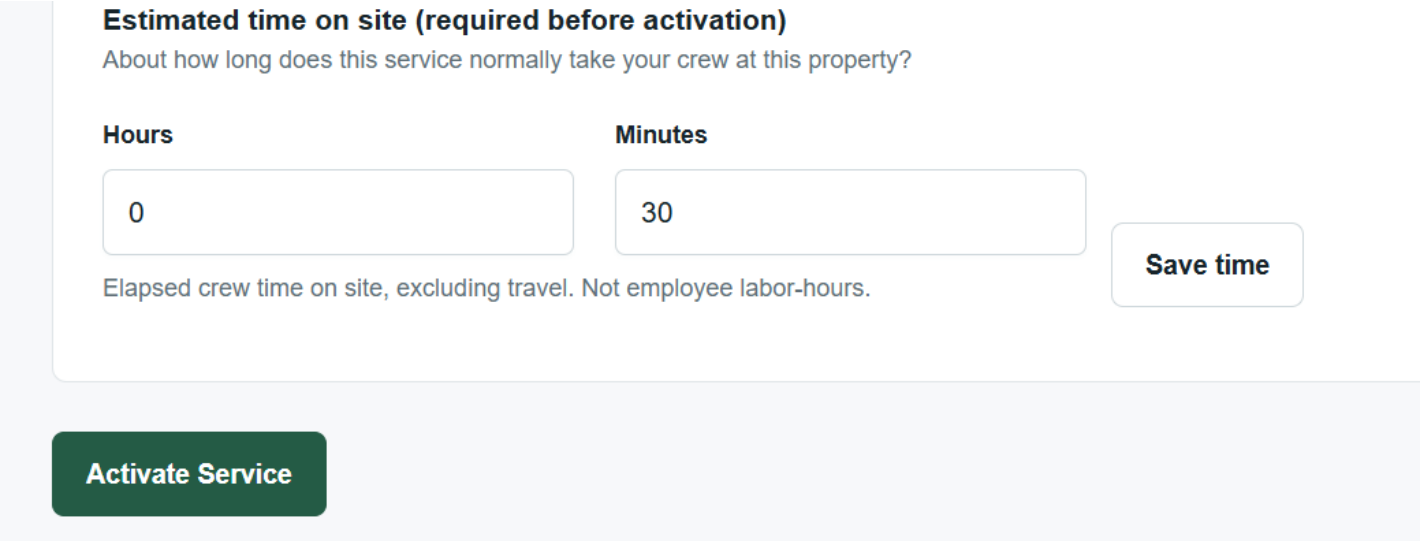
Frequency, dates, estimated time, and Save service.

What to expect: The service is saved as Draft. There are no generated visits yet.

Adding a Recurring Service

Activate and check visits

5. Review the draft's price, recurrence, property, and estimated time. Use Edit service to correct the draft.
6. If time is missing, enter the elapsed crew time on site and select Save time. This excludes travel and is not employee labor-hours.
7. Select Activate Service. Check the Active status and Upcoming visits, then open Schedule to assign a crew.



Save time before activation if needed, then select Activate Service.

What to expect: Activation generates upcoming visits in a bounded 90-day window. Use Generate upcoming visits later when more visits are needed. Pricing and recurrence lock after activation.