CRM Appointments - Who is the Organizer?

On the face of it the CRM Appointment is fairly straightforward, even though there are a number of key attributes to consider, such as Regarding, Required, Optional, Owner and 'Organizer'.

Most of the time the 'Organizer' is hardly ever considered, in fact it is hidden away on another tab (not the primary information tab), so why should you take any notice of it? It is actually a key attribute, especially if you use the Outlook Client and synchronize your CRM appointments with your Outlook calendar.

Natively, CRM uses the 'Owner' attribute to determine where the responsibility lays, so when you display a list of 'My Activities' and filter on Appointments (so see your records), this is where the 'Owner' attribute is used. The same rule is not applied when you synchronize your CRM Appointments with you Outlook Appointments - this is where the 'Organizer' comes in. The Organizer attribute determines which Outlook Calendar to apply the Appointment to.

Most of the time the Organizer is automatically populated for you – it defaults to the creator of the Appointment which is why most of the time it is ignored. However, there is one key place when the 'Organizer' is never inserted – and that is using the CRM 'Follow Up'.

If you use the 'Follow Up' to plan a future Appointment the 'Organizer' attribute is blank, which means that that Appointment will never be synchronized with your Outlook calendar – you have to remember to open the Appointment in CRM and then manually add the Organizer.

If you currently experience this as a problem, then there is a workaround – and that is to create a CRM 'Workflow Rule' that automatically inserts the Organizer if it is blank.

This workflow rule can be setup and running in a couple of minutes, so it is very easy.

In the Workflow Manager, select the ‘Appointment’ entity and create a new workflow rule that is based upon the ‘Create Event’. A sample screen shot of the completed rule is outlined below as a reference.