SAP Cloud for Customer Add-In for IBM Notes

THE BEST RUN **SAP**

Content

1 SAP Cloud for Customer Add-In for IBM Notes

This guide includes information for administrators and end-users, and is available in English only.

SAP Cloud for Customer Add-In for IBM Notes allows you to exchange information between IBM Notes and SAP Cloud for Customer.

1.1 For Administrators of SAP Cloud for Customer Add-In for IBM Notes

SAP Cloud for Customer Add-In for IBM Notes allows you to exchange information between IBM Notes and SAP Cloud for Customer. Each user who wants to use SAP Cloud for Customer functions from IBM Notes must install the add-in on his or her computer.

Prerequisites [page 3]

Tasks for Administrators [page 4]
> There are a variety of tasks that administrators can do to streamline installation and setup of the add-in for users.

1.1.1 Prerequisites

Element	Prerequisite
IBM Notes Client Version	We strongly suggest using the add-in with the version 8.5.3 or above. However, the add-in may also be backward compatible with the previous versions of Notes (8.5.2 and 8.5.1). At this point, we are testing the add-in with the previous versions to find any possible issues.
Operating System	Use Microsoft Windows® 7 (x86/x64).
Oracle Java/JRE	IBM Notes run on top of its own JRE, so we do not have any exclusive requirement regarding the JRE.
Proxy settings	The add-in uses the proxy settings from the default web browser, so you do not have to configure any proxy or open any ports exclusively.

Element	Prerequisite
User access	We always assume that the user logged in to IBM Notes has read and write access to the contacts (`names.nsf`) and their mails file (`username.nsf` on the domino server).
Multiple users	If you have multiple users set up for one IBM Notes client, you have ensured that they all have access to the correct contacts (`names.nsf`) file.

1.1.2 Tasks for Administrators

There are a variety of tasks that administrators can do to streamline installation and setup of the add-in for users.

1.1.2.1   Using Automatic Installation

Context

To install add-ins into IBM Expeditor-based clients such as IBM Notes, you package the add-ins into a feature and then install the feature. We recommend using DCommands as a scriptable and cross-platform way to deploy the add-in to an IBM Notes client on a remote machine.

To install add-ins using DCommands, do the following:

Procedure

1. Create definitions.

    You have installed a feature called "com.sap.sod.ln.shelf.addon" in version 2.0.0 (com.sap.sod.ln.shelf.addon_2.0.0.jar). We are installing into IBM Notes from a file location on disk - "`C:\groupware\ln\demo`" on Microsoft Windows® (or similar location on Linux or a Mac).

The syntax of the command is based on using the `rcplauncher.exe` (rcplauncher on Apple Mac®) to perform the operation supplying required arguments to the command. The command outline is as follows:

```
rcplauncher.exe -com.ibm.rcp.provisioning#provisioningCommand -
provisioningOperation provision <install manifest filepath>-application
com.ibm.rcp.provisioning.application.ProvisioningApplication -
provisioningStatusLog<install log filepath>
```

To install using the install manifest called install.update.xml from C:\groupware\ln\demo and writing the install log to a file called groupware_install.log in the same directory, the command would be as follows:

```
rcplauncher.exe -com.ibm.rcp.provisioning#provisioningCommand -
provisioningOperation provision "C:\groupware\ln\demo \install.update.xml" -
application com.ibm.rcp.provisioning.application.ProvisioningApplication -
provisioningStatusLog "C:\groupware\ln\demo \groupware_install.log"
```

As you can see, you must know the file location of the `rcplauncher.exe` on Microsoft Windows or the rcplauncher executable on Apple Mac.

In Microsoft Windows, the path may be discovered from the registry using the following path, where the value is the path to the `rcplauncher.exe`. `HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\IBM\Lotus \Expeditor\Notes`

On an Apple Mac, the application is always installed under *Applications*.

If IBM Notes is not currently running on the machine, the command starts the client showing the splash screen and then performs the operation before terminating the application. If the application is running, the operation is performed. If you prefer not to show the splash screen, append the –noSplash option after the `rcplauncher.exe`.

2. Understand the install manifest.

The concept of an install manifest covers the manifest required to install the feature. The install manifests are in XML format.

> i Note
>
> The following code is a sample for illustration purposes. The plug-in that you download from the system contains the actual manifest files and scripts required for installation and uninstallation.
>
> To download the current version number of IBM Notes, go to ▌▶ *Downloads* ▶ *Add-in for IBM Notes* ▌. For example, 1511.20151212.2230 is ReleaseVersion.YYYYMMDD.HHMM.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<ibm-portal-composit>
<domain-object name="com.ibm.rcp.installmanifest">
<object-data>
<install>
<installfeature id=" com.sap.sod.ln.shelf.addon.feature" required="true"
version=<PLUGIN_VERSION_NUMBER>
<requirements>
<feature action="install" mergeaction="add" shared="true"
restartPersonality="true" match="perfect"
id="com.sap.sod.ln.shelf.addon.feature" url="file:/c:/groupware/ln/demo/
notessidebarupdatesite" version=<PLUGIN_VERSION_NUMBER>/>
</requirements>
</installfeature>
</install>
</object-data>
```

```
</domain-object>
</ibm-portal-composite>
```

3. Save and run the automatic installation script.

   To install the SAP add-in into IBM Notes, save this script to an install.bat file and run it on Microsoft Windows.

```
@echo off
set KEY_NAME="HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\IBM\Lotus\Expeditor\Notes"
set rcpLauncherPath=""
FOR /F "tokens=3 usebackq" %%i IN (`reg query HKEY_LOCAL_MACHINE\SOFTWARE
\Wow6432Node\IBM\Lotus\Expeditor\Notes ^|find /i "launcher"`) DO SET
rcpLauncherPath=%%i
echo The rchLauncher.exe location : %rcpLauncherPath%
%rcpLauncherPath% -com.ibm.rcp.provisioning#provisioningCommand -
provisioningOperation provision "C:\groupware\ln\demo \install.update.xml" -
application com.ibm.rcp.provisioning.application.ProvisioningApplication -
provisioningStatusLog "C:\groupware\ln\demo \groupware_install.log"
```

4. If you want to use automatic installation on more machines, repeat the previous step on each machine.

1.1.2.2   Associating Documents and Custom Attributes

The following table contains the custom attributes and views that are created by the SAP Add-In for IBM Notes. You may need these attributes to archive documents such as e-mails or appointments. All changes are reversible.

Documents and Their Custom Attributes

Document	Custom Attributes
E-Mail	$AccountBPInternalID, $AccountBPUUID, $MasterBPUUID, $MasterGroupWareID, AccountName, Categories, $Master-GroupWareLastChangedDateTime, SODLastSyncTime, SOD-SyncStatus, SODMainAccountUUID, $ReferenceObjectLeads, $ReferenceObjectOpportunities
Contact or Account	$AccountBPUUID, $MasterBPInternalID, $MasterBPUUID, $MasterGroupWareID, $MasterLastChangeDateTime, AccountName, Accounts, SODLastSyncTime, SODMainAccountUUID, SODSyncStatus, Categories
Appointment	$AccountBPInternalID, $AccountBPUUID, $MasterBPInternalID, $MasterBPUUID, $MasterGroupWareID, AccountName, SODLastSyncTime, SODMainAccountUUID, SODSyncStatus, STARTDATETIME, Categories

1.1.2.3   Understanding Categories and Views

In this section, you see the definition of each of the views that the add-in creates in the background when you install it. This information may be helpful when you archive each user's content.

> **i Note**
>
> Every document (e-mail, contact, appointment, or task) that is associated with SAP Cloud for Customer is added to the category SAP CRM.

Contact Database Views

View	Formula
SAP Cloud for Customer – Sync Pending	SELECT (Form = „Person") & (Type = „Person" : „CODAccount") & (Categories = „SAP CRM") & (!@IsAvailable($AutoCreatedList)	!@UpperCase($AutoCreatedList) = „DIP") & ((@Modified > SODLastSyncTime)	(SODSyncStatus>0)
SAP Cloud for Customer Accounts	SELECT (Form = „Person") & (Type = „CODAccount") & (!@IsAvailable($AutoCreatedList)	!@UpperCase($AutoCreatedList) = „DIP")
SAP Cloud for CustomerContacts	SELECT (Form = „Person") & (Type = „Person") & (Categories = „SAP CRM") & (!@IsAvailable($AutoCreatedList)	!@UpperCase($AutoCreatedList) = „DIP")

E-Mail Database Views

View	Formula
SAP Cloud for Customer– Sync Successful	SELECT (Categories = „SAP CRM") & ((Form = „Memo")	(Form = „Reply")	(Form = „To Do")	(Form = „Task")	(Form = „_Calendar Entry")	(Form = „Appointment")) & (SODSyncStatus > -1) & (SODSyncStatus < 1)
SAP Cloud for Customer– Sync Pending	SELECT (Categories = „SAP CRM") & ((Form = „Memo")	(Form = „Reply")	(Form = „To Do")	(Form = „Task")	(Form = „_Calendar Entry")	(Form = „Appointment")) & ((@Modified > SODLastSyncTime)	(SODSyncStatus=1))

View	Formula
SAP Cloud for Customer – Sync Error **i Note** At times when data synchronization fails, do the following: 1. Set the logging level to 3 (detailed). 2. Re-associate the document for which the synchronization failed. 3. Re-trigger the sync. 4. Copy the log information from *HelpSupportView Trace* and forward the log information for error analysis.	SELECT (Categories = „SAP CRM") & ((Form = „Memo") | (Form = „Reply") | (Form = „To Do") | (Form = „Task") | (Form = „_Calendar Entry") | (Form = „Appointment")) & (SODSyncStatus =2)
SAP Cloud for Customer– All	SELECT (Categories = „SAP CRM") & ((Form = „Memo") | (Form = „Reply") | (Form = „To Do") | (Form = „Task") | (Form = „_Calendar Entry") | (Form = „Appointment"))

Hidden Database Views

View	Formula
($CODSyncPendingTask)	SELECT (Categories = „SAP CRM") & ((Form = „To Do") | (Form = „Task")) & ((@Modified > lastSyncTimeAttrib) | (SODSyncStatus = 1))
($CODSyncPendingCalendar)	SELECT (Categories = „SAP CRM") & ((Form = „_Calendar Entry") | (Form = „Appointment")) & ((@Modified > SODLastSyncTime) | (SODSyncStatus=1))
($CODSyncPendingEmail)	SELECT (Categories = „SAP CRM") & ((Form = „Memo") | (Form = „Reply")) & ((@Modified > + SODLastSyncTime) | (SODSyncStatus=1))
($CODSyncPendingContact)	SELECT (Form = „Person") & (Type = „Person" : „CODAccount") & (Categories = „SAP CRM") & (!@IsAvailable($AutoCreatedList) \| !@UpperCase($AutoCreatedList) = „DIP") & ((@Modified > SODLastSyncTime) | (SODSyncStatus > 0))

1.1.2.4 Predefining User Settings

Users can use settings to configure the behavior of the add-in. You can preconfigure user settings for the UI behavior and data synchronization of the add-in. You can deploy your preconfigured settings when you first install the add-in.

Preferences file: `<LotusNotes-install-dir>\Data\workspace\.metadata\.plugins \org.eclipse.core.runtime\.settings \com.sap.sod.ln.shelf.addon.prefs`

You may add the required parameters and settings to this preference file or create a new file if it does not exist. The following attributes manage the behavior of the add-in. All of the following configuration parameters are optional. You may choose not to set the value for any of them. The configuration parameters are divided into the following categories:

- Connection settings
- UI settings
- Synchronization settings
- Advanced settings

The following tables list the attributes in each category, along with explanation of the function and an example. A sample preferences setup appears after the following tables.

Connection Settings

Attribute	Explanation/Example
SODSystemUrl	URL used the last time this user was logged on to the SAP Cloud for Customer system i Note Example: SODSystemUrl= https\:/ /abc-cust007.dev.sap-bydesign.com

Attribute	Explanation/Example
SODSystemUrlsList	List of the system URLs that a user can log on to. ⓘ Note Example: Ensure that the whole XML string is in the same line. ``` <SOAP-ENV:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/"> <SOAP-ENV:Header/> <SOAP-ENV:Body> <SODLastLogins> <login url="https://abc-cust01.dev.sapbydesign.com" user="myusername1"/> <login url="https://abc-cust02.dev.sapbydesign.com" user="myusername2"/> </SODLastLogins> </SOAP-ENV:Body> </SOAP-ENV:Envelope> ```
SODUsername	User name that is used to log on to the SAP Cloud for Customer system. ⓘ Note Example: SODUsername=myusername
SODRememberPassword	Remember the password used during the last successful logon. ⓘ Note Example: SODRememberPassword=true / false
SODAutoLogin	Automatically log on to the same system used during the last successful logon. ⓘ Note Example: SODAutoLogin=true / false

User Interface Settings

Attribute	Explanation/Example
SODEnableLeadsUIFeature	Enables the leads table in the sidebar UI of the add-in. i Note Example: SODEnableLeadsUIFeature=true / false
SODenableOpportunitiesFeature	Enables the opportunities table in the sidebar UI of the add-in. i Note Example: SODenableOpportunitiesFeature=true / false
SODEnableActivitiesFeature	Enables the activities table in the sidebar UI of the add-in. i Note Example: SODEnableActivitiesFeature=true / false
SODEnableSalesQuotesUIFeature	Enables the sales quotes table in the sidebar UI of the add-in. i Note Example: SODEnableSalesQuotesUIFeature=true / false

Synchronization Settings

Attribute	Explanation/Example
SODEnableAutoSync	Enables auto synchronization. i Note Example: SODEnableAutoSync=true / false
SODAutoSyncInterval	Sets auto-synchronization time interval in seconds. i Note Example: SODAutoSyncInterval=300
SODAppointmentsStartDate	Number of days in the past the system starts downloading historical appointments, reflected as number of days before today. i Note Example: SODAppointmentsStartDate=30

Attribute	Explanation/Example
SODAppointmentsEndDate	Number of days in the future the system stops downloading future appointments, reflected as number of days after today. i Note Example: SODAppointmentsEndDate=180
SODAppointmentsSyncConflictPref	Defines your conflict resolution preferences for appointments. i Note Example: SODAppointmentsSyncConflictPref=0 0 => Server takes priority 1 => Client takes priority
SODTasksStartDate	Number of days in the past the system starts downloading historical tasks, reflected as number of days before today. i Note Example: SODTasksStartDate=30
SODTasksEndDate	Number of days in the future the system stops downloading tasks appointments, reflected as number of days after today. i Note Example: SODTasksEndDate=180
SODTasksSyncConflictPref	Defines your conflict resolution preferences for tasks. i Note Example: SODTasksSyncConflictPreff=0 0 => Server takes priority 1 => Client takes priority
SODContactsSyncConflictPref	Defines your conflict resolution preferences for contacts. i Note Example: SODContactsSyncConflictPref=0 0 => Server takes priority 1 => Client takes priority

Advanced Settings

Attribute	Explanation/Example
SODNotificationLevel	Sets the notifications frequency. **i Note** Example: SODNotificationLevel=2 0 => Disable all notifications 1 => Error notifications only 2 => All notifications
SODLoggingLevel	Sets the logging level. This needs to be enabled to log the details about the background operations. This will help analyzing problems with the add-in. Note that this setting may negatively impact the performance of the add-in. **i Note** Example: SODLoggingLevel=0 0 => Disable all logging 1 => Log errors only 2 => Log Everything (for debugging)

i Note

Sample Preferences Setup

```
#Sat Oct 19 12:22:32 PDT 2013
eclipse.preferences.version=1
SODSystemUrl=https\://abc-cust007.dev.sapbydesign.com
SODSystemUrlsList=<SOAP-ENV\:Envelope xmlns\:SOAP-ENV\="http\://
schemas.xmlsoap.org/soap/envelope/"><SOAP-ENV\:Header/><SOAP-ENV
\:Body><SODLastLogins><login url\="https\://abc-cust007.dev.sapbydesign.com" user
\="myusername"/></SODLastLogins></SOAP-ENV\:Body></SOAP-ENV\:Envelope>
SODUsername=myusername
SODRememberPassword=true
SODAutoLogin=false
SODEnableLeadsUIFeature=true
SODEnableOpportunitiesUIFeature=true
SODEnableActivitiesUIFeature=true
SODEnableSalesQuotesUIFeature=true
SODEnableAutoSync=true
SODAutoSyncInterval=300
SODAppointmentsStartDate=0
SODAppointmentsEndDate=0
SODAppointmentsSyncConflictPref=0
SODTasksStartDate=0
SODTasksEndDate=0
SODTasksSyncConflictPref=0
SODContactsSyncConflictPref=0
SODLoggingLevel=0
SODNotificationLevel=0
```

1.1.2.5   Using Automatic Uninstallation

Procedure

1. Understand the template uninstall manifest.

   Like installation manifests, uninstall manifests are in XML format.

   > **i Note**
   >
   > The following code is a sample for illustration purposes. The plug-in that you download from the system contains the actual manifest files and scripts required for installation and uninstallation.

   ```xml
   <?xml version="1.0" encoding="UTF-8"?>
   <ibm-portal-composite>
   <domain-object name="com.ibm.rcp.installmanifest">
   <object-data>
   <install>
   <installfeature id=" com.sap.sod.ln.shelf.addon .feature" required="true"
   version="2.0.0">
   <requirements>
   <feature action="uninstall" mergeaction="remove" shared="true"
   restartPersonality="true" match="perfect"
   id="com.sap.sod.ln.shelf.addon.feature" url="file:/c:/groupware/ln/demo/
   notessidebarupdatesite" version="2.0.0" />
   </requirements>
   </installfeature>
   </install>
   </object-data>
   </domain-object>
   </ibm-portal-composite>
   ```

2. Save and run the automated uninstallation script.

   To uninstall the SAP add-in from IBM Notes, save this script to an uninstall.bat file and run it on Microsoft Windows.

   ```
   @echo off
   set KEY_NAME="HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\IBM\Lotus\Expeditor\Notes"
   set rcpLauncherPath=""
   FOR /F "tokens=3 usebackq" %%i IN (`reg query HKEY_LOCAL_MACHINE\SOFTWARE
   \Wow6432Node\IBM\Lotus\Expeditor\Notes ^|find /i "launcher"`) DO SET
   rcpLauncherPath=%%i
   echo The rchLauncher.exe location : %rcpLauncherPath%
   %rcpLauncherPath% -com.ibm.rcp.provisioning#provisioningCommand -
   provisioningOperation provision "C:\groupware\ln\demo\uninstall.update.xml" -
   application com.ibm.rcp.provisioning.application.ProvisioningApplication -
   provisioningStatusLog "C:\groupware\ln\demo \groupware_uninstall.log"
   ```

1.2   Working with IBM Notes

The SAP Cloud for Customer Add-In for IBM Notes allows you to exchange information between IBM Notes and SAP Cloud for Customer.

> **i Note**
>
> IBM Notes integration does not support business-to-consumer (B2C) service processes, such as those involving individual customers, in SAP Cloud for Social Engagement and SAP Service Cloud. IBM Notes integration is supported for business-to-business (B2B) service processes, such as those involving accounts and contacts.

Check out this video for tips for working with the add-in for IBM Notes, such as:

- Recommended settings
- Associating e-mail messages with SAP Cloud for Customer
- Creating contacts in IBM Notes
- Synchronizing your inbox with your SAP solution

1.2.1 Installing the SAP Cloud for Customer Add-In for IBM Notes

Each user who wants to use SAP Cloud for Customer functions from IBM Notes must install the add-in on his or her computer. In some companies, administrators install it centrally for all users.

Requirements for Add-In for IBM Notes [page 15]
>   IBM Notes versions supported by the add-in.

Install the Add-In for IBM Notes [page 16]
>   If your system administrator has not installed the add-in company-wide, you can install it yourself by following these steps.

Make Settings for the SAP Cloud for Customer Add-In for IBM Notes [page 17]
>   You can adjust the settings for synchronization, appearance, and notifications.

Uninstall the Add-In for IBM Notes [page 17]
>   You can uninstall the add-in by using the application management function in IBM Notes.

1.2.1.1   Requirements for Add-In for IBM Notes

IBM Notes versions supported by the add-in.

- IBM Notes 10
- IBM Notes 9
- IBM Notes 8.5.x

> **! Restriction**
>
> We don't intend to support versions higher than IBM Notes 10.

1.2.1.2 Install the Add-In for IBM Notes

If your system administrator has not installed the add-in company-wide, you can install it yourself by following these steps.

Prerequisites

- IBM Notes has been installed, set up, and configured on your computer.
- To allow IBM Notes to accept plug-ins, you have added the following line to your `plugin_customization.ini` file:
  `com.ibm.notes.branding/enable.update.ui=true`
- To avoid compatibility issues with previous releases, make sure that you have installed the latest version of the add-in.

> **i Note**
>
> If you are using the Microsoft Windows 7 operating system, to avoid permission errors, run notepad as an administrator and edit the .ini file as follows:
>
> 1. Search programs and files for "notepad".
> 2. When the notepad text editor appears, run it as administrator.
> 3. In notepad, open your IBM Notes .ini file, make the changes directly, and save.

Context

Procedure

1. In SAP Cloud for Customer, choose *Download*.
2. Save the zip file that contains the add-in locally.
3. In IBM Notes, go to the application install step and use the option to search for new features to install.
4. Add the location of the zip file that you just downloaded.
5. Follow the on-screen instructions to complete the installation.
6. To activate the plug-in, restart IBM Notes.

1.2.1.3 Make Settings for the SAP Cloud for Customer Add-In for IBM Notes

You can adjust the settings for synchronization, appearance, and notifications.

You can make the following settings for the SAP Cloud for Customer Add-In for IBM Notes:

- Synchronization
  - Enable automatic synchronization to exchange data from IBM Notes to SAP Cloud for Customer for the items listed in this section.
  - Set up the timing for synchronization.
- User interface settings
  Select the sections you want to see in the sidebar.
- Advanced
  Configure the appearance of notifications.

1.2.1.4 Uninstall the Add-In for IBM Notes

You can uninstall the add-in by using the application management function in IBM Notes.

Procedure

1. In IBM Notes, in the application management function, find the SAP Cloud for Customer add-in.
2. Uninstall the add-in.
3. Restart IBM Notes.

Results

The SAP Cloud for Customer add-in no longer appears as a sidebar in IBM Notes.

1.2.2 Working from IBM Notes

The SAP Cloud for Customer Add-In for IBM Notes allows you to exchange information between IBM Notes and SAP Cloud for Customer.

Check out this video for tips for working with the add-in for IBM Notes, such as:

- Recommended settings
- Associating e-mail messages with SAP Cloud for Customer
- Creating contacts in IBM Notes

- Synchronizing your inbox with your SAP solution

To connect to the SAP solution, log on from the sidebar in IBM Notes.

You can either download all contacts from your SAP solution into IBM Notes at once, or you can build your contacts in IBM Notes as you work.

You can save time by adding appointments, tasks, or e-mails from your IBM Notes into SAP Cloud for Customer.

You can remove an e-mail message from the SAP solution (browser only) if you linked it to the SAP system originally.

1.2.2.1 Log On to the SAP Cloud for Customer Add-In for IBM Notes

To connect to the SAP solution, log on from the sidebar in IBM Notes.

Procedure

1. From the SAP Cloud for Customer sidebar in IBM Notes, enter your URL of the SAP system.

   > i Note
   >
   > Leave out the path or directory information at the end of the URL, and end the URL with .com. For example, you on log on with http://Test.sap.com and not http://Test.sap.com:7000/iri/portal.

2. Enter your user and password.

   > i Note
   >
   > Under *Settings*, if you choose the option for remembering your password and automatic login, you will stay logged on automatically with the same user name and password in the system.

Results

Your IBM Notes is now connected with the SAP Cloud for Customer system that you selected.

> → Tip
>
> When you are working offline and cannot log on to the system, any changes to relevant e-mails, appointments, and tasks, or new items for synchronization to SAP Cloud for Customer are kept in a pool in IBM Notes. Actual

synchronization of these items occurs automatically as soon as you log on to SAP Cloud for Customer using the add-in.

> ⚠ Caution
>
> If you are logged on to SAP Cloud for Customer with the add-in for many hours without any action, you may receive an authorization error when trying to use an IBM Notes integration function. In this case, your user cookies may have expired. Simply log off and log on again.

1.2.2.2   Copy Contacts into IBM Notes

You can either download all contacts from your SAP solution into IBM Notes at once, or you can build your contacts in IBM Notes as you work.

- To download all contacts at once, in the SAP Cloud for Customer sidebar, choose ▶ *Options* ❯ *Initial Download* ❭.
- To build contacts in IBM Notes as you work, you have the following options:
  - Automatic e-mail download
    When you select an e-mail in IBM Notes, the add-in searches your SAP solution for a corresponding contact. If one is found, it is downloaded into your IBM Notes contacts automatically.
  - Use *Save Contact* button
    Run a specific search in the sidebar, select a contact from the results, and choose *Save Contact*.

1.2.2.3   Add Appointments, Tasks, or E-Mails for Synchronization

You can save time by adding appointments, tasks, or e-mails from your IBM Notes into SAP Cloud for Customer.

Context

In IBM Notes, if you have contact information showing in the SAP Cloud for Customer sidebar, you can simply use drag and drop to associate an appointment, task, or e-mail with an opportunity, lead, or account listed under that contact.

If you wish to add an appointment for synchronization and do not have relevant contact information visible in the sidebar, use the following procedure.

Procedure

1. Go to the appropriate place in IBM Notes:
   - For an appointment, go to your calendar
   - For a task, go to your to-do list
   - For an e-mail, go to your inbox
2. Right-click an appointment, task, or e-mail and add it to SAP Cloud for Customer.
3. Add an account, opportunity, or lead as a reference, if appropriate.
4. Submit your changes.

   The solution creates an appointment, task, or e-mail in SAP Cloud for Customer, from the original one in IBM Notes.

Results

The appointment, task, or e-mail is synchronized with SAP Cloud for Customer.

> ! Restriction
>
> It is not possible to synchronize recurring appointments.

> i Note
>
> If you include attendees in an appointment in SAP Cloud for Customer, you can send the meeting request like this:
>
> 1. Ensure that the appointment is synchronized by repeating the steps for adding the appointment.
> 2. Open the appointment in IBM Notes and send the meeting request.

> i Note
>
> If you change a task, the changes are automatically synchronized to SAP Cloud for Customer when you save your changes.

> ! Restriction
>
> It is not possible to create an e-mail in SAP Cloud for Customer. When you create all new e-mails in IBM Notes directly, the SAP solution synchronizes them with SAP Cloud for Customer.

1.2.2.4   Remove E-Mails from SAP Cloud for Customer

You can remove an e-mail message from the SAP solution (browser only) if you linked it to the SAP system originally.

When you remove an e-mail from your SAP solution, the e-mail is not deleted: it still exists in Microsoft Outlook. The link to that e-mail is simply removed from SAP Cloud for Customer.

To remove e-mails from SAP Cloud for Customer, under *Activities*, hover over an e-mail and choose *Remove*.

Important Disclaimers and Legal Information

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Some links are classified by an icon and/or a mouseover text. These links provide additional information.
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Beta and Other Experimental Features

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