

## Version

This article was created by SAP C4C (1702) Version

## Brief Description

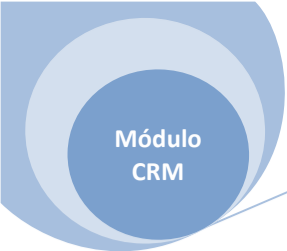
Nowadays the integration of any CRM Environment and E-mail software it crucial. Specially for Sales Team, Sales Rep and son on.

Thinking about it, I created an article of SAP C4C integrated with Microsoft Outlook. Describing step by step, how to configure, and mention the most important functionality of this integration.

I hope you enjoy!!

## Author

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Content

- 1. Customization ..... 3
  - 1.1. Description ..... 3
  - 1.2. Downloading Microsoft Outlook Add-in ..... 3
  - 1.3. Editing C4C Project’s Scope ..... 3
  - 1.4. Accessing Microsoft Outlook..... 5
  - 1.5. Synchronizing Contacts with Outlook ..... 8
  - 1.6. Checking Synchronized Data (Shelf) ..... 9
  - 1.7. Checking Synchronized Data (Accounts) ..... 10
  - 1.8. Creating an Activity in SAP C4C ..... 11
  - 1.9. Sending E-mails ..... 14
  - 1.10. Microsoft Outlook disconnect from SAP C4C ..... 15

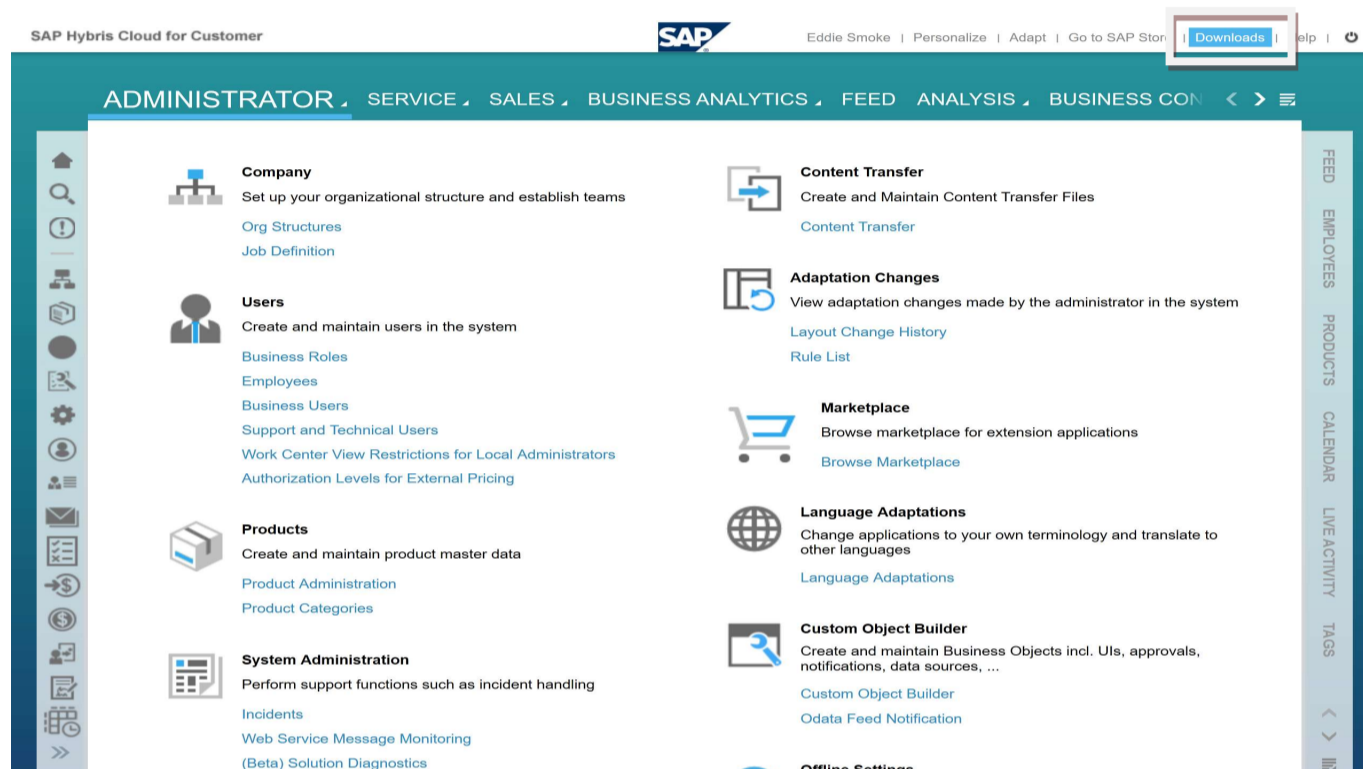
## 1. Customization

### 1.1. Description

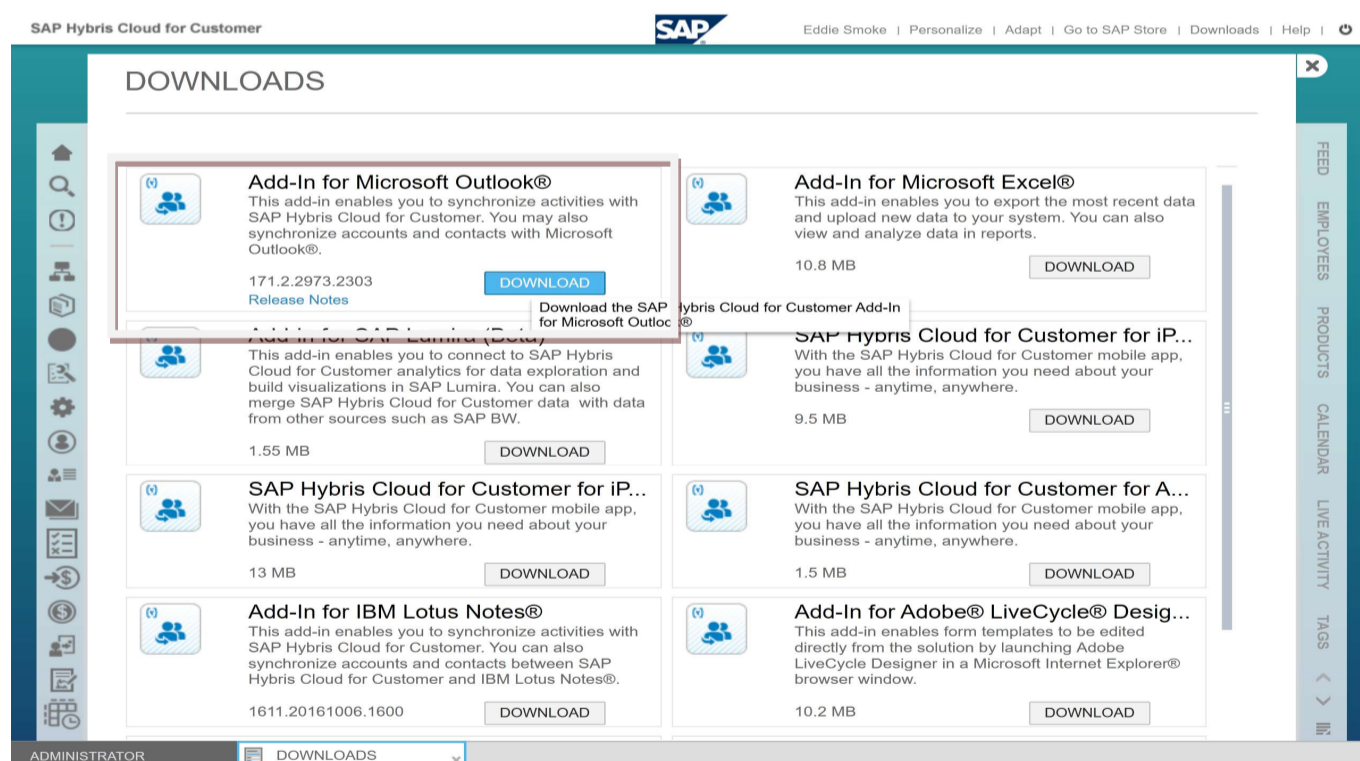
This article talks about the Microsoft Outlook and the possibilities to integrate with SAP C4C.

### 1.2. Downloading Microsoft Outlook Add-in

First, let's download the Microsoft Outlook Add-in on Downloads area.



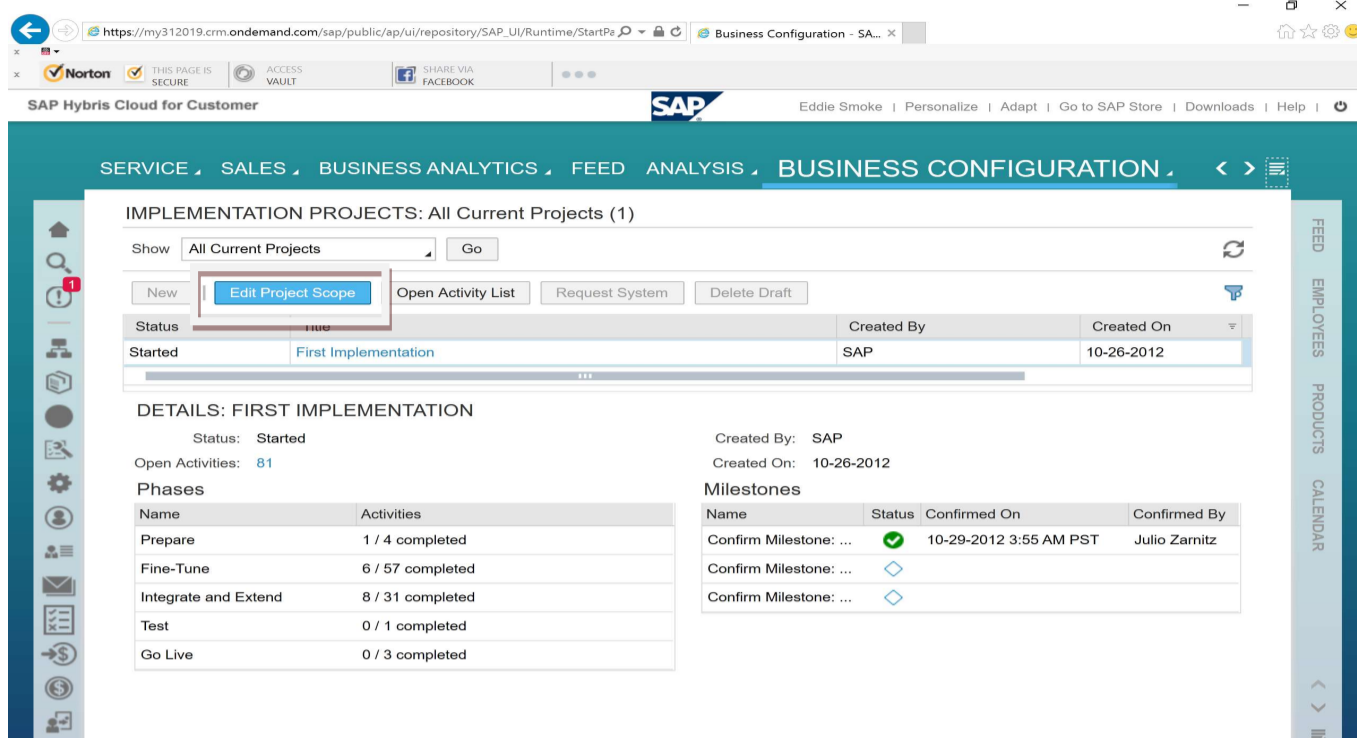
Click on "Download" Button, and install it locally



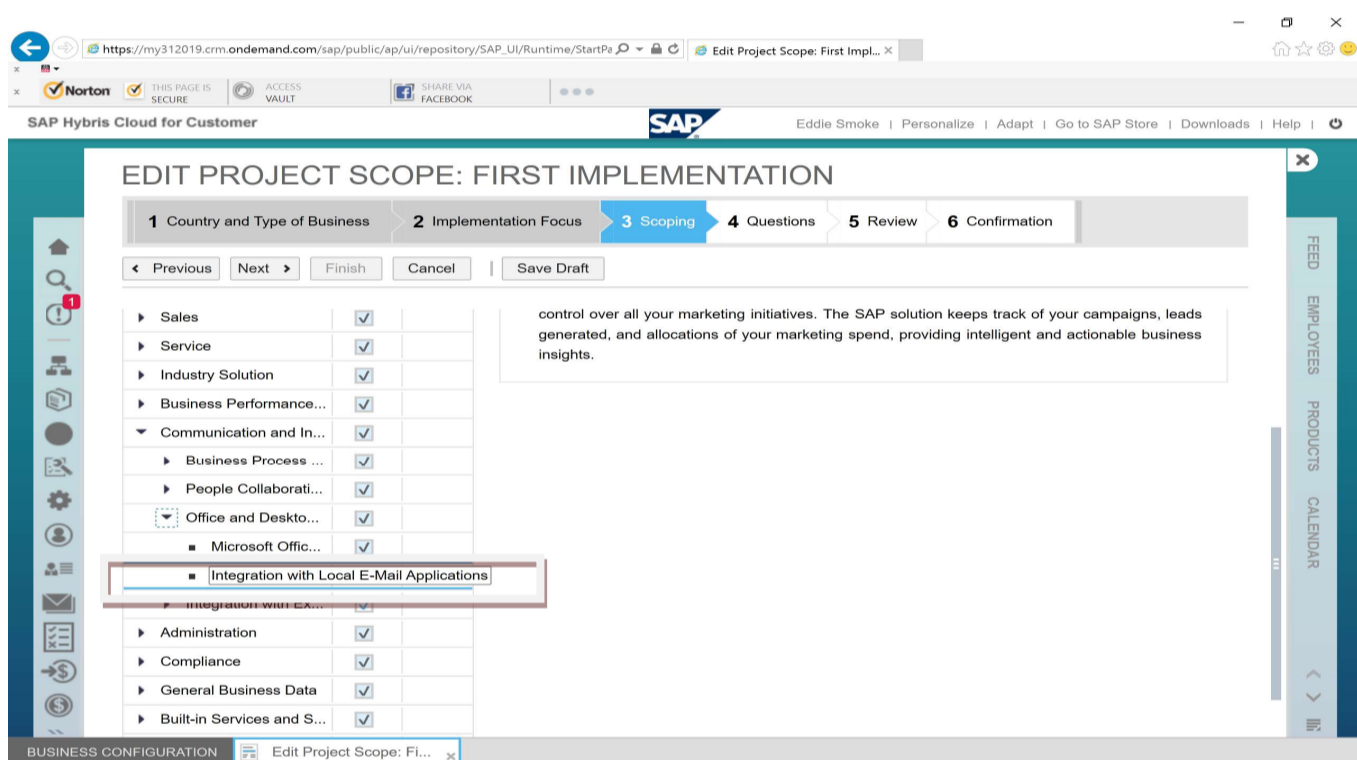
### 1.3. Editing C4C Project's Scope

Now, I will edit the C4C project's scope, allowing the Outlook Integration with environment SAP.

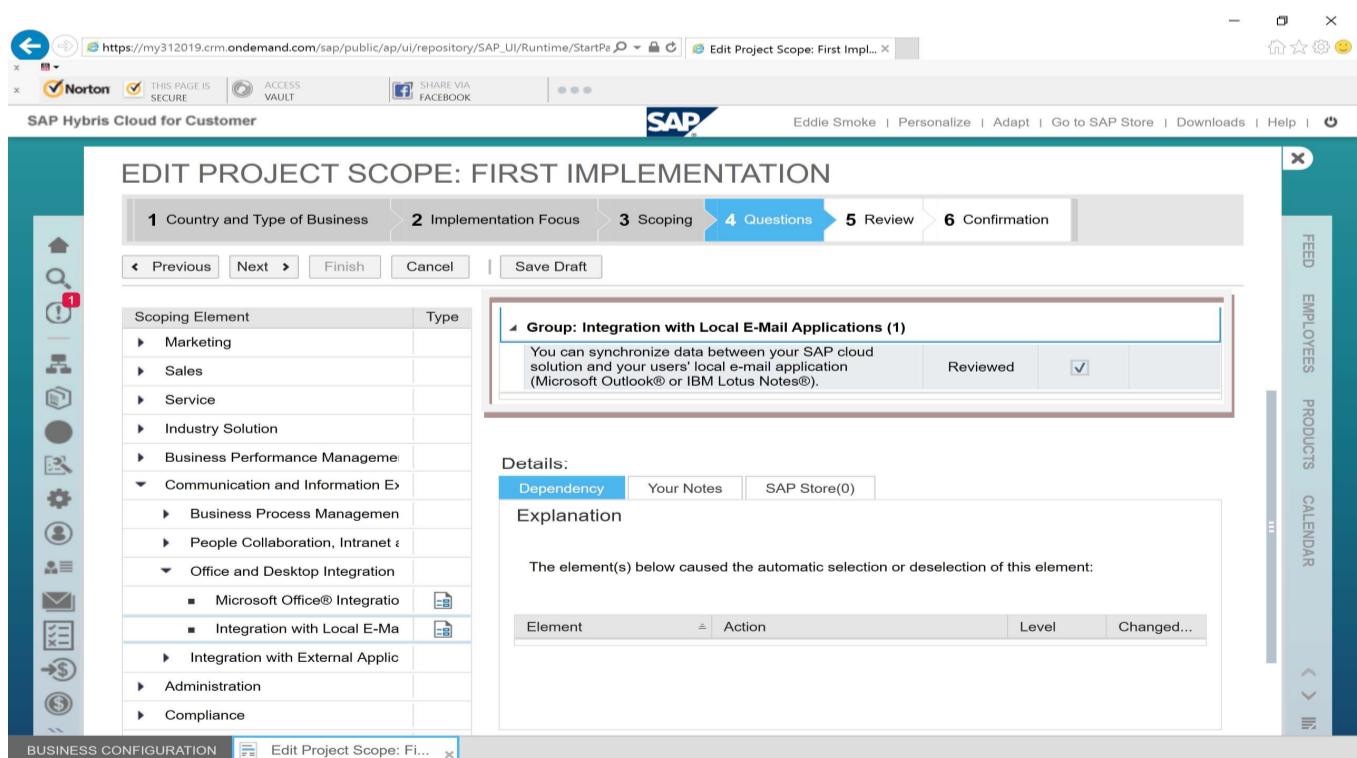
Click on "BUSINESS CONFIGURATION", and then, click on "Edit Project Scope" button.



On path demonstrated below, add the item “Integration with Local E-mail Applications”, and then Next

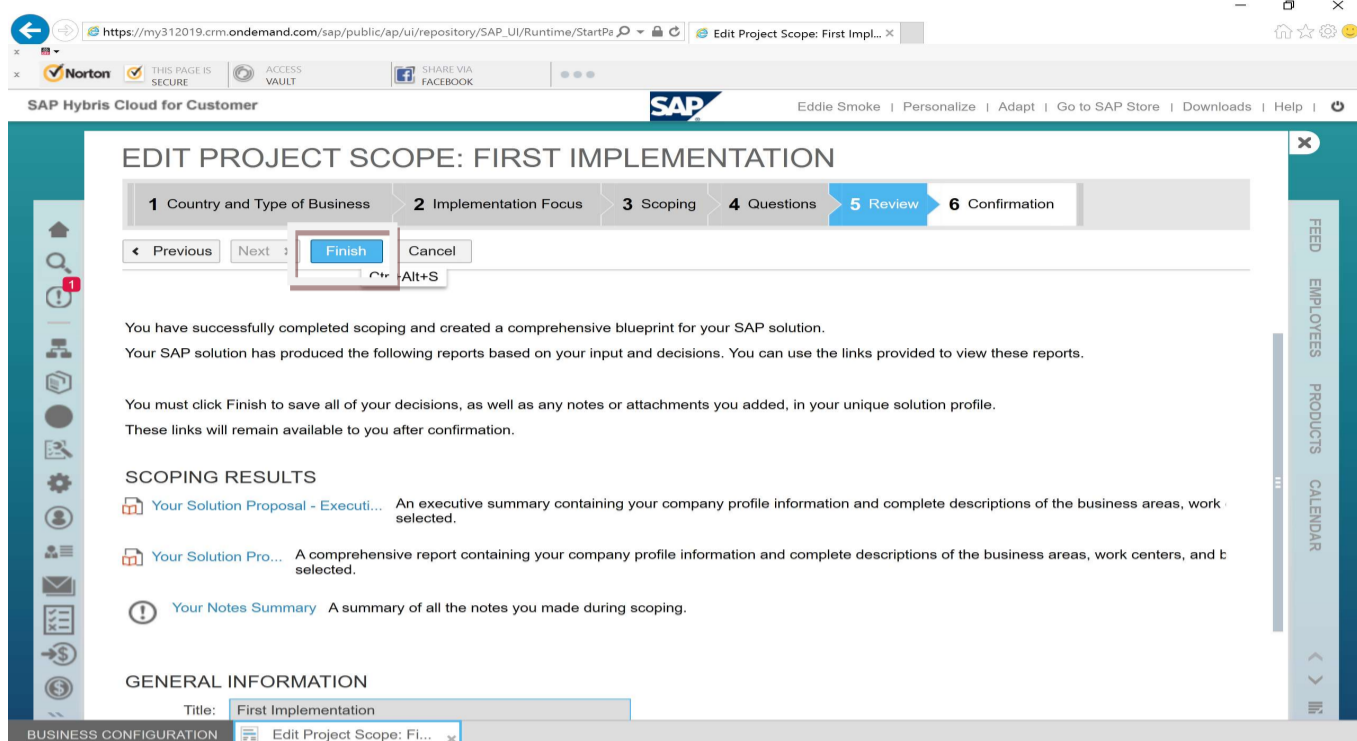


Next



Finish the process.

Now, we are ready to access the outlook.

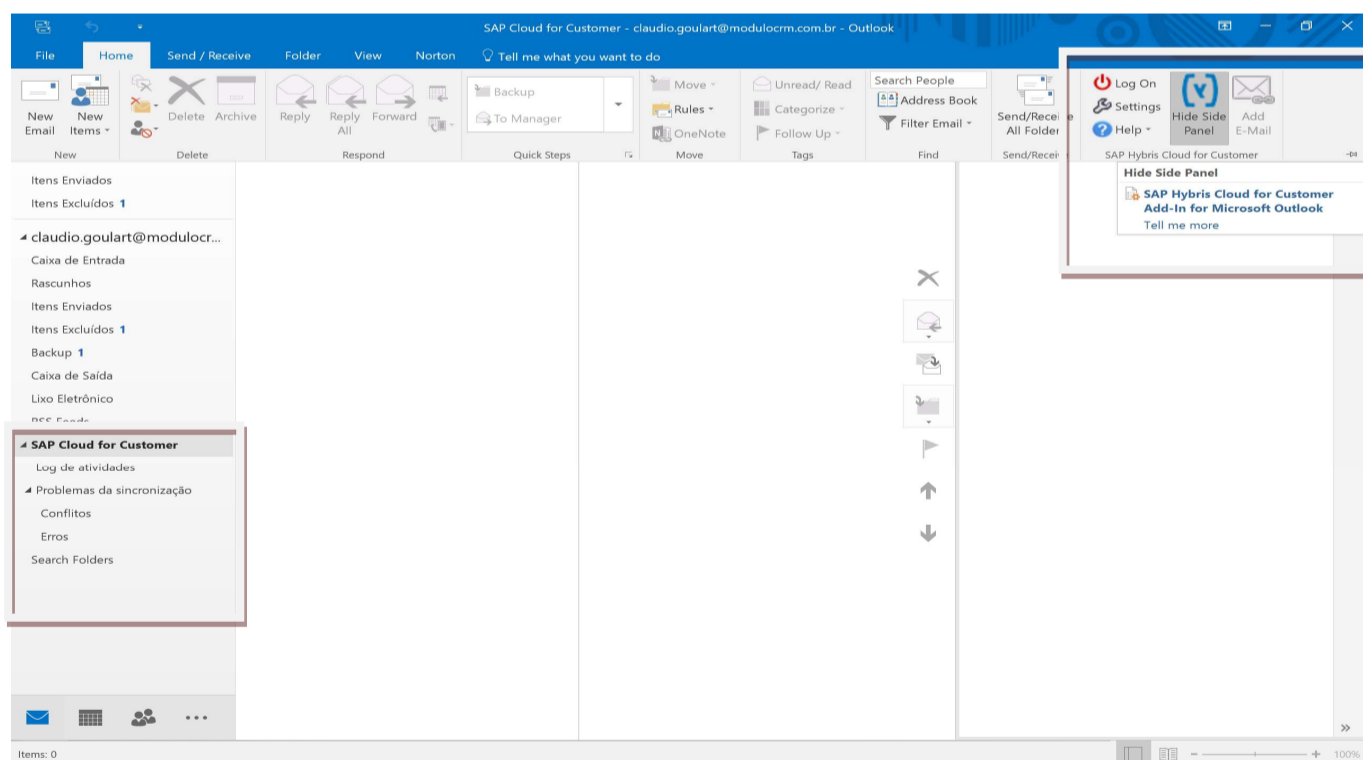


## 1.4. Accessing Microsoft Outlook

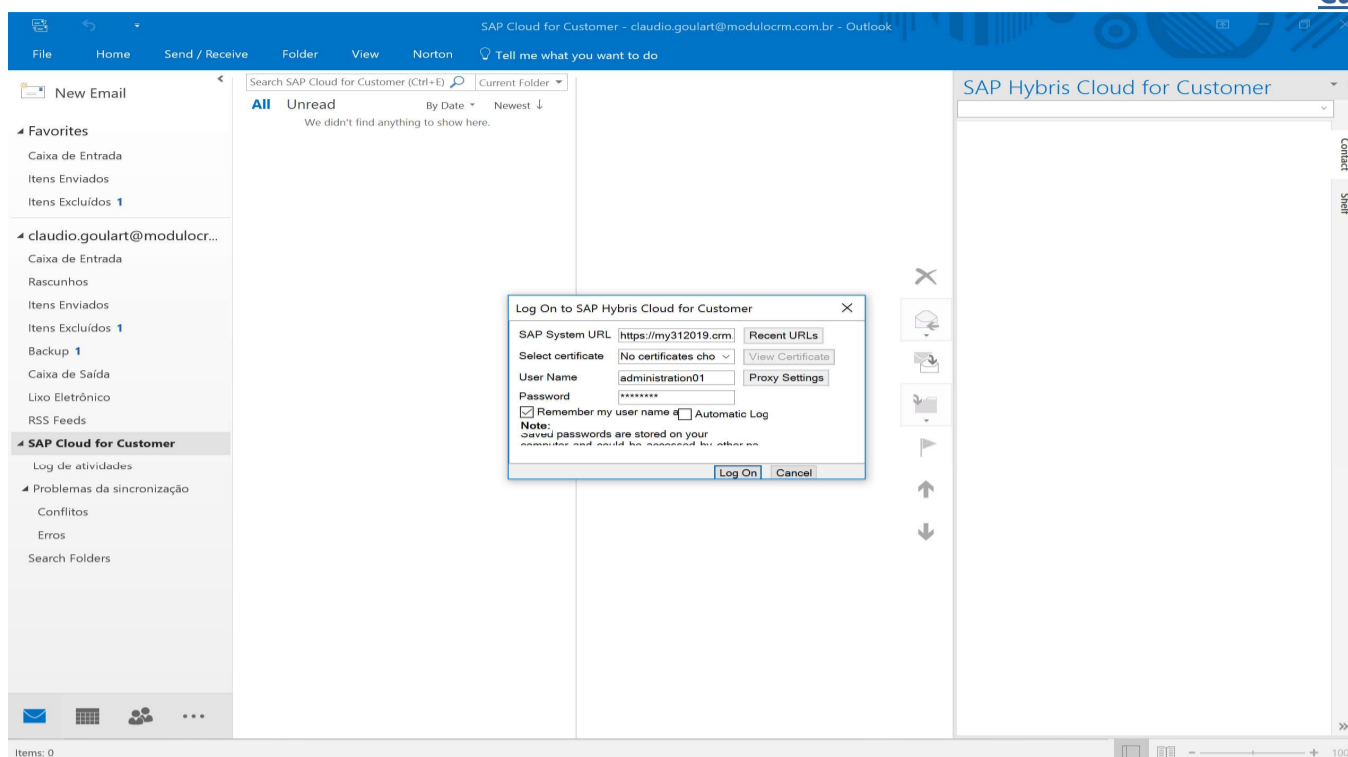
Let's access Microsoft Outlook to demonstrate some features.

When we install the C4C add-in locally, it was created a folder **"SAP Cloud for Customer"**. And also, on the right, follow buttons:

- Log On  
Log on SAP C4C
- Settings  
Here you can define what will be synchronize with Outlook
- Help  
Help online with C4C
- Hide Side Panel  
Enable on the right side some C4C features



I clicked on "Log on" button



You must inform the follow fields:

- SAP System URL  
Provide the SAP C4C URL
- User Name  
User used by you on SAP C4C
- Password

Log On to SAP Hybris Cloud for Customer

SAP System URL

9.crm.ondemand.com

Recent URLs

Select certificate

No certificates cho

View Certificate

User Name

administration01

Proxy Settings

Password

\*\*\*\*\*

☒ Remember my user name a

☐ Automatic Log

Note:

saved passwords are stored on your

computer and could be accessed by other na

Log On

Cancel

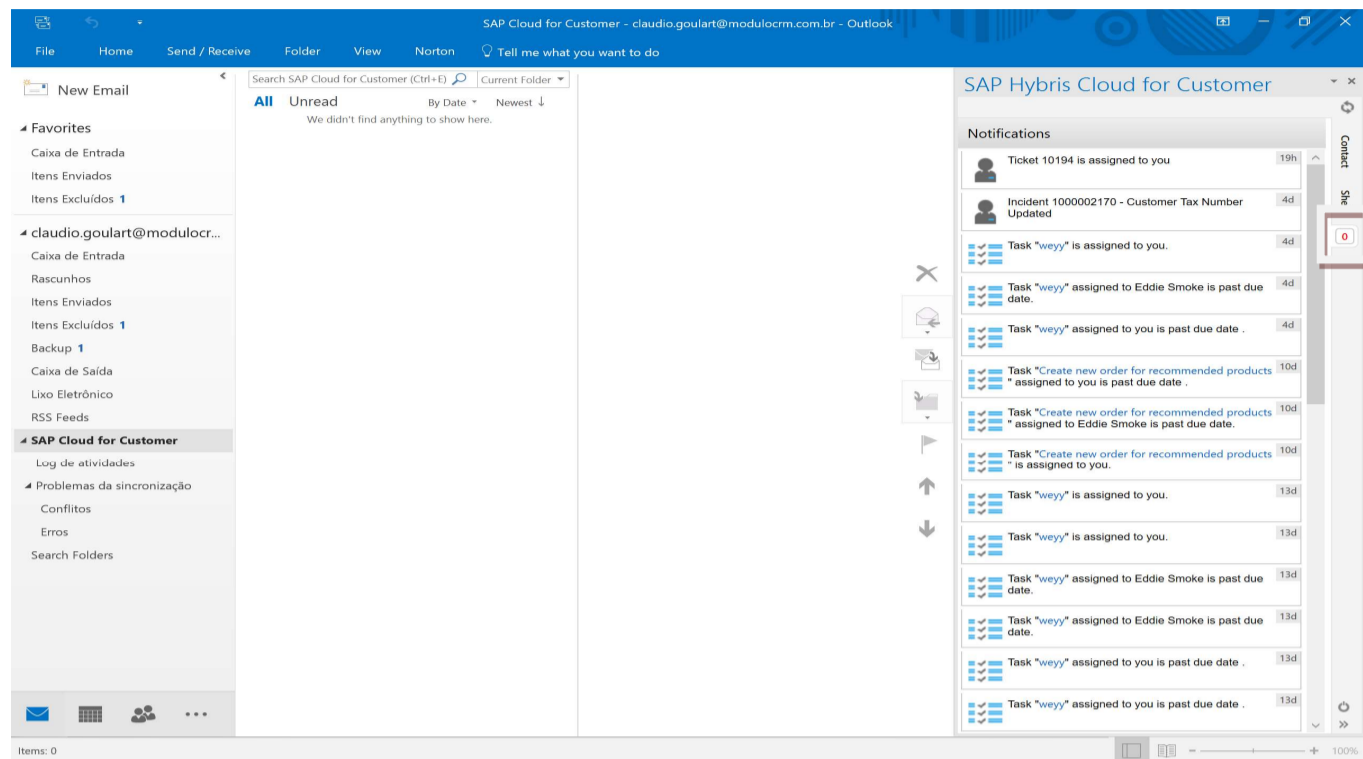
On read button indicate below, is listed all notifications belong to this user.

# Article - Blog Módulo CRM

## Customization Guide - SAP C4C

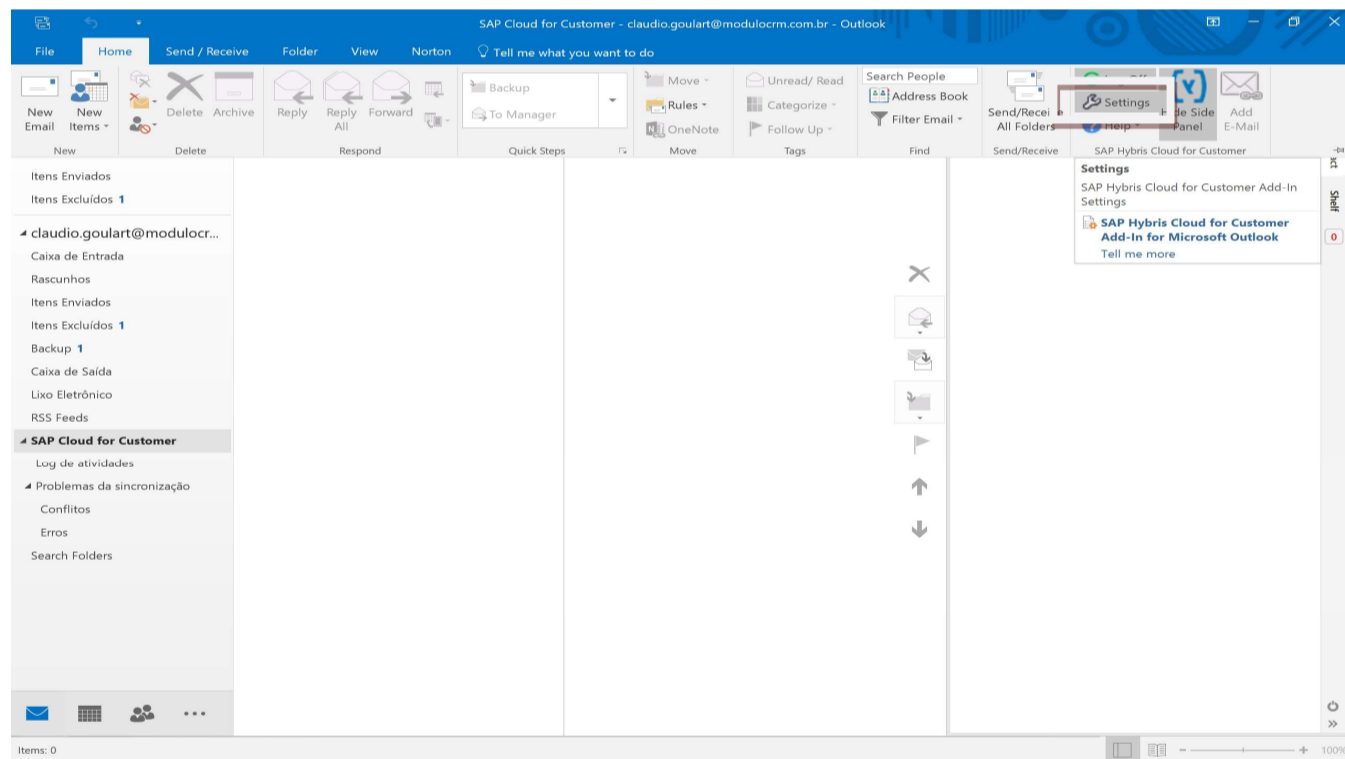
Is plenty used in BackOffice, cause it's not necessary been on SAP C4C to know what's task are assigned.

Important: If were identify an approval task, or task request some attention, just double click on record, and then SAP C4C is open automatically.



Now, let's define what and which object will be synchronize with Outlook.

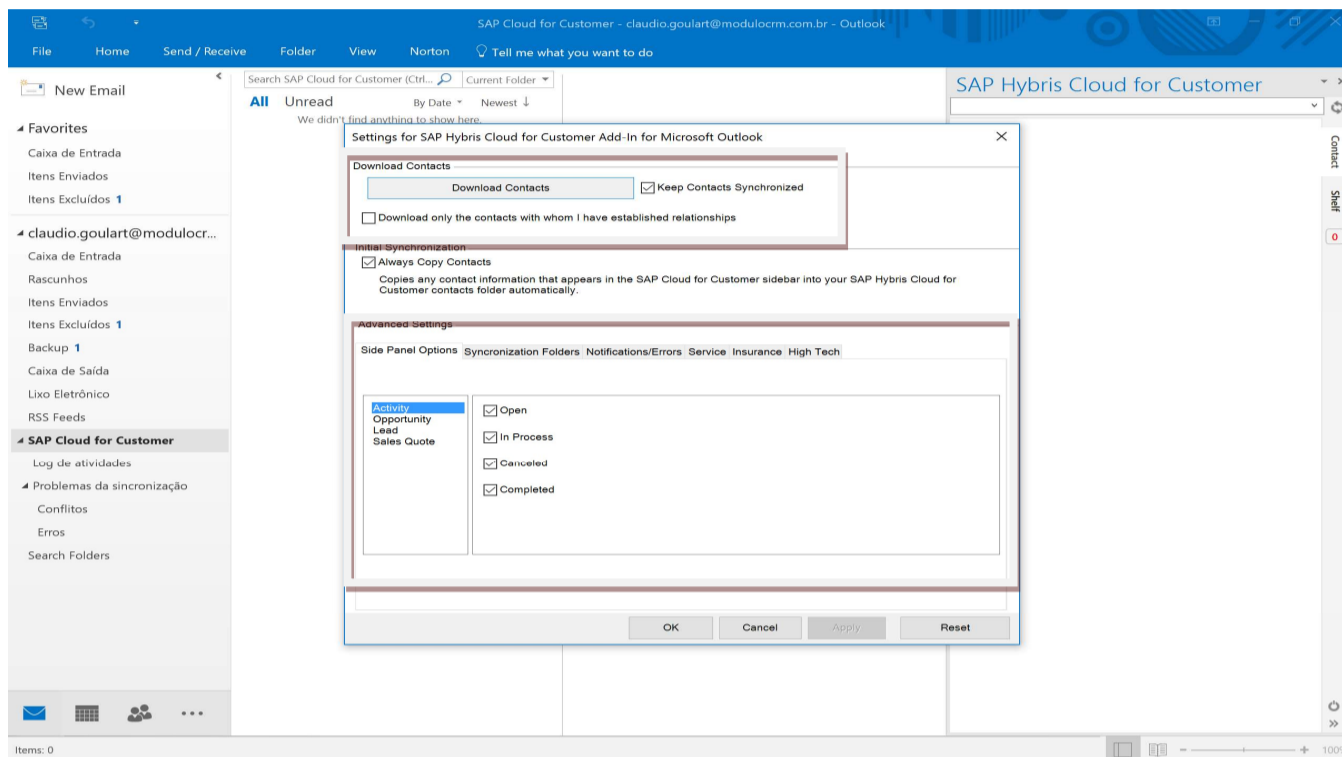
Click on "Settings" Button



On Settings there are some possibilities of synchronization:

- Contacts
- Account
- Individual Customers
- Activities
- Opportunities
- Leads
- Sales Quote

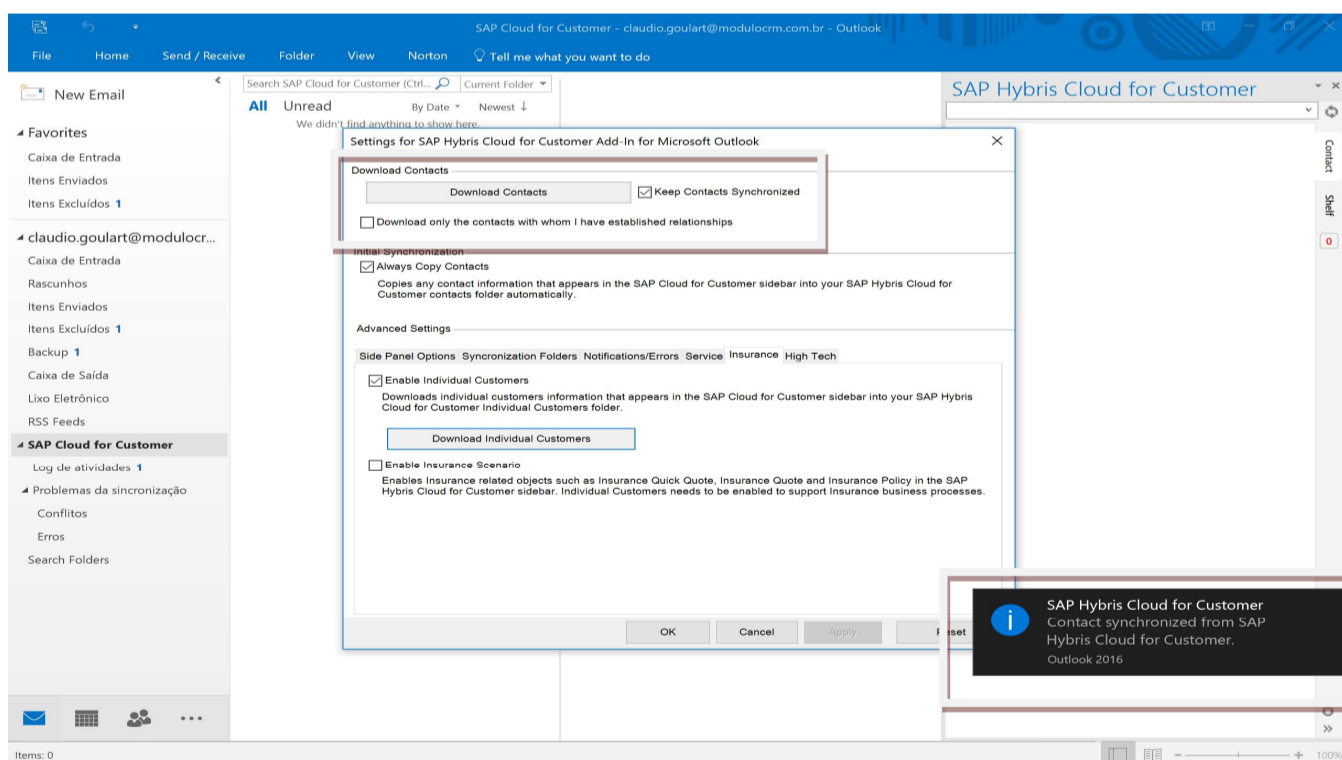
Important: On Business Transactions (Opportunity, leads etc.) you can define what phase the records can be synchronize to outlook.



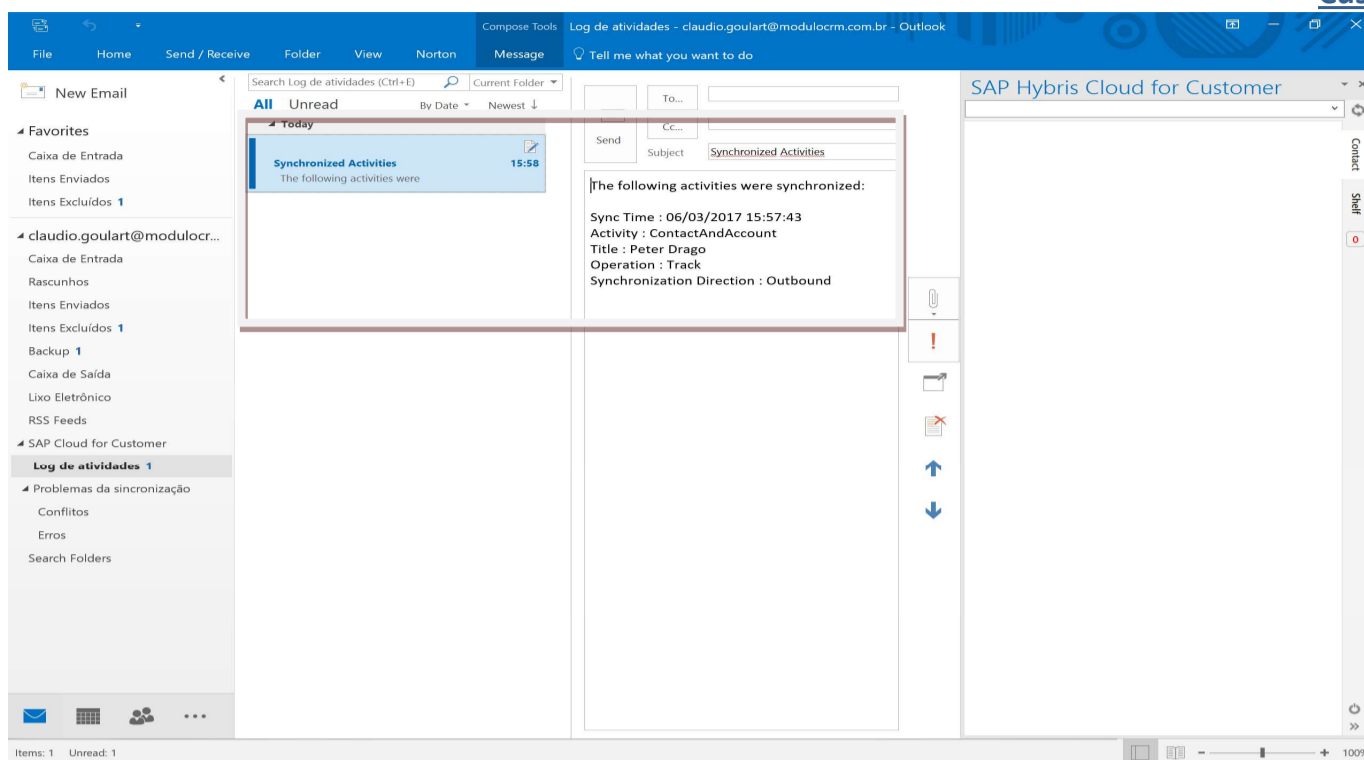
## 1.5. Synchronizing Contacts with Outlook

To Synchronize Contacts data just click on button “Download Contacts”.

And then outlook will be notified, if the process were well succeeding or not.



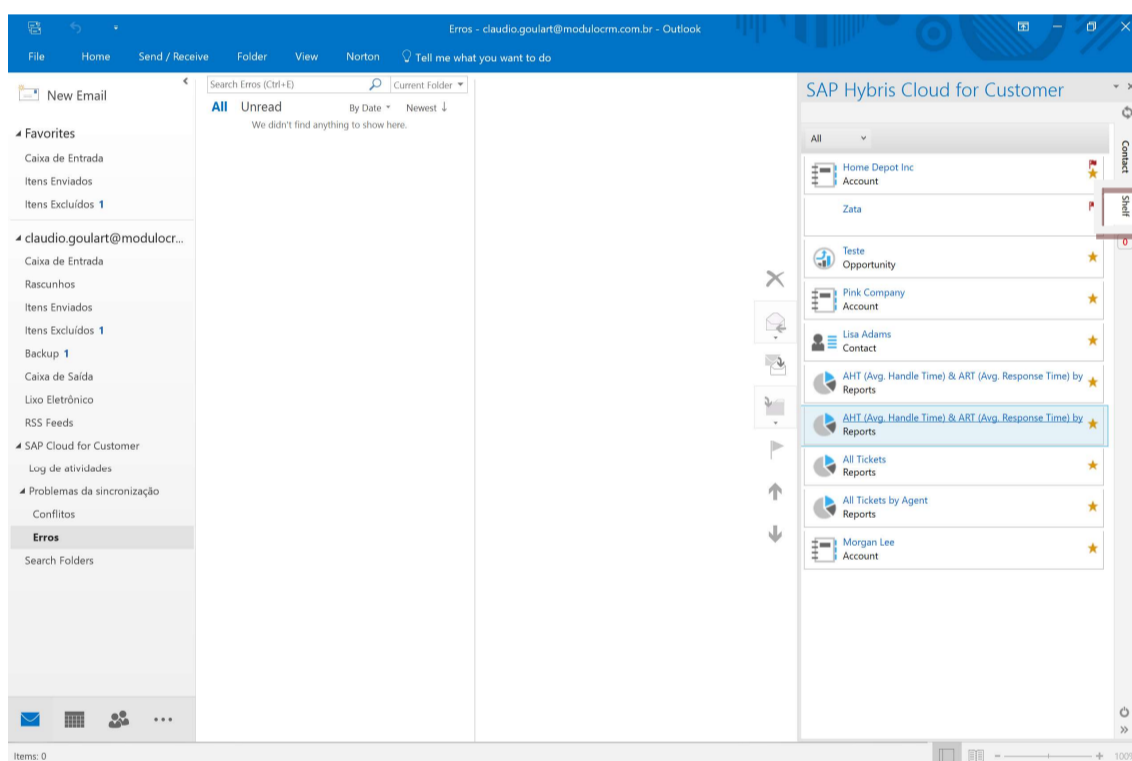
A message is listed on folder “Activities Log”



## 1.6. Checking Synchronized Data (Shelf)

On “Shelf” button, all customer data, business transactions and so on, will be consolidated.

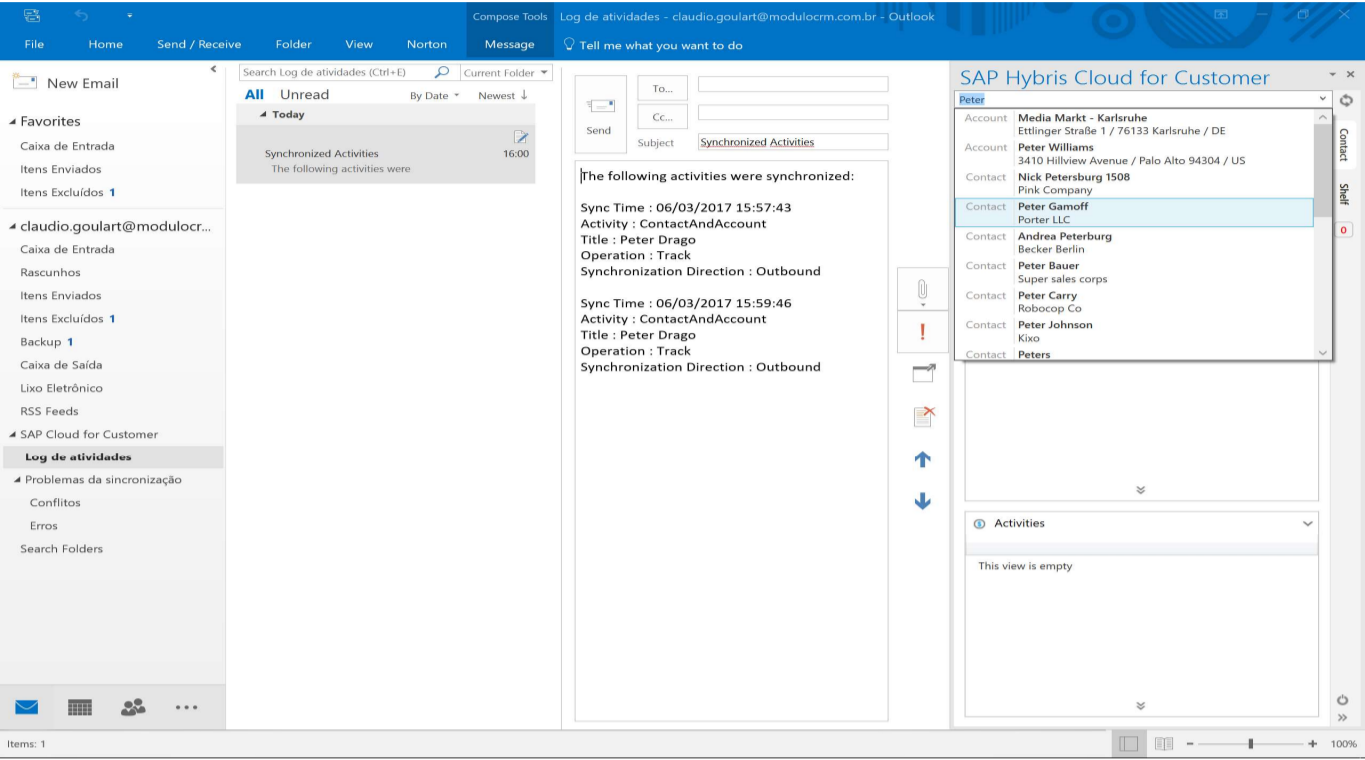
Below, we got Opportunities, Customer Data, Reports available.



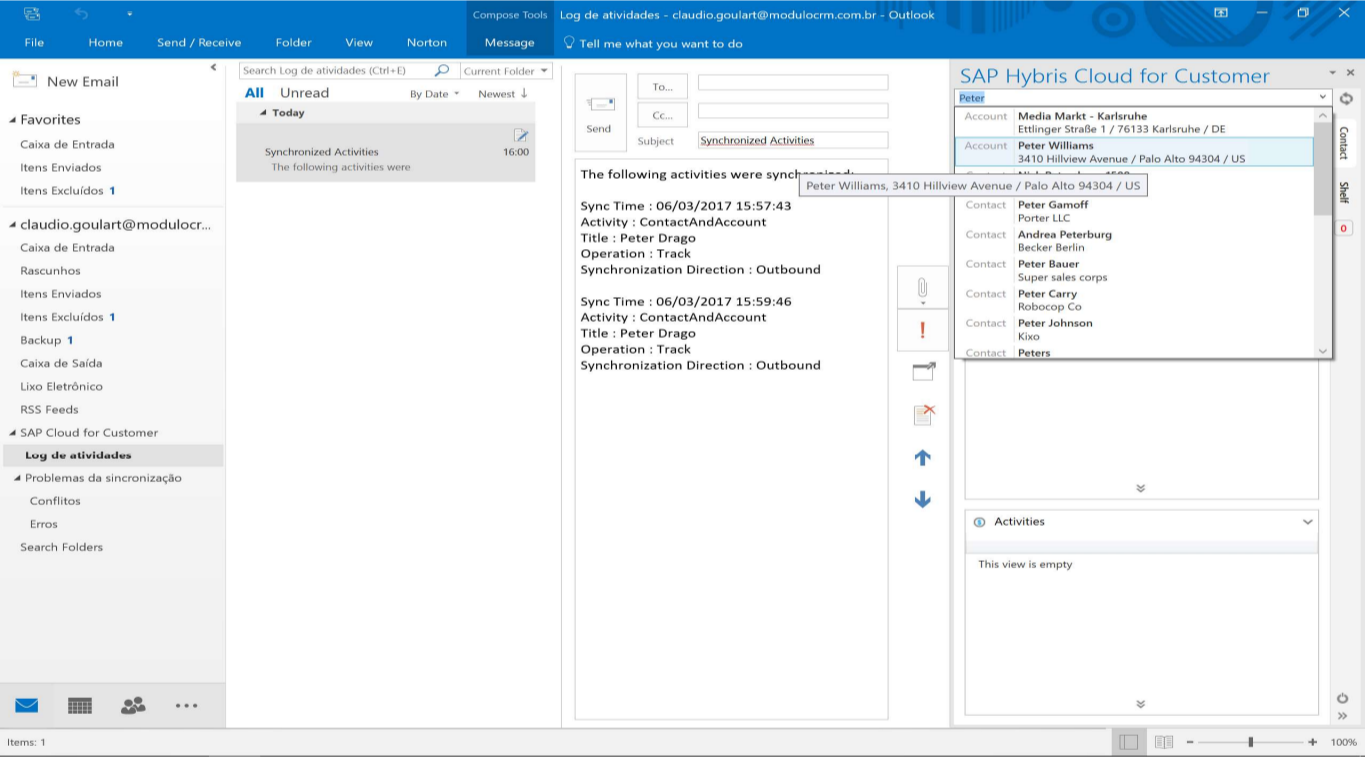
## 1.7. Checking Synchronized Data (Accounts)

On Pane in the left, you can type part the Account’s name, and find out what customer were synchronized.

A list of Contact and/or Accounts were listed.

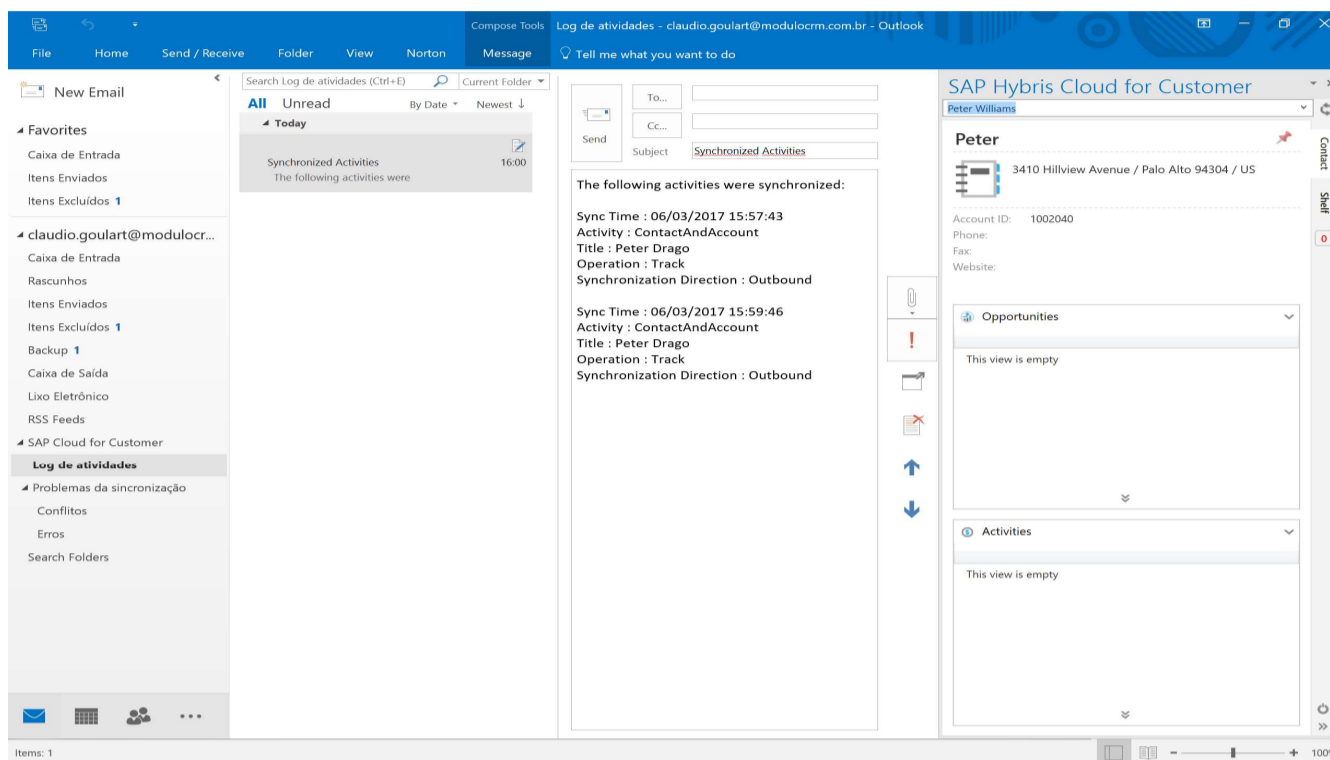


Then, select “Peter Williams”



Just some fields are listed:

- Account ID
- Phone
- Fax
- Web Site
- Opportunities (List)
- Activities

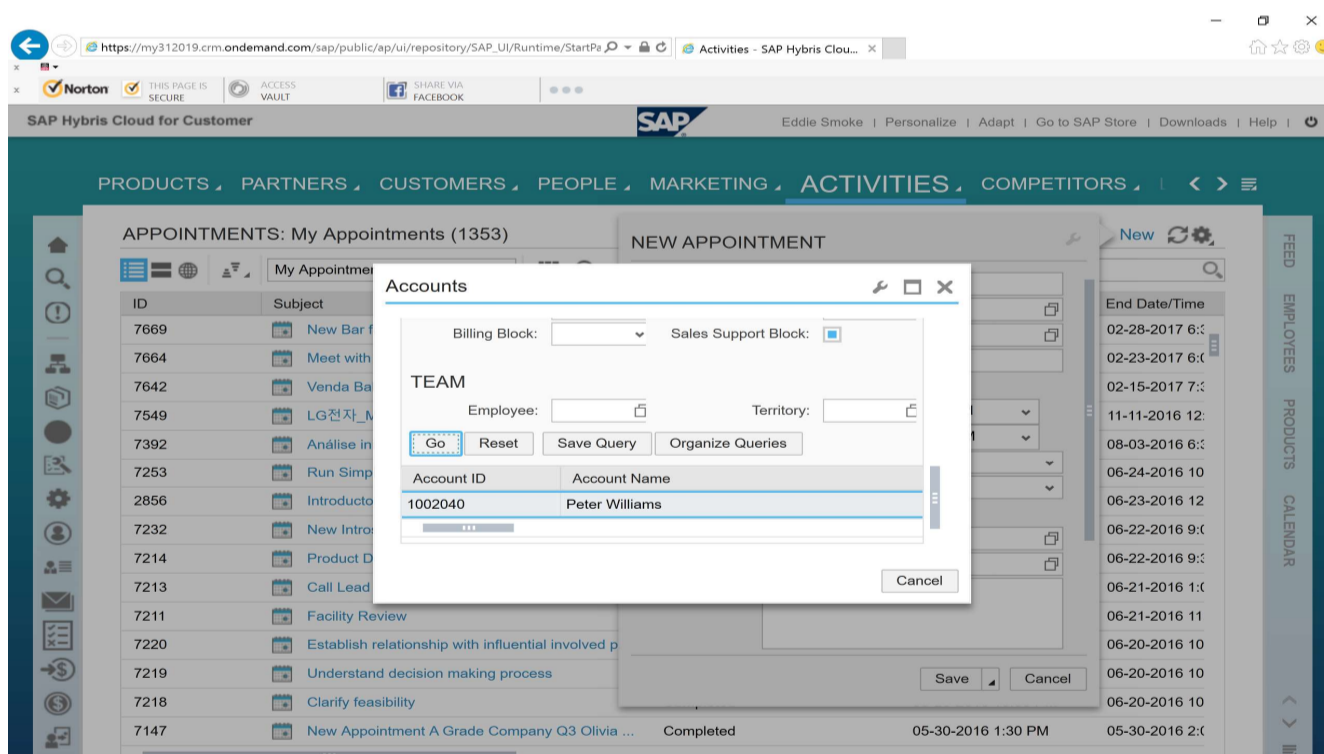


## 1.8. Creating an Activity in SAP C4C

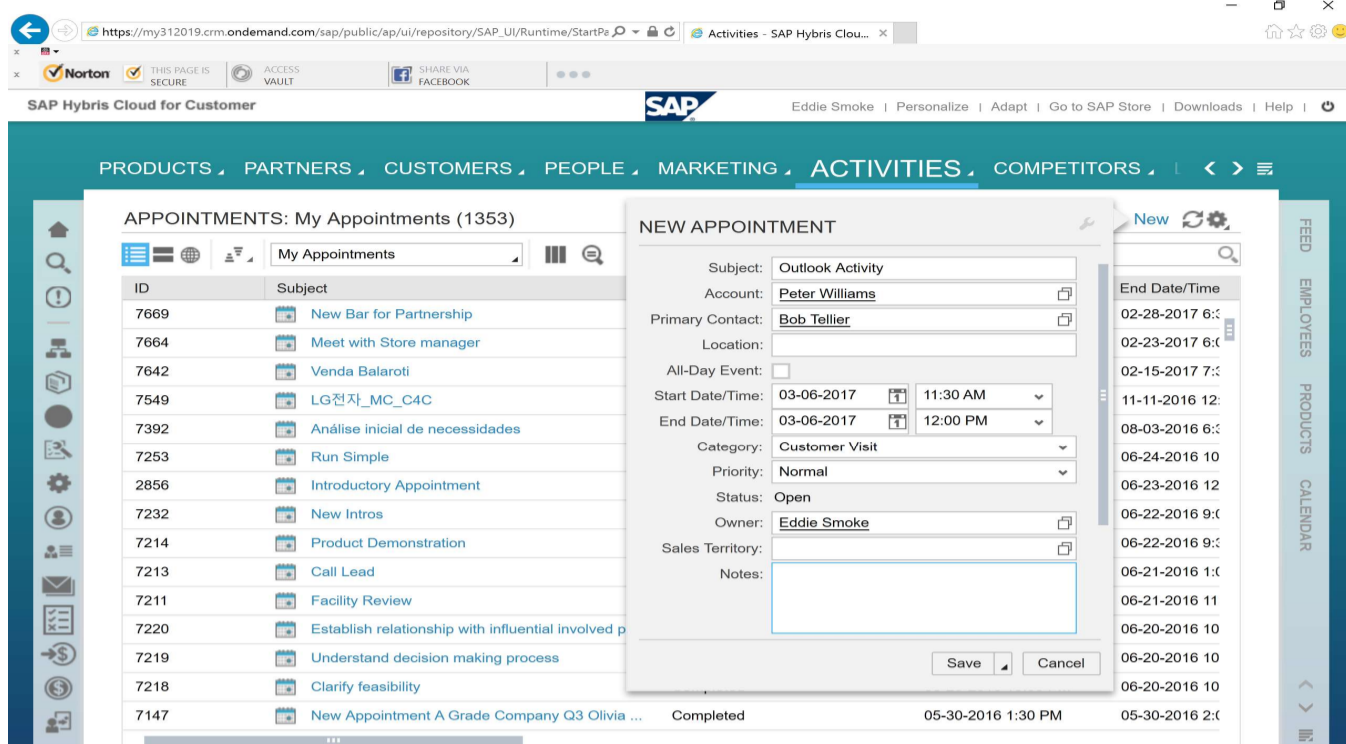
Now I will create an activity to Peter Williams, selected on outlook before. Then we will see what happens.

On SAP C4C, click on “ACTIVITIES”, and then click on “New” button.

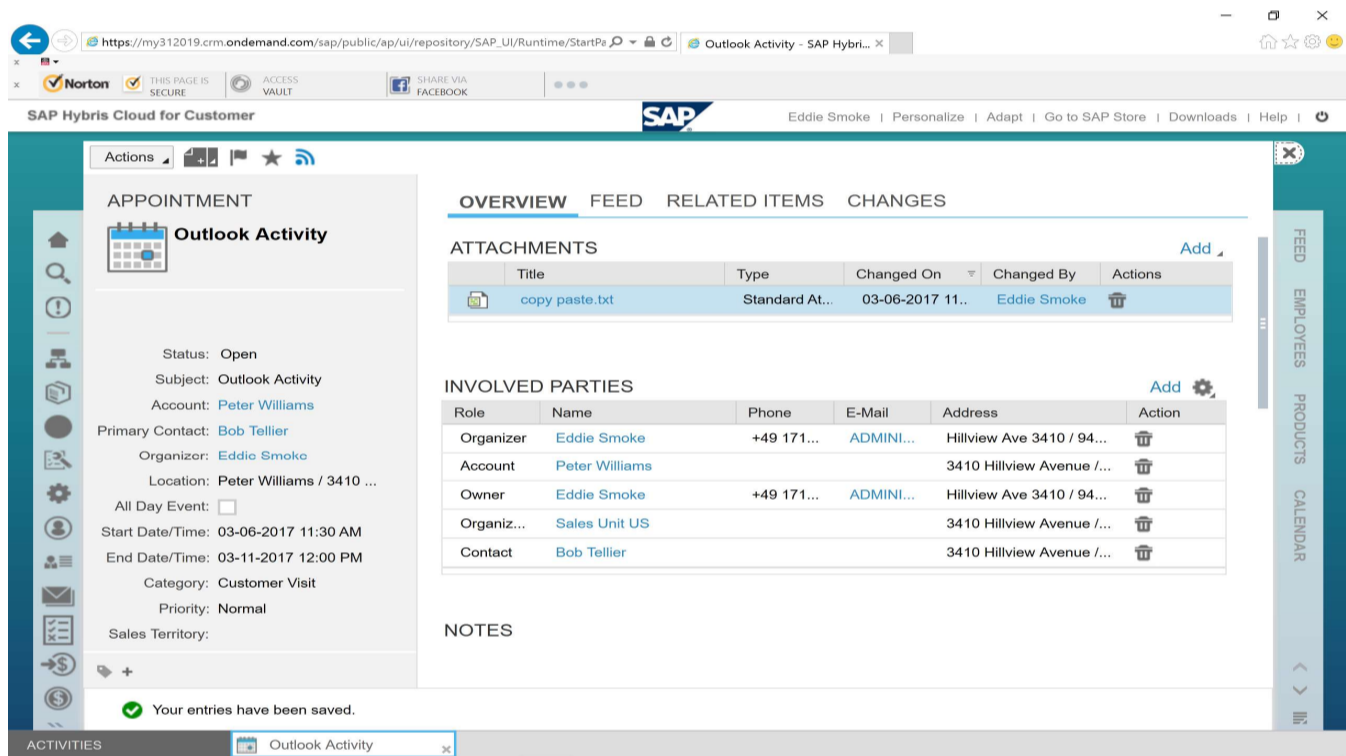
Select the Account “Peter Williams”



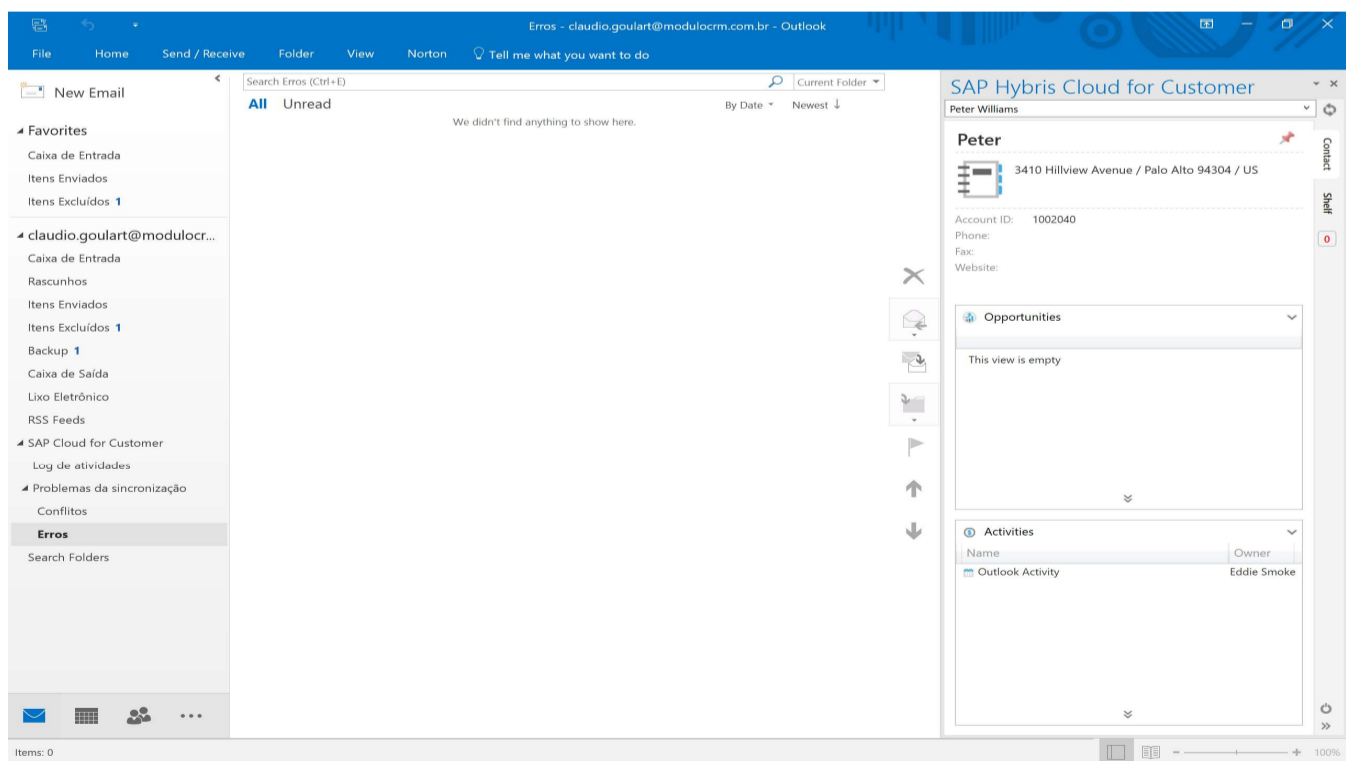
The activity is related by user logged, using the field “Owner”



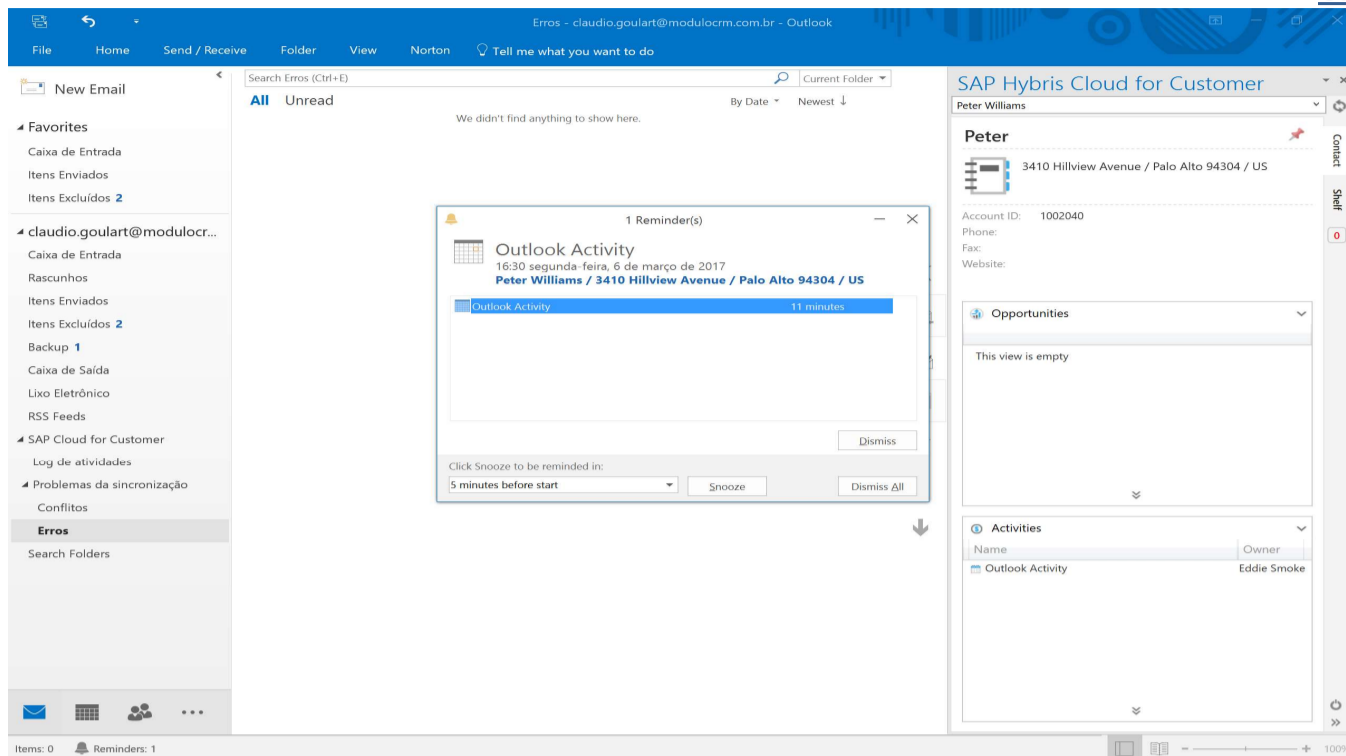
To make things harder, I will attach a file in C4C activity.



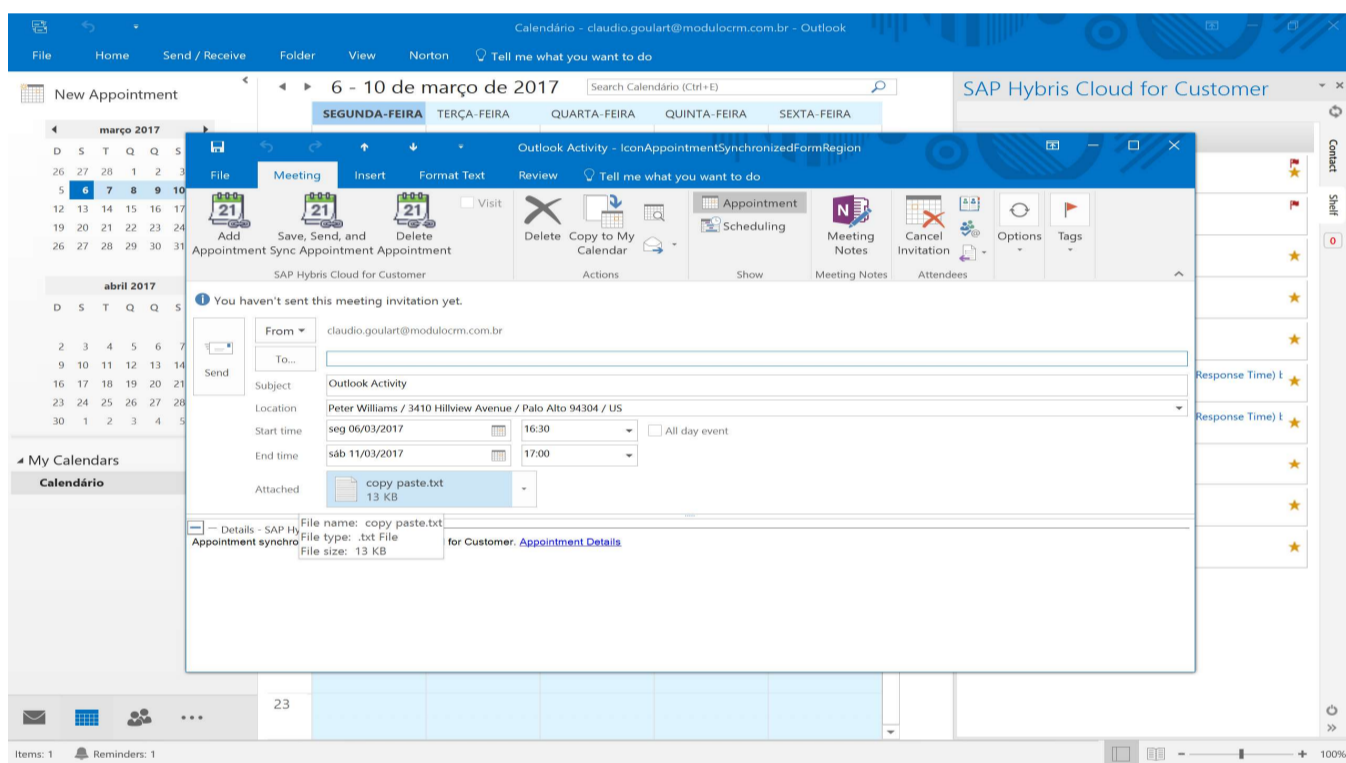
The synchronization occurs periodically, however, I will click on Synchronization button to make things faster.



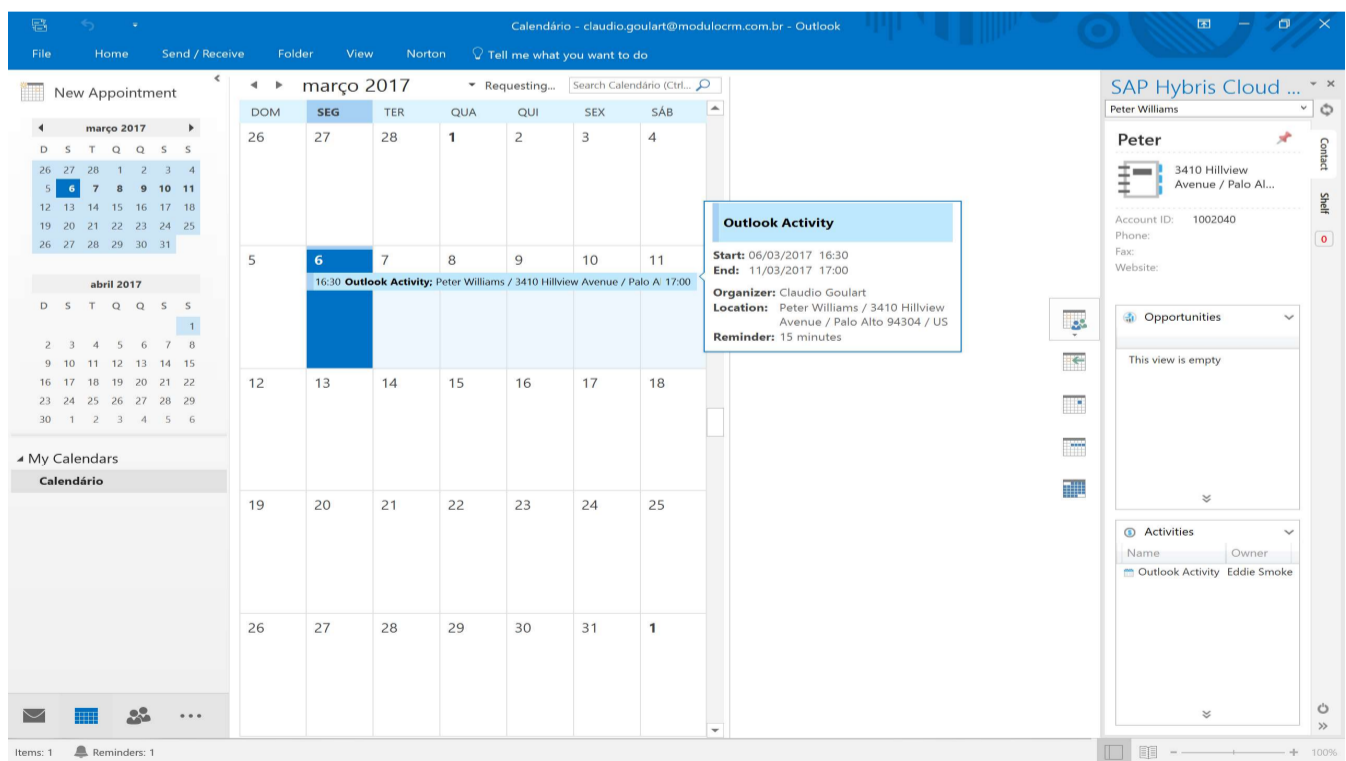
At the same time, an alert is popup inform about the activity.



Opening the C4C Activity, I notice my file attached on C4C. The file is synchronized too.

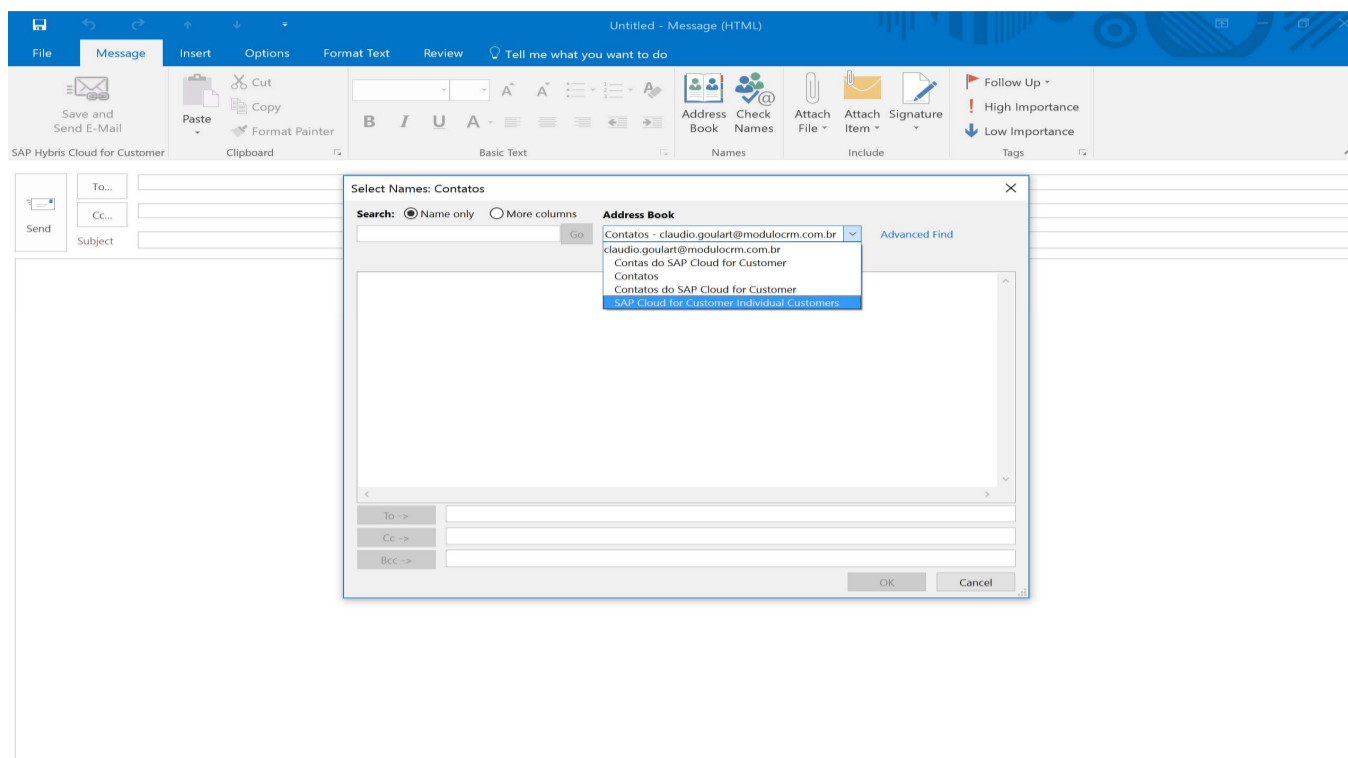


And the activity was input on calendar as new item. Now, it's not matter if you are connected in SAP or not.

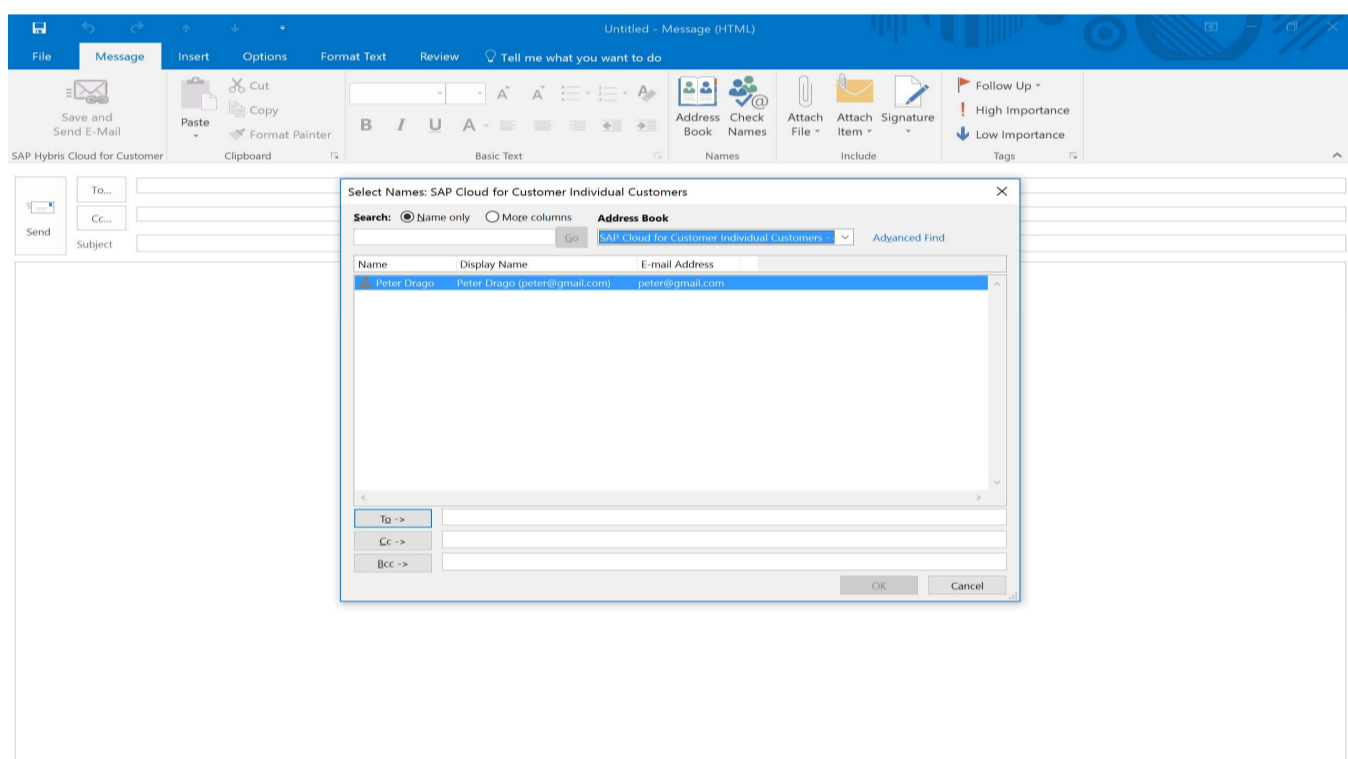


## 1.9. Sending E-mails

It's possible to use the Accounts, Customer or Contacts to send e-mail without C4C interference.



The Contacts are listed.



## 1.10. Microsoft Outlook disconnect from SAP C4C

Now, I logoff from SAP and even that data mentioned before are persisted.

