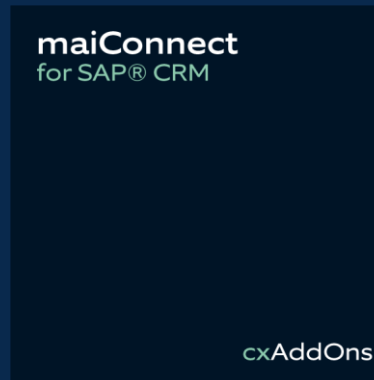


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# maiConnect for SAP® CRM onPrem User Guides

## E-Mail synchronization

# E-Mail synchronization

## Synchronization overview

**i** The synchronization of e-mails can be done in Outlook or in SAP® CRM onPrem. This depends on where you want to trigger the synchronization.

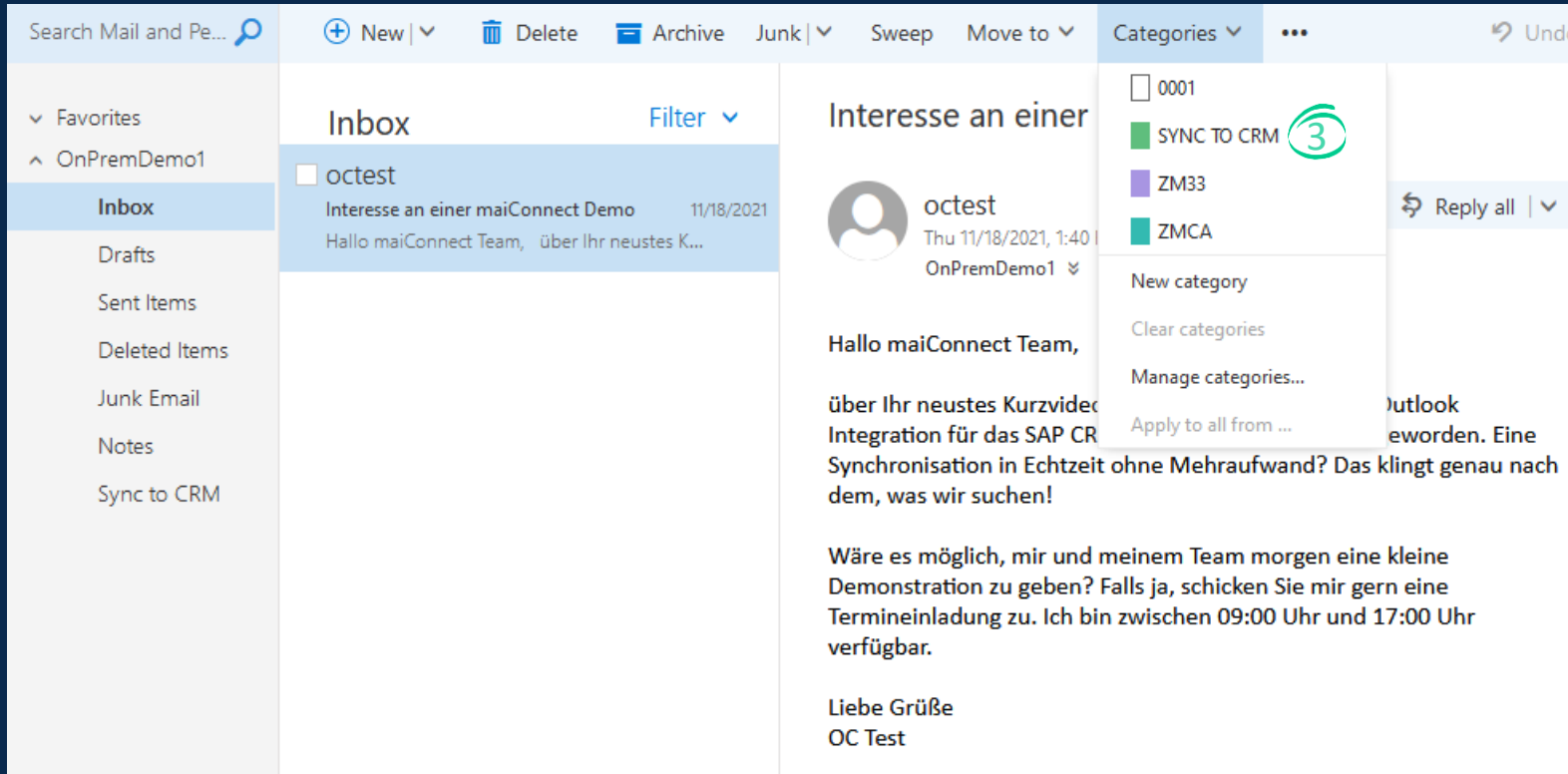
① Synchronize e-mails to CRM in Outlook.

② Trigger the synchronization of Outlook e-mails in CRM.

# E-Mail synchronization



Synchronize e-mails to CRM in Outlook.



**i** There are two ways to trigger the synchronization of e-mails in Outlook.

First option is:

**3** Triggering the synchronization by setting a category. Once this category is set, the synchronization job starts.

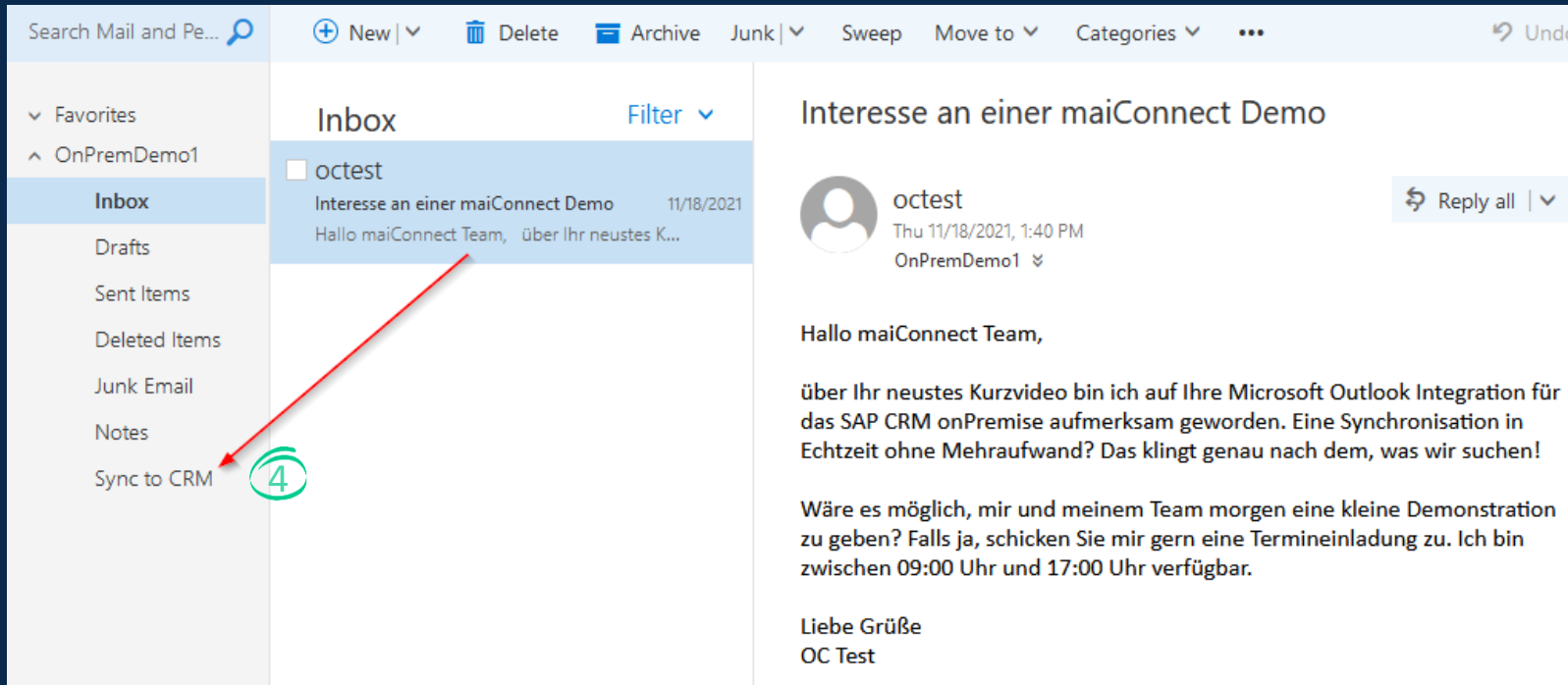
The category and at which intervals the job runs is customizable.

**i** During the synchronization, the e-mail activity is linked to the corresponding contact person. For incoming mails, it is the sender of the mail. For outgoing mails, it is the first matching recipient.

# E-Mail synchronization



Synchronize e-mails to CRM in Outlook.



- i** The second option to trigger the synchronization of e-mails in Outlook is:
- 4** Triggering the synchronization by moving it to a certain folder. The name of this folder is customizable.

**i** A maiConnect job needs to be scheduled, which synchronizes the mails to CRM from specific folders.

During the synchronization, the e-mail activity is linked to the corresponding contact person. For incoming mails, it is the sender of the mail. For outgoing mails, it is the first matching recipient.

# E-Mail synchronization



Trigger the synchronization of Outlook e-mails in CRM.

**E-Mails - Inbox**

Search

Search E-Mail messages with the following search criteria: [Show Filter](#)

Display Latest E-Mails:  Total number of items in folder:

Folders

- onpremdemo1@c4addons.com
  - Sent Items
  - Inbox**

Emails

Number of emails found: 1

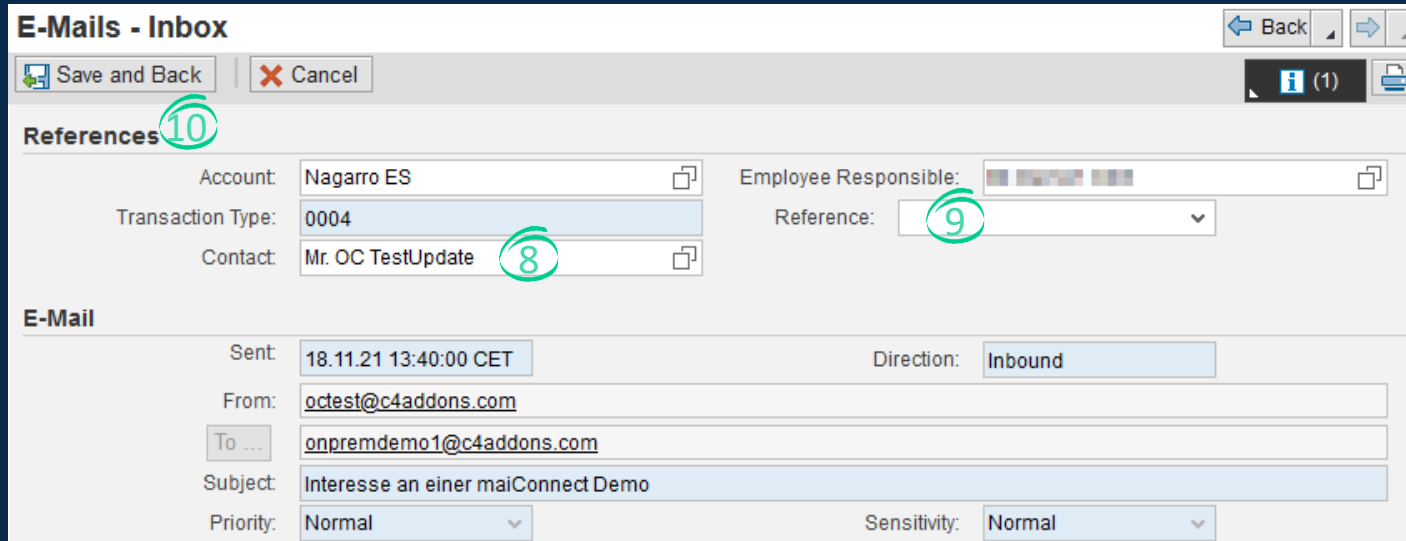
Filter:

Action	Atta...	Category	From	Subject	Received	Read	Imp...
<input type="button" value="Transfer to CRM"/>			octest@c4addons.com	Interesse an einer maiConnect Demo	18.11.202...	<input type="checkbox"/>	

- 5 In CRM you can open a maiConnect UI which shows a representation of your Outlook inbox and the current folders.
- 6 There you can see the e-mails of the currently selected folder.
- 7 By clicking on “Transfer to CRM” the synchronization is triggered.

# E-Mail synchronization

Relation to an account



**E-Mails - Inbox**

Save and Back | Cancel

References **10**

Account: Nagarro ES | Employee Responsible: [ ]

Transaction Type: 0004 | Reference: [ **9** ]

Contact: Mr. OC TestUpdate **8** | [ ]

**E-Mail**

Sent: 18.11.21 13:40:00 CET | Direction: Inbound

From: octest@c4addons.com

To ...: onpremdemo1@c4addons.com

Subject: Interesse an einer maiConnect Demo

Priority: Normal | Sensitivity: Normal

**i** After clicking on “Transfer to CRM” you can see the details of the e-mail:

- Date and time
- Sender, Recipients
- Direction
- Subject and mail body

**8** The assignment to the contact person and account is done automatically. You can still change it here.

**9** You can assign the e-mail to another CRM object, like lead, opportunity or another activity. Select the type from the drop down and then choose the object.

**10** Click on “Save and Back” to synchronize the e-mail to CRM.