## 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 <ul> <li>Minutes</li> <li>Piace</li> <li>3rd Floor Conference Room</li> <li>Type/Sub-Type</li> <li>Meeting</li> <li>Professional Develops</li> <li>Subject</li> <li>Weekly Staff Meeting</li> <li>Reason</li> <li>Keywords</li> <li>Active</li> <li>Active</li> <li>Active</li> <li>Tracked</li> <li>Private</li> <li>Prospect Progress Project Development, Goal Review</li> <li>Prospect Progress Project Progress Project Development, Goal Review</li> <li>Prospect Progress Project Progress Proje</li></ul>					
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	<b>N</b>	

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:
		<ul> <li>Creating the activities may take a long time. Please do not close the window before processing has completed.</li> <li>Maximum recurring activities that will be created at one time is 100.</li> </ul>
		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.

