

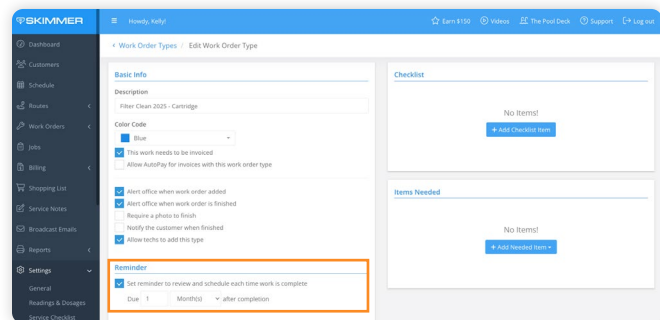
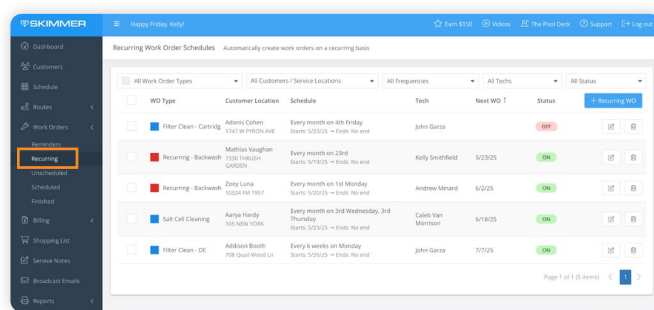
How to simplify recurring work with the right Skimmer tool



Skimmer gives you three powerful ways to manage recurring work. Whether you're completing a quick checklist item during a service stop or need to schedule dedicated work like filter cleans. Here's how to pick the right option for the recurring work you need to schedule:

1. Recurring work order schedules: Best for work on a predictable schedule

This tool is built for billable recurring work that needs to happen on a predictable, fixed schedule, like every third Thursday or the second day of each month, and deserves its own dedicated work order. You can assign a specific tech or leave it unassigned, giving you flexibility in scheduling. Unassigned work orders appear in the "unscheduled bin" on the schedule page, so teams can plan week to week while benefiting from automated scheduling.

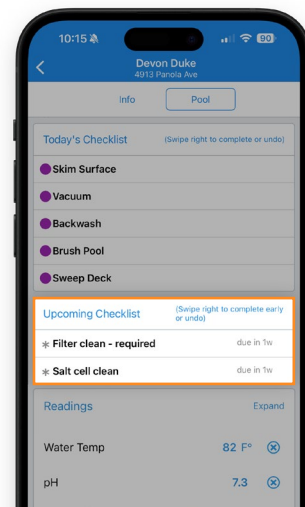
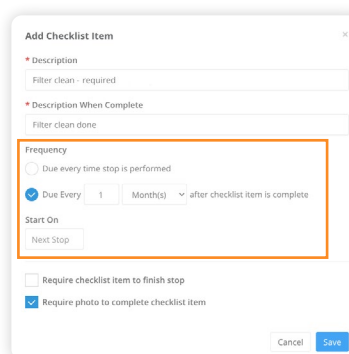


2. Work order reminders: Best for work that doesn't need to happen on a specific day

This tool is built for billable recurring work that doesn't need to land on a specific day or be assigned to a specific tech. Instead of automatically creating the work order, Skimmer reminds you when it's time to make one, based on when the job was last completed. This gives you more flexibility while keeping recurring work from slipping through the cracks.

3. Recurring checklist items: Best for scheduling items that happen during regular service

This tool is built for simple recurring items that happen during regular service visits. These items show up automatically on the service checklist ONLY when they're due. They're intended for work that isn't billed separately but still needs to be tracked and completed on a consistent basis. You can make these items required, require photo proof, and build them into your routine so nothing gets missed.



Recurring work cheat sheet

Use the grid below as a quick reference to help determine which Skimmer tool best fits how you schedule recurring work.

	Recurring work order schedules	Work order reminders	Recurring checklist items
What it does	<i>Automatically creates and schedules a work order on a set cadence (certain day(s) of the week and certain day(s) of the month).</i>	<i>Reminds you to create a work order after a set amount of time based on the last completion date.</i>	<i>Automatically adds checklist items to a service stop on a set schedule.</i>
Works best for	Regular recurring services like filter cleans, salt cell cleans, backwashes, equipment checks, or seasonal work where the day and tech ARE known.	Regular recurring services like filter cleans, salt cell cleans, backwashes, equipment checks, or seasonal work where the day and tech ARE NOT known.	Recurring items like vacuums that are part of the regular service checklist, handled by the same tech during routine maintenance visits.
Assignment	Can be assigned to a specific tech or left unassigned and assigned to any tech later.	Can be assigned to the tech already assigned to the pool or any available tech.	Assigned to the same tech who handles the pool's regular maintenance.
Ongoing scheduling	Fixed calendar date(s) or day(s) of the week (e.g., every 3rd Thursday, or the 2nd of every month etc).	Completion date of the previous work order.	Completion date of the previous checklist item.
What's visible in the app view	A separate work order on the tech's schedule.	A separate work order on the tech's schedule.	Checklist items due for that day's maintenance stop, along with any upcoming recurring item(s).
How do you bill for it?	Billed separately as a work order.	Billed separately as a work order.	Included in the service rate.
Example	Automatically schedule a filter clean for a customer every 3rd Thursday of the month.	Remind yourself to manually schedule a filter clean for a customer when the reminder says so.	Add "vacuum" to the checklist every 4 weeks while cleaning the pool.