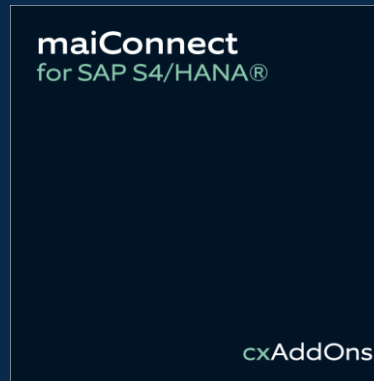


cxAddOns

Global AddOn specialists for Enterprise Software



maiConnect for S/4HANA® User Guides

Appointment synchronization

Appointment synchronization



Synchronization overview from Outlook to CRM

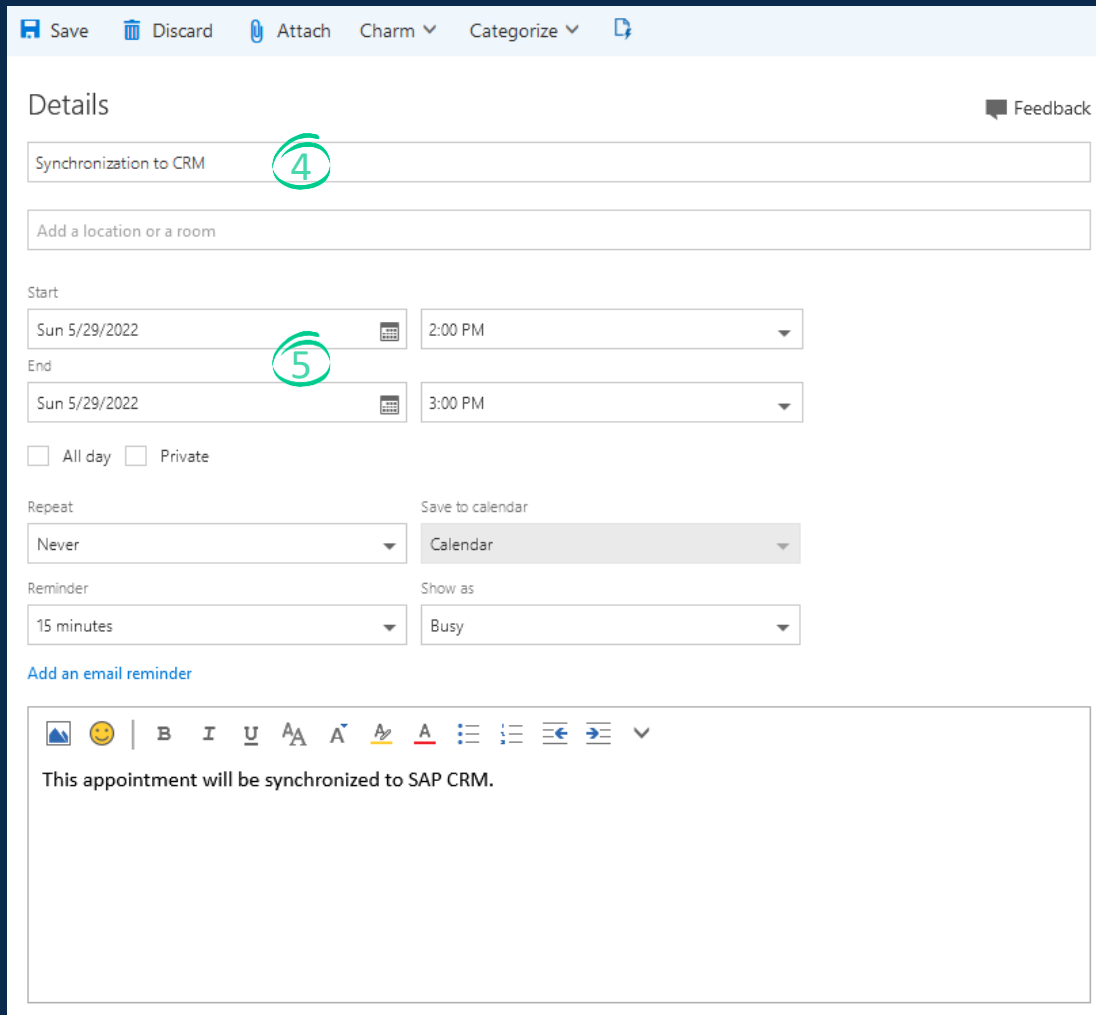
- i** There are different ways to synchronize appointments from Outlook to S/4HANA®. What you can use, depends on your company's customizing settings.

 - 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 field 'Sun 5/29/2022' and a time field '2:00 PM', both circled with a green '5'. The 'End' section has a date field 'Sun 5/29/2022' and a time field '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.

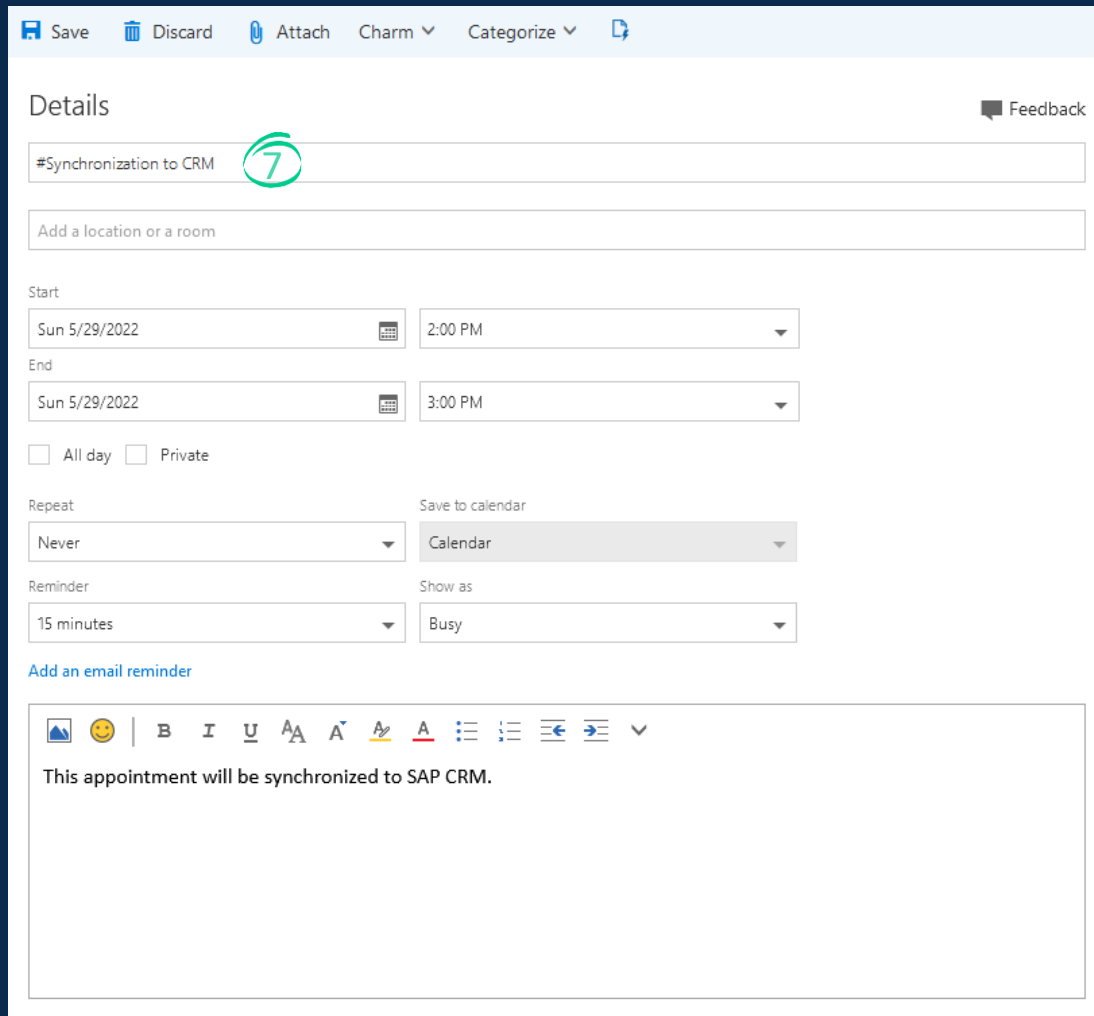
The category can be a

- 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 a '7' icon)
- 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

Appointment: Synchronization to CRM

New Edit Delete Copy

Appointment Details Attendees Notes Attachments Transaction History **8** Change History Scheduled Action > v

General Data

Description: Synchronization to CRM

Location:

Start Date/Time: 29.05.2022 14:00

End Date/Time: 29.05.2022 15:00

All Day:

Importance: Medium

Status: Open

Category: Date

Activity ID: 13552

References

Account:

Contact:

Employee Responsible: ██████████

Reference:

Item:

Reference Description:

Private:

> Attendees

Notes

Search New [grid] [calendar] [gear]

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

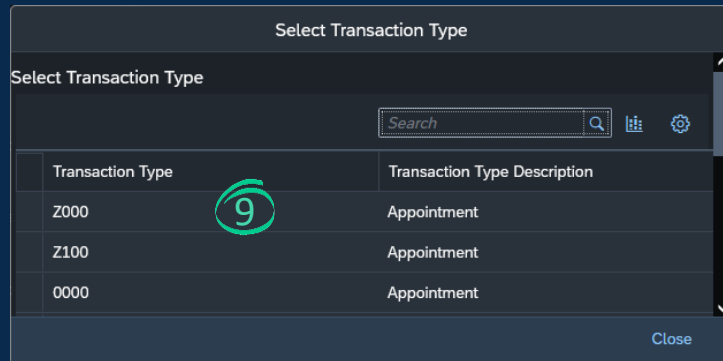
i This screenshot shows how the appointment is synchronized from Outlook to CRM.

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

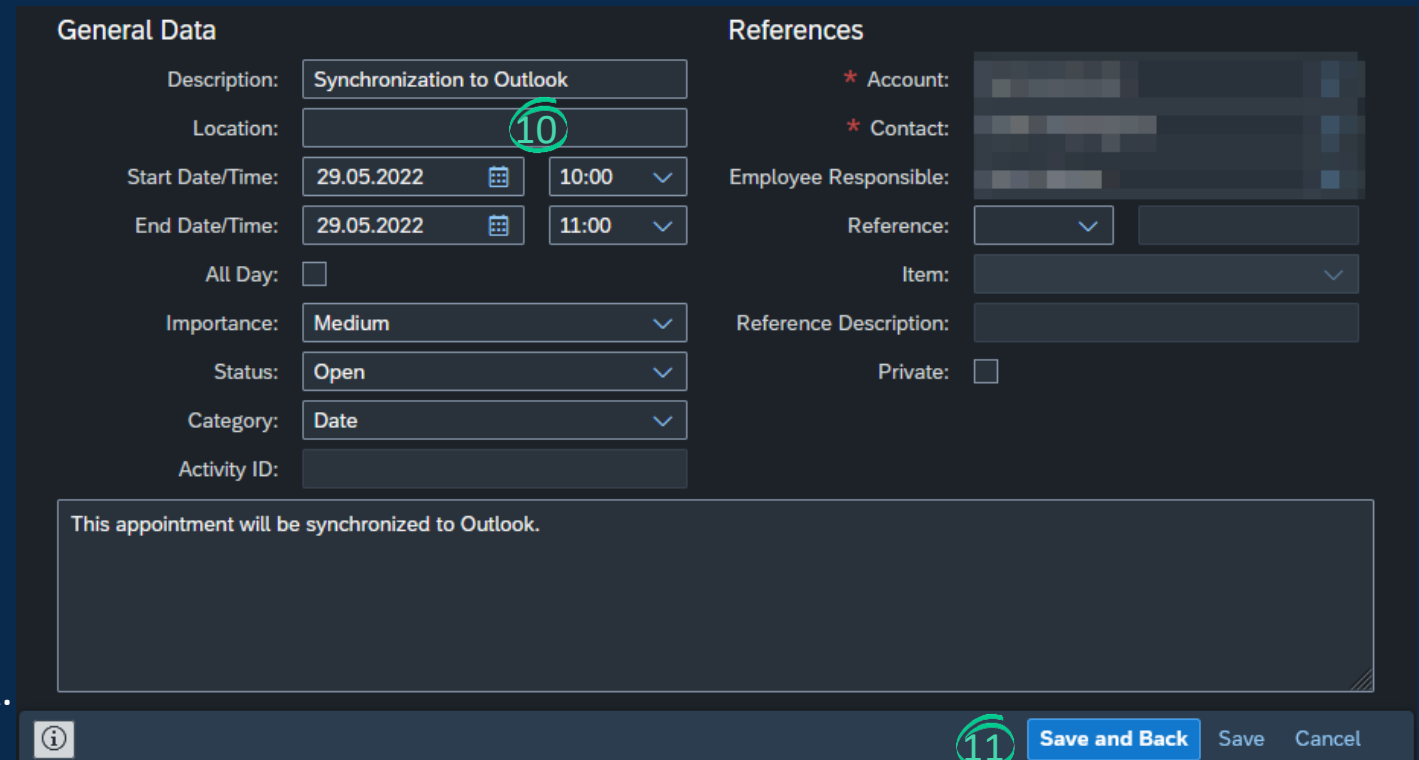
Synchronization from CRM to Outlook



The screenshot shows a dialog box titled "Select Transaction Type". It contains a search bar and a table with the following data:

Transaction Type	Transaction Type Description
Z000	Appointment
Z100	Appointment
0000	Appointment

A green circle with the number 9 is drawn around the first row (Z000, Appointment). A "Close" button is located at the bottom right of the dialog.



The screenshot shows a form for creating an appointment. It is divided into two main sections: "General Data" and "References".

General Data:

- Description: Synchronization to Outlook
- Location: (empty field, circled with 10)
- Start Date/Time: 29.05.2022, 10:00
- End Date/Time: 29.05.2022, 11:00
- All Day:
- Importance: Medium
- Status: Open
- Category: Date
- Activity ID: (empty field)

References:

- * Account: (blurred)
- * Contact: (blurred)
- Employee Responsible: (blurred)
- Reference: (dropdown menu)
- Item: (dropdown menu)
- Reference Description: (empty field)
- Private:

At the bottom of the form, there is a message: "This appointment will be synchronized to Outlook." Below this message is a bar with an information icon, a "Save and Back" button (circled with 11), and "Save" and "Cancel" buttons.

- 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.