

Fast•Class File

Client Data System

Volume 33: Recurring Activities

To create a recurring activity:

- Open an **Activity Detail** window by creating a new activity in the CDS Calendar or by opening the **Activity Detail** of an existing activity.

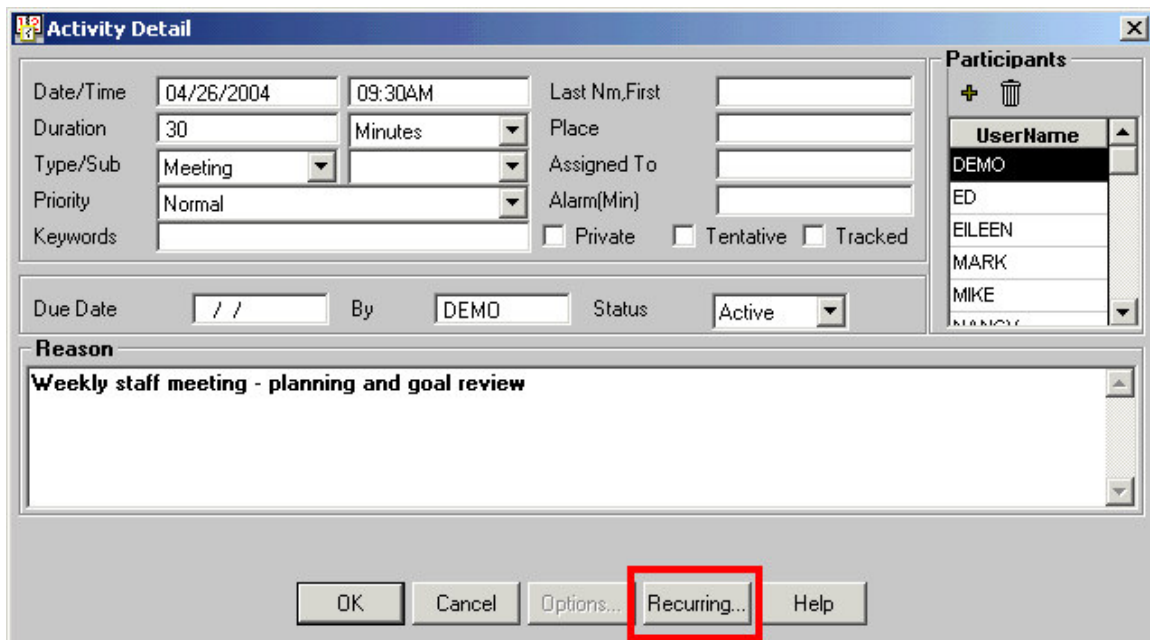


Figure 1: The Activity Detail window.

- When you have finished entering or verifying the details of the activity, click the **Recurring** button on the bottom of the **Activity Detail** window.
- Use the fields in the **Recurring Activity** window to define the pattern and frequency of the recurring activity.

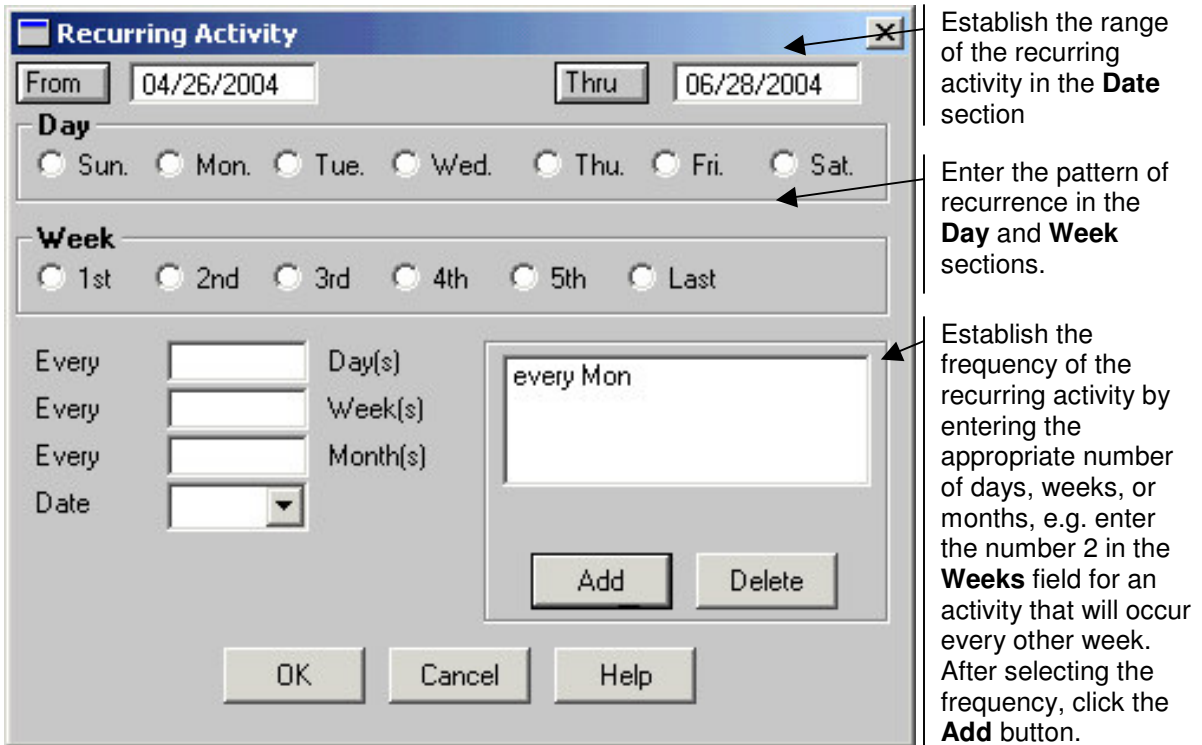


Figure 2: The Recurring Activity window.

- After selecting the pattern and frequency, click the **OK** button.
- Click **OK** in the **Activity Detail** screen to schedule the recurring activity.

How to rescheduling a recurring activity:

- From the CDS Calendar, open one instance of a recurring activity.
- Click the **Date/Time** field label in the **Activity Detail** window.
- Select the new date and/or time for the activity in the **DayView** scheduling window.

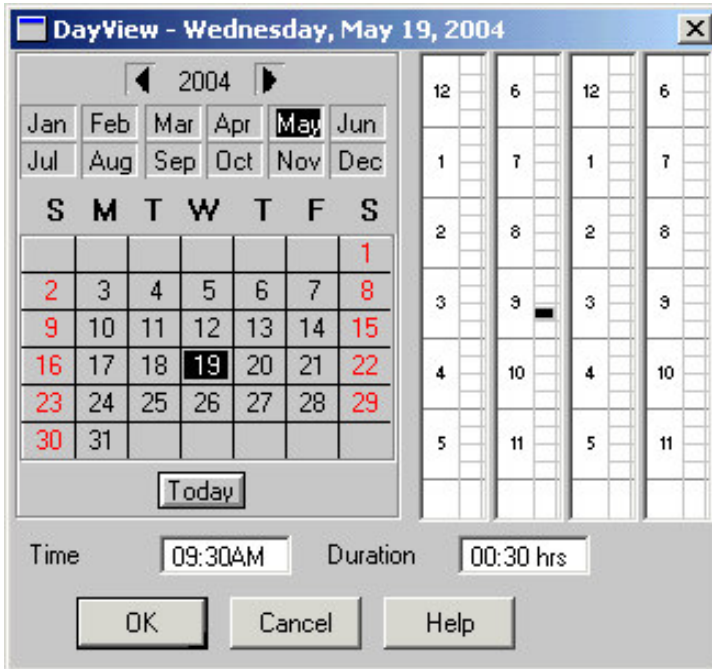


Figure 3: The DayView scheduling window.

- Click **OK**.
- CDS will prompt you to select whether the change relates to all instances of the recurring activity or just the one instance being modified.

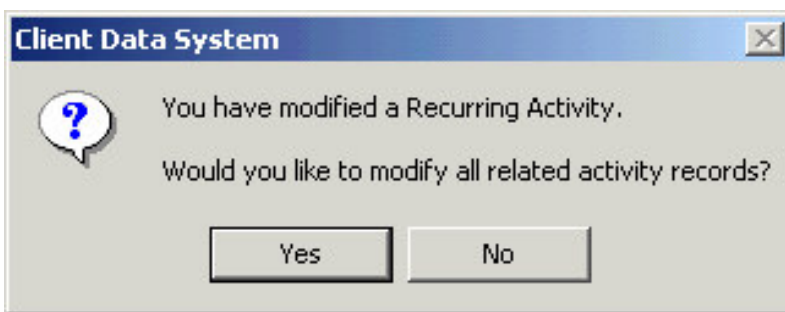


Figure 4: The modification prompt.

- If only the one instance is being modified, click **No**. If all instances are being modified, click **Yes**.
- CDS will make changes to the appropriate activities based on your entry.

How to delete a recurring activity:

- Select an instance of a recurring activity in the CDS Calendar.
- Right-click and select **Delete Current Activity**.

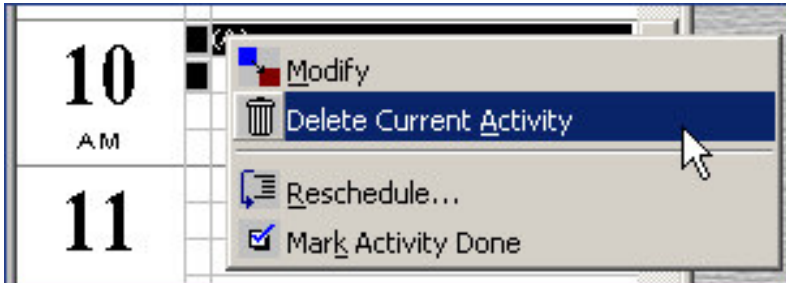


Figure 5: The Activity Modification pop-up menu.

- CDS will prompt you to select whether the deletion relates to all instances of the recurring activity or just the one instance being modified.

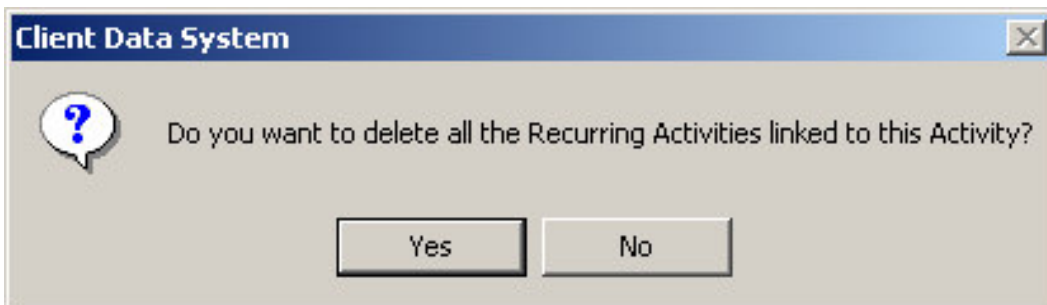


Figure 6: The deletion prompt.

- If only the one instance is being deleted, click **No**. If all instances are being deleted, click **Yes**.
- CDS will make changes to the appropriate activities based on your entry.