Getting Ready to Sync Contacts and Events with Exchange Sync (Beta)

Salesforce, Spring '16

@salesforcedocs

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CONTENTS

Exchange Sync (Beta) Syncs Your Microsoft® Items from the Cloud 1

Get Ready to Sync Events 2

Get Ready to Sync Contacts 4

Fix Sync Issues 6

EXCHANGE SYNC (BETA) SYNCS YOUR MICROSOFT® ITEMS FROM THE CLOUD

Keep your contacts and events in sync between your email system and Salesforce without installing and maintaining software.

Note: Exchange Sync is currently available through a beta program, which means it's a high quality feature with known limitations.

If your administrator set up your organization to sync contacts and events between your company's email system and Salesforce, you're already on the path to increasing your productivity. That's because there's no need for you to duplicate your work between the two systems.

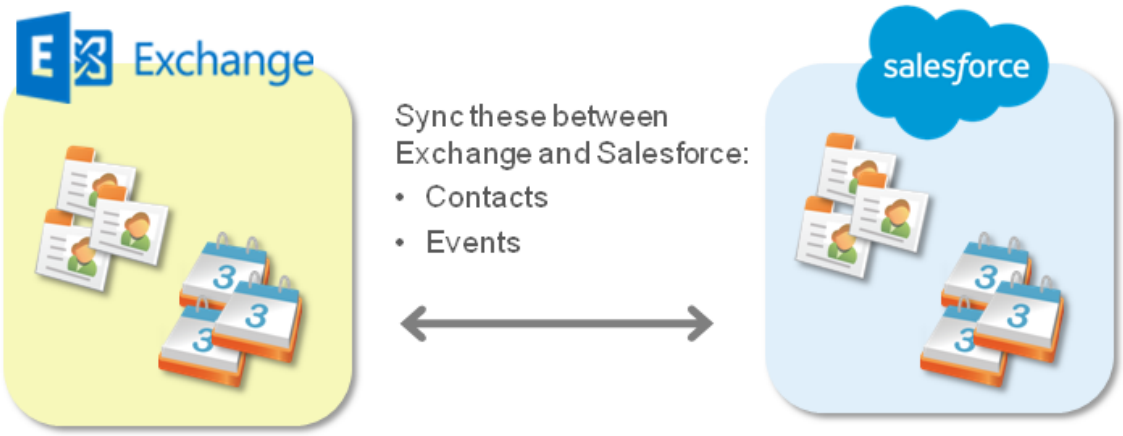
Depending on the settings your administrator selected, Salesforce for Exchange automatically syncs contacts and events between your company's email system and Salesforce in both directions, or one direction.

You can sync contacts and events you create and maintain, either at your desk or on your mobile device.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



At this time, Exchange Sync doesn't:

- Sync recurring events
- Sync invitees included in events
- Let you delete records from both systems in one action

However, you can manage these actions as you always have—by manually updating recurring events, adding event invitees, and deleting records in both systems.

GET READY TO SYNC EVENTS

USER PERMISSIONS

To sync events both ways:	"Read" and "Edit" on events, AND Event sync direction set to "Sync both ways" in Exchange configurations
To sync events from Salesforce to Exchange:	"Read" on events, AND Events sync direction set to "Salesforce to Exchange" in Exchange configurations
To sync events from Exchange to Salesforce:	"Create" on events, AND Event sync direction set to "Exchange to Salesforce" in Exchange configurations

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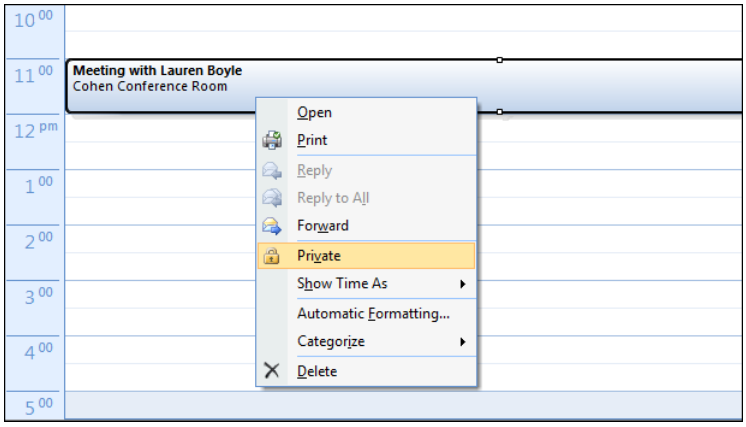
You can choose which events sync between your company's calendar application and Salesforce.

If your administrator has set up Salesforce to sync events, your events sync automatically between the calendar in your company's email system and Salesforce.

You can prevent personal events from syncing with Salesforce in different ways.

- Create a separate calendar in your calendar application to keep track of your personal events. (Exchange Sync is designed to sync only your main Exchange account calendar with Salesforce.)
- Ask your admin if your sync configuration is set up to sync private events. If you're not syncing private events, you can assign your personal events with the `Private` option in your calendar application, and those events won't sync with Salesforce.



It's best if you manage the events you don't want to sync before your administrator initiates sync for the first time. If your events begin syncing before you manage them, you can still remove them from Salesforce by deleting them manually.

Other events sync between Salesforce and your calendar every few minutes. If you're syncing a lot of events, your first sync might take some time.

GET READY TO SYNC CONTACTS

USER PERMISSIONS	
To sync contacts both ways:	"Read" and "Edit" on contacts, and "Read" on accounts, AND Contact sync direction set to "Sync both ways" in Exchange configurations
To sync contacts from Salesforce to Exchange:	"Read" on contacts, AND Contact sync direction set to "Salesforce to Exchange" in Exchange configurations
To sync contacts from Exchange to Salesforce:	"Create" on contacts, AND Contact sync direction set to "Exchange to Salesforce"

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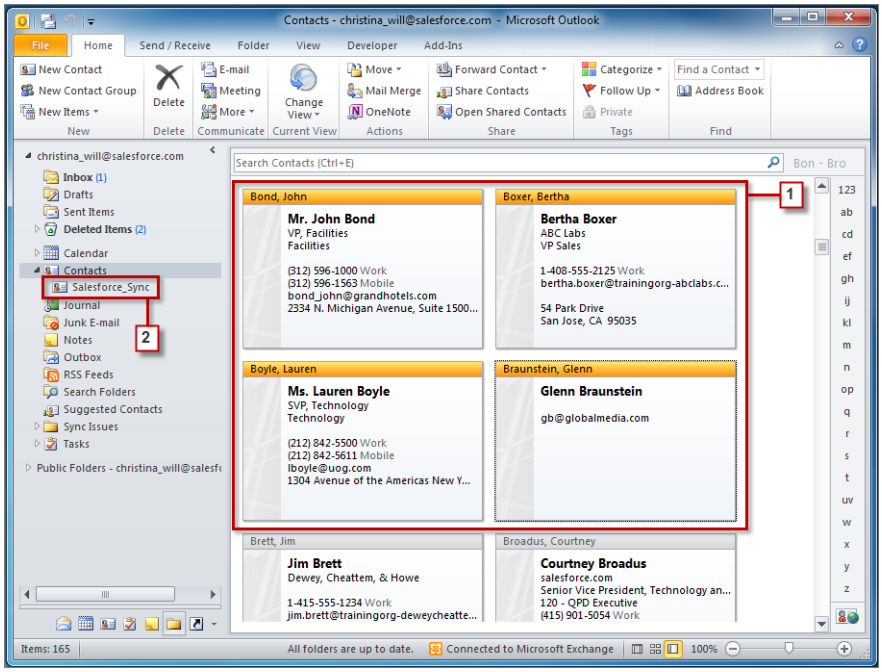
Learn how to sync contacts between your company email system and Salesforce. Depending on which direction you're syncing. , you'll move the email contacts you want to sync with Salesforce to a special folder in your email application.

After your administrator initiates contacts sync for you, Exchange Sync creates a folder in your email application called `Salesforce_Sync`. You can find the `Salesforce_Sync` folder under your contacts directory. Any contacts that have synced from Salesforce to your email system are in `Salesforce_Sync`. Don't rename, move, or delete the `Salesforce_Sync` folder, or syncing between Salesforce and your email system stops.

1. Ask your administrator which direction you're set up to sync.
   - If you're set up to sync from Salesforce to your email only, syncing is already in progress, and you don't need to do anything else. You're ready to access your Salesforce contacts directly from your email system!
   - If you're set up to sync from your email to Salesforce or to sync both ways, you'll move the email contacts you want to sync to Salesforce now.
2. In your email application, select the contacts you want to sync. You can select multiple contacts at a time.



3. Move—do not copy—your selected contacts to the folder `Salesforce_Sync`. If you copy your contacts, you'll have duplicate ones, which is a hassle!

The contacts you move to the `Salesforce_Sync` folder begin to sync every few minutes. If you move a lot of contacts to `Salesforce_Sync`, your first sync might take some time.

FIX SYNC ISSUES

If you have trouble syncing between Microsoft® Exchange and Salesforce, you can have your Salesforce administrator reset your sync process to clear out and then restore the connections between the records in your email and calendar application, and your records in Salesforce.

1. To reset sync for your contacts, make sure your `Salesforce_Sync` folder in your email application contains only the contacts you want to sync with Salesforce.
2. To reset sync for your events, make sure the events that you don't want to sync are assigned the `Private` option in your calendar application.
3. Ask your Salesforce administrator to reset your sync process.

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