



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 Pri > Edit

General Data

ID: 1214691 Employee:

Title: Mr. Employee ID:

Academic ...

First Name: Test

Last Name: Contact 3

Date of Bir...

Language: DE German

Archiving Flag:

Central Block:

Not released:

Main Address

Street: Westerbachstr. 32

Postal Code: 61476 Kronberg

Country/R... DE Germany

Region:

Address V...

Work Data

Account: CXAddons CXAddons

Account ID: 1210423 Phone: +49 (6173) 3363000

Mobile:

Valid From... 01.01.0001 31.12.9999 Fax:

Function: 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:

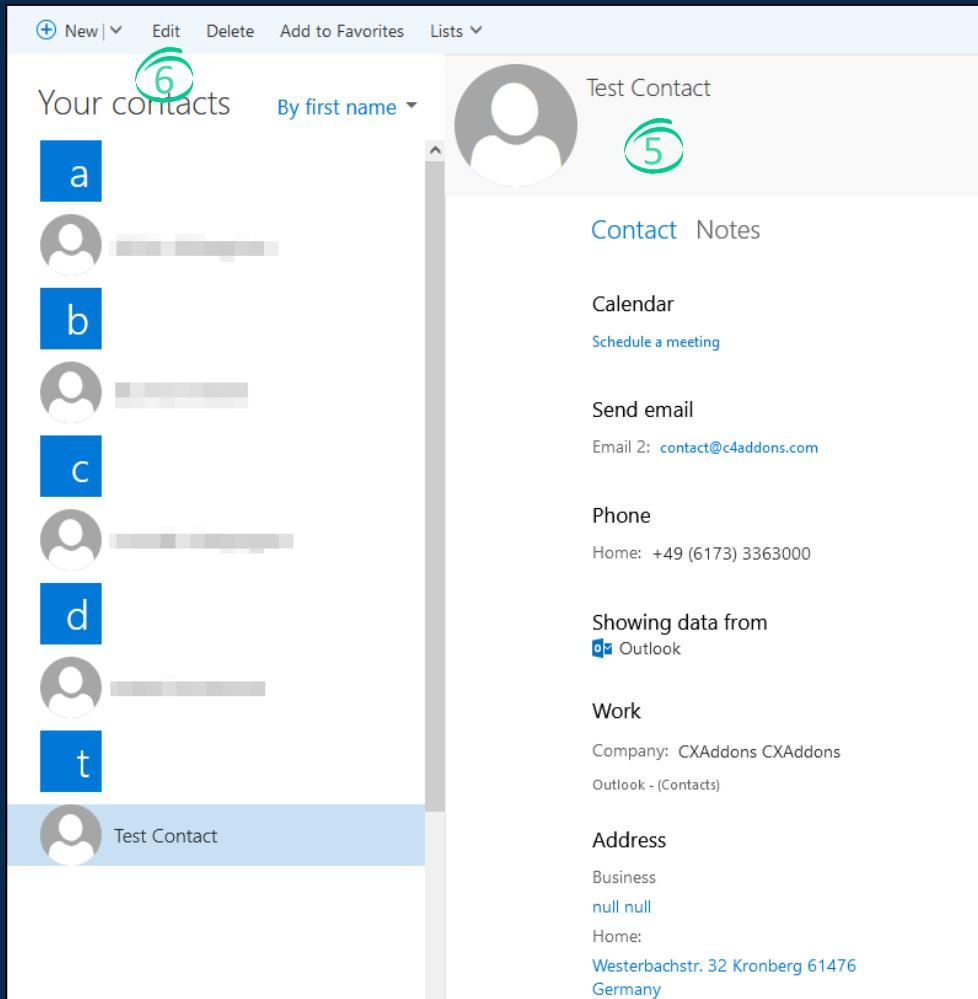
Standard:

Valid From:

Valid To:

Contact synchronization

Relation to a contact person



The screenshot shows the Microsoft Outlook contacts list. At the top, there are buttons for 'New', 'Edit', 'Delete', 'Add to Favorites', and 'Lists'. Below this, the 'Your contacts' section is displayed, showing a list of contacts with initials (a, b, c, d, t) and blurred names. A contact named 'Test Contact' is selected, highlighted with a blue background. The contact details for 'Test Contact' are shown on the right side of the screen. The contact has a profile picture with a green circle containing the number '5'. The contact information includes:

- Contact** Notes
- Calendar** Schedule a meeting
- Send email** Email 2: contact@c4addons.com
- Phone** Home: +49 (6173) 3363000
- Showing data from** Outlook
- Work** Company: CXAddons CXAddons
- Address** Business null null Home: Westerbachstr. 32 Kronberg 61476 Germany

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

The screenshot shows a CRM interface for a 'Corporate Business Partner' account named 'Gemüsehandel 15793 Brokkoli'. The 'Account Details' tab is selected, displaying general data like ID (1214631), name (Gemüsehandel), and address (Gemüsestraße 15793, Brokkoli, DE, Germany). The 'Contacts' tab is also visible, showing four contacts: Achim Auberginen, Bruno Brokkoli, Conrad Champignon, and Daniel Dosenmais, all associated with the same address. A modal window titled 'Corporate Business Partner: Gemüsehandel ...' is open, showing relationship settings. The 'Relationship' dropdown is set to 'Has the Employee Responsible', and the 'Partner' dropdown is set to '9' (Bruno Brokkoli). The 'Valid From' and 'Valid To' fields are empty.

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

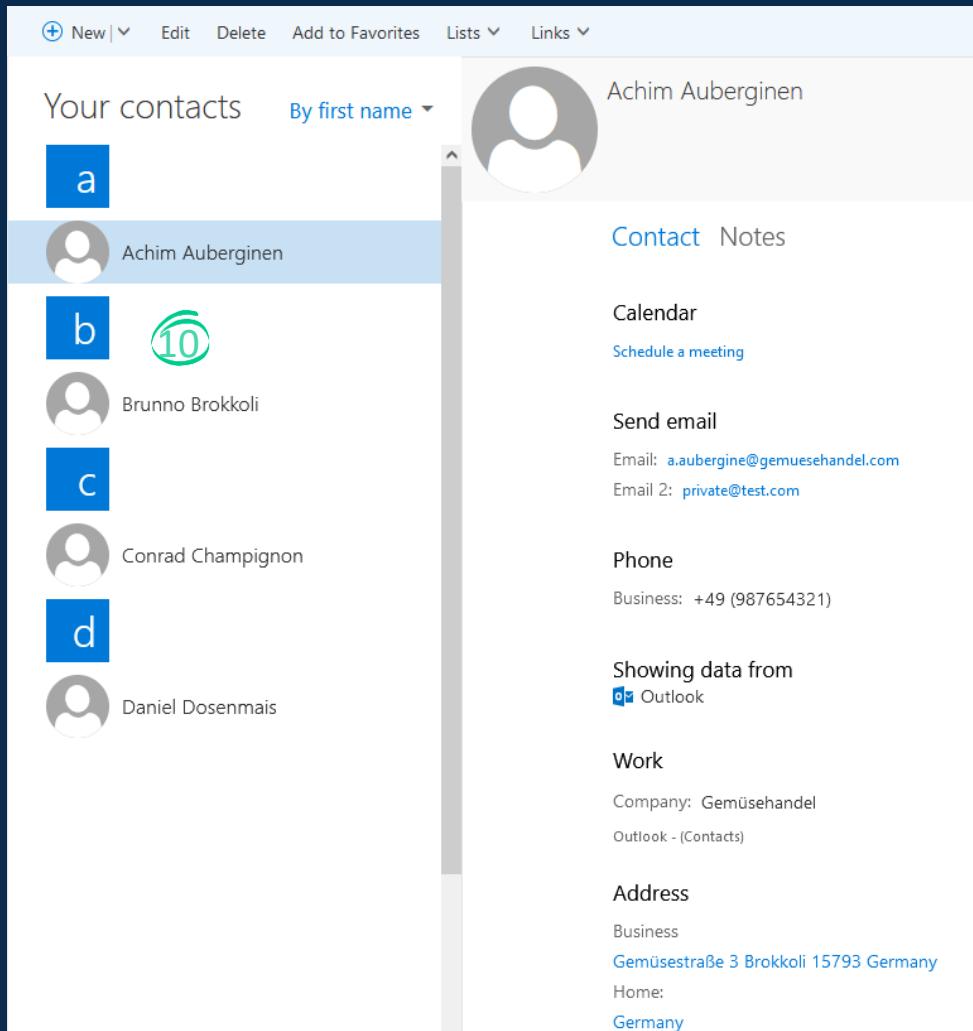
7 These are the details of an account in CRM.

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.

Contact synchronization

Outlook representation of the synchronized contacts



The screenshot shows the Microsoft Outlook interface for managing contacts. The left pane displays a list of contacts: Achim Auberginen (selected, highlighted in blue), Bruno Brokkoli, Conrad Champignon, and Daniel Dosenmais. Each contact has a blue square icon with a letter (a, b, c, d) and a small circular badge with the number 10. The right pane shows the details for Achim Auberginen, including a contact photo, a 'Contact' tab, and a 'Notes' tab. It lists a calendar section with 'Schedule a meeting', an email section with two email addresses, a phone section with a business phone number, and a work section indicating data is from Outlook. The address section shows a business address in Gemüsestraße 3, Brokkoli, 15793 Germany.

New | Edit | Delete | Add to Favorites | Lists | Links

Your contacts By first name

a Achim Auberginen

b 10

Bruno Brokkoli

c

d Conrad Champignon

Daniel Dosenmais

Achim Auberginen

Contact Notes

Calendar

Schedule a meeting

Send email

Email: a.aubergine@gemuesehandel.com
Email 2: private@test.com

Phone

Business: +49 (987654321)

Showing data from

Outlook

Work

Company: Gemüsehandel

Outlook - (Contacts)

Address

Business

[Gemüsestraße 3 Brokkoli 15793 Germany](#)

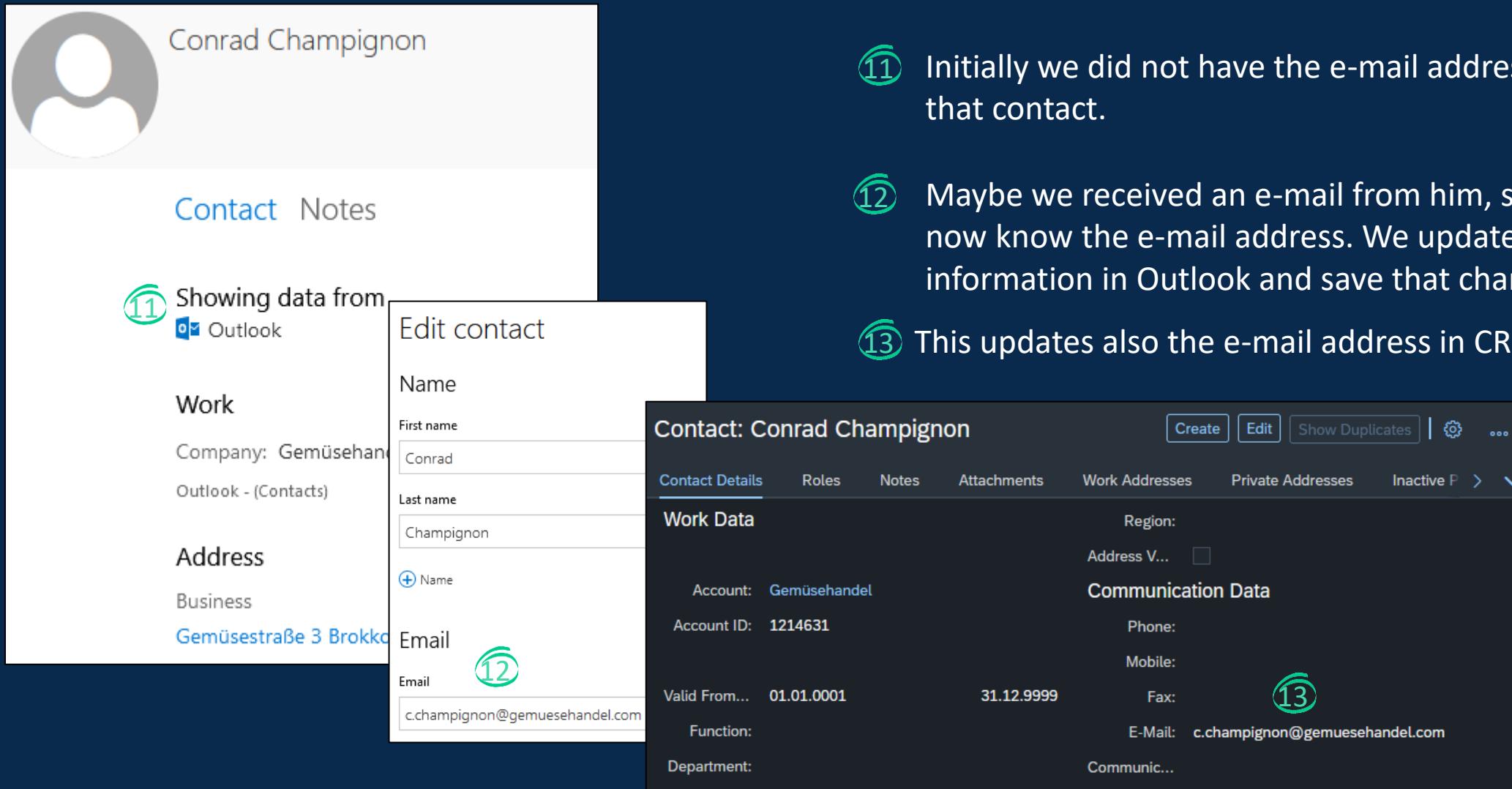
Home:

[Germany](#)

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



The screenshot illustrates the process of updating a contact person in Outlook, involving three main steps:

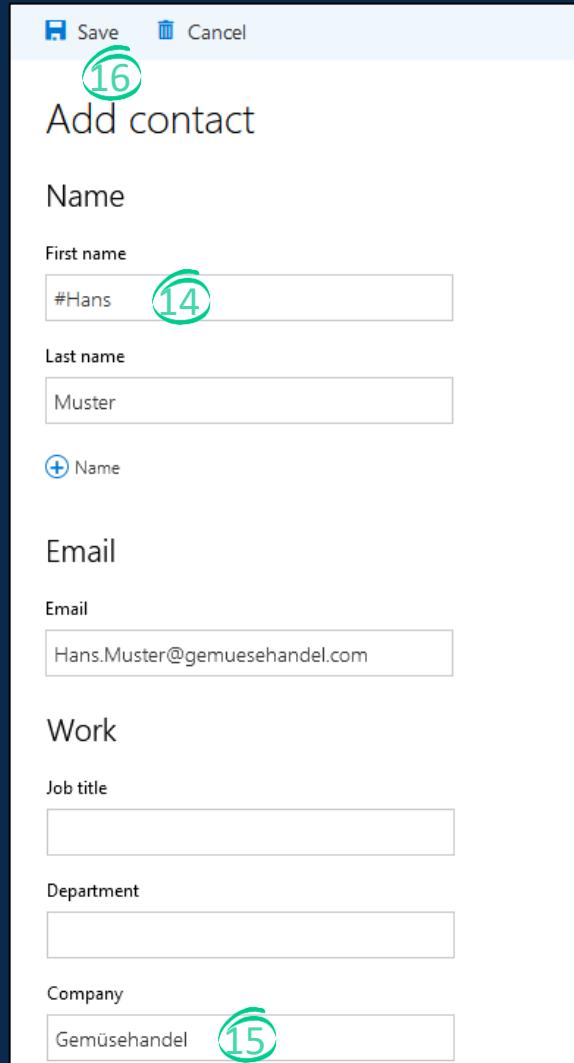
- Step 11:** Initially we did not have the e-mail address of that contact.
- Step 12:** Maybe we received an e-mail from him, so that we now know the e-mail address. We update his contact information in Outlook and save that change.
- Step 13:** This updates also the e-mail address in CRM.

The interface shows the following details:

- Contact Details:** Conrad Champignon
- Work Data:** Account: Gemüsehandel, Account ID: 1214631
- Communication Data:** E-Mail: c.champignon@gemuesehandel.com
- Address:** Gemüsestraße 3 Brokko
- Notes:** Showing data from Outlook

Contact synchronization

Creation of contacts in S/4HANA® based on Outlook contacts



The screenshot shows the 'Add contact' dialog in S/4HANA. At the top are 'Save' and 'Cancel' buttons. The main area has a heading '16 Add contact'. It contains fields for 'Name' (with 'First name' set to '#Hans' and 'Last name' set to 'Muster'), 'Email' (with 'Email' set to 'Hans.Muster@gemuesehandel.com'), and 'Work' (with 'Job title', 'Department', and 'Company' fields empty, and 'Company' set to 'Gemüsehandel'). A circled '14' is visible on the 'First name' field and the 'Company' field.

- 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.