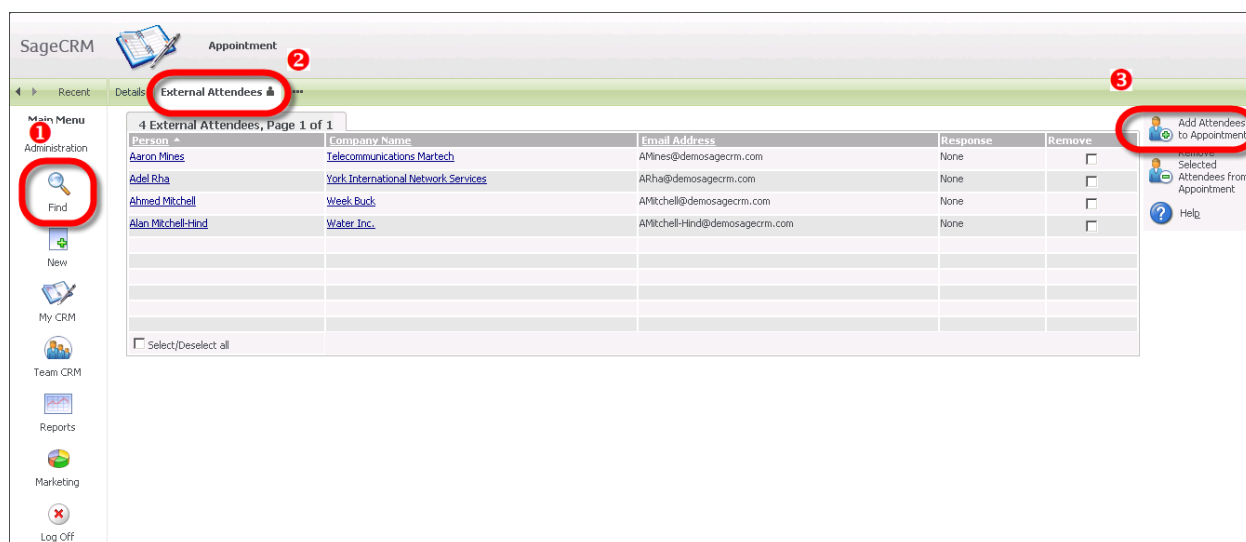


New features added to Communications in Sage CRM version 7.1

Any non-Sage CRM users (external attendees) who have been added to an appointment via Exchange or in Sage CRM are automatically added to the appointment in Sage CRM. Such appointments are stored against these external attendees in Sage CRM, therefore preserving an accurate communications history.

This feature can be used to show non-CRM user attendance at a meeting, even if Exchange Integration is not in use.

To view or add non-CRM users to a Sage CRM appointment:



The screenshot shows the Sage CRM interface for an appointment. The 'External Attendees' tab is selected, displaying a table of attendees. The 'Find' button in the main menu is circled with a red 1. The 'External Attendees' tab is circled with a red 2. The 'Add Attendees to Appointment' button in the top right is circled with a red 3.

Person	Company Name	Email Address	Response	Remove
Aron Mines	Telecommunications Martech	AMines@demosagecrm.com	None	<input type="checkbox"/>
Adel Rha	York International Network Services	ARha@demosagecrm.com	None	<input type="checkbox"/>
Ahmed Mitchell	Week Buck	AMitchell@demosagecrm.com	None	<input type="checkbox"/>
Alan Mitchell-Hind	Water Inc.	AMitchell-Hind@demosagecrm.com	None	<input type="checkbox"/>

- 1 Find the appointment.
- 2 Select the External Attendees tab. If the appointment already includes External Attendees, the tab displays a small attendee icon.

The External Attendees tab lists all attendees on an appointment who are not Sage CRM users, and shows if they have accepted or not (if Exchange Integration is enabled).

These can be person records in CRM whose e-mail addresses matched the Exchange e-mail addresses of the attendees on the appointment, or they can be e-mail addresses of users that were invited to the Exchange appointment but did not match a person record in Sage CRM.

- 3 To add more external attendees to the appointment click the Add Attendee To Appointment button.

A number of other changes have been made to Sage CRM's core Communications module to enhance the Exchange Server Integration feature. These include:

The screenshot displays the Sage CRM Appointment screen, divided into two main panels: 'Details' on the left and 'Scheduling' on the right. Four specific changes are highlighted with red circles and numbered 1 through 4:

- 1**: A new 'Subject' field is added to the 'Details' panel, containing the text 'New Sales Strategy'.
- 2**: A new 'Location' field is added to the 'Details' panel, containing the text 'Wolfe Room'.
- 3**: In the 'Scheduling' panel, the 'All day event' checkbox is checked.
- 4**: In the 'Scheduling' panel, the 'Recurrence' button is highlighted.

Other visible fields include 'Action' (Meeting), 'Date / Time' (03/11/2010 12:25), 'End Time', 'User' (System Administrator), 'Status' (Pending), 'Priority' (Normal), 'Territory' (Default), 'Private' checkbox, 'Percent Complete', 'Completed Time', and 'Organizer' (System Administrator).

- 1** A Subject field has been added to the Details panel of the Appointment screen.
- 2** A Location field has been added to the Details panel of the Appointment screen.
- 3** When creating a new appointment, it is possible to specify whether it is an all-day event.
- 4** A new Yearly option has been added when creating recurring appointments. These new fields map to the relevant Exchange fields for tasks and appointments, so that every time the appointment or task is synced the information will map consistently.

Note: External Attendees are not synchronized if Classic Outlook (and the Outlook Plug-in for Classic Outlook Integration) is being used. An option in this case is to synchronize the appointment to Outlook, and then open the appointment in Outlook adding the external attendees. Next, send the invitation to the external attendees from Outlook.

As you see, you now have more capabilities in [Sage CRM](#). With increased flexibility comes a certain amount of complexity, please [contact us](#) if you have any questions.

If you know someone who could benefit from our [blog](#), or from our other resources such as the [SUCCESS NEWSLETTER](#) or our [tips & tricks videos](#), then please forward this article to them or refer them to our website at www.axisgp.com.