



maiConnect for S/4HANA® User Guides

Appointment Synchronization

Appointment synchronization

Synchronization overview from Outlook to CRM



- ⓘ 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.

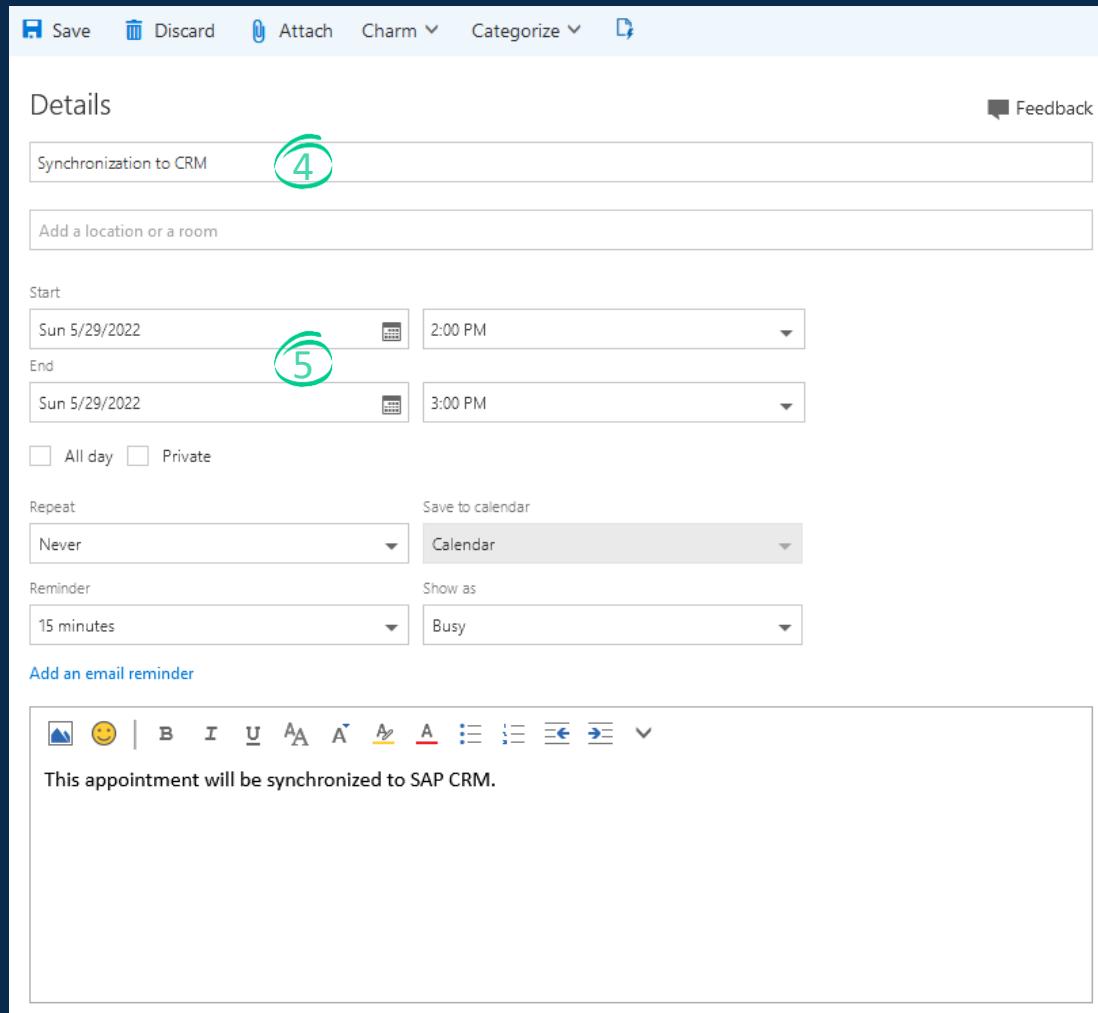
③ Synchronizing by setting a sync prefix.

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



④

Synchronization without restrictions.

This means, that no category or sync prefix is required.

⑤

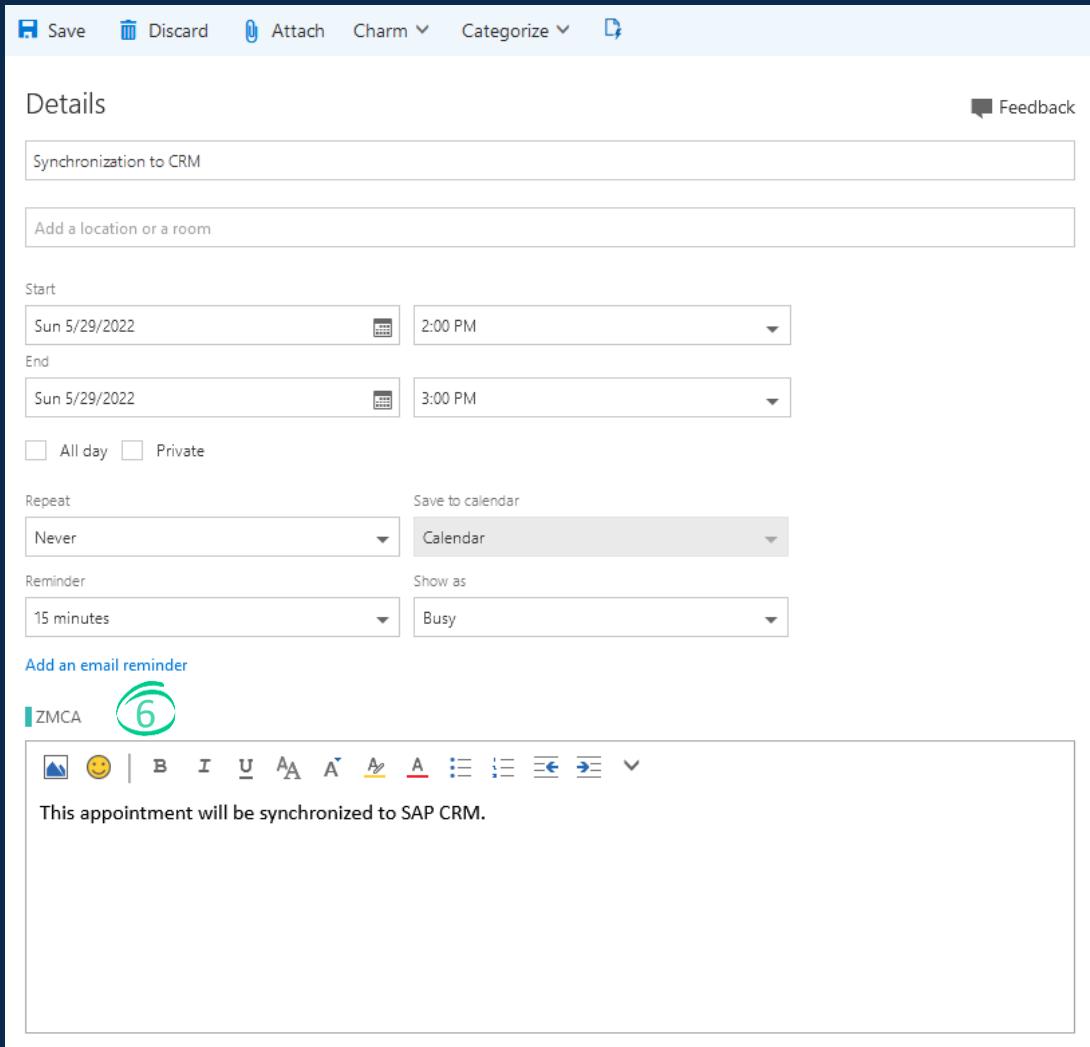
You can fill the details of the appointment.

- 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 

Feedback

Details

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 

This appointment will be synchronized to SAP CRM.

⑥

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

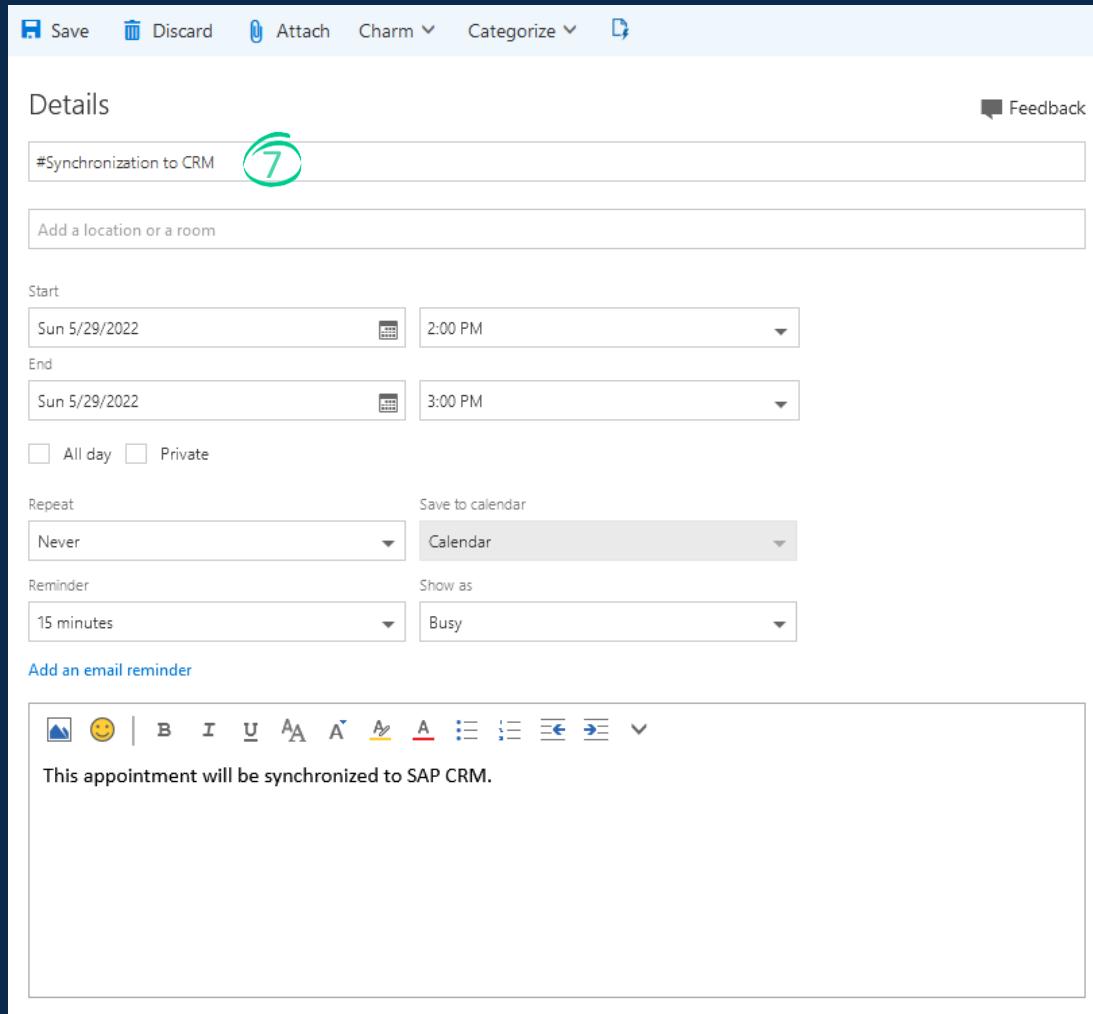
The category can be a

- 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 title of this appointment starts with a preconfigured prefix.

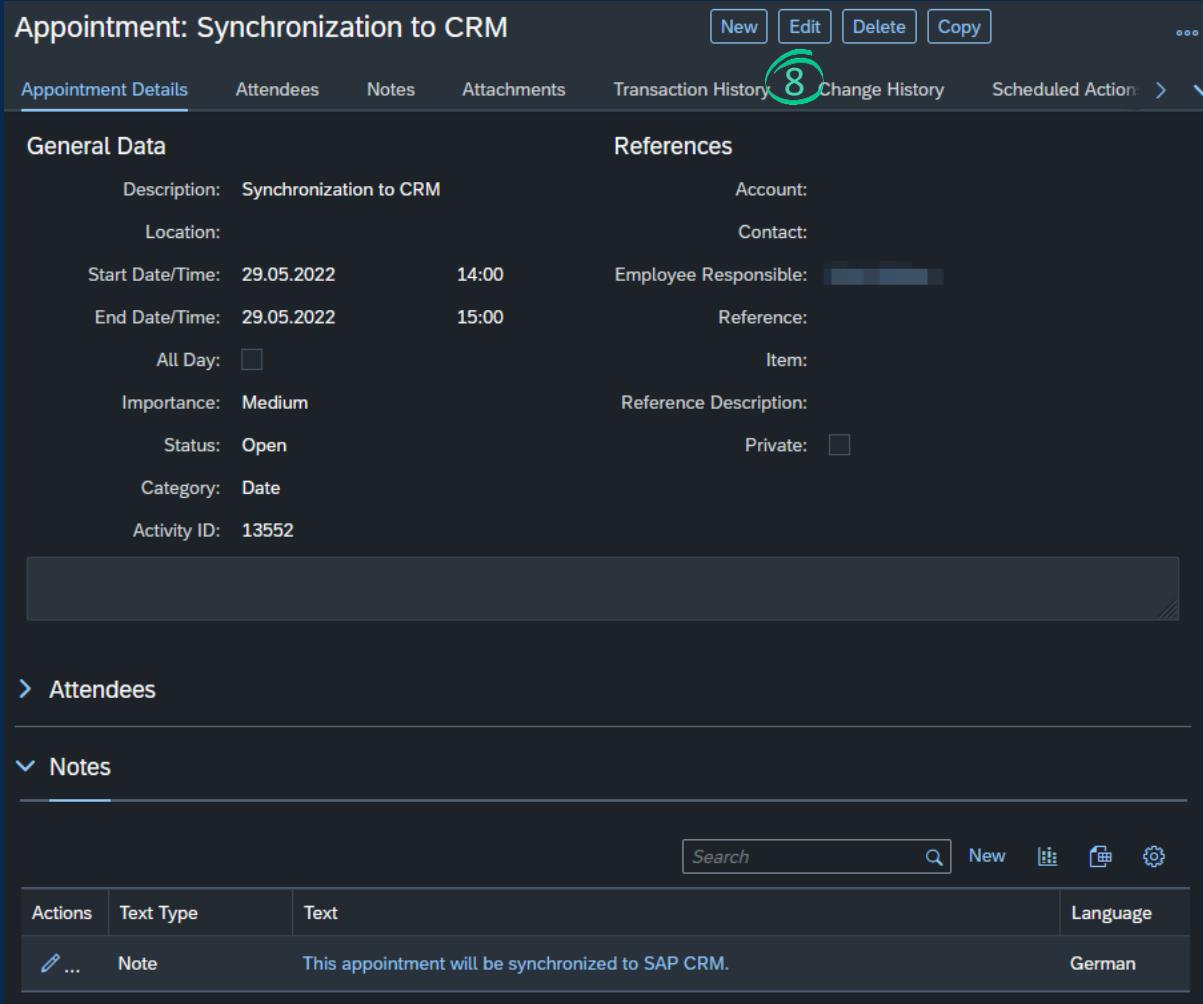
The prefix can be anything, but it is recommended to use the hashtag.

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



The screenshot shows the SAP CRM interface for managing an appointment. The title bar reads "Appointment: Synchronization to CRM". The top navigation bar includes "New", "Edit", "Delete", "Copy", and a "..." button. Below the title are tabs for "Appointment Details", "Attendees", "Notes", "Attachments", "Transaction History" (with a circled "8" indicating changes), "Change History", and "Scheduled Action". The "Appointment Details" tab is selected, showing the following fields:

Description:	Synchronization to CRM	
Location:		
Start Date/Time:	29.05.2022	14:00
End Date/Time:	29.05.2022	15:00
All Day:	<input type="checkbox"/>	
Importance:	Medium	
Status:	Open	
Category:	Date	
Activity ID:	13552	

On the right side, there is a "References" section with fields for "Account", "Contact", "Employee Responsible" (with a redacted value), "Reference", "Item", and "Reference Description". Below the main form, there are sections for "Attendees" and "Notes". The "Notes" section is expanded, showing a table with one row:

Actions	Text Type	Text	Language
<input type="button" value="..."/>	Note	This appointment will be synchronized to SAP CRM.	German

At the bottom of the notes section are buttons for "Search", "New", and "Language".

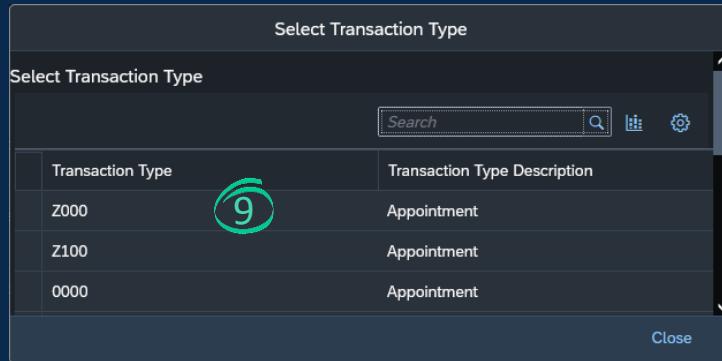
 This screenshot shows how the appointment is synchronized from Outlook to CRM.

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

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

Appointment synchronization

Synchronization from CRM to Outlook



General Data

Description:	Synchronization to Outlook
Location:	10
Start Date/Time:	29.05.2022 10:00
End Date/Time:	29.05.2022 11:00
All Day:	<input type="checkbox"/>
Importance:	Medium
Status:	Open
Category:	Date
Activity ID:	

References

Account:	
Contact:	
Employee Responsible:	
Reference:	
Item:	
Reference Description:	
Private:	<input type="checkbox"/>

This appointment will be synchronized to Outlook.

Save and Back Save Cancel

- 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.
- ⓘ The appointment can be modified again here or in Outlook, so that these changes are synchronized to the other system.