

cxAddOns

Global AddOn specialists for Enterprise Software

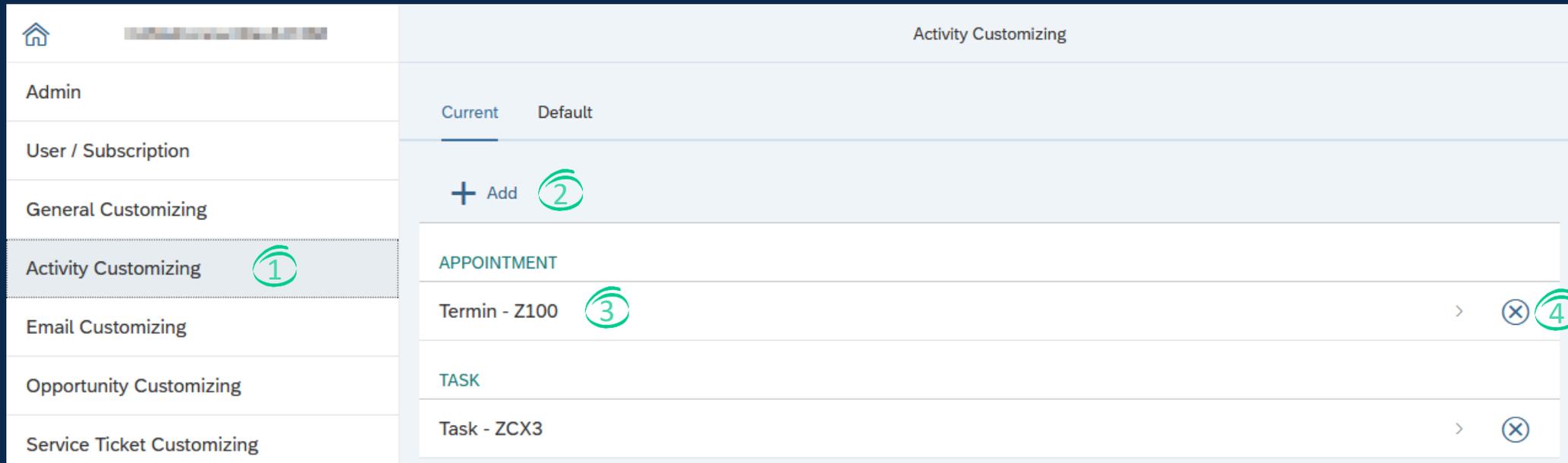


maiConnect for SAP® Sales Cloud Admin Guides

Activity Customizing

Activity Customizing

Activity customizing overview list



	Current	Default
	+ Add (2)	
	APPOINTMENT	
	Termin - Z100 (3)	> (X) (4)
	TASK	
	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"/>

- 1 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.

- 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”.