Sync Your Contacts and Events with Lightning Sync

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@salesforcedocs

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LIGHTNING SYNC: KEEP YOUR MICROSOFT® ITEMS IN SYNC WITH SALESFORCE

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

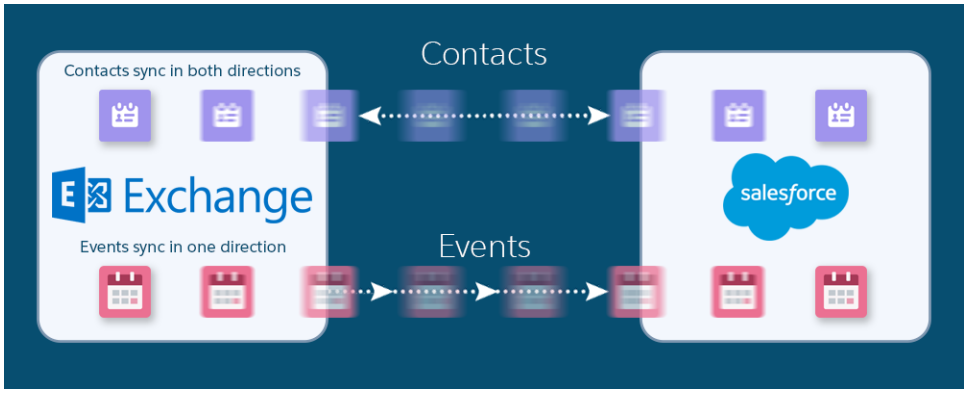
Your productivity increases when your administrator sets up your company to sync contacts and events between your email server and Salesforce. That's because there's no need for you to duplicate your work between the two systems. Lightning Sync can sync contacts and events you create and maintain, whether you're at your desk or working remotely from your mobile device.

Depending on the settings your administrator selected, Lightning Sync automatically syncs contacts between your company's email system and Salesforce in both directions, or one direction. In addition, Lightning Sync can sync events in one direction, from your Exchange-based calendar system to Salesforce.

EDITIONS

Available to manage from: both Salesforce Classic and Lightning Experience

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



Your administrator can select more settings to define your sync experience. Ask your administer about how you're set up to sync in these cases:

- Are you syncing all calendar events or only the events you relate to Salesforce using Lightning for Outlook?
- Are you syncing private events?
- Are events you delete from your calendar automatically removed from Salesforce?
- Are your events automatically related to relevant Salesforce contacts, or one relevant lead?

Lightning Sync for Microsoft Limitations

Currently, Lightning Sync doesn't:

- Sync events from Salesforce to Exchange
- Sync recurring events
- Delete syncing contacts in one action

GET READY TO SYNC EVENTS WITH LIGHTNING SYNC FOR MICROSOFT® EXCHANGE

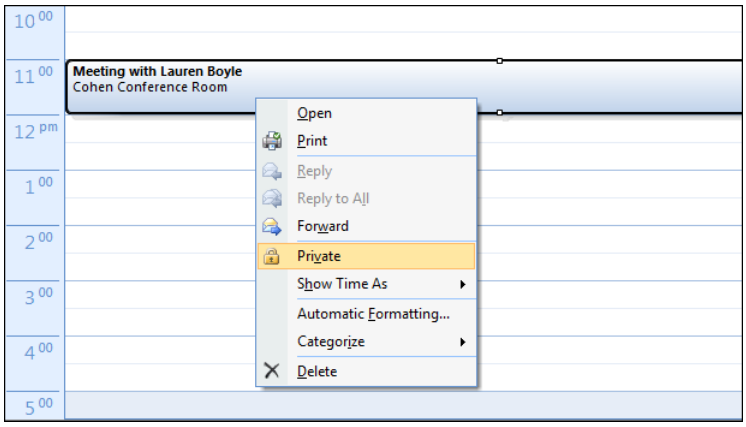
You can choose which events sync from your Microsoft calendar application to Salesforce.

If your administrator has set up Salesforce to sync events, your events sync automatically from the calendar in your company's email system to 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. Lightning Sync is designed to sync only your primary Microsoft® Exchange calendar to 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 from your calendar application, and those events won't sync with Salesforce.

  For example, you can mark an event as private from Microsoft Outlook® like this.



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USER PERMISSIONS

To sync events from your calendar to Salesforce:

- "Create" on events, AND

  An active Lightning Sync configuration

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.

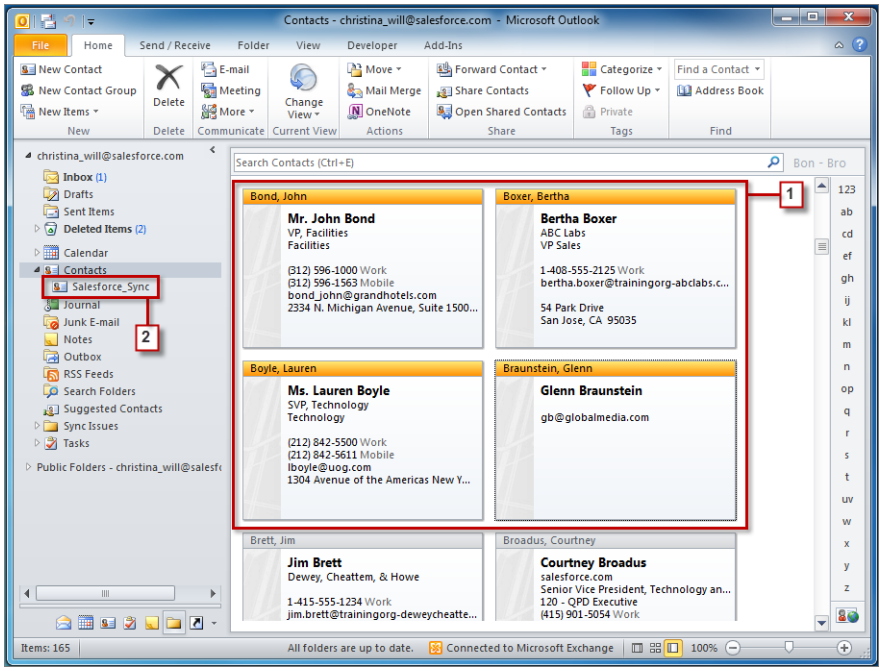
Other events sync from your calendar to Salesforce every few minutes. If you're syncing a lot of events, your first sync might take some time.

GET READY TO SYNC CONTACTS WITH LIGHTNING SYNC FOR MICROSOFT® EXCHANGE

Learn how to sync contacts between your company's email application and Salesforce using Lightning Sync.

After your administrator initiates contacts sync for you, Lightning 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 application are in `Salesforce_Sync`. Don't rename, move, or delete the `Salesforce_Sync` folder, or syncing between Salesforce and your email application 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 application only, syncing is already in progress, and you don't have to do anything else. Soon you can access your Salesforce contacts directly from your email application.
   - If you're set up to sync from your email to Salesforce or to sync both ways, it's time to move the contacts that you want to sync into the `Salesforce_Sync` folder.
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 get duplicates, which are a hassle!

The contacts you move to the `Salesforce_Sync` folder begin to sync every few minutes. If you move numerous contacts to `Salesforce_Sync`, your first sync can take some time.

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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"

FIX SYNC ISSUES

If you have trouble syncing between your email application and Salesforce using Lightning Sync, ask your Salesforce administrator to reset your sync process. Resetting clears out and then restores 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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