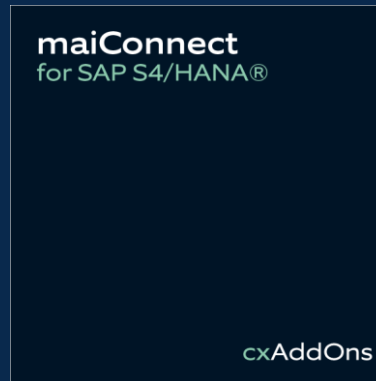


cxAddOns

Global AddOn specialists for Enterprise Software



maiConnect for S/4HANA® User Guides

Contact synchronization

Contact synchronization

Synchronization overview from CRM to Outlook

- i** There are two different ways to synchronize contacts from S/4HANA® 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 S/4HANA® based on Outlook contacts.

Contact synchronization



Relation to a contact person

Contact Details Roles Notes Attachments Work Addresses Private Addresses Inactive Pr >

Edit

General Data

ID: 1214691

Title: Mr.

Academic ...

First Name: Test

Last Name: Contact 3

Date of Bir...

Language: DE German

Archiving Flag:

Central Block:

Not released:

Work Data

Account: CXAddons CXAddons

Account ID: 1210423

Valid From... 01.01.0001 31.12.9999

Function:

Sales Employee

Employee:

Employee ID:

Main Address

Street: Westerbachstr. 32

Postal Code: 61476 Kronberg

Country/R... DE Germany

Region:

Address V...

Communication Data

Phone: +49 (6173) 3363000

Mobile:

Fax:

E-Mail: contact@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: Mr. Test Contact - Relationships

Relationships

Relationship: Has the Employee Responsible

Partner: 4

Partner ID:

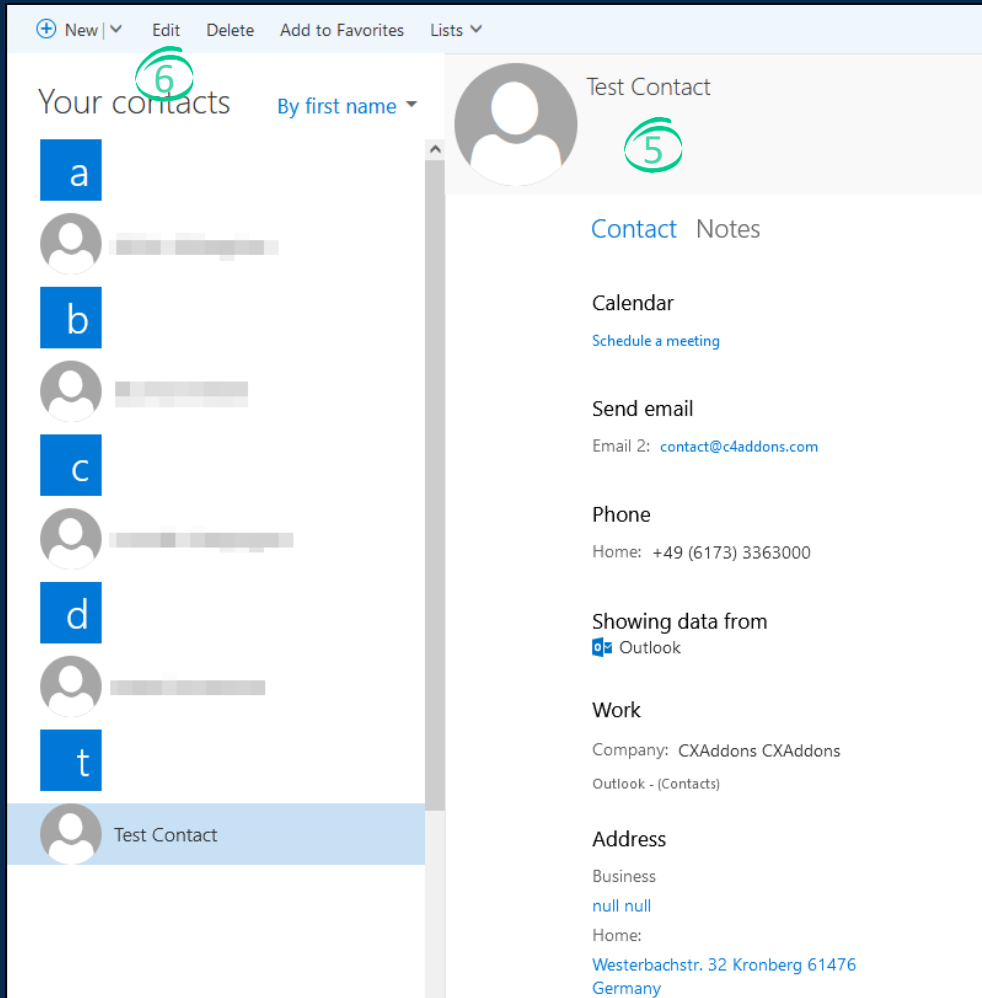
Standard:

Valid From:

Valid To:

Contact synchronization

Relation to a contact person



The screenshot shows the Outlook contact management interface. On the left, a list of contacts is displayed under the heading 'Your contacts'. A green circle with the number '6' highlights the 'By first name' dropdown menu. The contact 'Test Contact' is selected and highlighted in blue. On the right, the contact details for 'Test Contact' are shown. A green circle with the number '5' highlights the contact's profile picture. The details include sections for 'Contact Notes', 'Calendar', 'Send email', 'Phone', 'Showing data from', 'Work', and 'Address'. The 'Showing data from' section indicates that the data is synchronized from Outlook.

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 Business Partner: Gemüsehandel 15793 Brokkoli Create Edit ...

< Account Details Roles Contacts Addresses Address Types Business Hours Interaction History Relationships > ▾

▾ Account Details Edit

General Data

Grouping: Internal Numbering for standard use
ID: 1214631
Name 1: Gemüsehandel 7
Name 2:
Search Term 1:
Classification:

Main Address

Street: Gemüsestraße 3
Postal Code: 15793 Brokkoli
Country/Reg.: DE Germany
Region:
National Versi...
Transport Zone:

Employee Responsible **Communication Data**

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.

▾ Contacts

Create

Actions	Name	Function	Department	Work Address	Phone/Ext.
✎ ...	Achim Auberginen	8		Gemüsestraße 3 / ...	+49 (987654321)
✎ ...	Brunno Brokkoli	Position		Gemüsestraße 3 / ...	+49 (302585847)
✎ ...	Conrad Champignon			Gemüsestraße 3 / ...	
✎ ...	Daniel Dosenmais			Gemüsestraße 3 / ...	

Corporate Business Partner: Gemüsehandel ...

Relationships

Relationship: Has the Employee Responsible ▾

Partner: 9 +

Partner ID:

Standard:

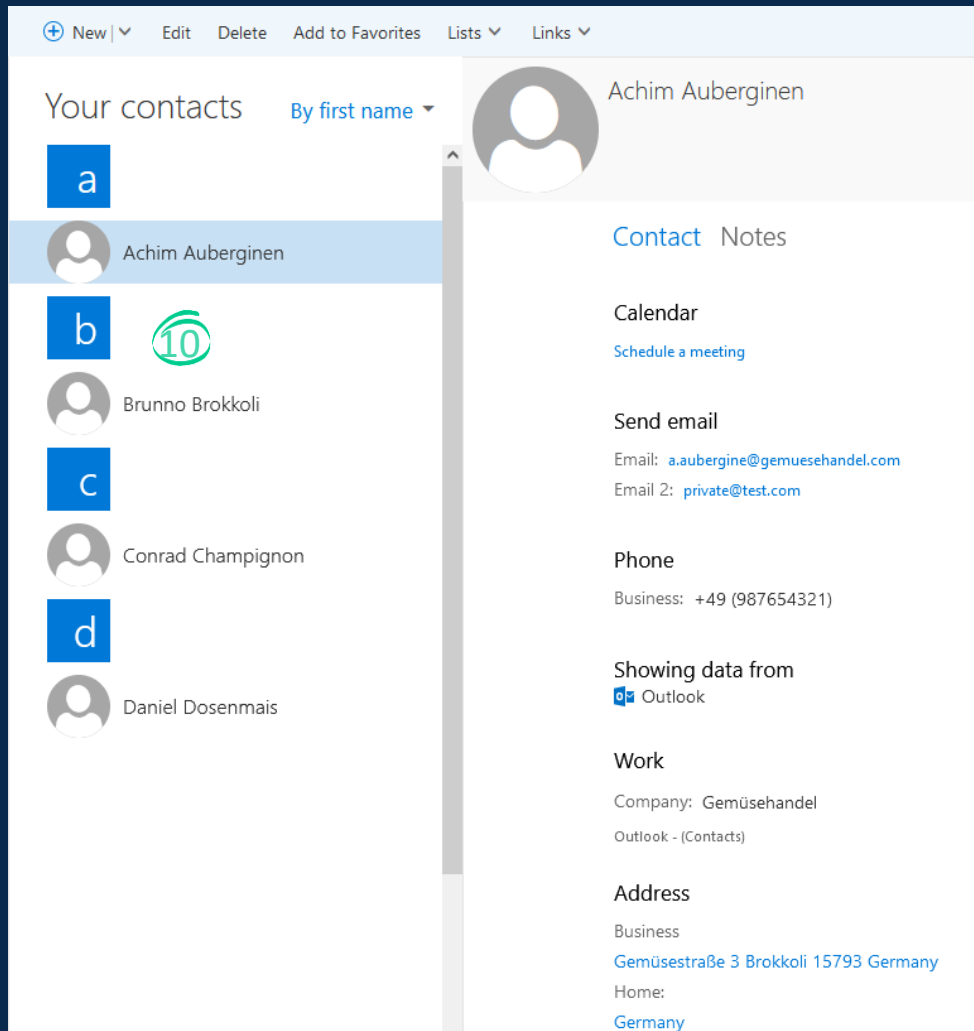
Valid From:

Valid To:

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

Conrad Champignon

Contact Notes

11 Showing data from Outlook

Work

Company: Gemüsehandel

Outlook - (Contacts)

Address

Business

Gemüsestraße 3 Brokk...

Edit contact

Name

First name: Conrad

Last name: Champignon

+ Name

Email

12 Email: c.champignon@gemuesehandel.com

Contact: Conrad Champignon

Create Edit Show Duplicates | ⚙️ ...

Contact Details Roles Notes Attachments Work Addresses Private Addresses Inactive P > ▾

Work Data

Region:

Address V...

Account: Gemüsehandel

Account ID: 1214631

Valid From... 01.01.0001 31.12.9999

Function:

Department:

Communication Data

Phone:

Mobile:

13 Fax:

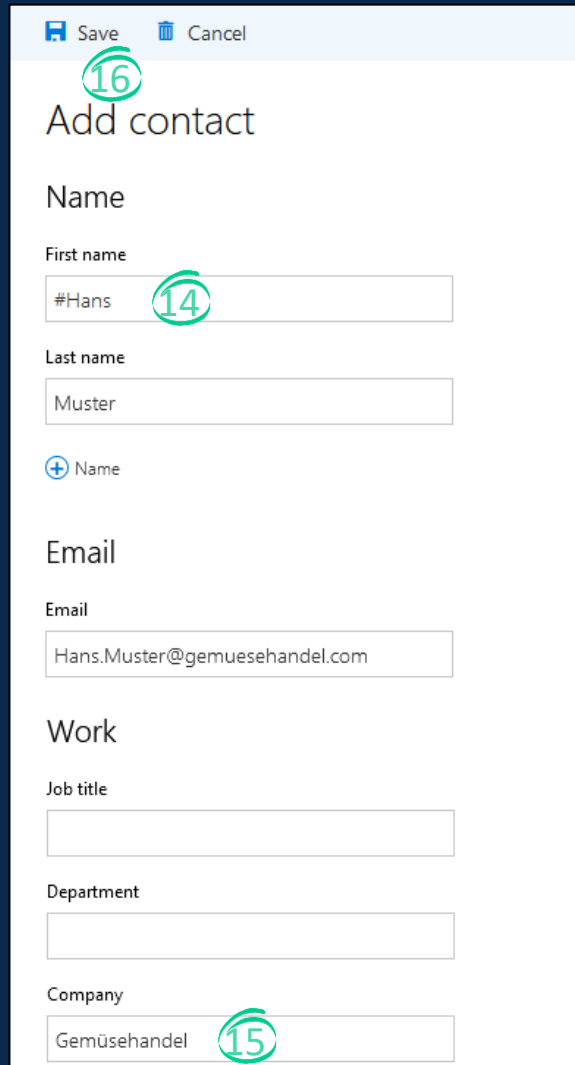
E-Mail: c.champignon@gemuesehandel.com

Communic...

- 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 S/4HANA® based on Outlook contacts



Save Cancel

16 Add contact

Name

First name

#Hans 14

Last name

Muster

+ Name

Email

Email

Hans.Muster@gemuesehandel.com

Work

Job title

Department

Company

Gemüsehandel 15

- 14 There are two possibilities to create a contact from Outlook to CRM: Assigning a category to the contact person or adding a customized sync prefix to the beginning of the contact's name.
- 15 The company name could be the exact name of the account in CRM or the CRM ID of the account. Via this a relation between the account and the newly created CRM contact is created.
- 16 After clicking on save, the contact gets created in CRM. The sync prefix is hereby removed.