

Fast•Class File

SmartOffice

Volume 58: Creating Recurring Activities

To Create Recurring Activities:

Begin by creating an activity in the SmartCalendar –

- Select **Calendar** in the main menu and select one of the calendar view options (**DayView**, **WeekView**, etc.).
- With the SmartCalendar open, click the **Add** button in the toolbar or click on a time hypertext link (**Dayview**) to create a new activity.
- Select a contact to link the activity to or select the **Do not search for this name** option to create an activity not linked to any SmartOffice contact.
- To add multiple participants to an activity, click the **Add** button in the participants section and add any participants listed in the **Available Users** screen. After selecting participants, click **OK** to add participants to the activity.

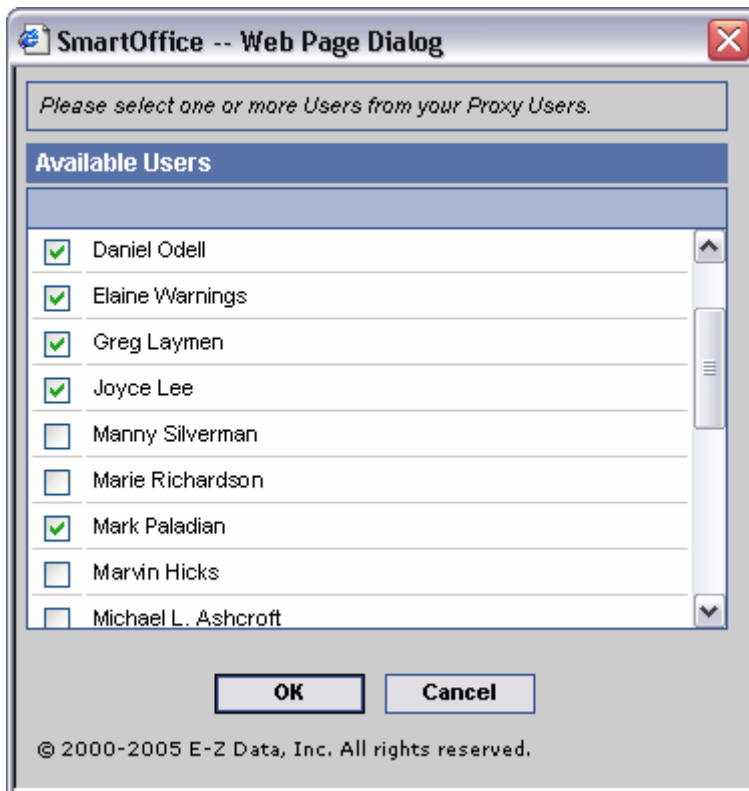


Figure 1: The Available Users screen (multiple users selected).

- Enter activity details as needed.

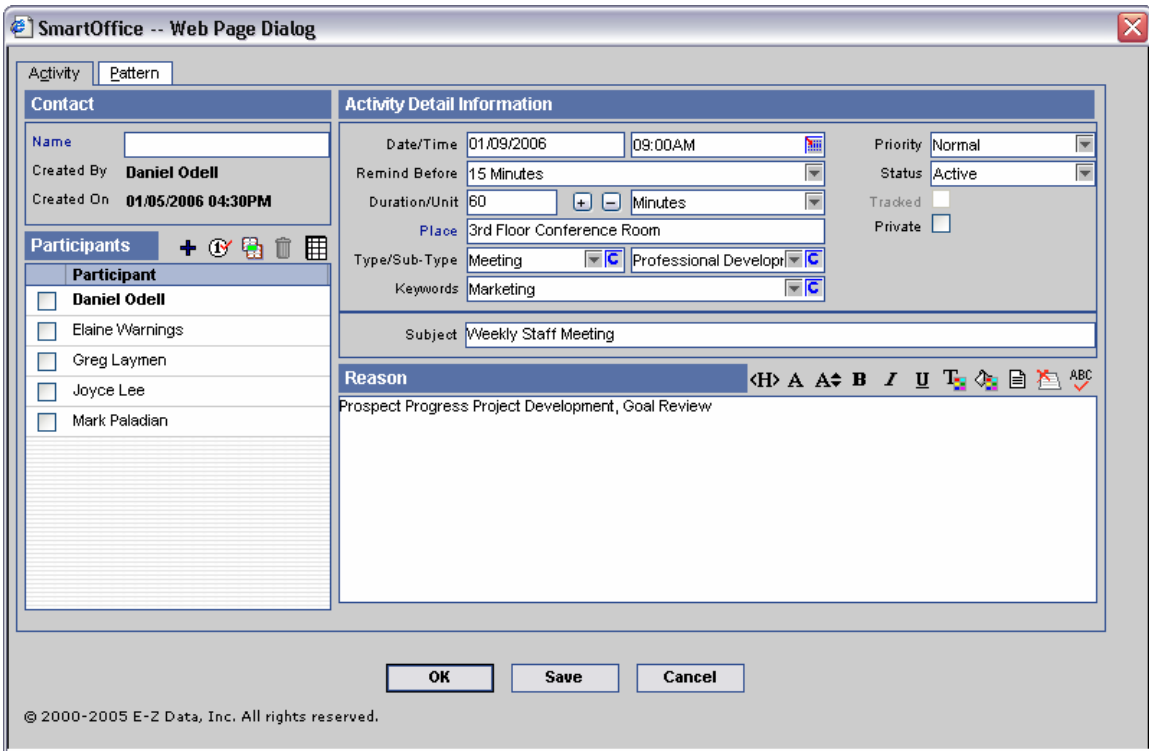


Figure 2: Activity Detail Screen.

- After entering activity details, select the **Pattern** tab.
- Select a **Recurrence Pattern** option.



Figure 3: Recurrence Pattern options on the Activity Pattern tab.

- After selecting a pattern of recurrence option, more options will become available to define the parameters of the recurrence pattern.

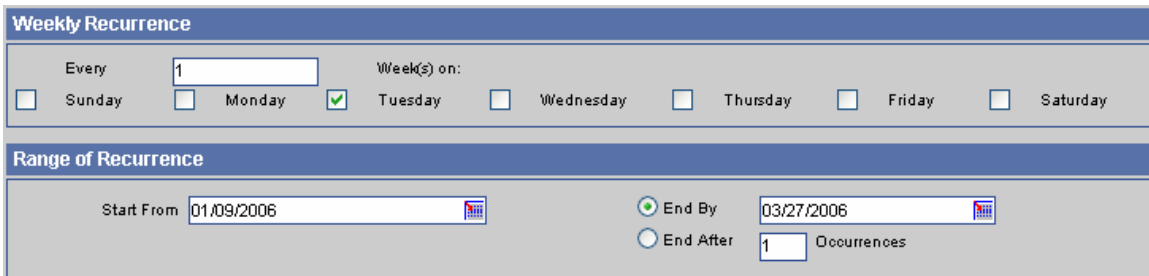


Figure 4: Recurrence Pattern parameter options for the Weekly recurrence option on the Activity Pattern tab.

Note: Range of Recurrence can be defined by date range or by number of activities.

- After selecting activity recurrence pattern options, click **OK**.

- SmartOffice will display a warning indicating that the creation of many activities may take a long time and that a maximum of 100 recurring activities will be created.

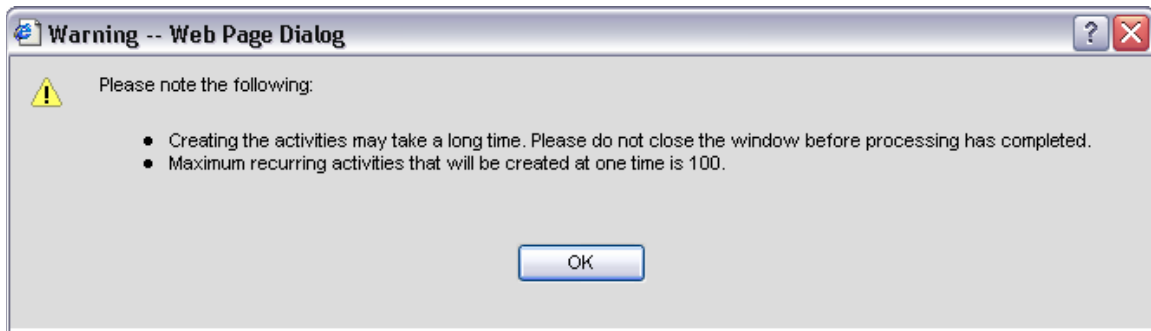


Figure 5: Activity creation warning.

- After reviewing the warning, click **OK** to create activities.

To Modify an Instance of a Recurring Activity:

- Open an instance of a recurring activity in the SmartCalendar.
- Make any necessary adjustments in the **Activity Detail** screen.
- Click **Save** when finished.
- SmartOffice will open a **Confirmation** screen with an option to apply the changes to all future instances of the recurring activity. Select **Yes** to apply the change(s) to all future instances of the recurring activity or select **No** to apply the change(s) only to the selected instance of the recurring activity.

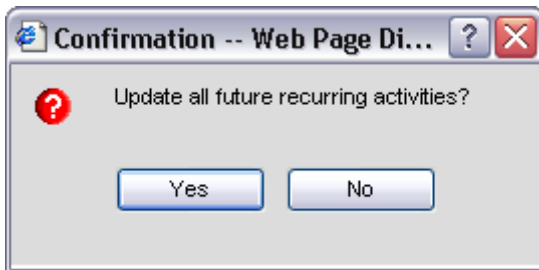


Figure 6: Activity updated Confirmation screen.

- Select the appropriate option to make the updates.