



# maiConnect for SAP® Sales Cloud Admin Guides

## Activity Customizing

# Activity Customizing

## Activity customizing overview list

Admin	Activity Customizing
Admin	Current Default
User / Subscription	
General Customizing	+ Add 2
Activity Customizing 1	APPOINTMENT
Email Customizing	Termin - Z100 3 > X 4
Opportunity Customizing	TASK
Service Ticket Customizing	Task - ZCX3 > X

- 1 Open the maiConnect AdminCockpit and click on the “Activity Customizing” menu item.
- 2 New activity customizings can be add by clicking on the Add button.
- 3 By clicking on an existing row, you can edit the details for this activity.
- 4 An activity customizing can be deleted by clicking on the delete button.

# Activity Customizing

Add a new activity customizing



< Activity Customizing

5 \*Description:  ☐ Use category in Outlook

6 \*Activity type:

7 \*Category:

☒ Synchronize notes ☐ Don't update notes including MS Teams URLs

☒ Synchronize attachments

> Participant options 8

	Status	CRM Status	Default	Prevent further updates to CRM	Prevent further updates to Exchange
⊗	Abgeschlossen	Completed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
⊗	Abgesagt	Canceled	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
⊕	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

i Please have a look at the product description for details.

5 Description of the activity.

6 Activity type can be Appointment, task or phone call.

7 The available categories are read from the SAP Sales Cloud system.

8 With the participant options you can define, which attendees are synchronized.

# Activity Customizing

## Default activity type assignment

Activity Customizing

Current Default

+ Add

Default Activity Type		Default Activity
⊗	Task 9	Task - ZCX3
⊗	Phone Call	Termin - Z100
⊗	Recurring Appointment 10	Termin - Z100
⊗	Customer Visit	Termin - Z100
⊗	Private Appointment 11	Termin - Z100
⊗	Appointment	Termin - Z100
⊗	Meeting	Termin - Z100

- i The default customizing defines, which activity type to choose when synchronizing from Outlook to SAP Sales Cloud.

The screenshot here shows an example configuration.

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- 9 In this example, for task synchronization from Outlook, always ZCX3 is used.
  - 10 For recurring appointments the activity type Z100 is used.
  - 11 Private appointments are assigned to the activity type Z100. The sync of private appointments can be turned off in the “General customizing”.