maiConnect for SAP® CRM onPrem
User Guides

Contact synchronization

Contact synchronization

Synchronization overview from CRM to Outlook

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ⓘ There 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.

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

Contact synchronization

Relation to a contact person

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.

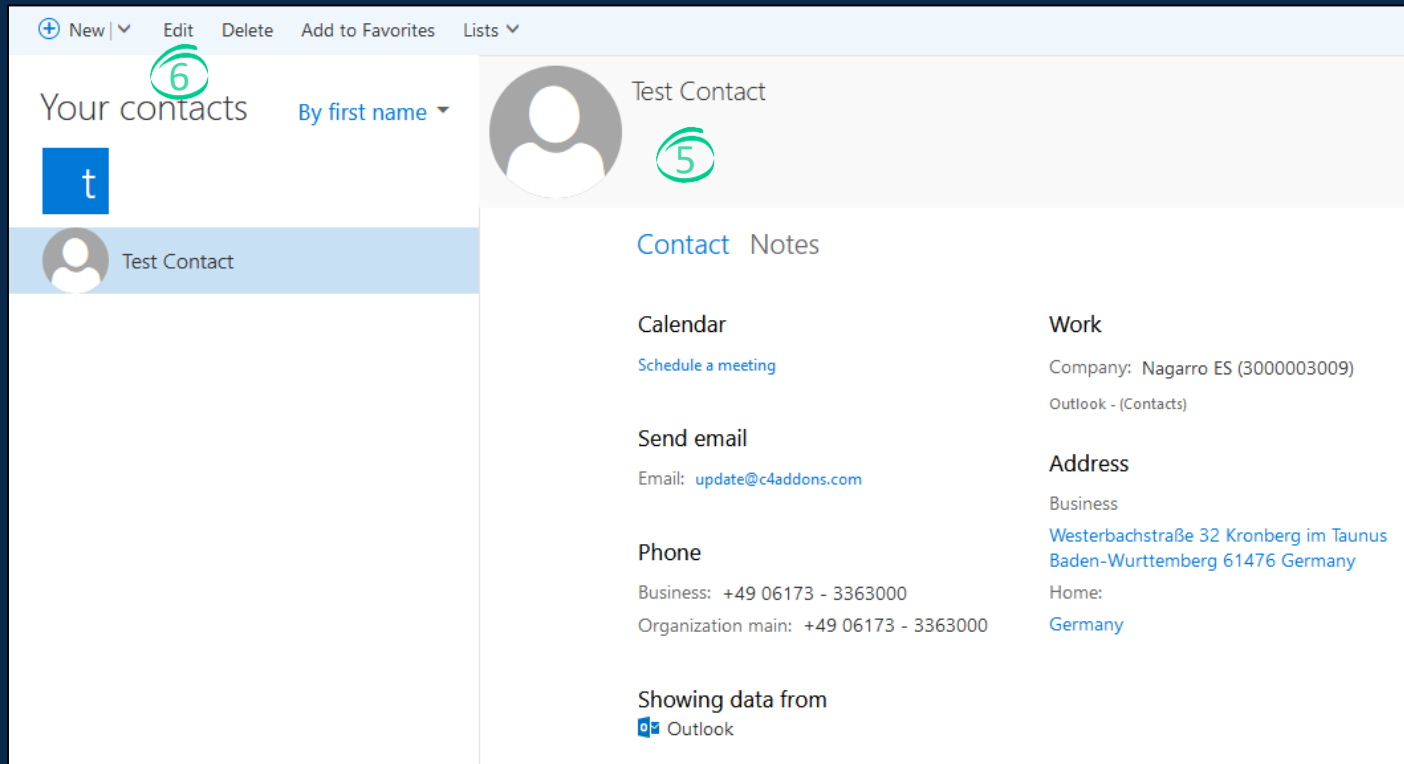ⓘ The relationship type is customizable and depends on your company's settings.

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

⑦ These are the details of an account in CRM.

⑧ The account contains several contact persons.

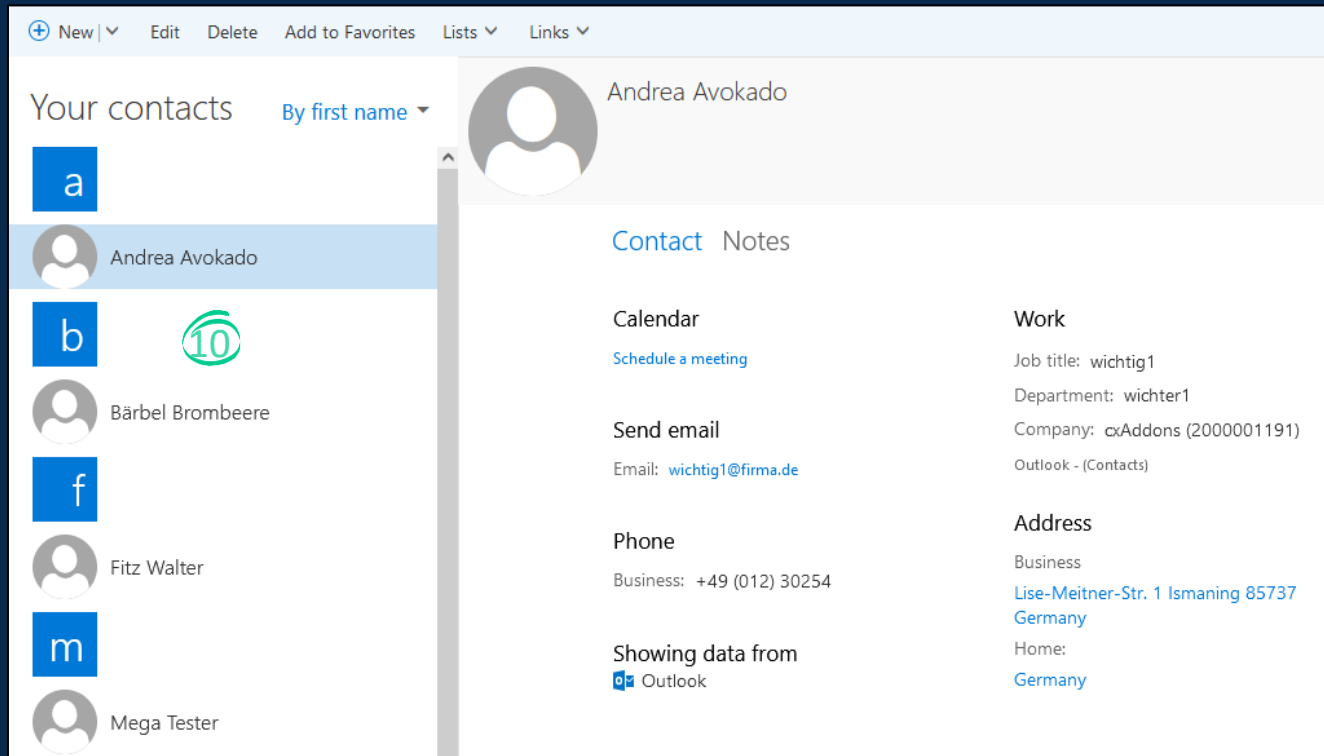⑨ By adding a relationship with type "Has the employee responsible" all the contact persons in that account will be synchronized to Outlook.
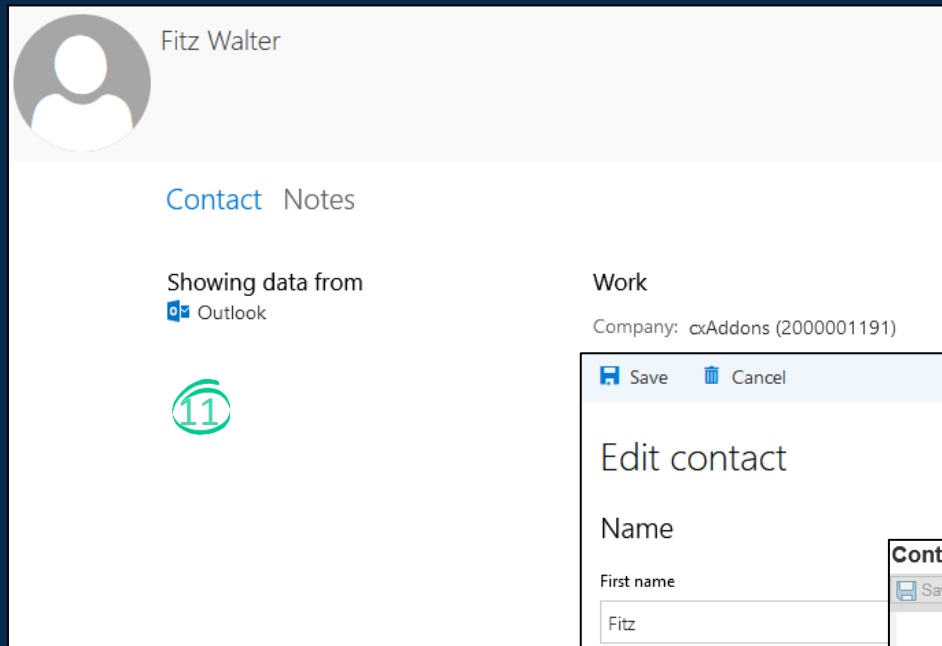
Contact synchronization

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

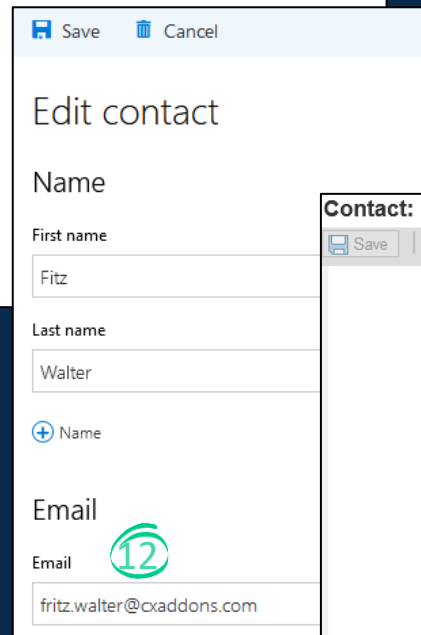⑪ Initially we did not have the e-mail address of that contact.

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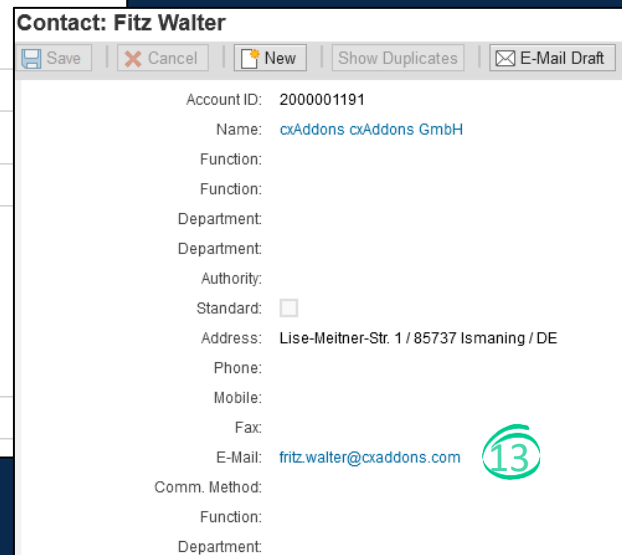
⑬ This updates also the e-mail address in CRM.

Contact synchronization

Creation of contacts in SAP® CRM based on Outlook contacts

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.