cxAddOns

Global AddOn specialists for Enterprise Software

nagarro

maiConnect for S/4HANA®

User Guides

Appointment Synchronization

Appointment synchronization

Synchronization overview from Outlook to CRM

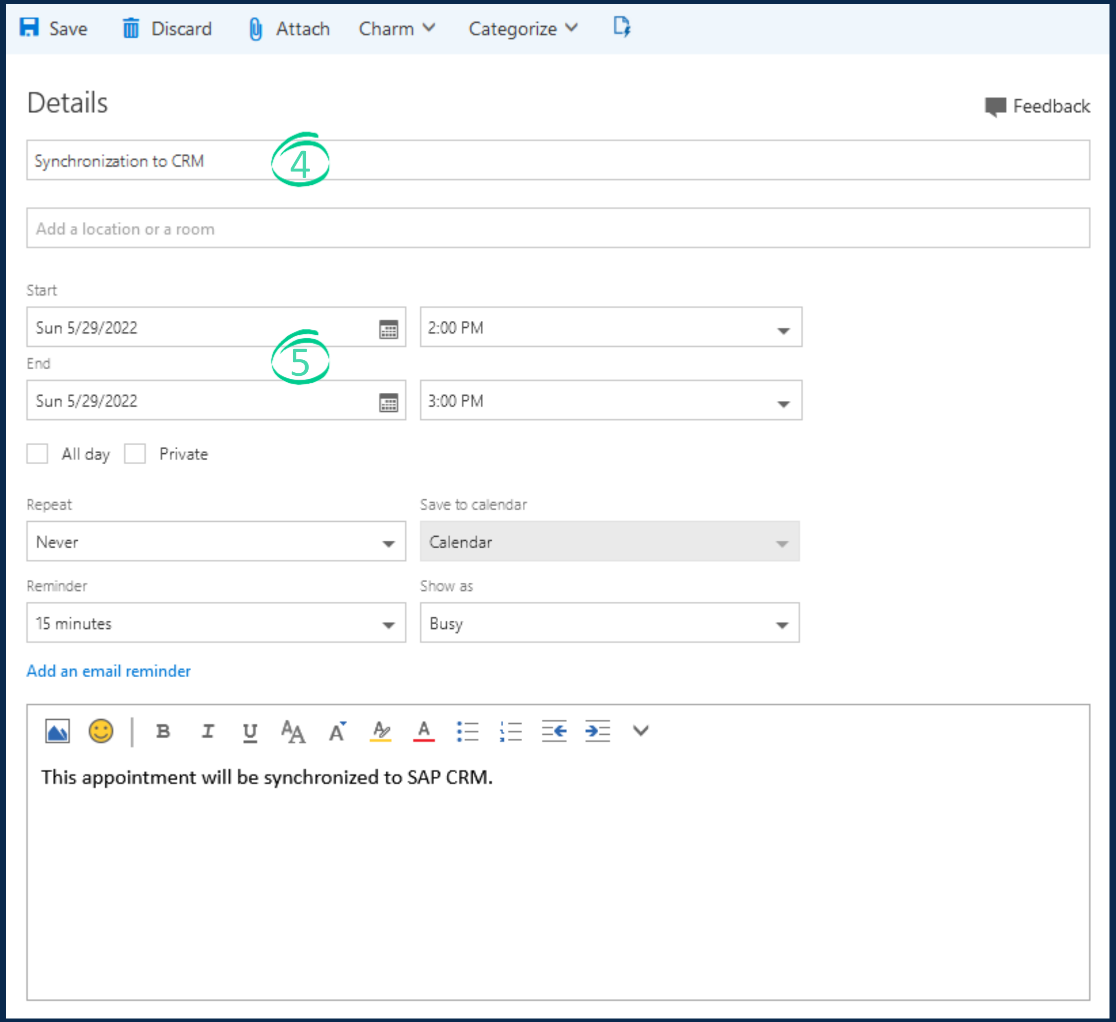
There are different ways to synchronize appointments from Outlook to S/4HANA®.
What you can use, depends on your company's customizing settings.

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.

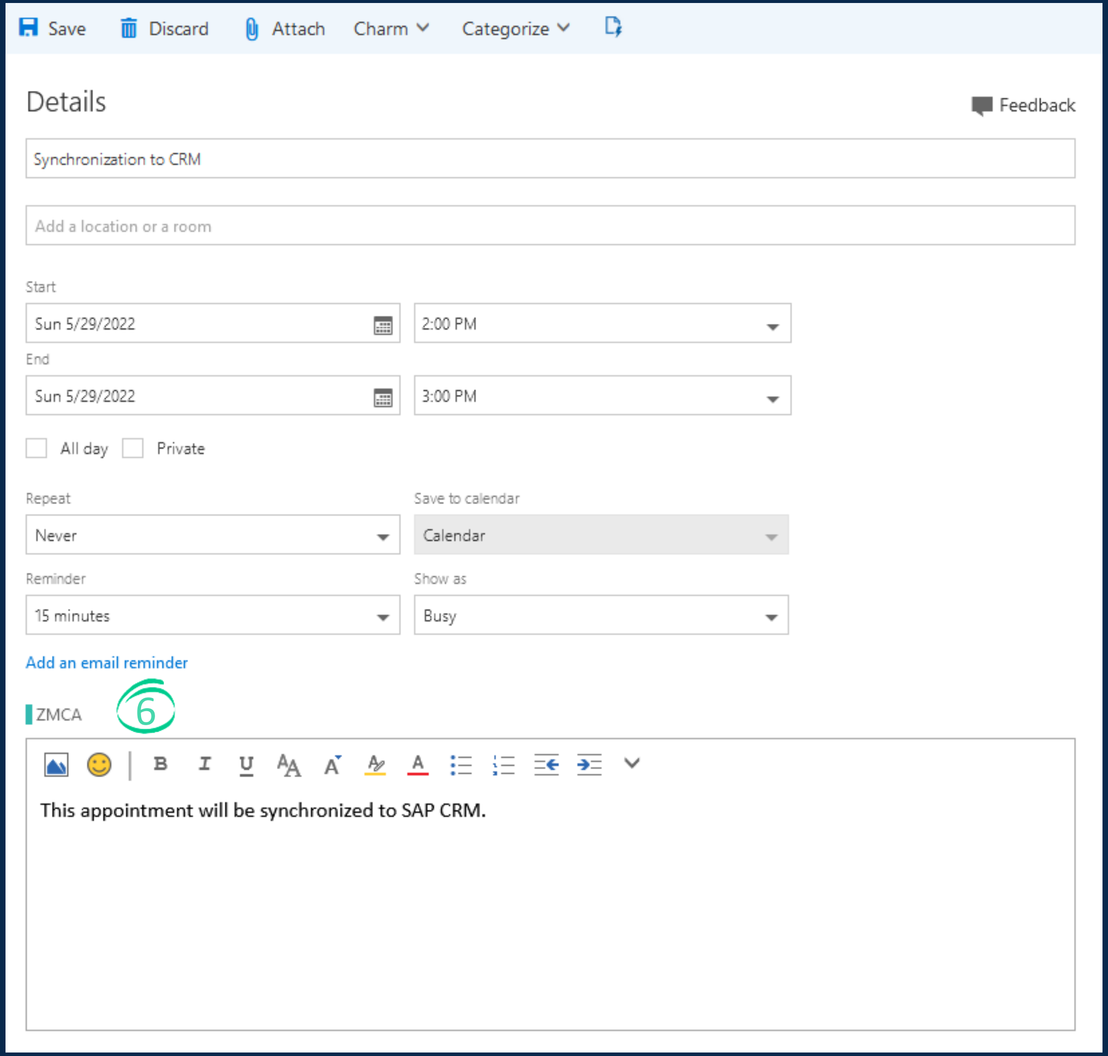
5 You can fill the details of the appointment.

- 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



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

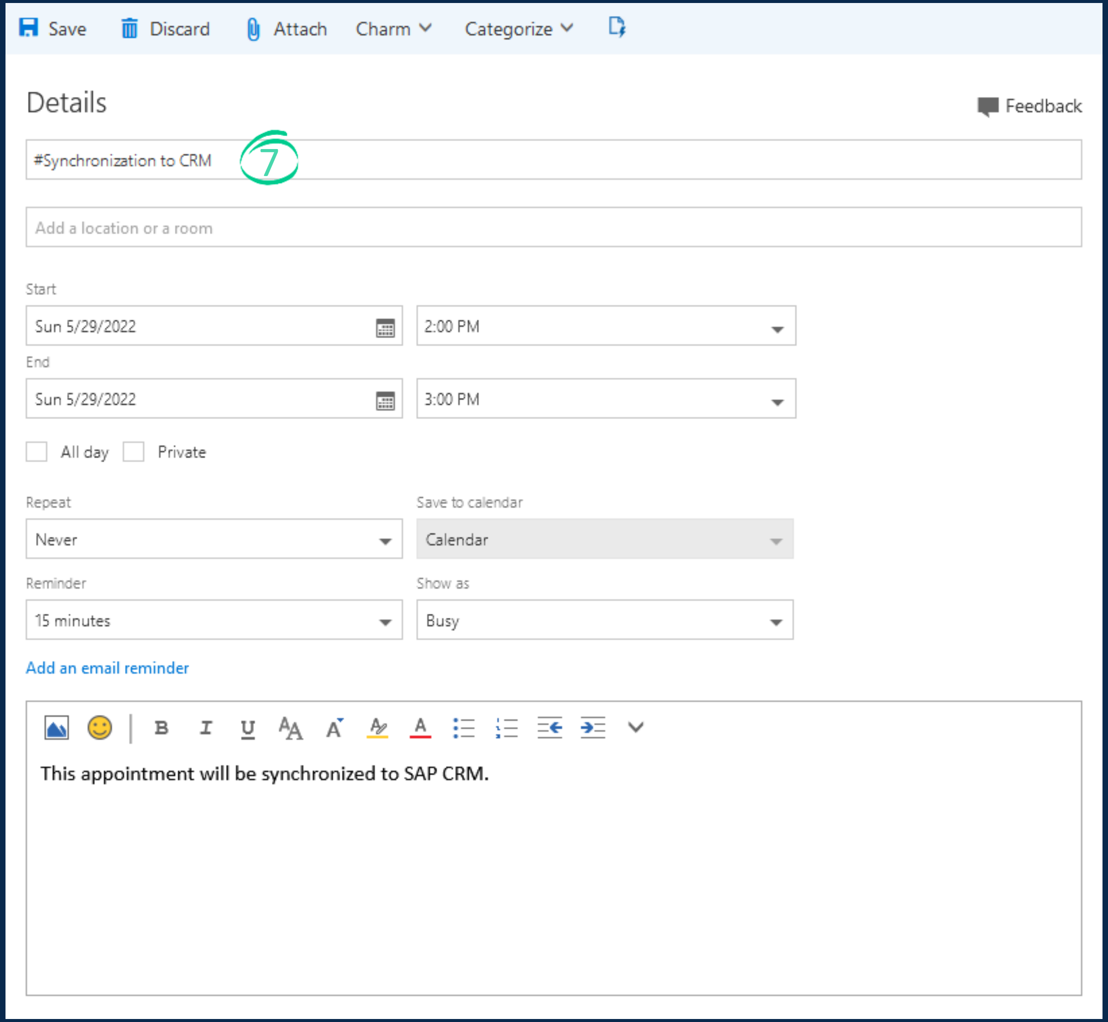
The category can be a

- 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.



7 The title of this appointment starts with a preconfigured prefix.

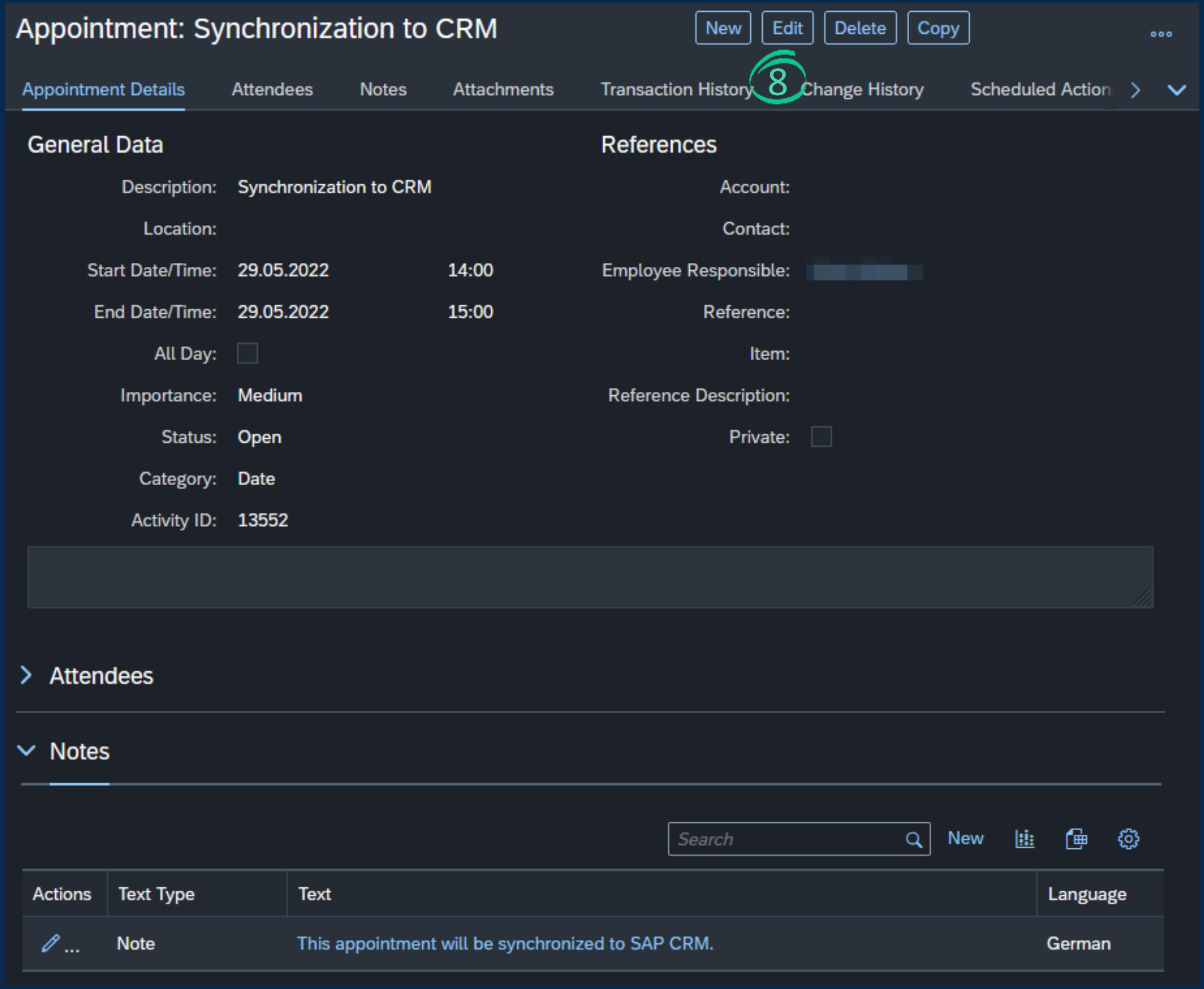
The prefix can be anything, but it is recommended to use the hashtag.

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



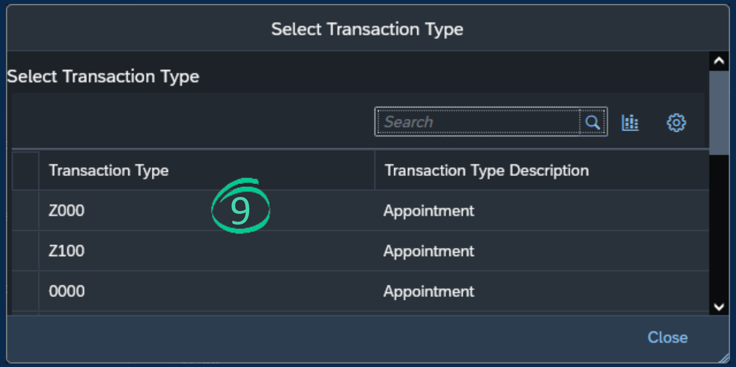
This screenshot shows how the appointment is synchronized from Outlook to CRM.

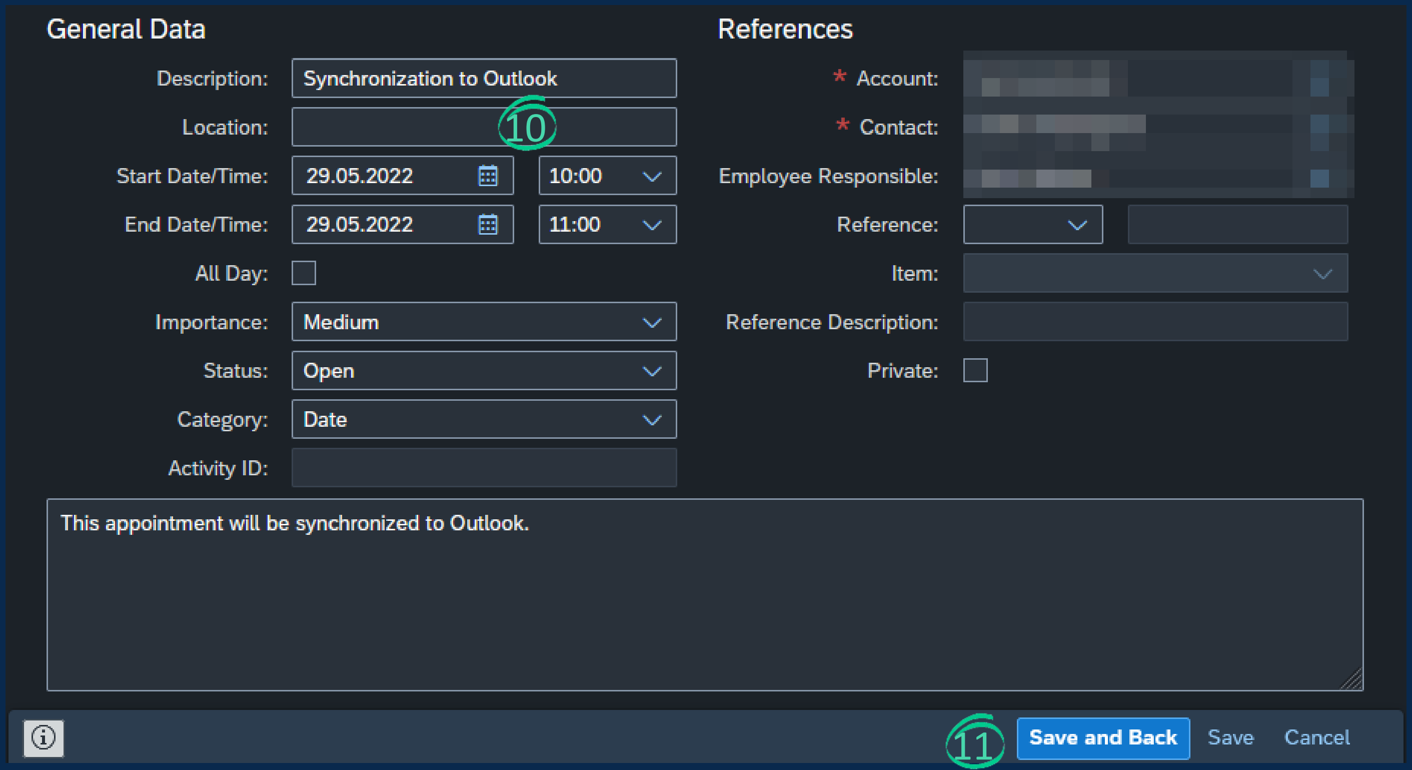
It can be modified in Outlook, so that these changes are again synchronized to CRM.

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

Appointment synchronization

Synchronization from CRM to Outlook





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.