

Recurrence Webinar Frequently Asked Questions

Below are the most common questions we received on the Recurrence webinar on July 30, 2020.

If you need more help, our support and success team is available! Simply open up the application and send your questions through the chat bubble. You can also email support at support@jetpackworkflow.com

General Recurrence Questions

Q: When is this going live?

A: These changes are live in Jetpack Workflow now!

Q: I am all for planning, but until the full functionality is ready, can you turn this off?

A: No, sorry. Releasing this change is a necessary step to allow us to bring you better planning and a better recurrence feature in the future.

Q: Is there a way to have the system stop recurrences at a particular date? Or after so many recurrences?

A: Yes! You can always have an end date on any Job in the system. On any Job you create or edit, you can change the repeat schedule to not repeat forever. Once you uncheck the "repeat forever" box, you're prompted to put in an "Until" date. This will allow you to stop Job repeats on a certain date. [Read more here.](#)

Q: How does JPWF "know" if a Job should be repeated or if it is a one-off?

A: The way JPWF knows if a Job should be repeated or is a one-off is by the use of the repeat feature on Jobs. Jobs that do not have the repeat function active will not repeat and are



one-off Jobs. The Jobs where you've turned on the repeat function by selecting a repeat schedule will repeat!

Q: Can we opt-out of this new recurring process and keep it the old way?

A: Currently, it's not possible to opt-out. This is a necessary change we have to make to the app to allow for it to grow and offer you new features in the future.

Q: What if you want the changes to the current instance to move to the next month?

A: If you only want the changes to move to the next month (and the next month only), then you should simply edit next month's Job in your account. If you'd like changes to apply to more than just the next month, then you should consider mass editing your tasks on the task subtab.

Q: Will we be able to filter by Magic Jobs?

A: You already can! If you use the custom due date filter on the Jobs tab, you can narrow the Jobs list down to a swath of Jobs that share the same due date - in this case - Magic Jobs!

Q: Can you increase the 10-minute time window to edit a Job?

A: We can and may do this in the future. If you'd like this to happen, please reach out to us and let us know! We'd love to hear your feedback.

Q: Is there a way for you to mark Jetpack-generated Jobs in the system so we know it was created by Jetpack and not by a team member?

A: Currently, there is not a way to know this but it is something we could potentially do in the app. If you'd like to see this happen, please let us know!

The Magic Job: Editing Jobs

Q: Will I need to edit the Jobs in between the most current Job and the Magic Job separately?

A: Yes. Remember, the Magic Job is the only Job whose edits will carry forward into the future. If you edit a task or a Job that is not the Magic Job, those edits will only affect the Job you are currently editing.

Q: If changes made to the Magic Job only carry forward, do we need to edit all Jobs prior to that Job for the change? We add tasks quite frequently as we improve our process and that is not a mass edit option, correct?

A: Yes, you will need to edit all Jobs prior to the Magic Job if you'd like those Jobs to reflect the changes you make to the Magic Job. If you find that you add tasks frequently, then consider following this process:

1. Identify the current Job and the Magic Job.
2. Delete all Jobs between those two Job instances.
3. Add a task to the current Job and Magic Job.
4. Back date the Magic Job to have the next due date after the current Job.
5. Our system will backfill the deleted Jobs within 10 minutes.

Q: What is the best way to modify daily repeating Jobs? Delete and recreate, or...?

A: It depends on what you'd like to accomplish. If you'd like to edit any part of the Job's Details (assignments, title, description, etc), task names, or delete tasks, then we highly recommend you mass edit either the Jobs or the tasks.

If you'd like to mass add tasks to existing Jobs, we'd recommend you follow this process:

1. Identify the current Job and the Magic Job.
2. Delete all Jobs between those two Job instances.
3. Add a task to the current Job and Magic Job.
4. Back date the Magic Job to have the next due date after the current Job.
5. Our system will backfill the deleted Jobs within 10 minutes.

Q: If we want to edit a Magic Job moving forward, but we still have two Jobs prior to that, do we need to edit the Jobs in between AND the Magic Job?

A: Yes, if a Job's due date comes earlier than a Magic Job in the Job series, then you will need to edit that Job to reflect the changes you want to see.

The Magic Job: Functionality

Q: Can you change the Magic Job?

A: Yes! You can edit or change any Magic Job just like it was any other Job. The difference is edits made to the Magic Job will carry forward into the future. Edits made to regular Jobs will not.

Q: Can you make a Job the Magic Job? If not now, is this a future plan?

A: Currently, this isn't possible in the app. We'd love to hear your feedback on this subject!

Q: If you want to edit an occurrence going forward from a date sooner than the Magic Job, can you delete the Magic Job then will the oldest Job become the Magic Job to edit for occurrences after that?

A: No, deleting the Magic Job is never recommended. There is no way to remove the "Magic" designation from the Magic Job. If you delete a Magic Job, the Job series will cease to repeat. You can, however, delete the Jobs which are not the Magic Job, edit the Magic Jobs, and back date the Magic Job to make JPWF backfill the deleted Jobs with your new changes.

Q: If the manager is going on vacation on the month the Magic Job is at. Do you have to wait for next year's Jobs in order to make a one time change for that month?

A: Any changes made to the Magic Job will carry forward into the future. For right now, we are only creating future Job instances 3 months into the future. Very soon, we hope to increase this time cushion to one year in the future. Hopefully, very soon, this will solve this problem!

Q: Is there a way to have a quarter-end month in a separate "Magic Job"?

A: Sure! You can have as many Jobs as you want! Just create a separate Job named "Quarter - End month" and set it to repeat on a quarterly basis. Once you do, this Job will create its own Magic Job.

Q: Does a Magic Job have to be a monthly repeat or could it repeat on a different schedule? Quarterly or annually?



A: Magic Jobs can be on any schedule you want.

Q: How do you make a Job a "Magic Job" if one was not done?

A: There will always be a Magic Job in a Job series. The Magic Job is the Job that is furthest out in terms of time and will have the cool Sparkle emoji on it! You cannot change a Magic Job - it's something that is automatically created and maintained by our app.

Q: Will the "Magic" Job be farther out than the 3 months now showing?

A: Yes, eventually! For right now, we are only giving it a 3 month time cushion, but in the future, we would like to eventually increase this to 1 year.

Q: How is this Magic Job different from a template?

A: A template is a standardized workflow that is kept in reserve and used to make new Jobs. You never actually do work on templates. Templates are tools for creating Jobs, not doing work. A Job is how you track work for a given client. A Job is a project and can be for anything a client pays you to do (bookkeeping, a tax return, a payroll).

Q: Will the labels duplicate over when assigned in the Magic Jobs?

A: Currently, no, Labels never repeat in JPWF. If you'd like this to become a feature in the future, please reach out to us and let us know!

Feature Request / Product Roadmap

We love hearing from you when it comes to new ideas and features to incorporate into Jetpack Workflow. Below are a few requests that came in from the Recurrence webinar that are some of our most popular requests. While we can't make any promises on when these could be added, we are listening and keeping track of these requests!

- More labels
- Adding a staff member to a client so the assignment auto-populates the project.
- Adding descriptions as a column when reviewing Jobs between Job name and Tasks.
- Adding an audit trail or change history tracker to Jetpack Workflow
- Selecting multiple Jobs in a filter
- Creating a template from a Job