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.

🕙 SmartOffice Web Page Dialog 🛛 🛛 🔀			
Please select one or more Users from your Proxy Users.			
Available Users			
Daniel Odell	^		
Elaine Warnings			
Greg Laymen			
Joyce Lee	≡		
Manny Silverman			
Marie Richardson			
Mark Paladian			
Marvin Hicks			
Michael L. Ashcroft	~		
OK Cancel © 2000-2005 E-Z Data, Inc. All rights reserved.			

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

• Enter activity details as needed.



🔄 SmartOffice Web Page Dialog 🛛 🛛 🔀						
Activity Pattern						
Contact	Activity Detail Information					
Name Created By Daniel Odell Created On 01/05/2006 04:30PM Participants + (Y (2) (1) (1) (1) (1) (1) (1) (1) (1) (1) (1	Date/Time 01/09/2006 09:00AM Priority Normal Remind Before 15 Minutes Status Active Duration/Unit 60 Minutes Piace 3rd Floor Conference Room Type/Sub-Type Meeting Professional Develops Subject Weekly Staff Meeting Reason Keywords Active Active Active Tracked Private Prospect Progress Project Development, Goal Review Prospect Progress Project Progress Project Development, Goal Review Prospect Progress Project Progress Proje					
OK Save Cancel © 2000-2005 E-Z Data, Inc. All rights reserved.						

Figure 2: Activity Detail Screen.

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

Recu	rrence Pattern					
۲	Individual	🔵 Daily	🔵 Weekly	O Monthly	🔿 Yearly	

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.

Wee	Weekly Recurrence									
	Every Sunday	1 Monday	Weel	(s) on: day	Wednesday		Thursday	Friday		Saturday
Ran	ge of Recurr	ence								
	Start Fro	om 01/09/2006		M		⊙ End By ○ End Af		2006 Occurrences	N	

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.

æ] Wa	rning Web Page Dialog 🔹 🕄 🔀
4	Â	Please note the following:
		 Creating the activities may take a long time. Please do not close the window before processing has completed. Maximum recurring activities that will be created at one time is 100.
		ОК

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.

🕙 Confirmation Web Page Di 😢 🔀				
Opdate all future recurring activities?				
	Yes No			

Figure 6: Activity updated Confirmation screen.

• Select the appropriate option to make the updates.

