TaskMax Periodic & Future Orders

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This article covers *Periodic Work Orders* and *Future Work Orders* in the **TaskMax** menu. Periodic work orders are recurring contracts, which have a frequency, a recurrence pattern and may have a finish date.

Future work orders are simply work orders that will not be processed and issued until the next process date.

Periodic and future work orders must be processed manually - they are not processed automatically in the system.

Creating Periodic and Future Work Orders

These steps cover the creation of periodic and future work orders. Although the screenshots reflect the periodic work orders, the process is exactly the same for future work orders.

- 1. Open the *TaskMax* menu and select the required building.
- 2. In the *View Status* section on the bottom right hand side of the screen, click on the drop-down menu and select *Periodic / Future.*

Status	Reference Number	Date Entered	Time	ContractorField	S	Change <u>B</u> uilding
						New
						<u>O</u> pen
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						Show Quotes
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3. Click the *New* button and proceed to enter all details just like whencreating a regular work order, but don't click *Save* or *Close* yet - click the *Edit Periodic / Edit Future* button.

<u>File Edit Reports</u>		Action
Status F-Periodic Ref No Date	10/02/15 Time 07:22 Job Managed By vwillson	Save
Originator	Job Subject Cleaning	Edit Periodic
111 Originator St Varsity Pde Qld 4545	Empty bins, clean common areas	Request Quote
		Delete
Tel H 0755757422 E Tel W Mob E Fax		Close Entry
Email training@stratamax.com	Property Alfected Common Property Dates Start 10/02/15	
John Smith Originator	At Site Front and Rear Urgent Finish 10/12/15	
Home Tel 0755757422	Contractor	
Work Tel Roll	08200002 Training Manager List	
Mobile 📃 Unit No	TelW 07 5575 7422 Type	
Invoice - Bank A/c: \$7262.43 0/D: \$0.00	Fax Contact Method Email accounts@stratamax.com	
Amount Quoted	Other	
Invoice No. Date	📄 Insurance Claim 📄 Service Fee 📄 Bill Lot Owner	Quotes
Details Cleaning OK to pay?	Notify Manager Email Copy to	
Doc ID Service Fee	Don't Print Order on Issue Extra Attachments	Notes

- 4. If creating a periodic work order, the *Periodic Work Order* window appears where the following details must be entered:
 - Select the *Frequency* of the job.
 - The *Periodic Factor* is optional and can be used to alter the recurrence pattern of when the work order will be processed. For example, for a work order to be processed once every two

months, the frequency should be *Monthly* and Periodic Factor will be 2.

- Enter the Start Date.
- Enter number of *Days to Complete* if required.
- Enter the *Finish Date* if applicable.
- Enter *Next Process Date.* This is the date that the system will observe each time any periodic or future work orders are processed, to determine whether or not this work order will be issued.
- Click OK.

requency	Monthly
Periodic Factor	2
Start Date	10/02/15
ays to Complete	3
Finish Date	10/12/15
Next Process Date	10/03/15
OK Entry Assistant Select from list	Cancel

- 5. If creating a future work order, the *Enter Future Process Date* window appears, where the next *Process Date* is entered.
 - TaskMax will observe this date each time any periodic or future work orders are processed, to determine whether a work order will be issued on the day.
- 6. Back in the *Work Order* details screen, click *Save*, then *Close Entry*.
 - Now in the list of work orders, the *Status* will be 'F-Periodic' or 'H-Future'.

Processing Periodic & Future Work Orders

The periodic work orders need to be processed manually on a regular basis as they are not processed or issued automatically.

It is the *Next Process Date,* which TaskMax will observe each time any periodic or future work orders are processed, to determine whether a work order will be issued on the day, i.e. the date must be either today's date or before. Once that work order has been issued, TaskMax will wait for the next work order in the sequence.

- 1. Open the *TaskMax* menu and select the required building.
- 2. To view any periodic or future work orders, the View Status drop-down menu in the bottom right

will need to be changed appropriately.

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<u>Report</u> Show Quotes Close
Eeport Show Quotes Close
Show Quotes Clos <u>e</u>
Clos <u>e</u>
Close
Onlines
Options
Options All This Build
Options () [AI] This Build
Options ● <u>All</u> This Build ● All ● Mine

3. Click *File > Process Periodic and Future.*

Luc	Configure	7				Action
~	Preview Orders	Date Entered	Time	Contractor	S	Change <u>B</u> uilding
	Print Copy Orders <u>A</u> lways	10/02/15	07:22	TRAINING MANAGER		New
	Printer Setup	-				<u>O</u> pen
	Process Periodic And Future	-s-				<u>R</u> eport
	Account <u>M</u> anager Edit					Show Quotes
	Creditor Commitments					Close
	Change Pass <u>w</u> ord					
	Insur <u>a</u> nce Claim Open Jobs Monitor					
	Update Perio <u>d</u> ic Issue Method					
	Compliance					
	Alternate Letterhead List					
4	Close				10	Options
						All This Building
	m				+	C All Mine
	of 1					Periodic -

4. Any relevant work orders will be issued, using the creditor's preferred method, which has been configured in the *Creditor Maintenance* menu.