
Helping Users Sync Contacts and Events with Lightning Sync

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ADMINISTERING LIGHTNING SYNC

Lightning Sync

Help users keep their contacts and events in sync between your Microsoft® Exchange server and Salesforce without asking them to install and maintain software.

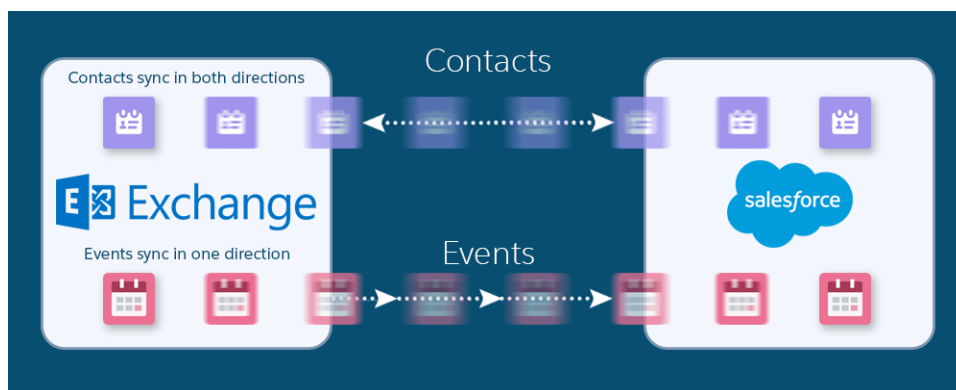
When you set up users' contacts and events to sync between your company's Microsoft® Exchange server and Salesforce, you help your users increase their productivity. That's because there's no need for users to duplicate their work between the two systems. In addition, Lightning Sync offers users with compatible computing environments the flexibility to sync items whether working from their desks or from their mobile devices.

You define your users' Lightning Sync experience by selecting sync settings for users in Salesforce. You can set up users to sync contacts between Exchange and Salesforce in both directions, or just one. You can also set up users to sync events in one direction, from Exchange to Salesforce.

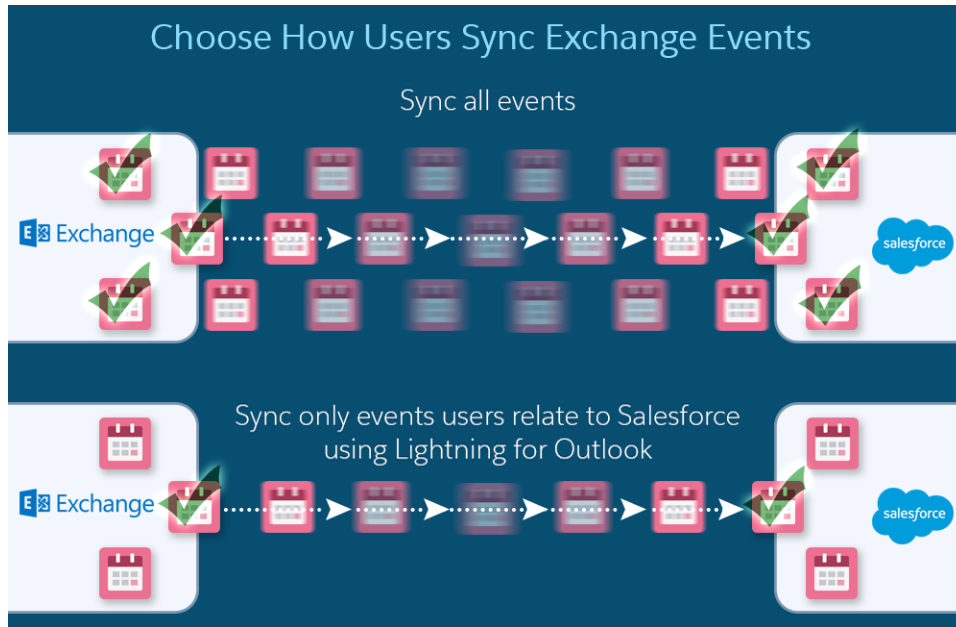
EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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



You can also decide how users' Exchange events sync to Salesforce. Set up users to sync all their events, or only the events they select. Users select which Exchange events sync to Salesforce using [Lightning for Outlook](#), a Microsoft integration feature that lets users experience Salesforce directly from Microsoft Outlook.



You can select more settings to define your users' sync experiences. For example, set up Lightning Sync to sync events your users mark as private. Or, to automatically remove events in Salesforce that your users delete from their calendars.

Lightning Sync Limitations

Currently, Lightning Sync doesn't:

- Sync events from Salesforce to Exchange
- Sync recurring events
- Sync invitees included in events
- Delete syncing contacts in one action
- Support Platform Encryption

Lightning Sync System Requirements

Confirm that your Microsoft® Exchange-based server meets these system requirements before you set up your sales reps to sync contacts and events with Lightning Sync.

Your company must be running either	With these settings enabled
<ul style="list-style-type: none"> • Office 365® Enterprise Editions with Exchange Online • Exchange Server 2016 • Exchange Server 2013 Service Pack 1 	<ul style="list-style-type: none"> • Exchange Web Services (EWS) on an SSL connection • Exchange Autodiscover Service • Basic authentication on both your Exchange server and your Autodiscover service • Encryption protocol TLS 1.1 or later

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

See the Big Picture for Setting Up Lightning Sync

Set up Lightning Sync so your users can sync contacts and events between your company's Microsoft® Exchange server and Salesforce. You complete several steps to prepare the systems to communicate, both on your Exchange server and in Salesforce.

Complete these steps to set up Lightning Sync.

1. [Prepare Your Microsoft® Exchange Server for Lightning Sync](#)

The first step in setting up Lightning Sync is to enable several settings on your Exchange server, including Exchange Web Services, Exchange Autodiscover Service, and Basic authentication.

2. [Set Up a Microsoft® Exchange Service Account to Communicate with Lightning Sync](#)

After you've enabled Exchange Web Services and Exchange Autodiscover Service on your Exchange server, create an Exchange service account with impersonation rights for the mailbox of each Lightning Sync user.

3. [Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters](#)

Run the Remote Connectivity Analyzer—the free web-based tool provided by Microsoft—to confirm whether you and your Exchange administrator have set up Lightning Sync successfully. Or, run the Remote Connectivity Analyzer if Lightning Sync was syncing your reps' items successfully, but suddenly stops. Use the parameters provided to run the test for Lightning Sync.

4. [Set Up Salesforce to Communicate with Microsoft® Exchange](#)

After running the Remote Connectivity Analyzer, log in to Salesforce to enable Lightning Sync and provide your service account credentials.

5. [Run the Lightning Sync Connection Test](#)

After providing your service account credentials in Salesforce, run the Lightning Sync connection test to confirm whether you and your Exchange administrator have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing your reps' items successfully, but suddenly stops.

6. [Tell Users How to Prevent Calendar Events from Syncing to Salesforce](#)

Tell your Lightning Sync users how to manage which of their Exchange calendar events sync with Salesforce. We recommend users prepare their calendars before you add users to Lightning Sync configurations and begin the sync process, but users can manage which events sync at anytime.

7. [Define Sync Settings for Sales Reps Using Lightning Sync](#)

After sales reps prepare their Exchange events to sync with Salesforce, you can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process for your reps.

8. [Tell Users How to Sync Email Contacts with Salesforce](#)

Tell your Lightning Sync users that it's time to manage the Exchange email contacts that they want to sync with Salesforce.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To prepare your Exchange server to communicate with Salesforce:

- Administrative access to your company's Microsoft® Exchange server

SEE ALSO:

[Salesforce Experience in Microsoft Email Success Community](#)

Prepare Your Microsoft® Exchange Server for Lightning Sync

The first step in setting up Lightning Sync is to enable several settings on your Exchange server, including Exchange Web Services, Exchange Autodiscover Service, and Basic authentication.

These instructions vary depending on the version of Microsoft® Exchange your company uses. For more support, visit Microsoft's support website, search for the keywords mentioned here, and follow the instructions intended for your Exchange version.

Complete the following steps on your Exchange server.

1. Enable Exchange Web Services (EWS) on an SSL connection.
 - Make sure your Exchange server has a signed certificate from one of the [Salesforce-approved Certificate Authorities](#).
 - If your organization has configured a firewall, allow an inbound connection to your Exchange client access server on ports 80 and 443.
2. Enable Exchange Autodiscover Service.
3. Enable Basic authentication on both your Exchange server and your Autodiscover service. If you need to run additional authentication methods (such as Microsoft NTLM), there is no need to disable those methods; you can run Lightning Sync without conflict.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Set Up a Microsoft® Exchange Service Account to Communicate with Lightning Sync


After you've enabled Exchange Web Services and Exchange Autodiscover Service on your Exchange server, create an Exchange service account with impersonation rights for the mailbox of each Lightning Sync user.

Before setting up an Exchange Service account, make sure you've [enabled the appropriate Exchange server settings to set up Lightning Sync](#).

To set up an Exchange service account, you'll complete these steps on your Exchange server.

Watch a Demo:

-  [Salesforce Lightning Sync Setup in Office 365 via Point and Click](#)
-  [Salesforce Lightning Sync Setup in Exchange via the Command Line](#)

 **Note:** For more support, visit Microsoft's support website, search for the keywords mentioned here, and follow the instructions intended for your Exchange version.

1. Create an Exchange user with a mailbox that will act as the service account. You'll use this email address for this mailbox to configure Exchange impersonation for the service account.
2. Using Exchange Management Shell, enter the commands that enable service account impersonation for your version of Exchange. If you receive a pipeline error message, wait a few minutes and re-enter the command to let your server process the requests.
 - If you're using Exchange 2013:

- a. Enable the Active Directory extended permission for `ms-Exch-EPI-Impersonation` on all Client Access servers.

```
Get-ExchangeServer | where {$_IsClientAccessServer -eq $TRUE} | ForEach-Object
{Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity
<EnterExchangeSyncServiceAccountEmailAddress> | select-object).identity
-extendedRight ms-Exch-EPI-Impersonation}
```

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up a service account to communicate with Lightning Sync:

- Administrative access to your company's Exchange server

- b. Enable the Active Directory extended rights for `ms-Exch-EPI-May-Impersonate` to let your service account impersonate all accounts on your Exchange server. You'll set a filter later that lets you limit the users the service account syncs with Salesforce.

```
Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname
  -User <EnterExchangeSyncServiceAccountAddress> -ExtendedRights
  ms-Exch-EPI-May-Impersonate}
```

- If you're using Exchange Online offered by Microsoft Office 365™:

- a. Enable customization on your Exchange server.

```
Enable-OrganizationCustomization
```

3. Using Exchange Management Shell, enter these commands to configure your service account to impersonate the group of users who'll sync with Lightning Sync.

- a. Create a management scope to define a filter that groups together the Exchange users who'll sync with Lightning Sync. For example, if you want only your sales representatives to sync, and their Exchange mailboxes all have the same value `Sales` for the filterable property `Department`, you'd enter `Department -eq 'Sales'` in place of `<ChooseRecipientFilter>`.

```
New-ManagementScope -Name:<ChooseExchangeSyncScopeName>
-RecipientRestrictionFilter:{<ChooseRecipientFilter>}
```

- b. Create a management role assignment that restricts the service account to impersonate only the users you defined in the management scope.

```
New-ManagementRoleAssignment -Name:<ChooseExchangeSyncRoleAssignmentName>
-Role:ApplicationImpersonation -User:<EnterExchangeSyncServiceAccountAddress>
-CustomRecipientWriteScope:<EnterExchangeSyncScopeName>
```

Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters

Run the Remote Connectivity Analyzer—the free web-based tool provided by Microsoft—to confirm whether you and your Exchange administrator have set up Lightning Sync successfully. Or, run the Remote Connectivity Analyzer if Lightning Sync was syncing your reps' items successfully, but suddenly stops. Use the parameters provided to run the test for Lightning Sync.

Before you run the Remote Connectivity Analyzer, make sure that you've [enabled the appropriate Exchange server settings](#) and then [set up an Exchange service account](#). Wait a few minutes after completing those tasks to let your Exchange server process the changes you've made. Otherwise, the Remote Connectivity Analyzer can show a failed test summary, even though you've configured setup correctly.

The Remote Connectivity Analyzer checks several points of connectivity between your Salesforce organization and your Exchange server. When the test is complete, Microsoft provides a summary describing your connection status.



Note: The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between Exchange and your Salesforce organization. If you want to test connectivity for only one (or a few) of your reps, check their sync statuses from [Lightning Sync Status](#) in Setup.

1. Visit Microsoft's website and search for the Remote Connectivity Analyzer.
2. On the `Exchange Server` tab, select **Service Account Access (Developers)**.
3. Click **Next**.
4. Complete the test fields:

For this test field

`Target mailbox email address`

`Service Account User Name (Domain\User Name or UPN)`

`Service Account Password`

Type this parameter

The email address of a sales rep you've set up to be impersonated by your Lightning Sync service account

The service account domain\user name or UPN you've set up for Lightning Sync

The service account password you've set up for Lightning Sync

5. Select `Use Autodiscover` to detect server settings.
6. Select `Test predefined folder`.
7. Choose `Contacts` if you'd like to test sync connectivity for this user's contacts, or `Calendar` for this user's events.
8. Check `Use Exchange Impersonation`.
9. In the `Impersonated User` field, type the same Exchange email address you specified for `Target mailbox email address`.
10. For `Impersonated user identifier`, select `SMTP Address`.
11. Check the `I understand that I must use the credentials of a working account...` acknowledgment.
12. Type the analyzer verification code and click **verify**.
13. At the top of the page, click **Perform Test**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To get the necessary parameters to run the test:

- Administrative access to your company's Microsoft® Exchange server

Running the test usually takes less than 30 seconds. When the test is complete, the analyzer displays a summary evaluating the sync connectivity for the Exchange user you've specified.

14. Take action based on the test results.

- If the test summary displays "Connectivity Test Successful" or "Connectivity Test Successful with Warnings," it's likely that you've set up your service account correctly. and you're ready to [provide your service account credentials to Salesforce](#).
- If the test summary displays "Connectivity Test Failed," review the test details to troubleshoot setup issues. If the test continues to fail, verify that you've completed the previous setup steps correctly and then contact Salesforce Customer Support for help.

Set Up Salesforce to Communicate with Microsoft® Exchange

After running the Remote Connectivity Analyzer, log in to Salesforce to enable Lightning Sync and provide your service account credentials.

1. From Salesforce Setup, enter *Lightning Sync Setup* in the **Quick Find** box, then select **Lightning Sync Setup**.
2. Under Enable Lightning Sync, click **Edit**.
3. Check **Enable Lightning Sync** and click **Save**.
4. Enter the service account user name you created in Exchange, including your company's domain and top-level domain. For example, if you work for AW Computing, and the service account mailbox you've created is *svcacct@awcomputing.com*, enter your user name in either of these formats:
 - *svcacct@awcomputing.com*
 - *awcomputing.com\svcacct*

Some network configurations require one format rather than the other. If your first attempt to get Salesforce and Exchange to communicate is unsuccessful, try the other format.

5. Enter your service account password.
6. If your sales reps' email domains are different than your service account domain, enter the additional domains in a comma-separated list. For example, if your service account is *svcacct@awcomputing.com*, but your reps' email addresses are in the domain *awcomputing.net*, enter *awcomputing.net* as an additional domain so Lightning Sync can recognize it.
7. Click **Save**.

EDITIONS

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

USER PERMISSIONS

To access Lightning Sync setup in Salesforce:

- "View Setup and Configuration"

Run the Lightning Sync Connection Test

After providing your service account credentials in Salesforce, run the Lightning Sync connection test to confirm whether you and your Exchange administrator have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing your reps' items successfully, but suddenly stops.

The Lightning Sync connection test checks several points of connectivity between your Salesforce organization and your Exchange server. When the test is complete, it provides a summary describing your connection status.

Run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer when you're testing connectivity. The tests differ slightly, so running both gives you more information about your connection status.

Test your connection status to confirm whether you and your Exchange administrator have set up Lightning Sync successfully. Or, run the connection tests if Lightning Sync was syncing successfully, but syncing suddenly stops for all reps in your Salesforce organization.

The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between Exchange and your Salesforce organization. If you want to test connectivity for only one (or a few) of your reps, check their sync statuses from **Lightning Sync Status** in Setup.

1. From Setup, enter *Lightning Sync Setup* in the **Quick Find** box, then select **Lightning Sync Setup**.
2. From the **Connection Test** section, provide the email address for one of the reps you've set up your Exchange service account to impersonate.
3. Click **Test**.
Salesforce checks your connection between Salesforce and your Exchange server and summarizes your connection status.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run the connection test:

- "View Setup and Configuration"

Tell Users How to Prevent Calendar Events from Syncing to Salesforce

Tell your Lightning Sync users how to manage which of their Exchange calendar events sync with Salesforce. We recommend users prepare their calendars before you add users to Lightning Sync configurations and begin the sync process, but users can manage which events sync at anytime.

Users might not want to sync some calendar events—like personal events—to Salesforce.

In the next setup step, you define user sync settings in Lightning Sync configurations, which starts syncing your users' items. At that time, if you set up users to sync events, all of users' events start to sync to Salesforce right away—unless you tell users to manage their events now.

Users can prevent personal events from syncing from Exchange to Salesforce in different ways.

- Users can create a separate calendar in their calendar application to keep track of their personal events. (Lightning Sync is designed to sync only a reps' main Exchange account calendar to Salesforce.)
- In the next setup step, you choose whether you want to sync users' private events. If you opt not to sync users' private events, you can tell users to assign the private option to events in their calendar applications that they'd rather not sync.

If users don't manage their personal events before syncing begins, users can still remove those events from Salesforce by deleting personal events Salesforce manually.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

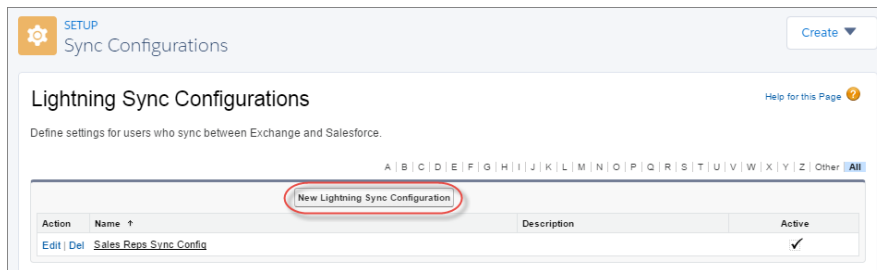
Define Sync Settings for Sales Reps Using Lightning Sync

After sales reps prepare their Exchange events to sync with Salesforce, you can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process for your reps.

Defining sync settings lets you control which of your users can sync contacts and events. You can also control which direction your users sync, and create filters to limit certain records from syncing.

Before you begin, make sure that you understand how to define your sync settings to [avoid syncing data between organizations](#). Syncing data between organizations is possible if you test Lightning Sync before rolling it out to your sales reps, or your company uses multiple Salesforce orgs.

1. From Salesforce Setup, enter *Sync Configurations* in the Quick Find box, then select **Sync Configurations**.
2. Click **New Lightning Sync Configuration**.



EDITIONS

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

USER PERMISSIONS

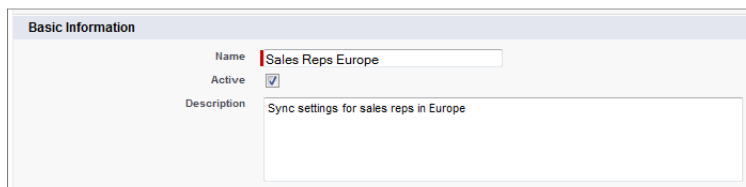
To access Lightning Sync setup in Salesforce:

- “View Setup and Configuration”

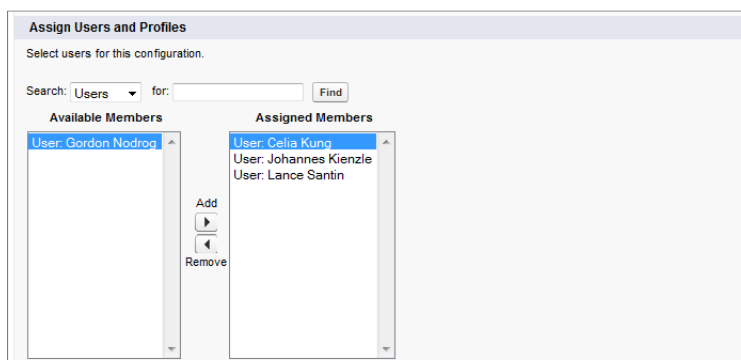
To create, edit, or delete Lightning Sync configurations:

- “Manage Email Client Configurations”

3. Enter the name of the configuration. For example, if you’re creating a configuration for users in a particular region, enter a unique name for it, and then select **Active**.



4. Assign users and profiles to this configuration.



- Indicate the sync direction for your users' contacts.

Data Settings

Contacts

Sync Direction: Sync both ways

Conflict Behavior: Salesforce always wins

[Edit Field Mappings](#)

If an Exchange contact matches multiple Salesforce contacts, sync it with the Salesforce contact that:

- ☒ Has the most recent activity
- ☐ Was last updated
- ☐ Has the oldest creation date

- To change field mappings between Salesforce and Exchange contacts, click **Edit Field Mappings**.
- Indicate whether you'd like to sync your users' events from Exchange to Salesforce.

Events

Sync Direction: Exchange to Salesforce

Conflict Behavior: Exchange always wins

Specify Which Exchange Events Sync to Salesforce: All events

[Edit Field Mappings](#)

- Indicate whether you want all Exchange events to sync to Salesforce, or only the events your users select. If you set up users to select events, events users relate to Salesforce from Lightning for Outlook begin to sync between the two systems. To finish setting up that option, you're required to enable Lightning for Outlook, and your users are required to complete Lightning for Outlook setup.
- To change field mappings between Salesforce and Exchange events, click **Edit Field Mappings**.
- Click **Save**.
- Set filters to specify the contacts users can sync from Salesforce to Exchange. You are required to set filters based on your users' record ownership. Choose whether you want to:
 - Limit contacts that users sync to only what users own, choose **Selected Contacts**, and then select **User's Records**. Make sure that you select both of these settings together, or no contacts sync for users in this configuration.
 - Let users sync all contacts they can see in Salesforce, choose **All Contacts**.

Contact Filters ! Required Information

Filter the contacts users of this configuration can sync. Contacts can be filtered by the records they're related to.

Filter By Record Ownership

Sync: ☒ Selected Contacts ☐ All Contacts

Contacts

☒ User's Records

Set more sync filters, if you wish. For example, to prevent contacts from outside your users' territories from syncing, create sync filters for specific fields on users' contact records. Contact filters don't apply to contacts syncing from Exchange to Salesforce.

Object	Field	Operator	Value	
Contact	Mailing Country	not equal to	United States	AND
Contact	Mailing Country	not equal to	Japan	AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND

[Add Row](#) [Remove Row](#)

Other Contacts to Include

☐ Sync contacts users follow in Chatter

12. Select `Sync private events` to sync events your users have marked private either in Salesforce or their calendars.
13. Select `Automatically remove deleted Exchange events from Salesforce` to let reps delete Exchange events and Salesforce events in one action.
14. Specify the specific events users can sync from Exchange to Salesforce. Enter a filter in the `Greater or equal to` field. Doing so limits the events users can sync to these time frames.
 - `TODAY`—Syncs events that end on or after today. The start time is 12:00 a.m. [Learn more](#) about why this selection is recommended in certain scenarios.
 - `LAST MONTH`—Syncs events that ended on or after the first day of last month.
 - `LAST N DAYS`—Syncs events that ended on or after a specified number of days ago, such as `LAST 30 DAYS`. You can sync events that ended up to 180 days ago.

Event Filters

Filter the events users of this configuration can sync.

Sync: User's Records

Additional Settings for Events

☐ Sync private events [i](#)

☐ Automatically remove deleted Exchange events from Salesforce [i](#)

Filter By End Date [Learn more](#)

Greater or equal to TODAY

15. Click **Save**.

Contact and event syncing has begun for users in this Lightning Sync configuration.

SEE ALSO:

[How Can I Avoid Syncing Data Between My Salesforce Organizations?](#)
[How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook](#)

Tell Users How to Sync Email Contacts with Salesforce

Tell your Lightning Sync users that it's time to manage the Exchange email contacts that they want to sync with Salesforce.

If you've set up your users to sync contacts from only Salesforce to Exchange, you can skip this step—your users' contacts and events are already syncing.

After you define users' sync settings by adding them to Lightning Sync configurations and make the configurations active, Lightning Sync creates a folder that's called `Salesforce_Sync` as a subdirectory under the `Contacts` directory in each user's email account.

Users who are syncing contacts from Exchange to Salesforce or syncing both ways can choose which email contacts sync to Salesforce by moving those contacts into the `Salesforce_Sync` folder.

Tell users to move their contacts to the `Salesforce_Sync` folder now.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Manage Lightning Sync

Assign Users to Lightning Sync Configurations

To get your Lightning Sync users' contacts and events to sync, you add users to a Lightning Sync configuration. You can do this in Salesforce by adding individual users, or multiple users with user profiles.

Before you assign a user to a Lightning Sync configuration, consider how that user's records sync if they're already mentioned in another configuration:

- If you assign an individual user to two Lightning Sync configurations, the user is removed from the first configuration automatically and assigned to the new one.
- If you assign a user to two Lightning Sync configurations as both an individual user and as part of a profile, the user is not removed from either configuration, but the user's records will sync according to the configuration that lists the user individually.
- If you assign a user to one Lightning Sync configuration and one configuration, the user is not removed from either configuration, but the user's records will sync according to the Lightning Sync configuration.

Users observe the assignments you've created, added, or removed the next time Lightning Sync runs a sync cycle.

To assign a user to a Lightning Sync configuration,

1. From Setup, enter *Lightning Sync Configurations* in the **Quick Find** box, then select **Lightning Sync Configurations**.
2. If you're modifying a Lightning Sync configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Lightning Sync Configuration**, and then complete the required fields.
3. In the Assign Users and Profiles section, select either *Profiles* or *Users* in the **Search** drop-down list.
4. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
5. Select members from the Available Members box, and click **Add** to add them to the group. If all available users are assigned to this configuration, the Users list is empty and you can only assign profiles.
6. To remove members, select those members and click **Remove**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view configurations

- "View Setup and Configuration"

To create, edit, or delete configurations:

- "Manage Email Client Configurations"

7. Click **Save**.

How Can I Avoid Syncing Data Between My Salesforce Organizations?

If your company uses Lightning Sync in multiple Salesforce organizations, make sure the data in those organizations remains separate by being mindful about how you set up your Lightning Sync configurations.

You're using multiple organizations if you either:

- Test new features in a sandbox organization before setting up the feature in your live organization.
- Maintain separate Salesforce organizations for different divisions of your company.

To prevent Lightning Sync from syncing contacts and events between your Salesforce organizations, don't add the same user to Lightning Sync configurations in more than one organization.

We don't recommend marking a Lightning Sync configuration as inactive to prevent data from syncing between your Salesforce organizations. While marking a configuration as inactive prevents it from syncing a user's data, you risk forgetting that user is included in multiple Lightning Sync configurations, and marking the configuration as active later.



Example: You're testing Lightning Sync features in your sandbox organization, so you add user Marianne Schumacher to an Lightning Sync configuration in the sandbox organization. After you're satisfied with how you've set up Lightning Sync features for Marianne, you're ready to add her to a Lightning Sync configuration in your live organization.

Before you add Marianne to a Lightning Sync configuration in your live organization, remove her from the configuration in your sandbox organization. Otherwise, Lightning Sync can sync contacts and events between Marianne's email application, the sandbox organization, and the live organization, saving test and live data to all three data sources.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Fix Sync Issues for Lightning Sync Users

If an Lightning Sync user has trouble syncing between Microsoft® Exchange and Salesforce, you can troubleshoot sync issues by checking your users' sync statuses or running a Lightning Sync error report. If you find a sync issue that a user can't overcome, then you can reset that user's sync process for them.

[Check Lightning Sync Users' Sync Statuses](#)

If your users can't sync, you can check their sync statuses—and the sync status of your Lightning Sync setup—to learn where sync is failing.

[Build and Run a Lightning Sync Error Report](#)

If your Lightning Sync users can't sync, you can build and run an error report to discover what's causing sync to fail in your organization, and for which users. The report details provide suggestions to help you troubleshoot sync issues.

[Reset Sync for Lightning Sync Users](#)

If a user has trouble syncing between Microsoft Exchange and Salesforce, you can reset that user's sync process. This process clears out and then restores the connections between a user's Exchange and Salesforce records. Resetting the sync process won't affect information stored in those records.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

[Test Your Connection Between Salesforce and Microsoft® Exchange](#)

Run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer when you're testing connectivity. The tests differ slightly, so running both gives you more information about your connection status.

[Lightning Sync Statuses](#)

Understanding Lightning Sync statuses helps you assess and address Lightning Sync errors that appear on the Lightning Sync status page in Salesforce.

Check Lightning Sync Users' Sync Statuses

If your users can't sync, you can check their sync statuses—and the sync status of your Lightning Sync setup—to learn where sync is failing.

1. From Setup, enter *Lightning Sync Status* in the **Quick Find** box, then select **Lightning Sync Status**.
2. Type the name of the user whose sync status you'd like to check, and click **Check Status**.
The sync status for that user is displayed.

In some cases, you may need to reset sync for a user.

If you need help interpreting sync statuses, or need recommendations on correcting sync issues, check out [Lightning Sync Statuses](#).

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To access Lightning Sync statuses:

- "View Setup and Configuration"

Build and Run a Lightning Sync Error Report

If your Lightning Sync users can't sync, you can build and run an error report to discover what's causing sync to fail in your organization, and for which users. The report details provide suggestions to help you troubleshoot sync issues.

First, you'll create a custom report type using a Lightning Sync Error Report custom object we've set up for you in Salesforce. Then, you'll create a Lightning Sync error report. Finally, you'll run your report to help your users fix those pesky sync errors they're experiencing.

1. [Create a custom report type](#). Set the `Primary Object` to **Lightning SyncError**.
2. Create your Lightning Sync error report. From the Reports tab, click **New Report**. Set the `Report Type` to the Lightning Sync report type you created in step 1, and click **Create**.
3. Save and run your Lightning Sync error report. From the unsaved report, click **Save**, complete the required fields, and click **Save and Run Report**.
Salesforce generates a list of errors sync errors found in your organization, or displays "Grand Totals (0 records)" if the report couldn't identify any sync errors.

If the report couldn't identify any errors, but users still can't sync, contact Salesforce.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create or update custom report types:

- "Manage Custom Report Types"

To create, edit, and delete reports:

- "Create and Customize Reports"

AND

"Report Builder"

Reset Sync for Lightning Sync Users

If a user has trouble syncing between Microsoft Exchange and Salesforce, you can reset that user's sync process. This process clears out and then restores the connections between a user's Exchange and Salesforce records. Resetting the sync process won't affect information stored in those records.

1. Make sure that your user's `Salesforce_Sync` folder contains only the contacts the user wants to sync with Salesforce, and the events the user doesn't want to sync are marked as `Private` in the user's calendar application.
2. From Salesforce Setup, enter *Lightning Sync Status* in the `Quick Find` box, then select **Lightning Sync Status**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Quick Find / Search...

Expand All | Collapse All

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- ☒ **Salesforce App for Outlook**
 - App for Outlook Settings
 - Exchange Sync Setup (beta)
 - Exchange Sync Configurations (beta)
 - Exchange Sync Status (beta)** 2

Exchange Sync Status Help for this Page

System Sync Status ! = Required Information

Check your system's status to make sure records are syncing between Exchange and Salesforce.

Configuration Setup

Microsoft Exchange service account provided:	svcacct@awcomputing.com
Users in active Salesforce Exchange configurations:	12
Users with linked Microsoft Exchange and Salesforce email addresses:	0

Contacts

Last sync activity:	Fri Jan 22 02:13:55 GMT 2016
Records synced in last 60 minutes:	0
Records synced in last 24 hours:	0

Events

Last sync activity:	Fri Jan 22 02:13:55 GMT 2016
Records synced in last 60 minutes:	0
Records synced in last 24 hours:	0

User Sync Status

Check the sync status of a user to make sure that user's records are syncing between Exchange and Salesforce. If the user is having trouble syncing between Exchange and Salesforce, you can reset the user's sync process. Resetting cleans up information that only Salesforce for Exchange uses, and does not remove data from your Microsoft Exchange server or Salesforce.

User: 3

Check Status Reset Sync

3. Type a user's name, and click **Reset Sync**.


During the next sync cycle, Lightning Sync will sync:

- All contacts from the user's `Salesforce_Sync` folder in Exchange to Salesforce, excluding contacts that fall outside of the filters you set in the user's Exchange configuration.
- All events from the user's calendar in Exchange to Salesforce, excluding events that fall outside of the filters you set in the user's Exchange configuration, or events the user marked as `Private` in Exchange.

Test Your Connection Between Salesforce and Microsoft® Exchange

Run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer when you’re testing connectivity. The tests differ slightly, so running both gives you more information about your connection status.

Test your connection status to confirm whether you and your Exchange administrator have set up Lightning Sync successfully. Or, run the connection tests if Lightning Sync was syncing successfully, but syncing suddenly stops for all reps in your Salesforce organization.

 **Note:** The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between Exchange and your Salesforce organization. If you want to test connectivity for only one (or a few) of your reps, check their sync statuses from `Lightning Sync Status` in Setup.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To get the necessary parameters to run the Microsoft Remote Connectivity Analyzer:

- Administrative access to your company’s Microsoft® Exchange server

To run the Lightning Sync connection test:

- “View Setup and Configuration”

Lightning Sync Statuses

Understanding Lightning Sync statuses helps you assess and address Lightning Sync errors that appear on the Lightning Sync status page in Salesforce.

System Statuses

Table 1: Configuration Setup Statuses

If	Provides this status	This status means that
Microsoft Exchange service account provided:	<i>Your Service Account User Name</i>	You’ve saved your service account credentials in Salesforce, and Lightning Sync has recognized a valid service account. This status doesn’t necessarily mean that the service account is set up to sync using Lightning Sync. If you continue to have sync errors, we recommend that you use Microsoft®’s Remote Connectivity Analyzer tool to

EDITIONS

Available in: Salesforce Classic

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



If	Provides this status	This status means that
		test your connection and troubleshoot setup issues.
	None	Lightning Sync couldn't save your service account credentials. Verify that you've provided the correct service account ID and password and that you've set up a valid service account in Microsoft Exchange.
Lightning for Outlook enabled:	Yes	You've enabled Lightning for Outlook in Setup. If you've set up sales reps to select which Microsoft events sync to Salesforce, reps select events using Lightning for Outlook.
	No	You haven't enabled Lightning for Outlook in Setup. If you've set up sales reps to select which Microsoft events sync to Salesforce, reps can't select events until you've enabled Lightning for Outlook.
Salesforce recognizes Microsoft Exchange service account:		Lightning Sync recognizes the service account that you provided. This status doesn't necessarily mean that the service account is set up to sync using Lightning Sync. If you continue to see sync errors, we recommend that you use Microsoft's Remote Connectivity Analyzer tool to test your connection and troubleshoot setup issues.
		Lightning Sync couldn't recognize the service account that you provided. Check to make sure that you've set up a valid service account in Microsoft Exchange.
Users with linked Microsoft Exchange and Salesforce email addresses:	The expected number of Lightning Sync users	All of your users' Microsoft Exchange email addresses have mapped correctly to the corresponding Salesforce email addresses.
	An unexpected number of Lightning Sync users	Some of your users' Microsoft Exchange email addresses have not mapped correctly to the corresponding Salesforce email addresses. Compare your users' addresses in Exchange and Salesforce to verify that they match.
	0	None of your users' Microsoft Exchange email addresses has mapped to its corresponding Salesforce email addresses. Contact Salesforce Customer Support.

Table 2: Contacts Statuses

If	Provides this status	This status means that
Last sync activity:	A contact sync time within the last few minutes	Your organization last synced contacts with Lightning Sync on this date, at this time. In general, Lightning Sync is syncing records as expected. If you see this status and individual users still report that contacts are not syncing as expected, check your Exchange server or Lightning Sync configurations for settings related to those particular users.
	A contact sync time within a few hours	Your organization last synced contacts on this date, at this time. It's possible you recently set up Lightning Sync, because the initial contacts sync might take up to several hours to complete. If you haven't initiated contacts sync for your organization for the first time, this status might indicate a problem with contacts sync in your organization. Monitor the last sync activity over the next 24 hours to see if syncing resumes.
	A contact sync time on a past date	Your organization last synced contacts on this date, at this time. If your organization doesn't sync again within 24 hours, verify that you provided the correct Exchange service account credentials, that Salesforce recognized your service account, and that you've used Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 60 minutes:	The number of contacts that were synced in your organization in the last 60 minutes	Within the last 60 minutes, your organization last synced this number of contacts.
	0	Your organization hasn't synced any contacts within the last 60 minutes. Monitor record sync activity over the next 24 hours to see if sync resumes. If sync doesn't resume, use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that

If	Provides this status	This status means that
		your connection is working, contact Salesforce Customer Support.
Records synced in last 24 hours:	The number of contacts that were synced in your organization over the last 24 hours	Within the last 24 hours, your organization synced this number of contacts.
	0	Your organization hasn't synced any contacts within the last 60 minutes. Use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.






Table 3: Events Statuses

If	Provides this status	This status means that
Last sync activity:	An event sync time within the last few minutes	Your organization last synced events with Lightning Sync on this date, at this time. In general, Lightning Sync is syncing records as expected. If you see this status and individual users still report that events are not syncing as expected, check your Exchange server or Lightning Sync configurations for settings related to those particular users.
	An event sync time within a few hours	Your organization last synced events on this date, at this time. You might have recently set up Lightning Sync, because the initial events sync might take up to several hours to complete. If you haven't initiated events sync for your organization for the first time, this status might indicate a problem with events sync in your organization. Monitor the last sync activity over the next 24 hours to see if syncing resumes.
	An event sync time on a past date	Your organization last synced events on this date, at this time. If your organization doesn't sync again within 24 hours or longer, verify that you provided the correct Exchange service account credentials, that Salesforce recognized your service account, and that you've used Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with

If	Provides this status	This status means that
		Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 60 minutes:	The number of events that were synced in your organization in the last 60 minutes	Within the last 60 minutes, your organization last synced this number of events.
	0	Your organization hasn't synced any events within the last 60 minutes. Monitor record sync activity over the next 24 hours to see if syncing resumes. If syncing doesn't resume, use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 24 hours:	The number of contacts that were synced in your organization in the last 24 hours	Within the last 24 hours, your organization synced this number of contacts.
	0	Your organization hasn't synced any events within the last 60 minutes. Use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.

User Statuses

Table 4: Configuration Setup Statuses

If	Provides this status	This status means that
User assigned to active Exchange configuration:		This user is set up to sync in an active Lightning Sync configuration.
		This user isn't set up to sync in an active Lightning Sync configuration.
User mailbox is running on supported version of Microsoft Exchange:		Lightning Sync supports this user's version of Microsoft Exchange.
		Lightning Sync doesn't support this user's version of Microsoft Exchange.
User recognized by Exchange service account:		This user is represented by the service account that you've set up in Exchange, and






If	Provides this status	This status means that
		Lightning Sync can communicate with your Exchange service account.
		This user isn't represented by the service account that you've set up in Exchange, or Lightning Sync can't communicate with the Exchange service account that you provided. Check your Exchange service account setup to verify that you've set up a valid service account and that it accurately represents this user.
User's reset sync status:	Marked for reset	You've reset this user for sync, but the reset hasn't started. Your reset request is in the system queue and will be completed when the system is available.
	Reset in progress	The reset sync process is in progress. When reset is complete, "User's reset sync status" is no longer displayed on this page.
User set up Lightning for Outlook:	Yes	This sales rep has set up Lightning for Outlook. If you've set up reps to select which Microsoft events sync to Salesforce, reps select events using Lightning for Outlook.
	No	This sales rep hasn't set up Lightning for Outlook. If you've set up reps to select which Microsoft events sync to Salesforce, reps can't select events until they've set up Lightning for Outlook.





Table 5: Contacts Statuses

If	Provides this status	This status means that
Salesforce_Sync folder found:		The Salesforce_Sync folder was found in this user's email account under the Contacts directory.
		Lightning Sync can't find the Salesforce_Sync folder on your Exchange server or can't create it automatically for this user. You can create the folder Salesforce_Sync for this user as a subdirectory under the Contacts directory in this user's email account.

If	Provides this status	This status means that
Salesforce and Exchange email addresses linked:		This user's Microsoft Exchange email address has mapped to the user's Salesforce email address correctly.
		This user's Microsoft Exchange email address hasn't mapped to the user's Salesforce email address correctly. Reset sync for this user.
Salesforce to Exchange sync status:	Not started	This user's contacts hasn't started syncing from Salesforce to Exchange.
	Initial sync in progress	This user's contacts are syncing from Salesforce to Exchange for the first time. This initial sync might take several hours.
	Initial sync completed	This user's contacts have completed syncing from Salesforce to Exchange for the first time.
	Sync in progress	This user's contacts are syncing from Salesforce to Exchange right now.
	In sync	This user's contacts have completed syncing from Salesforce to Exchange.
	Exchange configuration not set to sync	This user isn't set up to sync contacts from Salesforce to Exchange in an active Lightning Sync configuration.
Exchange to Salesforce sync status:	Not started	This user's contacts have not started syncing from Exchange to Salesforce yet.
	Initial sync in progress	This user's contacts are syncing from Exchange to Salesforce for the first time. This initial sync might take several hours.
	Initial sync completed	This user's contacts have completed syncing from Exchange to Salesforce for the first time.
	Sync in progress	This user's contacts are syncing from Exchange to Salesforce.
	In sync	This user's contacts have completed syncing from Exchange Salesforce.
	Exchange configuration not set to sync	This user isn't set up to sync contacts from Exchange to Salesforce in an active Lightning Sync configuration.
Records in sync	The number of contacts that are syncing for this user	This user has this number of contacts syncing between Exchange and Salesforce. If this user's contacts are syncing as

If	Provides this status	This status means that
		expected, this number matches the number of contacts in this user's Salesforce_Sync folder.

Table 6: Event Statuses

If	Provides this status	This status means that
Calendar folder found:		The calendar folder was found in this user's email account.
		Lightning Sync can't find the user's calendar folder on your Exchange server.
Salesforce and Exchange email addresses linked:		This user's Microsoft Exchange email address has mapped to the user's Salesforce email address correctly.
		This user's Microsoft Exchange email address hasn't mapped to the user's Salesforce email address correctly. Reset sync for this user.
Salesforce to Exchange sync status:	Not started	This user's events haven't started syncing from Salesforce to Exchange.
	Initial sync in progress	This user's events are syncing from Salesforce to Exchange for the first time. This initial sync might take several hours.
	Initial sync completed	This user's events have completed syncing from Salesforce to Exchange for the first time.
	Sync in progress	This user's events are syncing from Salesforce to Exchange right now.
	In sync	This user's events have completed syncing from Salesforce to Exchange.
	Exchange configuration not set to sync	This user isn't set up to sync events from Salesforce to Exchange in an active Lightning Sync configuration.
Exchange to Salesforce sync status:	Not started	This user's events haven't started syncing from Exchange to Salesforce.
	Initial sync in progress	This user's events are syncing from Exchange to Salesforce for the first time. This initial sync might take several hours.

If	Provides this status	This status means that
	Initial sync completed	This user's events have completed syncing from Exchange to Salesforce for the first time.
	Sync in progress	This user's events are syncing from Exchange to Salesforce.
	In sync	This user's events have completed syncing from Exchange to Salesforce.
	Exchange configuration not set to sync	This user isn't set up to sync events from Exchange to Salesforce in an active Lightning Sync configuration.
Records in sync	The number of events that are syncing for this user	This user has this number of events syncing from Exchange to Salesforce. If this user reports difficulty syncing only some events, verify that the user is set up to sync events as expected in the user's Lightning Sync configuration and that the user didn't assign the <code>private</code> option to the event. Also remember that at this time, Lightning Sync doesn't sync recurring events or invitees on events.

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