

Creating recurring activities

There are 2 ways of adding recurring activities.

- In the Schedule screen
- In the Activity Calendar

Schedule Screen

1. Right click on an agents timeline.
2. Enter the Activity Type, Start and Length of the activity.
3. To have the activity reoccur, tick the box for '**Duplicate Activity**'
4. Tick the boxes for which days you want the activity to be duplicated.
5. Enter the date that the activities should stop.
6. Click Save.

Activity
Service Service11

Activity Type
Holiday

Start
13 30

Length (End 14:00)
00 30

☐ All Day

☒ Duplicate Activity

End Date
2020-06-28

☐ M ☐ T ☐ W ☐ T ☐ F ☐ S
☐ S

Note

CANCEL SAVE

Activity Calendar

1. Right click on the date the activity starts from.
2. Choose the activity from the dropdown box, the start time and the length. Enter a note if required. Click **Next**
3. Choose the agent or agents that should attend the activity. Searching and filtering can be used.
4. Click **Next**
5. Click **Assign** to add the activity or tick the **Recurring** box.

- Choose to repeat the activity at a specifed frequency for Days, Weeks or Months.
- Choose the end date.
- Click Assign.

Scheduling

Day

Week

Month

Activity Calendar

Schedule Calendar

Schedule Jobs

Campaign

Demo

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Displayed Activities

Absence, Sick Leave, Holiday, Medical Appt

▼

Displayed Agents

Agent 1, Agent 2, Agent 3

▼

←

April 2023

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M	T	W	T	F	S	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

1 Selected Days

Apr 12, 2023

Agent 1

Holiday absence

00:00-00:00

🗑

Agent 1

Holiday absence

All day

🗑