

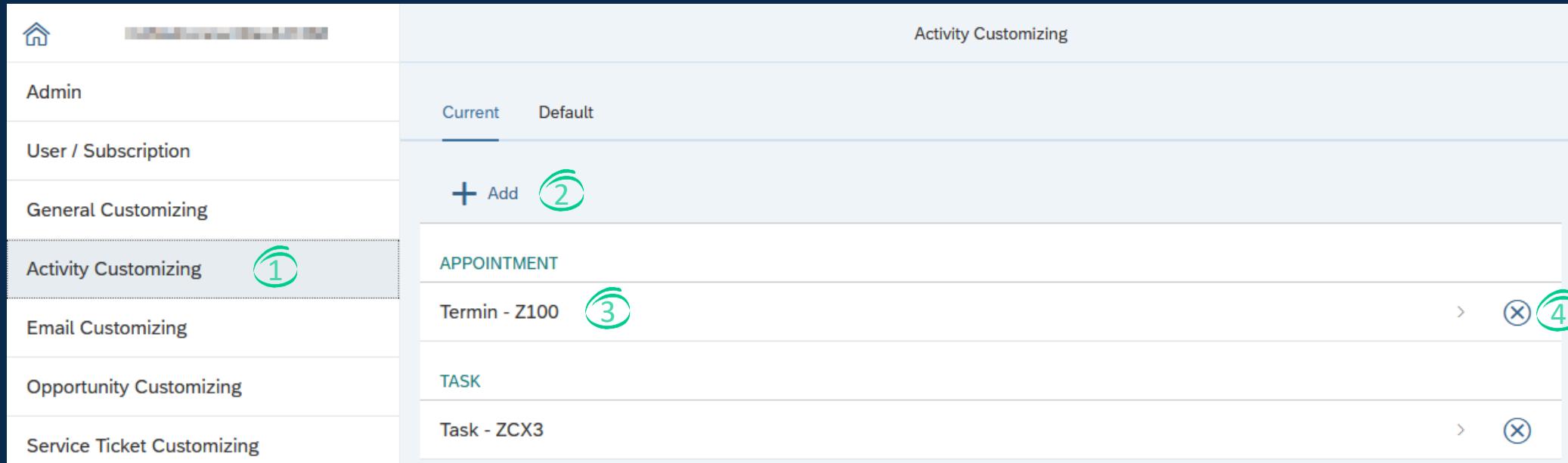


maiConnect for SAP® Sales Cloud Admin Guides

Activity Customizing

Activity Customizing

Activity customizing overview list



Activity Customizing

Current Default

+ Add ②

APPOINTMENT

Termin - Z100 ③

TASK

Task - ZCX3

- 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:

6 *Activity type:

7 *Category:

Synchronize notes Use category in Outlook

Synchronize attachments Don't update notes including MS Teams URLs

8 Participant options

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="button" value="New"/>	<input type="button" value="New"/>	<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	Task - ZCX3	⑨
Phone Call	Termin - Z100	
Recurring Appointment	Termin - Z100	⑩
Customer Visit	Termin - Z100	
Private Appointment	Termin - Z100	⑪
Appointment	Termin - Z100	
Meeting	Termin - Z100	

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

The screenshot here shows an example configuration.

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”.