



odoo training

RECURRING MAINTENANCE

RECURRING MAINTENANCE



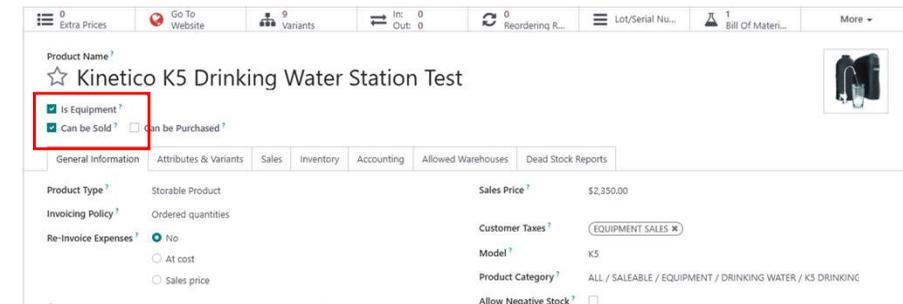
Recurring Maintenance is a custom automated module designed to manage and track recommended maintenance for existing customers.

Product Setup

Identify all equipment that requires ongoing maintenance.

Each product must be configured as:

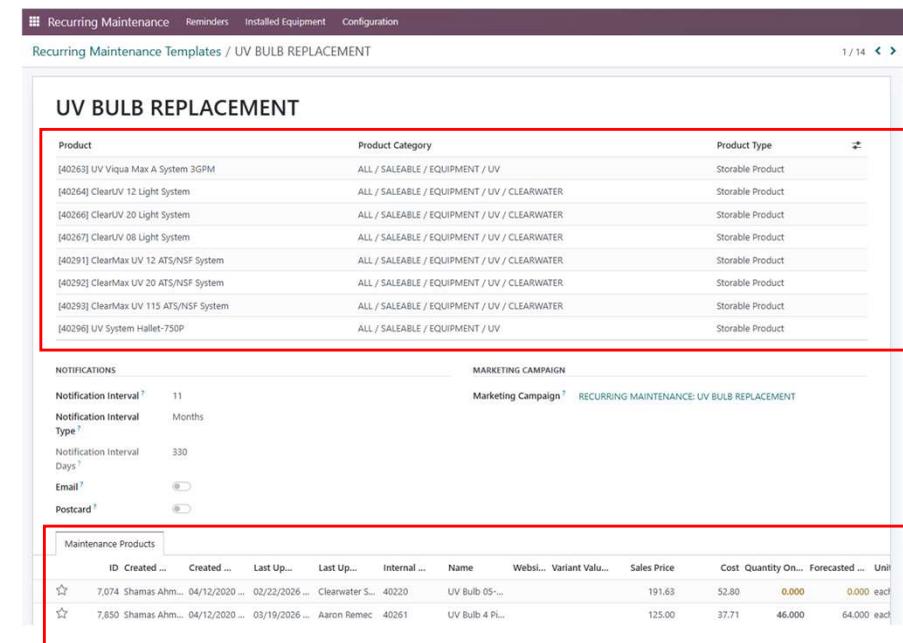
- Is Equipment = Enabled
- Product Type = Storable Product



Recurring Maintenance Template Setup

Create an Installed Equipment Template to define:

- Products that require maintenance
- Maintenance frequency (notification cycle)
- Associated marketing campaign
- Products used to perform the maintenance



RECURRING MAINTENANCE



Once products and templates are configured, system automation manages the process.

When a sales order containing a recurring maintenance product is delivered:

- A Recurring Maintenance Profile is created for the customer
- Installed equipment is added to the customer's record

With installed equipment and a maintenance profile in place:

- The system generates Recurring Maintenance Reminders
- Each reminder is tied to a specific piece of equipment

Recurring Maintenance Profile

Recurring Maintenance Profile
RM/18/Hollis

Customer [?] Ray Hollis
Service Center [?] OH AKRON SERVICE CENTER
Service Center Group [?] Eastern OH

Reminders

ADD

Reminder [?] Missing Campaign Missing IE Install Date Waiting

Installed Equipment:
IE/399616/Cooler New C&C Plastic White Gibraltar
Campaign:
Next Notification:

Reminder [?] Missing Campaign Waiting

Installed Equipment:
IE/2670/Cooler New C&C Plastic White Gibraltar
Campaign:
Next Notification:
06/10/2020

Contact Record – Installed Equipment

Opportunities Meetings Survey Auto Delivery Item Transfers WFO Notes Payments More

Individual Company
Ray Hollis

Parent Account

Additional Information [?]

Contact [?] 792 Carpenter St.
Street [?] 44102 Akron, OH, United States
Service Center [?] OH AKRON SERVICE CENTER Manual [?]
Tax ID [?] e.g. 8524747203
Account ID [?]
Water Source List [?]
Tags [?] OH AKRON SERVICE CENTER

Phone [?]
Mobile [?] RAYHOLLIS@VAHOO.COM
Email [?]
On Credit Hold [?]
In Collections [?]
COD Only [?]

Contacts & Address Sales & Purchase Installed Equipment Accounting Internal Notes Partner Assignment Customer Statement Communication Preferences Saved Payment/Out

ID	Stock	Move	Completion Date	Install Date	Name	Product	Serial	Tags
399616	06/10/2020	17:03:46			IE/399616/Cooler New C&C Plastic...	[399616] Cooler New C&C Plastic...	W319K13170	Calc Order Missing WFO Drive Date Reminder: Waiting <input type="checkbox"/> Reset Reminder
2670	06/10/2020	17:03:46	06/10/2020		IE/2670/Cooler New C&C Plastic...	[399616] Cooler New C&C Plastic...	W319K13169	Reminder: Waiting <input type="checkbox"/> Reset Reminder

Recurring Maintenance Reminder

Recurring Maintenance Reminder
Cooler New C&C Plastic White Gibraltar

Missing Campaign Missing IE Install Date Waiting

SETTINGS

Select the marketing campaign for this reminder and the frequency for notifications. When the next notification day is reached, the customer will be added to the marketing campaign and the reminder date will be changed to "Remind".

Customer [?] Ray Hollis
Installed Equipment [?] IE/399616/Cooler New C&C Plastic White Gibraltar
Marketing Campaign [?] RAYHOLLIS@VAHOO.COM
Notes [?]

NOTIFICATIONS

State [?] Waiting
Type [?] Email
Notification Interval [?] 0 Months
Notification Start Date [?] Install/Service
Install Date [?]
Most Recent Service Date [?]
Last Campaign Date [?]
Next Campaign Date [?]

Maintenance Products Email Notification History

State of Reminder



All automation is driven by the Recurring Maintenance Reminder.

Each reminder moves through the following states:

Waiting

Reminder is active, but no action is currently required

Remind

Notification interval has been reached; outreach begins

No Response

No action taken after 30 days in Remind

Inactive

Removed from the process (manually or automatically)

Recurring Maintenance Reminder
Cooler New C&C Plastic White Gibraltar

Missing Campaign Missing IE Install Date **Waiting**

SETTINGS

Select the marketing campaign for this reminder and the frequency for notifications. When the next notification day is reached, the customer will be added to the marketing campaign and the reminder state will be changed to 'Remind'

Customer [?] Ray Hollis

Installed Equipment [?] IE/399616/Cooler New C&C Plastic White Gibraltar

Marketing Campaign [?]

Email [?] RAYHOLLIS@YAHOO.COM

Notes [?]

NOTIFICATIONS

State [?] Waiting

Type [?] Email

Notification Interval [?] 0 Months

Notification Start Date [?] Install/Service

Install Date [?]

Most Recent Service Date [?]

Last Campaign Date [?]

Next Campaign Date [?]

Maintenance Products Email Notification History

Waiting

When a reminder is first created, it is set to Waiting.

This means:

- The reminder is active
- No maintenance is currently due
- No customer communication is triggered

Profile

Recurring Maintenance Reminder
Cooler New C&C Plastic White Gibraltar

Missing Campaign Missing IE Install Date Waiting

SETTINGS

Select the marketing campaign for this reminder and the frequency for notifications. When the next notification day is reached, the customer will be added to the marketing campaign and the reminder state will be changed to 'Remind'

Customer ? [Ray Hollis](#)

Installed Equipment ? [IE/399616/Cooler New C&C Plastic White Gibraltar](#)

Marketing Campaign ?

Email ? [RAYHOLLIS@YAHOO.COM](#)

Notes ?

NOTIFICATIONS

State ? [Waiting](#)

Type ? [Email](#)

Notification Interval ? [0](#) Months

Notification Start Date ? [Install/Service](#)

Install Date ?

Most Recent Service Date ?

Last Campaign Date ?

Next Campaign Date ?

[Maintenance Products](#) [Email Notification History](#)

Remind – Marketing Campaign



When a reminder enters the Remind state:

- The assigned email campaign is automatically launched
- Campaigns typically include 2–4 emails over 4 weeks

Recurring Maintenance Reminder
K5 Drinking Water Station with VOC Guard

REMIND

SETTINGS

Select the marketing campaign for this reminder and the frequency for notifications. When the next notification day is reached, the customer will be added to the marketing campaign and the reminder state will be changed to 'Remind'

Customer: ROBERT DONAHUE
Installed Equipment: IE/403660/K5 Drinking Water Station with VOC Guard
Marketing Campaign: RECURRING MAINTENANCE: RO FILTER CHANGE
Email: N1925U@GMAIL.COM
Notes:

NOTIFICATIONS

State: Waiting
Type: Email
Notification Interval: 53 Weeks
Notification Start Date: Install/Service
Install Date: 02/19/2026
Most Recent Service Date:

Maintenance Products | Email Notification History

- Filter - K5 / A200 Post Orange[40024] Price: 67.95
- Filter - K5 Aux Arsenic Guard Black[40081] Price: 88.95
- Filter - K5 Aux Purefecta Virus/Bacteria Guard White[40316] Price: 145.95
- PKL K5 Filters Price: 0.00
- Filter - K5 / A200 Pre Purple[40023] Price: 95
- Filter - K5 Aux Perchlorate Pink[40315] Price: 95
- Filter - K5 Aux VOC/Lead Red[62025] Price: 95
- Filter - K5 Aux VOC Silver[40313] Price: 95

Routine Maintenance Due

This is a reminder that routine maintenance is essential to keep your reverse osmosis (RO) system operating efficiently and ensuring high-quality water for your home. Routine system maintenance includes replacing the pre-filters, post-filters, and any specialty filters. It also involves testing both the inlet and outlet water quality to ensure the membrane is operating at peak performance.

Staying on schedule helps extend the life of your system, protects water quality, and prevents unexpected issues.

Please call us at 888-928-3710 to schedule maintenance or if you have any questions about your system, we're happy to help.

Thank you for trusting us with your water treatment needs.

Best regards,
George Jordan
George Jordan
Service Director

Referral Program

We appreciate our customers, and now we want to thank you with **cash rewards!** When you refer a friend, family member, or neighbor who could benefit from a home water filtration system, you can earn up to \$150 in cash. Click below to read more and fill out the referral form.

[Referral Form](#)

Clearwater Systems, Inc
Unsubscribe | Contact
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Remind back to Waiting



If the customer completes maintenance, the reminder resets to Waiting, stopping the campaign.

This can happen when:

- A maintenance appointment is scheduled
- A maintenance product is purchased at POS
- A maintenance product is purchased via sales order

OR

Service by Installed Equipment



Installed Equipment Auto and Manual Maintenance Alignment

For customers with a single unit:

- Maintenance is automatically linked to that equipment

For customers with multiple units of the same type:

- The system prompts the user to select which equipment the service applies to

If not assigned:

- The transaction is marked as Undefined

Best Practice

- Review and assign undefined transactions weekly
- Ensure old equipment is marked as Removed to avoid duplicates

A screenshot of a software interface showing a service history entry. The title is "Unmatched Service History / RMS/1092/Flat Rate - RO Filter(s) Change". The interface includes a "Profile" button, a "Recurring Maintenance Service History" section, and a form with the following fields: "Customer" (ANDREA & DAVID OLIVAREZ), "Date" (02/17/2026 12:19:06), "Product" ([LBR-0004] Flat Rate - RO Filter(s) Change), "Stock Move Line", "Installed Equipment" (with a dropdown menu open showing "IE/313138/K5 Drinking Water Station", "IE/176104/K5 Drinking Water Station", and "Start typing..."), and "Sale Order" (S612411). There is also an "Action" button and a "New" button in the top right corner.

Remind – Blacklisted Email



If a customer unsubscribes:

- Their email is added to the Blacklist
- Email appears in red on the reminder
- Blacklisted customers will not receive marketing emails

Important:

They will still receive:

- Invoices
- Statements
- Sales communications

They will not receive:

- Mass Marketing Campaigns (email marketing or Marketing Automation)

The screenshot shows the 'Recurring Maintenance Profiles' page in the Clearwater Systems software. The breadcrumb trail is 'Recurring Maintenance Profiles / RM/1846/Testing / RMR/357572/Testing'. The page has a dark purple header with navigation links: 'Recurring Maintenance', 'Reminders', 'Installed Equipment', 'Upcoming Reminders', 'Configuration', and 'Reports'. Below the header, there are 'RESET' and 'DEACTIVATE' buttons. The main content area shows a 'Recurring Maintenance Reminder' for 'K5 Drinking Water Station with VOC Guard'. The reminder status is 'Waiting' (blue pill) and 'Email Blacklisted' (red pill). Below this, there are two columns: 'SETTINGS' and 'NOTIFICATIONS'. The 'SETTINGS' column includes fields for 'Customer' (Mr. Test PARENT, Joe Testing), 'Installed Equipment' (IE/401419/K5 Drinking Water Station with VOC Guard), 'Marketing Campaign' (RECURRING MAINTENANCE: RO FILTER CHAN), 'Email' (joetest@noemail.com), and 'Notes'. The 'NOTIFICATIONS' column includes fields for 'State' (Waiting), 'Type' (Email), 'Notification Interval' (53 Weeks), 'Notification Start Date' (Install/Service), 'Install Date' (05/09/2025), 'Most Recent Service Date', 'Last Campaign Date', and 'Next Campaign Date' (05/15/2026). A 'Profile' icon is visible in the top right corner of the main content area.

Remind to No Response

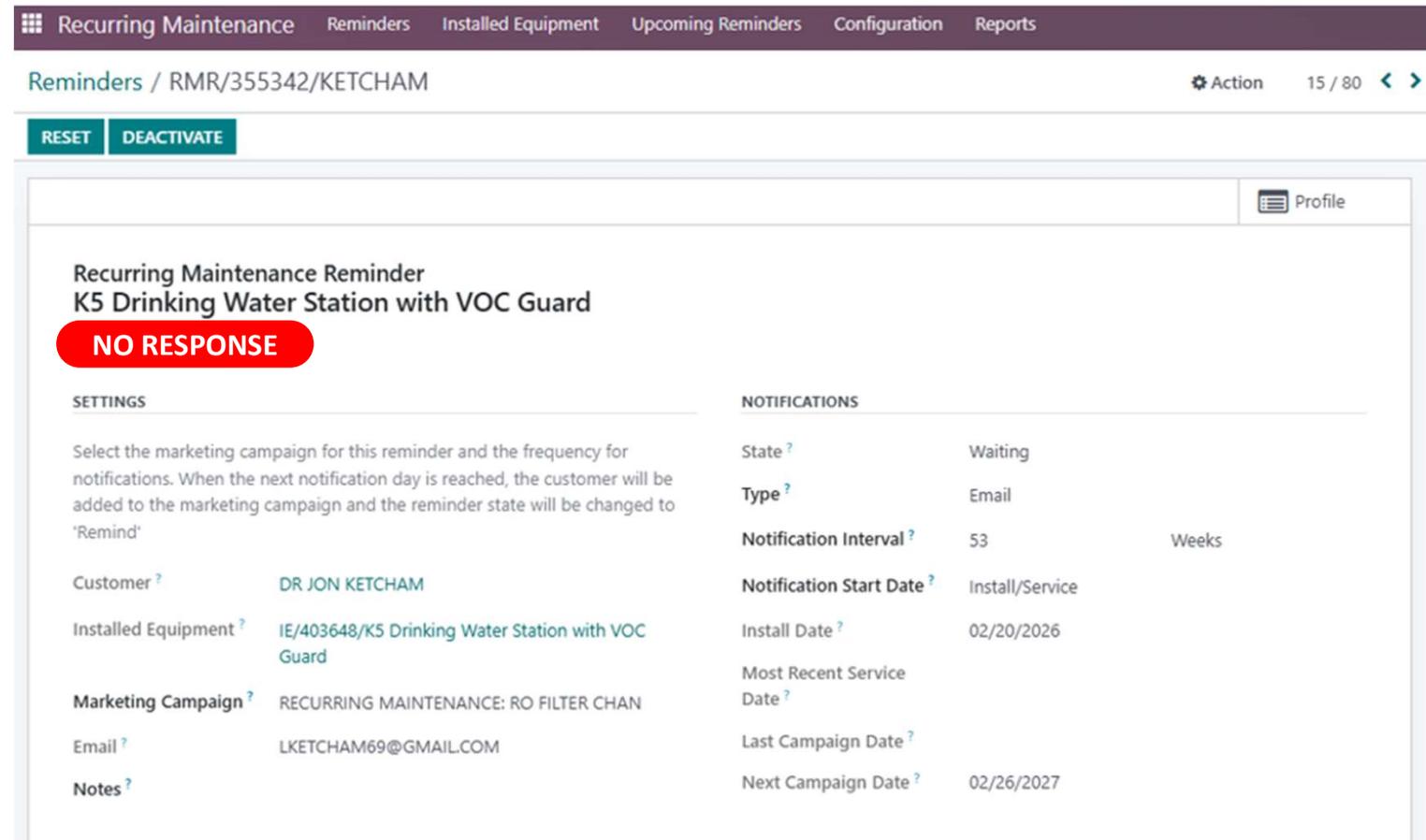
If no action is taken within 30 days:

- The reminder moves to No Response

In this state:

- Marketing emails stop
- The campaign does not advance
- No further automation occurs
- Reminders remain in No Response until manually changed.

Future process improvements may define how these are handled long-term, automating their return to the reminder process.



Recurring Maintenance Reminders / RMR/355342/KETCHAM

RESET DEACTIVATE

Profile

Recurring Maintenance Reminder K5 Drinking Water Station with VOC Guard

NO RESPONSE

SETTINGS	NOTIFICATIONS
Select the marketing campaign for this reminder and the frequency for notifications. When the next notification day is reached, the customer will be added to the marketing campaign and the reminder state will be changed to 'Remind'	State? Waiting
Customer? DR JON KETCHAM	Type? Email
Installed Equipment? IE/403648/K5 Drinking Water Station with VOC Guard	Notification Interval? 53 Weeks
Marketing Campaign? RECURRING MAINTENANCE: RO FILTER CHAN	Notification Start Date? Install/Service
Email? LKETCHAM69@GMAIL.COM	Install Date? 02/20/2026
Notes?	Most Recent Service Date?
	Last Campaign Date?
	Next Campaign Date? 02/26/2027

Remind to Inactive

Manually set a reminder to Inactive to remove it from automation.

Use Cases

- Equipment is no longer in service
- Customer should no longer be tracked

Do NOT use for:

- Customers who simply opt out of emails
→ Instead, change the communication method

Recurring Maintenance Profiles / RM/1846/Testing / RMR/357572/Testing Action 1 / 1 < >

RESET

Profile

Recurring Maintenance Reminder K5 Drinking Water Station with VOC Guard

Inactive **Email Blacklisted**

SETTINGS	NOTIFICATIONS
Select the marketing campaign for this reminder and the frequency for notifications. When the next notification day is reached, the customer will be added to the marketing campaign and the reminder state will be changed to 'Remind'	State ? Inactive
Customer ? Mr. Test PARENT, Joe Testing	Type ? Email
Installed Equipment ? IE/401419/K5 Drinking Water Station with VOC Guard	Notification Interval ? 53 Weeks
Marketing Campaign ? RECURRING MAINTENANCE: RO FILTER CHAN	Notification Start Date ? Install/Service
Email ? joetest@noemail.com	Install Date ? 05/09/2025
Notes ?	Most Recent Service Date ?
	Last Campaign Date ?
	Next Campaign Date ?

Reports



Note: All reports can be filtered by Service Center Group.

It is recommended to save a default filter for your location.

Upcoming Reminders

- Shows future activity by next action date
- Grouped by year and month

Call Report

- Customers in Remind state requiring phone follow-up
- Use chatter to log call attempts

Print Report

- Customers requiring mailed notifications
- Export monthly for marketing distribution

Unmatched Service Report

- Service actions not linked to equipment
- Should be reviewed and resolved regularly

<input type="checkbox"/>	Name	Customer	Installed Equipment	Notes	State	Tags
▼	2026 (1459)					1-80 / 1459
▼	March 2026 (56)					
<input type="checkbox"/>	RMR/357605/Hadley	Marci/Doug Hadley	IE/401386/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368574/Elliott	Mike Elliott	IE/378422/Kinetico A200 RO		Waiting	Waiting
<input type="checkbox"/>	RMR/368587/COOPER	VIRGIL/MARY COOPER	IE/378411/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368591/White	David/Janice White	IE/378406/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368593/False	Brad Picha	IE/378404/Kinetico A200 RO		Waiting	Waiting
<input type="checkbox"/>	RMR/368599/Willis	Mark Willis	IE/378399/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368602/WATSON	BILL WATSON	IE/378395/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368609/Wesler	Paul Wesler	IE/378390/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368614/Smigielski	Sharon Smigielski	IE/378384/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368621/SCHIEBE	BILL SCHEIBE	IE/378379/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368625/Anderson	James Anderson	IE/378374/K5 Drinking Water Station with VOC Guard		Waiting	Waiting
<input type="checkbox"/>	RMR/368630/Keaton	Wendy Keaton	IE/378367/K5 Drinking Water Station with VOC Guard		Waiting	Waiting

Installed Equipment



While reminders track communication activity, the Installed Equipment record provides:

- Warranty details
- Service history
- Maintenance reminders by product

Additional Controls

- Set status: In Use or Removed
- Reset reminders to Waiting
- Deactivate reminders if needed

Installed Equipment / IE/404370/Tank - Pkg'd K5 3 Gallon Quick Flow (WOW Tank) Action 1 / 80 New

SET STATE: REMOVED RESET REMINDER DEACTIVATE REMINDER

Sale Order Delivery/P...

Installed Equipment

IE/404370/Tank - Pkg'd K5 3 Gallon Quick Flow (WOW Tank)

In Use **Reminder: Remind**

CUSTOMER/EQUIPMENT INFO		STOCK INFO	
Nickname ?		Sale order ?	S622012
Customer ?	Sue Gaston	Installation Date ?	03/19/2026
Account ID ?	VAC002851 COPY	Lot no. ?	
Product ?	[60086] Tank - Pkg'd K5 3 Gallon Quick Flow (WOW Tank)	Move Line ?	[60086] Tank - Pkg'd K5 3 Gallon Quick Flow (WOW Tank)
Created by ?	Logan Funk	Stock Picking ?	CVW/SERVICE-OUT/11759
Created on ?	03/19/2026 17:29:51	Stock Move Completion Date ?	03/19/2026 17:29:52
Notes ?			

Warranties Maintenance Products Reminders Service History

Manual Override ?

Parts Warranty ?	03/19/2026
Labor Warranty ?	03/19/2027
Tank Warranty ?	03/19/2036
Membrane Warranty ?	03/19/2026
Other Warranty ?	03/19/2026