

Recurring Appointments

09/23/2024 2:20 pm CDT

Overview

Recurring Appointments is a scheduling option which allows you to create appointments that are set to occur on a regular basis. If you need to revisit a customer every two weeks on Wednesday at 9:00 am, this would be the way to do it. This page will go over the different options you'll have available to you when scheduling recurring appointments, as well as how each option will function in a live environment.

This article will review:

- [Settings and Navigation](#)
- [Frequency, Occurrences, and End Dates](#)
- [Initial N Appointment Pricing](#)
- [Jumpstart Count](#)
- [Starting, Finishing, and Invoicing Appointments](#)
- [Get an Overview of Recurring Appointments](#)
- [Master vs Shadow Appointments](#)
- [View, Edit, and Cancel Recurring Appointments](#)
- [FAQs](#)

Video Tutorials

Create and Schedule Recurring Services

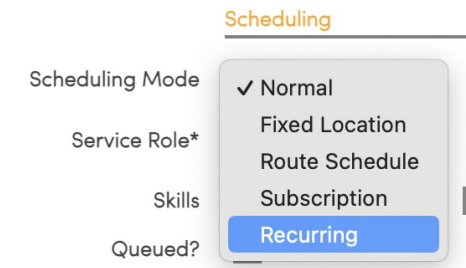
Your browser does not support HTML5 video.

Edit Recurring Appointments

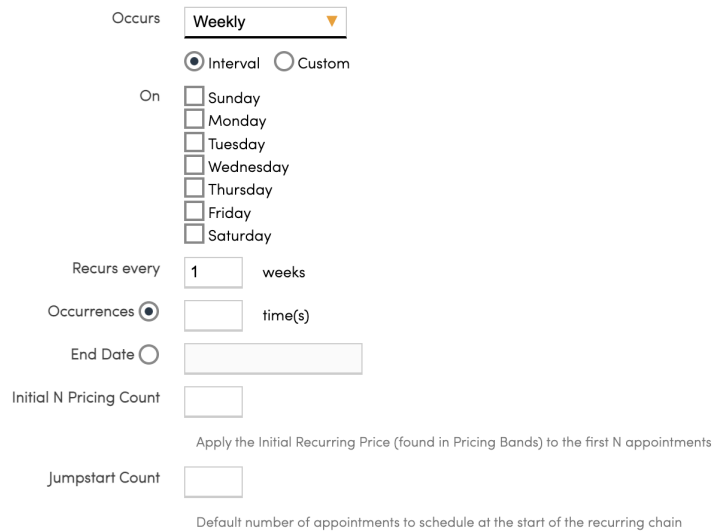
Your browser does not support HTML5 video.

Settings and Navigation

In **Control Panel > Services** you can enable certain services to always be scheduled as recurring appointments. Under the Scheduling section, make sure that you choose **Recurring** in the **Scheduling Mode** dropdown menu. This will open a new set of options for you below.



This will open a new set of options for you below where you can determine the frequency, number of occurrences, end date, initial pricing, and jumpstart count. Each of these settings will be discussed in detail in the rest of this article.



A screenshot of a web form for scheduling appointments. The form includes the following fields and options:

- Occurs:** A dropdown menu set to "Weekly".
- Interval/Custom:** Two radio buttons; "Interval" is selected.
- On:** A list of days from Sunday to Saturday, each with an unchecked checkbox.
- Recur every:** A text box containing "1" followed by the word "weeks".
- Occurrences:** A radio button is selected, followed by an empty text box and the text "time(s)".
- End Date:** An empty text box.
- Initial N Pricing Count:** An empty text box.
- Jumpstart Count:** An empty text box.

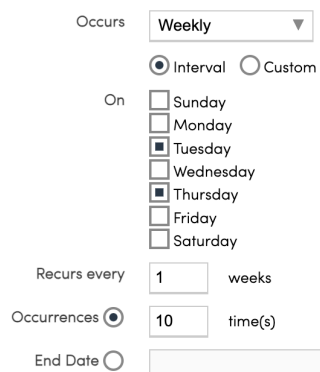
Below the "Initial N Pricing Count" field, there is a small text label: "Apply the Initial Recurring Price (found in Pricing Bands) to the first N appointments". Below the "Jumpstart Count" field, there is another small text label: "Default number of appointments to schedule at the start of the recurring chain".

Frequency, Occurrences, and End Dates

Frequency

The frequency is set on the service level or on an individual appointment by using the **Occurs** dropdown menu. The frequency options available are as follows:

- **Once:** This is the default option. Functions exactly like creating a single appointment.
- **Daily:** Defines an appointment that occurs once every so many days (ex. occurs once every two days). Based on what you enter into the first box, the appointment will occur every *n* days.
- **Weekly:** These appointments will occur every *n* weeks on the days of your choosing.
 - Note: If an appointment occurs every week on Tuesday and Thursday, both of those days are treated as one single occurrence. This only affects the Number of Occurrences setting. As seen in the photo below, this appointment would repeat on Tuesdays and Thursdays for 10 weeks.



A screenshot of the same appointment scheduling form as above, but with the following changes:

- Occurs:** Still set to "Weekly".
- Interval/Custom:** "Interval" is still selected.
- On:** The checkboxes for "Tuesday" and "Thursday" are now checked, while the others remain unchecked.
- Recur every:** Still "1" weeks.
- Occurrences:** The radio button is still selected, but the text box now contains the number "10".
- End Date:** Still an empty text box.

- **Monthly:** This option lets you schedule an appointment to take place every *n* months on the chosen date.

The first box determines the date of the month to be used.

- The scheduled start date for an appointment that's created this way will be placed on the earliest possible date, based on your input into the first box. If it is currently the 15th of June and you choose to have the appointment occur on the 1st of every month, the scheduled start date for the first appointment will be on the 1st of July.
- If you leave the date box empty, the appointment will be scheduled on whichever date you choose on the calendar, and will repeat monthly on the date of the first (Master) appointment.

Occurs

Recur on the

of every month(s)

Occurrences ☒ time(s)

- **Monthly (Relative):** This functions almost exactly like the monthly option but is instead based on the day of the week as opposed to the day of the month (i.e., the first Monday of every month).

Occurs

Recur on the

of every month(s)

Occurrences and End Date

You can choose to set the maximum number of occurrences or an end date for your recurrence settings. You may only choose one or the other, or you can leave them both blank to have them repeat indefinitely. When you set the number of occurrences or set an end date, the appointments will be generated automatically when the appointment is saved.

You can view the chain of recurring appointments on the calendar directly on the scheduling page...

Settings		Recurring Appointments						
Recurrence Settings		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Occurs <input type="text" value="Weekly"/>	<input checked="" type="radio"/> Interval <input type="radio"/> Custom	Jun 16	17	0/3 18	0/1 19	20	0/1 21	22
On <input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday		23	24	0/1 25	0/1 26	27	28	29
Recur every <input type="text" value="1"/> weeks		30	Jul 1	0/2 2	0/1 3	4	5	6
Occurrences <input checked="" type="radio"/> <input type="text" value="10"/> time(s)		7	8	0/1 9	0/1 10	11	12	13
End Date <input type="text"/>		14	15	0/1 16	0/1 17	18	19	20
Date and Time Options								
Scheduling Style <input checked="" type="radio"/> Normal <input type="radio"/> Ad-hoc <input type="radio"/> Queued								

...or from the details page of any appointment in the chain by clicking on the Recurring Appointments Tab on the right side of the page.

Additional Details							Timeline
Map	Recurring Appointments	Notes (0)	Pictures	Videos	Audits	Checklists	
Page 1 of 1 (10 items)							
#	Date	Tentative	Duration	Service Agent			
Edit Cancel	Monday, June 24 at 8:00a ⚙ (2)	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, July 1 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, July 8 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, July 15 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, July 22 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, July 29 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, August 5 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, August 12 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, August 19 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			
Edit Cancel	Monday, August 26 at 8:00a 📅	No	30 mins / Man: 30 mins	Example User			

If you choose to leave the Occurrences and End Date blank, the appointments will not generate immediately, and will instead only generate when you view your calendar. For example, if you have an appointment occur once a month on the 1st, and that starts on the first of January, if you were to go view July later that year, appointments would automatically be created for February - July. They will generate as far as you've viewed into the future on your calendar. The reasoning behind this is we don't want to create appointments until the end of time that easily.

Initial N Appointment Pricing

When creating proposals or appointments, you can specify that the first n appointments can be a different price than the regular recurring price. This can be configured as a default on the service but can also be edited by clicking the pencil on the service when creating/editing a proposal or scheduling an appointment. When this is done on a proposal, this special pricing will show up on the client view of the proposal in the same area that payment plans would normally be shown.

The current settings will also be displayed on the service line, just below the description.

Jumpstart Count

Either for the service defaults or when scheduling, you can specify a Jumpstart count. This equates to the number of appointments to schedule at the beginning of the recurring sequence that are always 1 week/month apart based on your recurring frequency being in weeks or months.

This can be used for scenarios where you want to go every week/monthly for the first few visits before settling down in to the extended recurring sequence. For example, if you have a bi-weekly service and set your Jumpstart count to 2, the first 3 visits will be Week 1 and Week 2, then every other week thereafter.

You can set/change the Jumpstart value for a particular proposal/recurring appointment sequence by penciling the service and entering number of appointments to jumpstart in the Jumpstart field.

Starting, Finishing, and Invoicing Appointments

Starting, finishing, or invoicing an appointment within a line of recurring appointments will cause that appointment to be committed to history. That appointment will no longer be considered a shadow and is treated as its own separate appointment. When this happens to the appointment at the beginning of the line, the next appointment in line becomes the new master appointment, so to speak.

Any new changes to recurrence settings should be made on that appointment from that point onwards. Starting, finishing, or invoicing an appointment later down the line will simply cause it to no longer be a shadow appointment, excluding it from bulk updates.

Get an Overview of Recurring Appointments

Filtering the Appointments Grid by Recurring Status

The Appointments Grid contains a column for sort appointments by their status as a Master, Shadow, ex-Shadow, or non-recurring appointment. This may be useful in targeting masters for multiple customers of a particular service.

Service Agent	Cancel Reason	Category	Recurring Status	Actual Start
Ghostbuster...		Customer		
Tutorial Agent		Customer	Shadow	
Tutorial Agent		Customer	Shadow	
Tutorial Agent		Customer	Shadow	
Tutorial Agent		Customer	Master	
Tutorial Agent		Customer	Shadow	
Tutorial Agent		Customer	Shadow	
Test User		Customer	Shadow	
Test User		Partner	Shadow	

Recurring Appointments Snapshot

Users with the correct permission also have a Snapshot (left Navigation panel) which shows all customers with recurring appointments, and gives details on these, such as service, start & end date, and next scheduled.

Master vs Shadow Appointments

Master Appointments

Master appointments are an important part of recurring appointments. They have a gear icon in the appointments list signaling that they control everything in the "chain" that follows. These appointments are treated as templates for any newly created appointments within a recurrence chain. This primarily applies to chains that have no defined end date or number of max occurrences. Since these types of chains are generated over time instead of all at once, we use the master appointment as a template when new appointments need to be added to the chain.



The Master appointment is typically the first appointment in a recurrence chain. When this appointment is finished or invoiced, the next appointment in the chain becomes the master appointment. This process continues until there are no more appointments left.

Shadow Appointments

Shadow appointments are appointments that are part of a recurrence chain and are represented by the chain icon. When you update an appointment within a recurrence chain and choose to update all or all future appointments,

only shadow appointments will be affected by these changes.

An appointment is no longer a shadow when it has been edited, started, finished, or invoiced. Sweeping changes throughout a recurrence chain will no longer affect non-shadow appointments.

View, Edit, and Cancel Recurring Appointments

When viewing the details page of an appointment that's part of a recurrence chain, you'll have access to a new tab that summarizes all appointments within the chain.

- The appointment highlighted in **blue** is the appointment you're currently viewing.
- The Gear icon designates the **Master** appointment and the chain link icon refers to **Shadow** appointments.

Scheduled Appointment

Service: Weekly Maintenance

Scheduled Start: Monday, June 24 at 8:00a ☐ Confirmed

Origin: The blue bar is the appointment you are currently viewing

Scheduled Duration: 30 mins (30 man-mins)

Quantity: 1

Contact: Stacey F. The gear means that this is the Master appointment

Phone: (222) 222-2222

Email: sfokeame324@gmail.com

Lead: The chain link means that these are all Shadow appointments

Where: [Redacted], Austin, TX 78703 | Copy

Community: Tarrytown

GeoZones: My Territory

Additional Details

Map Recurring Appointments Notes (0) Pictures Videos Audits Checklists

Page 1 of 1 (10 items)

#	Date	Tentative	Duration	Service Agent
Edit Cancel	Monday, June 24 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, July 1 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, July 8 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, July 15 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, July 22 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, July 29 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, August 5 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, August 12 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, August 19 at 8:00a	No	30 mins / Man: 30 mins	Example User
Edit Cancel	Monday, August 26 at 8:00a	No	30 mins / Man: 30 mins	Example User

How to Edit Recurring Appointments

There are some very specific rules in place for editing recurring appointments, and they are as follows:

- If you edit a recurring appointment that was automatically generated due to recurrence settings, that appointment **cannot** have recurrence settings of its own.
- Any time you edit an appointment that is part of a recurrence line, you will be asked if you want to update just that appointment, all appointments, or all future appointments.
- Editing a single appointment to have a different date, time, agent, etc., will cause it to 'break' from the chain. This means that if you choose to update all recurring appointments (or all future recurring appointments) to have a new time, that appointment you edited by itself will not be included. We call appointments that are part of a chain, 'shadow' appointments.
- If you change the base recurrence settings for a line of appointments, all shadow appointments will be wiped clean, and new appointments will be generated.
- Updating all future appointments in a chain will effectively split the chain in two. Your future appointments will become their own chain with their own master, while the previous appointments will remain where they were. This is because new appointments in a chain are always based on the Master appointment, so creating a new chain with a new master to hold your new changes will allow new appointments to take your updates into account.

How to Cancel Recurring Appointments

If you have recurring appointments but the customer cancels, it is easy to stop the chain of repeating appointments. Go to the Contact detail page. On the right-hand side of the screen, select the Appointments tab and click "Cancel" for the upcoming recurring appointment so they are no longer on the agenda.

Additional Details

Timeline

Map

Notes (5)

Proposals (3)

Tasks (7/7)

Appointments (16)

Invoices (2)

Pictures (2)

Documents

Emails (3)

Videos (1)

Page 1 of 1 (16 items)

Find the Appointments tab

Report...	Date	Invoice	Service	Duration
Edit Cancel	8/26/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	8/19/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	8/12/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	8/5/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	7/29/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	7/22/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	7/15/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	7/8/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	7/1/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit Cancel	6/24/2024 8:00a		Weekly Maintenance	30 mins (30 .
Edit	5/9/2024 8:00a		Weekly Maintenance	30 mins

Select Cancel

When cancelling one appointment in a recurring chain, you have the option to cancel just one appointment, all upcoming appointments or to cancel all appointments (past and future).

Confirm Cancel: Are you sure you want to cancel this appointment?

Name

Stacey Fakename

Service Address

Scheduled Start

Monday, June 24 at 8:00a

Scheduled Duration

30 mins / Man: 30 mins

☐ Convert to Proposal?

Cancel just this appointment?

☒

Cancel all future appointments?

☐

Or cancel all appointments?

☐

Choose which appointments need to be cancelled.

Category*

Customer ▼

You can change the contact's current category here

Reason

FAQs

Is it better to set up recurring schedule in Control Panel > Services or in individual appointments?

If a particular Service is always on a set timeframe, then set it up at the Service level. That will always carry over your preferences when making the Appointment, which saves you a step every time. You can also edit the timing of recurrence on the Appointment if needed so the settings are not set in stone.