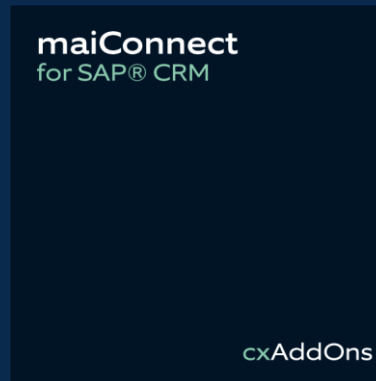


**cxAddOns**

Global AddOn specialists for Enterprise Software



# maiConnect for SAP® CRM onPrem User Guides

## Appointment synchronization

# Appointment synchronization



Synchronization overview from Outlook to CRM

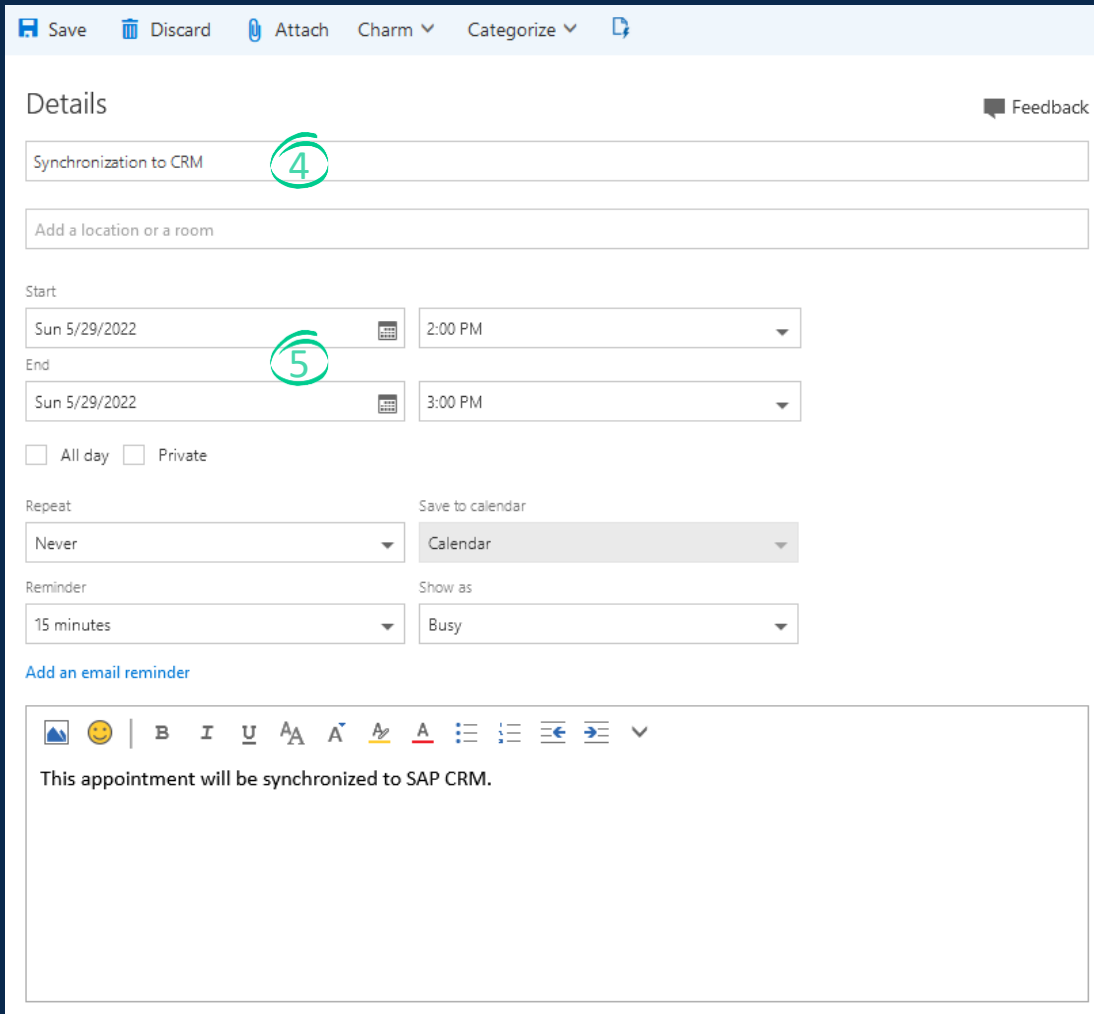
- i** There are different ways to synchronize appointments from Outlook to SAP® CRM onPrem. What you can use, depends on your company's customizing settings.

  - 1** Synchronization without restrictions.  
All appointments are synchronized to CRM. Check with your administrator if the whitelisting is activated.
  - 2** Synchronizing by categorizing the appointment.  
Only appointments with a certain category are synchronized to CRM.
  - 3** Synchronizing by setting a sync prefix.  
Appointments are synchronized to CRM only if the appointment title starts with a certain prefix.

The following pages show the possible ways.

# Appointment synchronization

Synchronization from Outlook to CRM without restrictions



The screenshot shows the Outlook appointment details form. At the top, there is a toolbar with 'Save', 'Discard', 'Attach', 'Charm', and 'Categorize' buttons. Below this is the 'Details' section with a 'Feedback' icon. A text input field contains 'Synchronization to CRM' and is circled with a green '4'. Below it is a field for 'Add a location or a room'. The 'Start' section has a date 'Sun 5/29/2022' and a time '2:00 PM', both circled with a green '5'. The 'End' section has a date 'Sun 5/29/2022' and a time '3:00 PM'. There are checkboxes for 'All day' and 'Private'. The 'Repeat' section has a dropdown set to 'Never' and a 'Save to calendar' dropdown set to 'Calendar'. The 'Reminder' section has a dropdown set to '15 minutes' and a 'Show as' dropdown set to 'Busy'. At the bottom, there is a rich text editor with a toolbar and the text 'This appointment will be synchronized to SAP CRM.'

④ Synchronization without restrictions.  
This means, that no category or sync prefix is required.

⑤ You can fill the details of the appointment.

- Start time, end time
- Location
- Notes
- Attachments
- ...

Click on Save to let it synchronize to CRM.  
If you have invited a participant, then that person will get an Outlook appointment invitation.

# Appointment synchronization



Synchronizing by categorizing the appointment

Save Discard Attach Charm Categorize

Details Feedback

Synchronization to CRM

Add a location or a room

Start  
Sun 5/29/2022 2:00 PM

End  
Sun 5/29/2022 3:00 PM

All day  Private

Repeat: Never Save to calendar: Calendar

Reminder: 15 minutes Show as: Busy

[Add an email reminder](#)

ZMCA **6**

This appointment will be synchronized to SAP CRM.

**6** This appointment is synchronized to CRM by setting a preconfigured category.

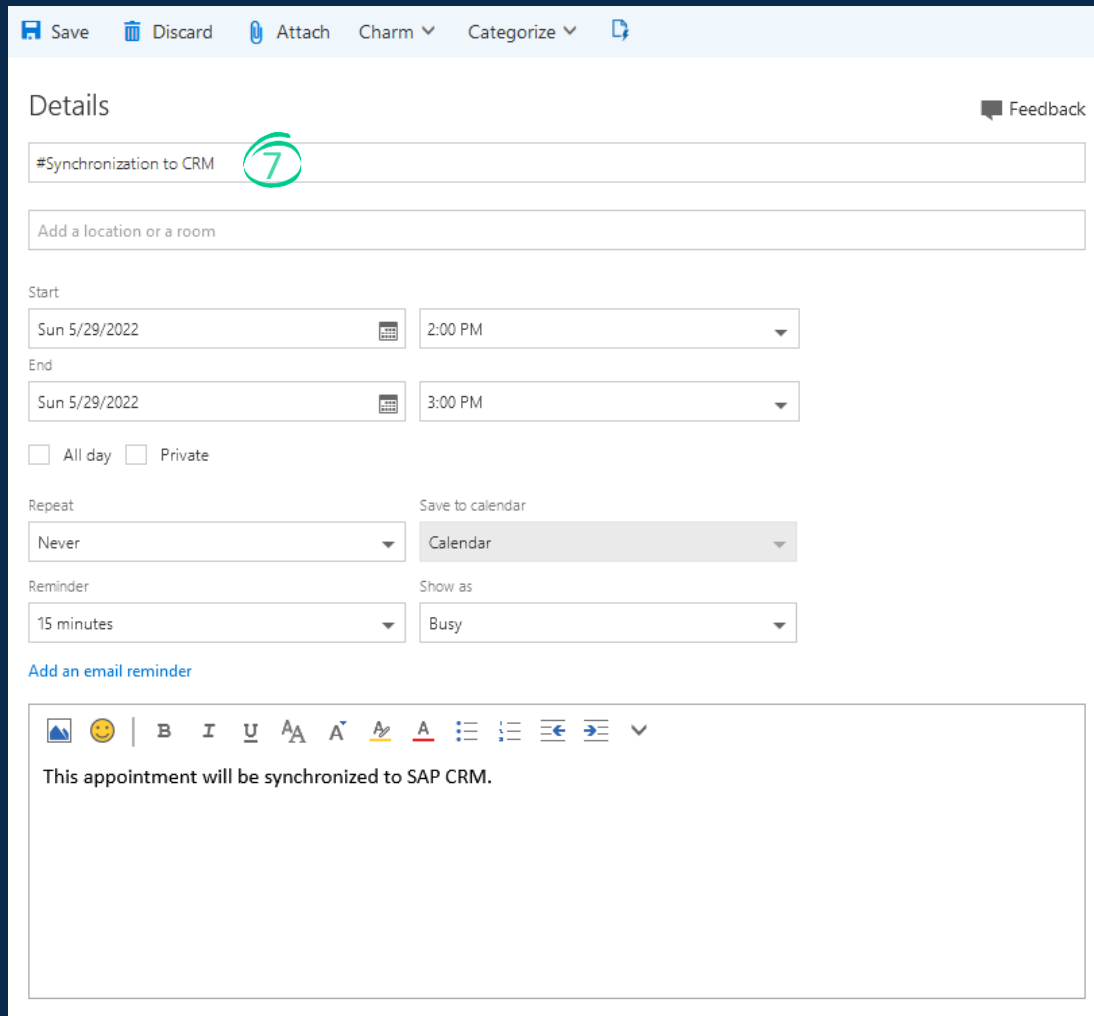
The category can be a

- generic category like “SYNC TO CRM” or
- CRM activity type like “ZMCA” or “ZM33”

Setting a category and clicking on Save is the trigger to synchronize it to CRM.

# Appointment synchronization

Synchronizing by setting a sync prefix.



The screenshot shows a calendar appointment form with the following fields and options:

- Title:** #Synchronization to CRM (highlighted with a green circle and the number 7)
- Location:** Add a location or a room
- Start:** Sun 5/29/2022, 2:00 PM
- End:** Sun 5/29/2022, 3:00 PM
- Options:**  All day,  Private
- Repeat:** Never
- Save to calendar:** Calendar
- Reminder:** 15 minutes
- Show as:** Busy
- Buttons:** Save, Discard, Attach, Charm, Categorize, Feedback
- Rich Text Editor:** This appointment will be synchronized to SAP CRM.

7 The title of this appointment starts with a preconfigured prefix.

The prefix can be anything, but it is recommended to use the hashtag.

The prefix can automatically be removed after the synchronization.

Setting a prefix and clicking on save is the trigger to synchronize it to CRM.

# Appointment synchronization



CRM representation of the Outlook appointment

**maiConnect Appointment: Synchronization to CRM**

Back Save Cancel New Send E-Mail More

**Appointment Details** Edit

**General Data**

Activity ID: 3100003971  
Description: Synchronization to CRM  
Location:  
Start Date/Time: 30.05.2022 14:00  
End Date/Time: 30.05.2022 15:00  
All Day:   
Importance: Medium  
Active Status: Open  
Category:  
Result: BTSUBJECT NOT BOUND  
Input Channel:  
Time zone from: CET  
Time zone to: CET

**References**

Account:  
Contact:  
Employee Responsible:  
Reference:  
Item:  
Reference Description:  
Private:

**Attendees**

**Attachments**

**Notes** New Filter:

Actions	Text Type	Text	Language
	Note	This appointment will be synchronized to SAP CRM.	English

**i** This screenshot shows how the appointment is synchronized from Outlook to CRM.

It can be modified in Outlook, so that these changes are again synchronized to CRM.

**8** The appointment can also be edited here, so that these changes are then synchronized to Outlook.

# Appointment synchronization

Synchronization from CRM to Outlook



Transaction Type	Transaction Type Description
ZM33	Customer Visit (M)
ZMCA	maiConnect App.

### maiConnect Appointment: New

Save and Back Save Cancel New Send E-Mail More

#### Appointment Details

<b>General Data</b>	<b>References</b>
Activity ID: <input type="text"/>	Account: <input type="text"/>
Description: Synchronization to Outlook	Contact: <input type="text"/>
Location: <input type="text"/>	Employee Responsible: <input type="text"/>
Start Date/Time: 30.05.2022 10:00	Reference: <input type="text"/>
End Date/Time: 30.05.2022 11:00	Item: <input type="text"/>
All Day: <input type="checkbox"/>	Reference Description: <input type="text"/>
Importance: Medium	Private: <input type="checkbox"/>
Active Status: Open	
Category: Date	
Result: <input type="text"/>	
Input Channel: <input type="text"/>	
Time zone from: CET	
Time zone to: CET	

#### Notes

This appointment will be synchronized to Outlook.

- 9 When creating an appointment in CRM you first have to select an activity type.
- 10 Fill the details of the appointment.
- 11 Click on Save to let it synchronize to Outlook.
- i The appointment can be modified again here or in Outlook, so that these changes are synchronized to the other system.