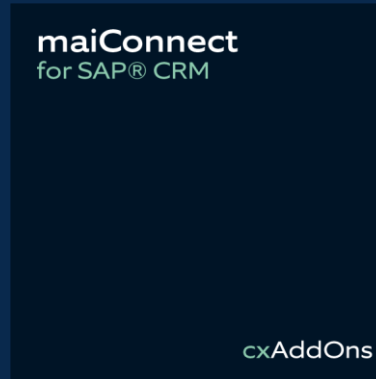


cxAddOns

Global AddOn specialists for Enterprise Software



maiConnect for SAP® CRM onPrem User Guides

Contact synchronization

Contact synchronization

Synchronization overview from CRM to Outlook

- i** There are two different ways to synchronize Contacts from SAP® CRM onPrem to Outlook. What you can use, depends on your company's customizing settings.

 - 1** Relation to a contact person.
Only that contact person is synchronized to Outlook.
 - 2** Relation to an account.
All contact persons of that account are synchronized to Outlook.

- i** Creation of contacts in SAP® CRM based on Outlook contacts.

Contact synchronization



Relation to a contact person

Contact: Test Contact

Save Cancel New Show Duplicates E-Mail Draft

Contact Details Edit

General Data	Sales Employee
ID: 3000003016	Employee:
Title:	Employee ID:
Academic Title:	
First Name: Test	
Last Name: Contact	
Date of Birth:	
Language: DE German	
Contact Authorization:	Main Address and Communication Data
Name Format:	Street/House Number:
Name Afix:	Street 2:
Name Afix 2:	Street 3:
Name Supplement:	Postal Code/City:
Academic Title:	Country: DE Germany
2nd Academic:	Region:
Title:	National Version(s): <input type="checkbox"/>
Title:	Phone:
Middle Name:	Mobile:
Initials:	
Archiving Flag: <input type="checkbox"/>	
Known As:	
Account ID: 3000003009	
Name: Nagarro ES	
Function:	
Function:	
Department:	
Department:	
Authority:	
Standard: <input type="checkbox"/>	
Address: Westerbachstraße 32 / 61476 Kronberg	
Phone: +49 (6173) 3363000	
Mobile:	
Fax:	
E-Mail: update@c4addons.com	

3 These are the details of a contact person in CRM.

4 If you add a new relationship with type “Has the Employee Responsible” to that contact person, he or she will be synchronized to Outlook.

i The relationship type is customizable and depends on your company’s settings.

Contact: Test Contact - Relationships

Back

Relationships

Relationship: Has the Employee Responsible

Partner:

Partner ID:

Standard:

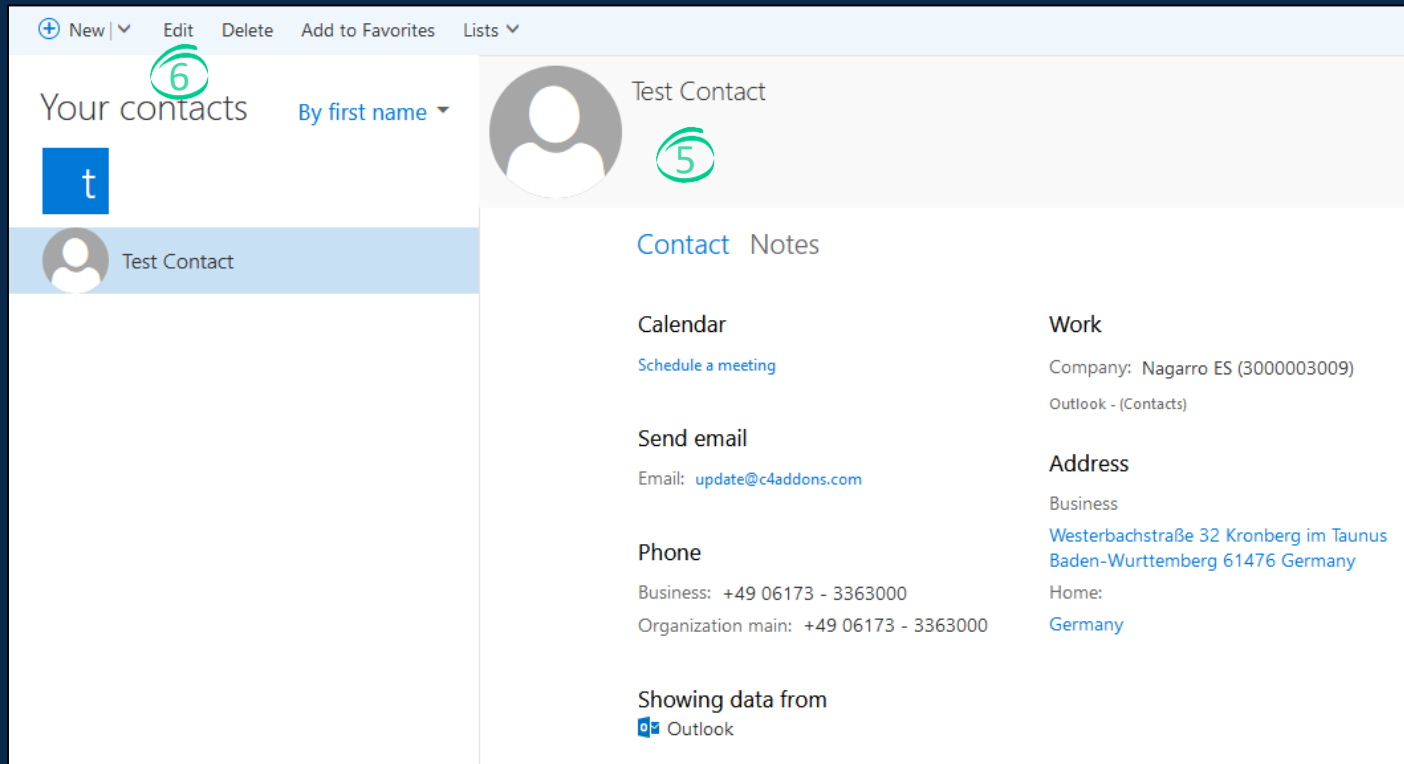
Valid From:

Valid To:

Contact synchronization



Relation to a contact person



5 This shows the synchronized contact in Outlook.

Every information is the same, compared to CRM.

- Name
- Address
- Contact information like e-mail or phone
- Company details

6 If you edit the contact here in Outlook, this change will also be synchronized back to CRM.

Contact synchronization



Relation to an account

Corporate Account: cxAddons 85737 Ismaning

Save Cancel New Show Duplicates More

Account Details Edit

General Data

ID: 2000001191
Name 1: cxAddons
Name 2: cxAddons GmbH
Search Term: CXADDONS
Rating:

Main Address and Communication Data

Street/House Number: Lise-Meitner-Str. 1
Postal Code/City: 85737 Ismaning
PO Box Post Cde:
Country: DE Germany
Region:
Language:
Phone:
Fax:
E-Mail:
Website:
Communication Method:

Employee Responsible

Employee:
Employee ID:
Bill Block Reason:
Del. Block Reason:
Tran. Block Reason:

Notes

Roles

Planned Activities

Contacts New Add Filter:

Actions	Name	Function	Department	Work Address	Phone/Ext.
	Andrea Avokado	wichtig1	wichter1	Lise-Meitner-Str. 1 / 85737 Is...	+49 (12) 30254
	Bärbel Brombeere	Wichtig2	Wichtiger2	Lise-Meitner-Str. 1 / 85737 Is...	+49 (54) 16864664
	Herr B.A. Stefan Luisoder			Lise-Meitner-Str. 1 / 85737 Is...	
	Thomas Meier				

7 These are the details of an account in CRM.

8 The account contains several contact persons.

9 By adding a relationship with type "Has the employee responsible" all the contact persons in that account will be synchronized to Outlook.

Corporate Account: cxAddons 85737 Ismaning - Relationships

Back

Relationships

Relationship: Has the Employee Responsible

Partner:

Partner ID:

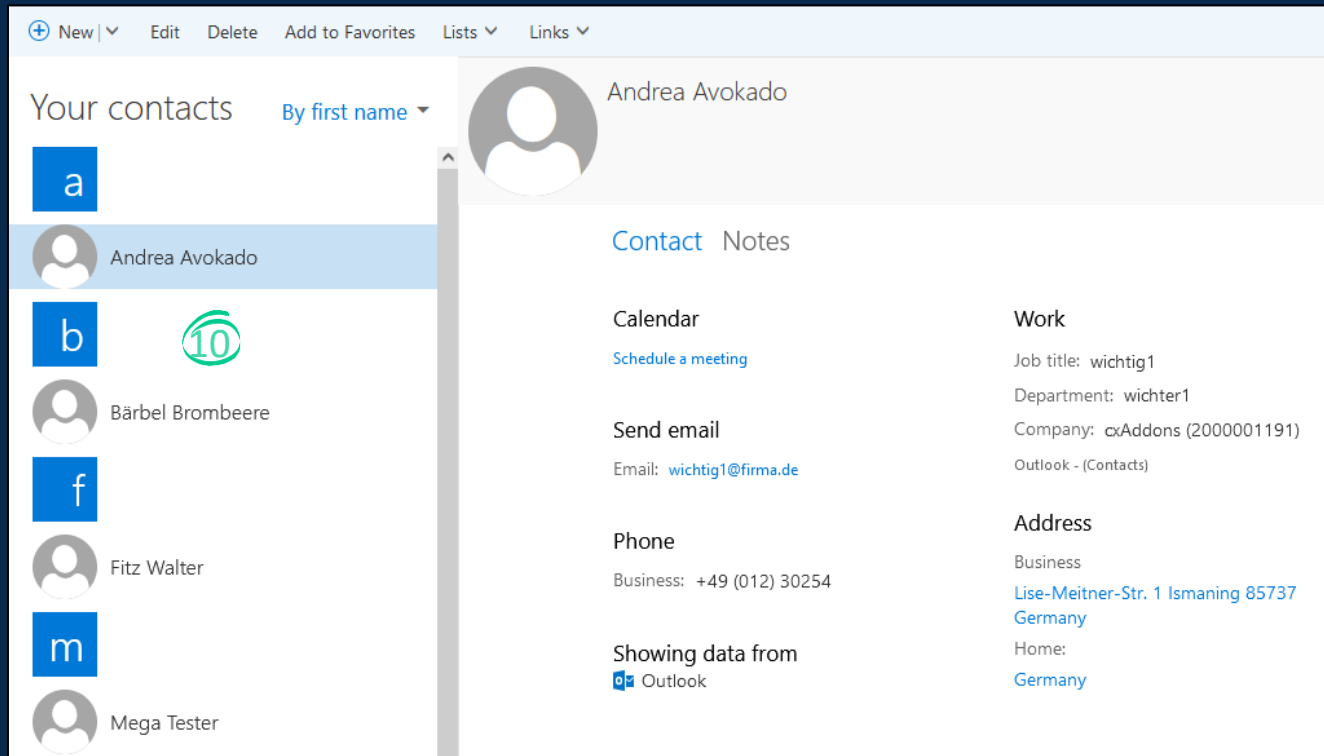
Standard:

Valid From: 1

Valid To: 1

Contact synchronization

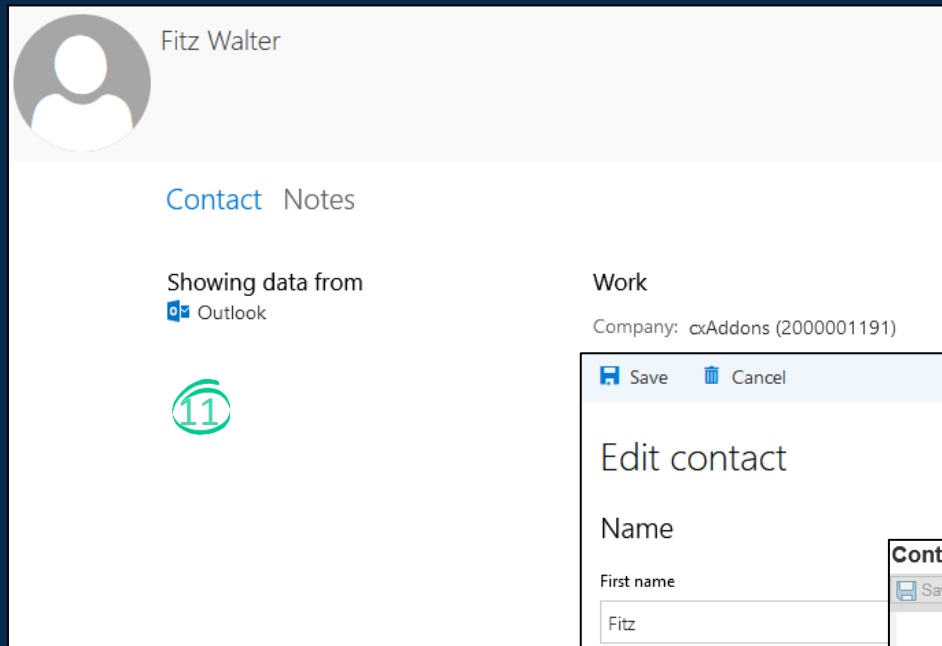
Outlook representation of the synchronized contacts



10 All contacts were synchronized to Outlook. They can be modified here, so that these changes are synchronized to CRM.

Contact synchronization

Updating a contact person in Outlook



Fitz Walter

Contact Notes

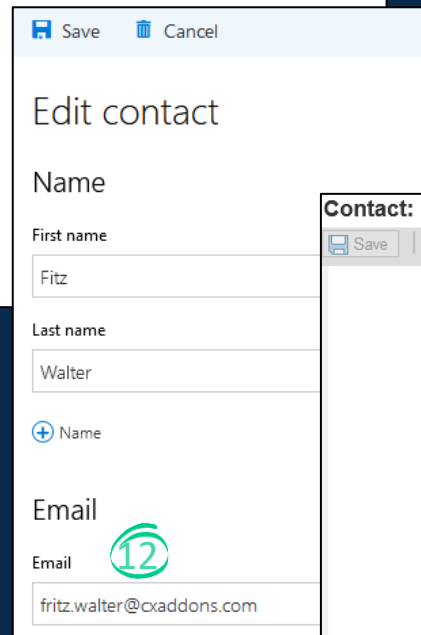
Showing data from Outlook

Work
Company: cxAddons (2000001191)

11

11 Initially we did not have the e-mail address of that contact.

12 Maybe we received an e-mail from him, so that we now know the e-mail address. We update his contact information in Outlook and save that change.



Save Cancel

Edit contact

Name

First name
Fitz

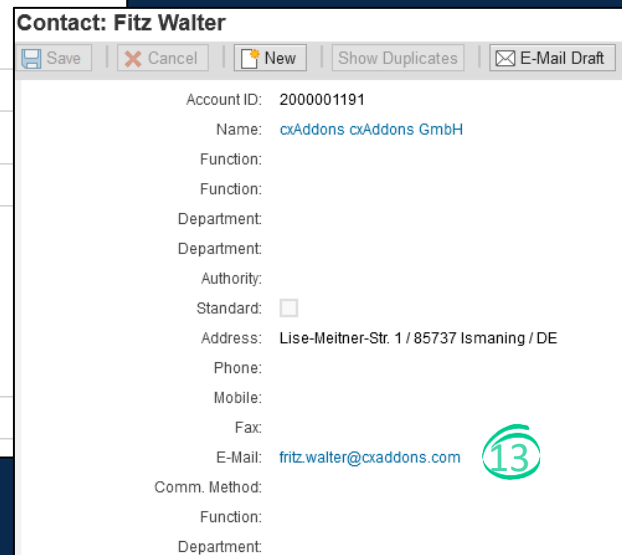
Last name
Walter

+ Name

Email

Email
fritz.walter@cxaddons.com

12



Contact: Fitz Walter

Save Cancel New Show Duplicates E-Mail Draft

Account ID: 2000001191
Name: cxAddons cxAddons GmbH
Function:
Function:
Department:
Department:
Authority:
Standard:
Address: Lise-Meitner-Str. 1 / 85737 Ismaning / DE
Phone:
Mobile:
Fax:
E-Mail: fritz.walter@cxaddons.com

Comm. Method:
Function:
Department:

13

13 This updates also the e-mail address in CRM.

Contact synchronization



Creation of contacts in SAP® CRM based on Outlook contacts

The screenshot shows the 'Add contact' form in Outlook. At the top, there are 'Save' and 'Cancel' buttons. The form is titled 'Add contact' and has a circled '16' next to it. Below the title, there are sections for 'Name', 'Email', 'Phone', and 'Work'. The 'Name' section has a 'First name' field containing '#Hans' with a circled '14' and a 'Last name' field containing 'Muster'. The 'Email' section has an 'Email' field containing 'Hans.Muster@c4addons.com'. The 'Phone' section has a 'Business' field which is empty. The 'Work' section has a 'Company' field containing '2000001191' with a circled '15'.

- 14 While creating a contact person in Outlook, the first name needs to start with a customized sync prefix.
- 15 The company name needs to be the CRM ID of the account. Via this ID a relation between the account and the newly created CRM contact is created.
- 16 After clicking on save, the contact gets created in CRM.