



# Create a New Appointment

Help Documentation

## Creating New Calendar Appointments

To create a new calendar appointment, click New in the navigation pane toolbar. This will open a new appointment window that you will use to add the appointment to SmarterMail and to invite attendees.

### Saving Appointment Details

When you add a new appointment to your calendar, you can save as much or as few details about the appointment as you like. In general, appointment details are divided into four tabbed sections:

#### Event

The event is essentially whatever you want to schedule in your calendar. It can be a lunch or dinner, a meeting, an anniversary or birthday, or virtually any other type of event you want to keep organized in your calendar. To create an Event, you will need to include the following information. Note: The Subject and Start date are the only fields required to save an appointment.

- Subject - The subject is the friendly name for the event you're creating.
- Attendees - Attendees are the people you want to invite to your event. When adding Attendees, each will receive an event invitation that they can either accept or reject. You will receive notifications back regardless of whether the attendee accepts or rejects the invitation. To add attendees, you can either type their email address directly or simply click the "Attendees" field name to open your list of contacts. You can select contacts from your various contact lists, including the Global Address List (GAL), as well as cycle through contacts you have listed in categories.
- Conflicts - If you add an attendee from your Global Address List, and their schedule conflicts with the date and time of your event, it will be displayed as a Conflict. To find a new day or time for the event, click on the availability icon next to the Attendees field to bring up a grid of all GAL Attendees' availability.
- Location - Where the Event will be taking place. The location can be a room or building, an address, or even some descriptive text, such as "via Webex". Regarding Room selection versus Location, these are mutually exclusive, yet compatible fields. Separating them allows for users to specify more general locations, such as a geographical location or specific office building, while still being able to reserve conference rooms at those locations.
- Room - If your domain administrator has added any shared resources, like conference rooms, the list of rooms will be available in this dropdown. Just as with attendee availability, if a conference room is already reserved for a specific day and time an Event is to be set, this information will display in the Conflicts field of the new appointment window. Conference room availability will also show when users click the availability icon next to the Attendees field in the new appointment window.

- Start and End Dates and Times - A Start Date is required to save the event. By default, Events start as the current date and time and end 1 hour later. These fields are fully customizable.
- Availability - Here you can set your own availability - either Busy or Free. Setting your status as Busy will be reflected if others within your Global Address List try inviting you to their own events.
- Reminder - Setting a reminder will make a pop-up window appear in webmail at whatever reminder interval you set.
- Email Notification - Adding in an email address will send the event reminder to that email address based on the time interval set by the reminder.

### **Recurrence Information**

In some cases, Events will need to occur on a regular basis. For example, weekly meetings, monthly lunches, holidays, anniversaries or business appointments. In these cases, an Event's recurrence is set. The recurrence feature is very flexible and can be as simple or as complex as necessary. Examples include a birthday that occurs every August 7th, a meeting that happens the second Monday of every month, or an appointment that occurs every four days for three weeks.

When you select the timeframe for how often the Event needs to repeat, you're presented with several options. The first is how often the Event occurs, in weeks. For example, if the Event occurs every week, you leave the recurrence at "Every 1 week(s)." If the Event happens every third week, you set the recurrence at "Every 3 week(s)," etc.

Next, you select the day of week the you want the Event to repeat on.

Finally, you set the end time for the Event recurrence. The Event can repeat indefinitely or can end after a certain number of occurrences or on a specific date.

### **Description**

Use the Description area to keep any important notes or a description of the Event. You can also include any webinar information, call in numbers, or other information you want your Attendees to see. The Event Description is passed along with the Event invitation and will appear in your Attendees' calendars and Event details.

### **Categories**

A category provides a way to organize your Events into manageable groups. To add a category, simply click the Master Categories button and type the new category name. Note: Be sure to separate categories with a comma.