



SAP® Business
One

SAP BUSINESS ONE: Microsoft Outlook

SAP Business One V10 now integrates with Microsoft Office and OneDrive, providing businesses with seamless document sharing and increased flexibility in ERP.

With the Microsoft Outlook integration, you can exchange and share data between SAP Business One and Microsoft Outlook, keeping your team up to date with real-time information. The integration also reduces work time, allowing for greater productivity and efficiency in business processes.

The SAP Business One Microsoft Outlook integration offers a user-friendly interface that works seamlessly with ease for both new and experienced professionals.

It provides quick access to important business details, such as sales quotes, customer and partner data, and more.

KEY FEATURES

- Data Synchronization - *You can now sync appointments, contacts & tasks*
- Import Quotations
- Email Integration
- Connect to Word/Excel

Get started

Want to see this integration in action?

Get in touch with us today to learn more.

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Data Synchronization

Data synchronization between SAP Business One and Microsoft Outlook comprises the synchronizing of the following non-transactional items:

- Calendar appointments
- Contacts
- Tasks

Prerequisites

You have at least one of the following SAP Business One authorizations and associations:

- The authorization Access Business Partners owned by others
- An association to a sales employee in the employee master data (maintained in the Human Resources module)
- If you are associated with a sales employee but do not have the authorization Access Business Partners owned by others, you can only synchronize the following:
 - Business partners assigned to this sales employee
 - Activities associated with business partners assigned to the sales employee
 - Quotations assigned to the sales employee

Activities

To define which aspects of items are synchronized, you can choose from specific criteria for each of these items. These criteria are grouped into the following categories:

- General settings, for example, what kind of item (appointments, contacts, and/or tasks) will be synchronized.
- Calendar-specific settings, for example, the date range of the appointments that will be synchronized.
- Contact-specific settings, for example, only the contacts belonging to a specific business partner will be synchronized.
- Task-specific settings, for example, only open tasks will be synchronized.
- Scheduling settings, for example, you can schedule an automatic data synchronization every time you log on to SAP Business One
- Conflict resolution settings, for example, when two system copies exist for the same appointment (one in SAP Business One and one in Microsoft Outlook), you decide which system data is written to the other system.

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Quotations

This function enables you to:

- Display and edit existing quotations from SAP Business One in Microsoft Outlook
- Create new quotations in Microsoft Outlook that you can store in SAP Business One
- Send a quotation as an e-mail with Microsoft Outlook

Activities

When you first log on to SAP Business One from the Microsoft Outlook Integration add-on, a Quotations folder is created in your Microsoft Outlook folder list, as well as a quotation view that displays:

- No.: document number
- Customer: customer code
- Name: customer name
- Contact Person
- Phone: contact person's telephone number
- Posting Date

When you first log on to SAP Business One from the Microsoft Outlook Integration add-on, only a Quotations folder is created in your folder. A quotation view is not created.

For both Microsoft Outlook versions, to import existing quotations from SAP Business One, you must first define the filter criteria. After you have imported the quotations, their headers are saved in the Quotations folder.

The Quotations folder also contains the headers of all new quotations you create in Microsoft Outlook that match your current filter criteria. If you double-click a quotation in the Quotations folder, the entire quotation is displayed.

You can edit the quotation, if required, and then send it as an e-mail.

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Email Integration

Note: Synchronization of e-mail between SAP Business One and Microsoft Outlook is not supported

E-mail integration comprises the real-time (transactional) integration between SAP Business One and Microsoft Outlook. You can save e-mails that you receive, send, or forward in Microsoft Outlook as activities in SAP Business One.

Features

Save an E-Mail in Microsoft Outlook as an Activity in SAP Business One

To save an e-mail that you receive, send, or forward in Microsoft Outlook as an activity in SAP Business One, you have the following options:

Quick Save E-mail as Activity

If you select this function, - and depending upon whether you are the sender or receiver of the e-mail - the system matches either the e-mail address of the recipient, or the sender of the e-mail, with that of a contact person in SAP Business One. If there are more than two parties involved in the e-mail exchange, you are prompted to choose the primary e-mail address to be saved for a contact person in SAP Business One.

As soon as the match is made, an activity is created automatically in SAP Business One.

Save E-mail as Activity

If you select this function, the Save E-Mail as Activity window appears. You then determine the relevant contact person manually and make follow-up and attachment settings for the activity.

Save E-Mail as Activity - Default Settings

If you select this function, you can make default settings for follow-ups and attachments for the activity.

Sending E-Mails from SAP Business One Using Microsoft Outlook

When you send a message from SAP Business One, you can choose to send it as an e-mail from Microsoft Outlook. The sent e-mail then appears in your Sent Items folder in Microsoft Outlook, allowing you to track your e-mails.

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Word/Excel Connection

With the Microsoft Outlook Integration add-on, you also can save data from Microsoft Word/Excel in SAP Business One.

Integration

Once you are logged on to SAP Business One from one of the following programs, you can use the other programs without having to log on separately:

- Microsoft Outlook
- Microsoft Word
- Microsoft Excel

Activities

- You can log on to SAP Business One directly from Microsoft Word/Excel
- You can save a Microsoft Word/Excel document as an activity in SAP Business One.
- You can select the business partner or contact person in SAP Business One with which a Word/Excel document is saved as an activity.
- You can associate other types of documents in SAP Business One with the new activity.
- You can instruct the system to remind you to perform a follow-up to the new activity in SAP Business One.