

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

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:

Partner ID:

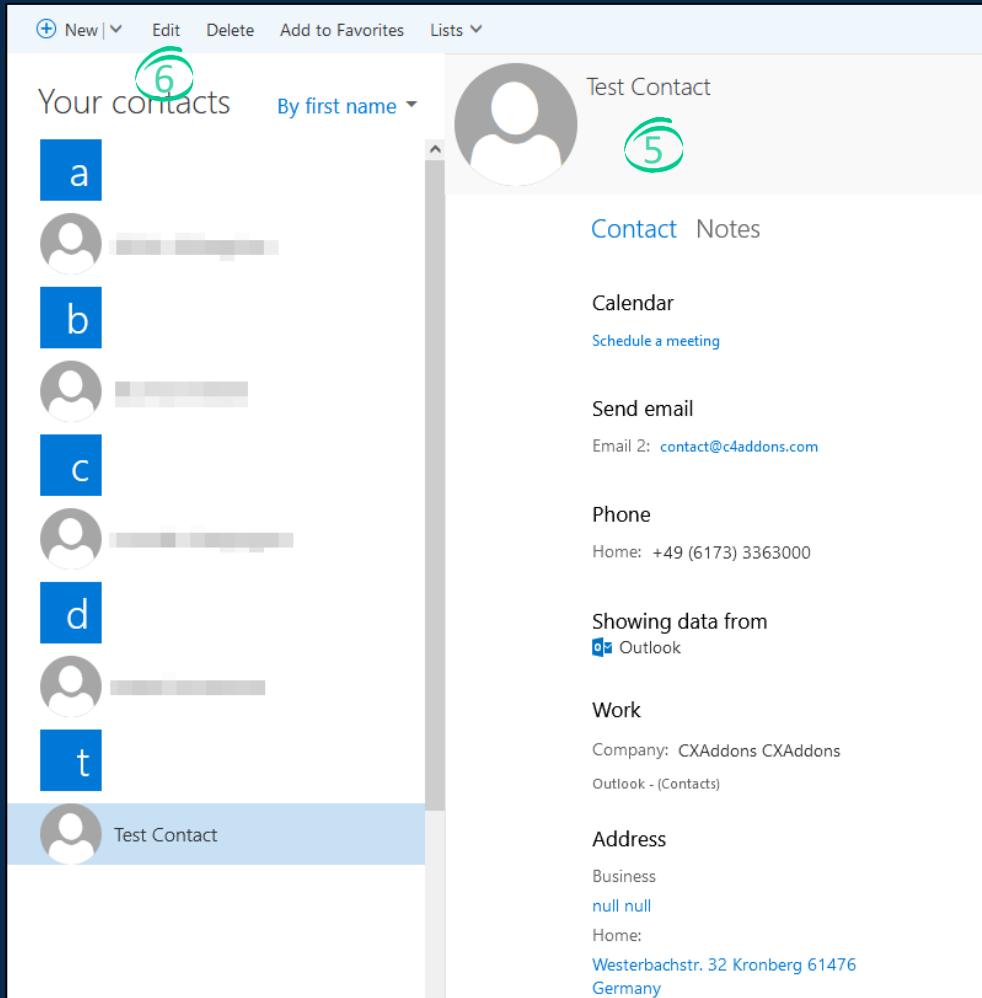
Standard:

Valid From:

Valid To:

Contact synchronization

Relation to a contact person



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

CreateEdit

<Account DetailsRolesContactsAddressesAddress TypesBusiness HoursInteraction HistoryRelationships>

Account Details

General Data

Grouping: Internal Numbering for standard use

ID: 1214631

Name 1: Gemüsehandel

Name 2:

Search Term 1:

Classification:

Employee Responsible

Main Address

Street: Gemüsestraße 3

Postal Code: 15793 Brokkoli

Country/Reg.: DE Germany

Region:

National Versi... ☐

Transport Zone:

Communication Data

Edit

Contacts

Search Create

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

- 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.

Corporate Business Partner: Gemüsehandel ...

Relationships

Relationship: Has the Employee Responsible

Partner:

Partner ID:

Standard: ☐

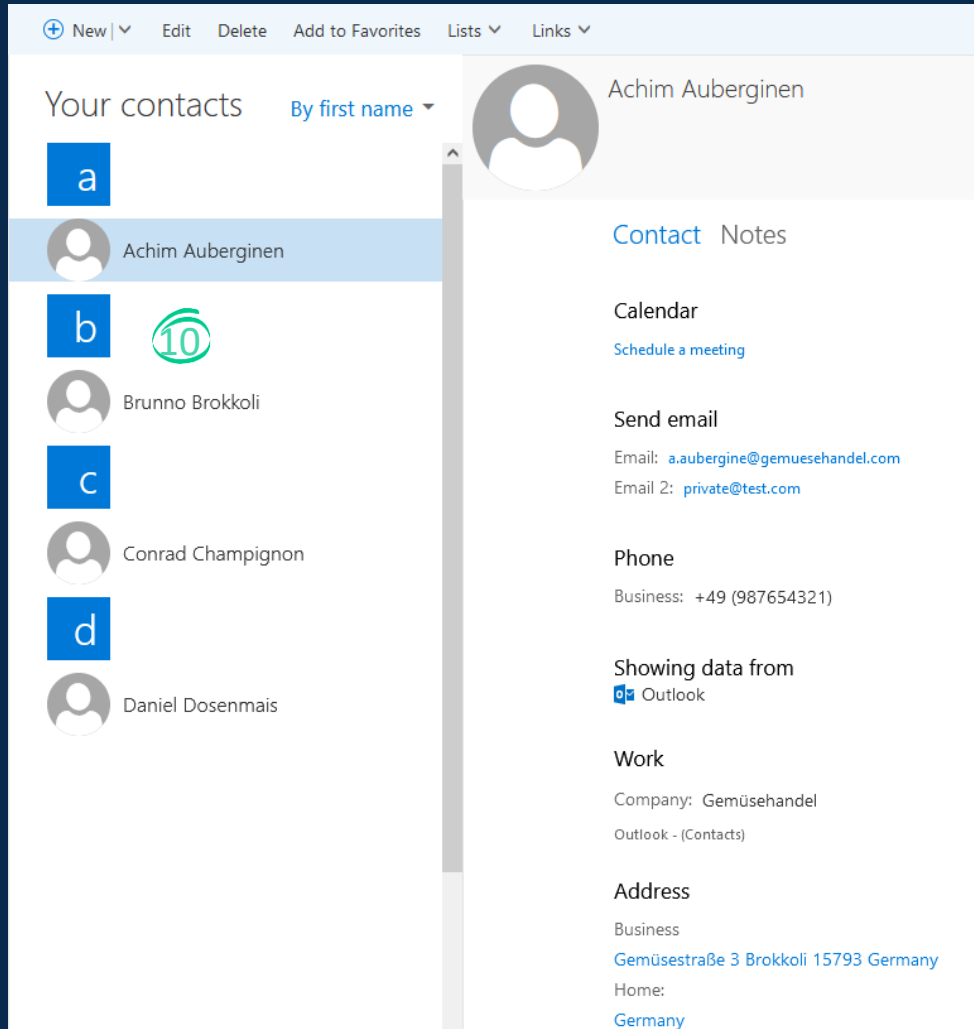
Valid From:

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 | Settings ...

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

Work Data

Account: Gemüsehandel

Account ID: 1214631

Valid From... 01.01.0001 31.12.9999

Function:

Department:

Region:

Address V... ☐

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.