

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 'Details' pane for an appointment. At the top, there's a toolbar with 'Save', 'Discard', 'Attach', 'Charm', 'Categorize', and a share icon. Below this, the 'Details' section has a 'Feedback' link. The first field is 'Synchronization to CRM', which is highlighted with a green circle and the number 4. Below it is a field for 'Add a location or a room'. The 'Start' section shows 'Sun 5/29/2022' and '2:00 PM', with a green circle and the number 5 next to the date. The 'End' section shows 'Sun 5/29/2022' and '3:00 PM'. There are checkboxes for 'All day' and 'Private'. The 'Repeat' section has a 'Never' dropdown. The 'Save to calendar' section has a 'Calendar' dropdown. The 'Reminder' section has a '15 minutes' dropdown. The 'Show as' section has a 'Busy' dropdown. At the bottom, there's a link 'Add an email reminder' and a rich text editor with a toolbar. The text in the editor says '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.

A screenshot of a web-based appointment creation form. At the top, there is a toolbar with icons for 'Save', 'Discard', 'Attach', 'Charm', 'Categorize', and a share icon. Below this is a 'Details' section with a 'Feedback' button. The main title field contains the text '#Synchronization to CRM' and is highlighted with a green circle containing the number 7. Below the title is a field for 'Add a location or a room'. The 'Start' and 'End' time fields are set to 'Sun 5/29/2022' at '2:00 PM' and '3:00 PM' respectively. There are checkboxes for 'All day' and 'Private'. The 'Repeat' dropdown is set to 'Never', and the 'Save to calendar' dropdown is set to 'Calendar'. The 'Reminder' dropdown is set to '15 minutes', and the 'Show as' dropdown is 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.'

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

>

▼

General Data

References

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

Account:

Contact:

Employee Responsible:

Reference:

Item:

Reference Description:

Private: ☐

> Attendees

▼ Notes

Search

Q

New

Actions	Text Type	Text	Language
<div>✎ ...</div>	Note	This appointment will be synchronized to SAP CRM.	German

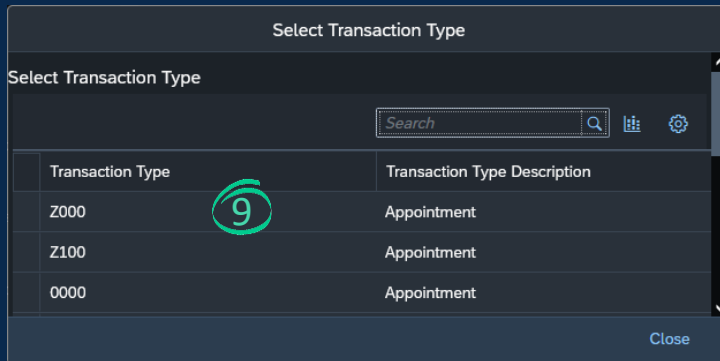
i This screenshot shows how the appointment is synchronized from Outlook to CRM.

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

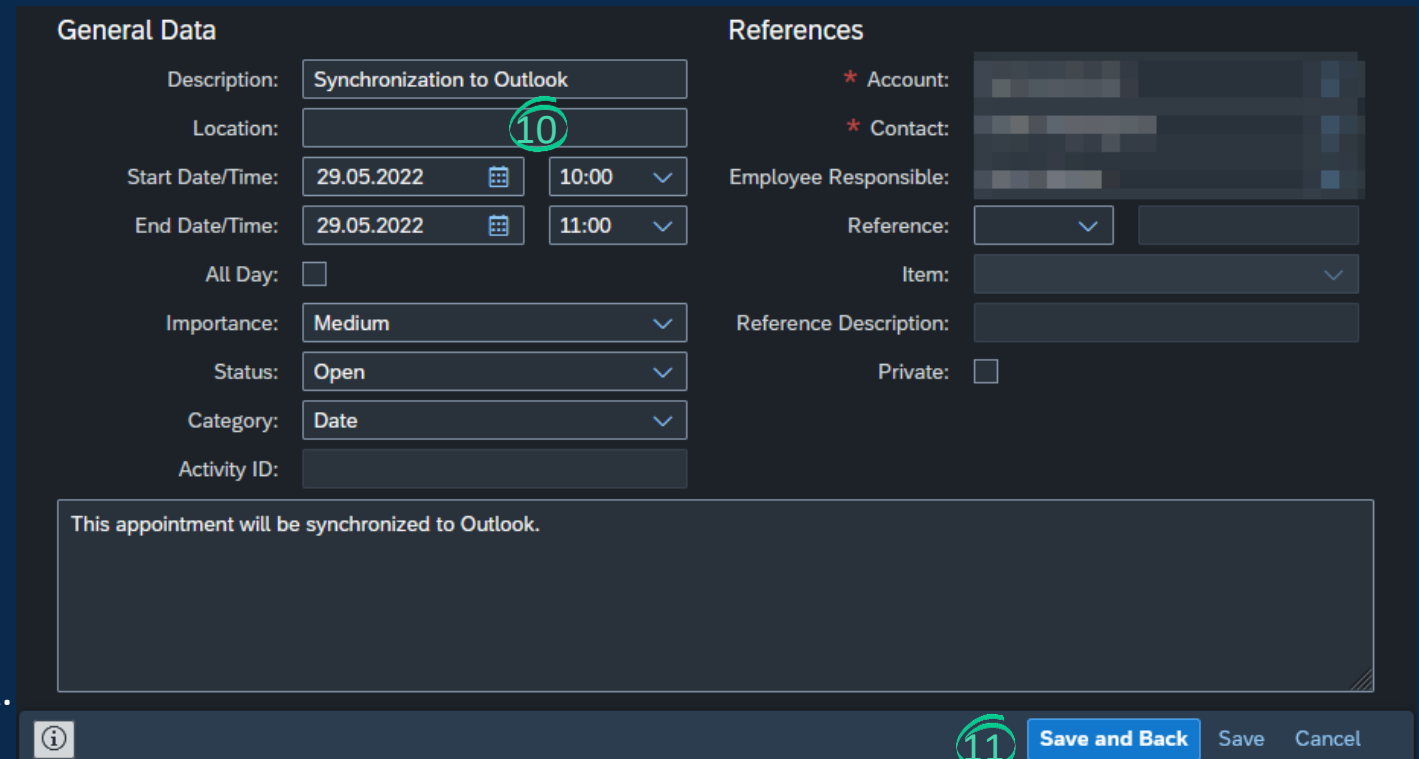
8 The appointment can also be edited here, so that these changes are then synchronized to Outlook.

Appointment synchronization

Synchronization from CRM to Outlook



Transaction Type	Transaction Type Description
Z000	Appointment
Z100	Appointment
0000	Appointment



General Data

Description: Synchronization to Outlook

Location:

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:

References

* Account:

* Contact:

Employee Responsible:

Reference:

Item:

Reference Description:

Private: ☐

This appointment will be synchronized to Outlook.

11 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.
- i The appointment can be modified again here or in Outlook, so that these changes are synchronized to the other system.