Help Sales Reps Sync Contacts and Events with Lightning Sync

Salesforce, Winter '27

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LEARN ABOUT LIGHTNING SYNC FOR MICROSOFT® EXCHANGE FEATURES

Keep your contacts and events in sync between your Microsoft® Exchange server and Salesforce without installing and maintaining software manually.

Important: Starting in Winter '21, Lightning Sync isn't available to new Salesforce customers. If you're on Lightning Sync, use the Lightning Sync migration assistant for a seamless transition to Einstein Activity Capture, our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

When your contacts and events sync between your company's Microsoft® Exchange server and Salesforce, you increase your productivity. There's no need to duplicate your work between the two systems. Plus, Lightning Sync syncs items whether you're working from your desk or from the Salesforce mobile app.

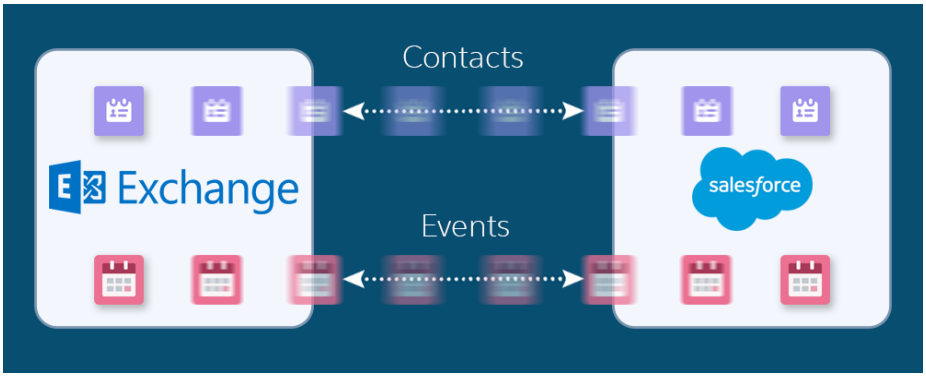
Salesforce admins define your experience by selecting sync settings from Salesforce. For example, admins can choose whether both contacts and events sync, or whether only contacts or only events sync. Admins can also decide which direction your items sync: between Salesforce and your Microsoft Exchange server, or just one way.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform



Admins can also set up all events to sync or only the events that you select. If you're set up to sync only selected events, you can choose which events to sync using the Outlook integration app. Outlook integration lets you experience Salesforce features directly from Microsoft Outlook®.

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

- Are you syncing private events?
- Are events that you delete in one calendar automatically removed from the other?
- Are your events automatically related to relevant Salesforce contacts, or one relevant lead?
- Are you syncing event series (repeating events created in Lightning Experience or the Salesforce mobile app)?

Lightning Sync for Microsoft Exchange Limitations

Currently, Lightning Sync doesn't. See Lightning Sync Considerations for more details.

- Sync tasks. Instead, admins can set up the Outlook integration app to let you work with Salesforce tasks from Outlook.
- Sync recurring events (repeating events created in Salesforce Classic). Instead, move to Lightning Experience—Lightning Sync can sync event series (repeating events created in Lightning Experience).
- Automatically remove deleted contacts from the other application.

SEE ALSO:

Lightning Sync Setup Guide (for Users)

Salesforce Experience in Microsoft Email Trailblazer Community

LIGHTNING SYNC SYSTEM REQUIREMENTS

Confirm that your Microsoft® Exchange-based server or Google Workspace account meet these system requirements before you set up your sales reps for Lightning Sync.

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Lightning Sync for Google

The service account connection method is available for companies working from Google Workspace. Einstein Activity Capture supports the Basic, Business, and Enterprise editions of Google Workspace.

Lightning Sync for Microsoft Exchange

The service account and OAuth 2.0 connection method are available for companies working from Microsoft Exchange.

Lightning Sync doesn't support hybrid Exchange server deployments that include both Exchange Online and on-premises Exchange servers. Syncing to even one of the servers in a hybrid deployment isn't supported.

Connection method	Supported servers	Required Settings
Exchange service account	• Office 365® Enterprise Editions with Exchange Online (Supported until Microsoft retires Basic Authentication for Exchange Online in your tenant.) • Exchange Server 2019 • Exchange Server 2016 • Exchange Server 2013 Service Pack 1	• Exchange Web Services (EWS) on an SSL connection • Exchange Autodiscover Service • Either Basic Authentication or NTLM on both your Exchange server and your Autodiscover server • Encryption protocol TLS 1.1 or later
OAuth 2.0 for Exchange	Office 365® Enterprise Editions with Exchange Online. Lightning Sync only supports Office 365 tenants hosted on Microsoft Azure global infrastructure clouds. Azure national clouds aren't supported.	No additional settings are required to connect using OAuth 2.0

LIGHTNING SYNC CONSIDERATIONS

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations.

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Considerations for Syncing Events from Your Calendar Application to Salesforce Only
Before Salesforce admins set up Lightning Sync, they can familiarize themselves with these considerations for syncing events from Google or Microsoft® to Salesforce only. That way, their rollout generates no surprises.

Lightning Sync Considerations for Companies With Multiple Salesforce Organizations
If your company uses multiple Salesforce organizations, review these considerations to avoid sync issues and unsupported configurations.

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Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

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Considerations for Syncing Events from Your Calendar Application to Salesforce Only

Before Salesforce admins set up Lightning Sync, they can familiarize themselves with these considerations for syncing events from Google or Microsoft® to Salesforce only. That way, their rollout generates no surprises.

Admins decide whether Lightning Sync users sync events, and in which direction, by defining sync settings from Lightning Sync configurations in Setup.

When syncing from Microsoft or Google calendars to Salesforce only, there's potential for Lightning Sync to overwrite event data. To prevent such an occurrence, admins can be considerate about how they roll out Lightning Sync.

Admins can consider whether reps meet one or more of these scenarios.

- Reps are migrating reps from Salesforce for Outlook
- Reps routinely edit their events records in Salesforce
- Reps already have access to the Outlook integration or the Gmail integration

For example, say that a rep maintains meeting notes in Salesforce event records. But the matching event in that rep's calendar doesn't include those notes. If reps are set up to sync from Microsoft or Google to Salesforce, Lightning Sync overwrites the event in Salesforce with the one from the calendar.

Admins can prevent reps' events from being overwritten by following our guidelines for syncing events from Microsoft or Google to Salesforce only.

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Guidelines for Syncing Events from Your Calendar Application to Salesforce Only
Before Salesforce admins roll out Lightning Sync, admins can address these guidelines to avoid overwriting event data during certain sync scenarios.

Guidelines for Syncing Events from Your Calendar Application to Salesforce Only

Before Salesforce admins roll out Lightning Sync, admins can address these guidelines to avoid overwriting event data during certain sync scenarios.

If sales reps fall into one of the scenarios outlined in Considerations for Syncing Events from Your Calendar Application to Salesforce Only, admins can follow these guidelines to set up reps for Lightning Sync.

- In Lightning Sync configurations, don't change the default setting, `TODAY`, for the event sync filter. That way, edits that reps made to past events in Salesforce are excluded from the initial sync.
- We recommend that admins tell reps to edit event fields that sync (like date, time, subject, or description) in their calendars, and not in Salesforce. That way, Lightning Sync doesn't overwrite those edits in Salesforce. (Reps can continue to use Salesforce features that don't involve editing their Salesforce event fields, however, like relating events to Salesforce records.)

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Lightning Sync Considerations for Companies With Multiple Salesforce Organizations

If your company uses multiple Salesforce organizations, review these considerations to avoid sync issues and unsupported configurations.

You're using multiple organizations if you:

- Test new features in a sandbox org before setting up features in your live production org.
- Maintain separate Salesforce orgs for different divisions of your company.

Setting up the same user to sync across multiple orgs is not supported. While we recommend testing in a sandbox org before rolling out Lightning Sync, remove users from sandbox sync configurations before adding users to production configurations.

Likewise, we don't recommend marking a Lightning Sync configuration as inactive to prevent a user from syncing across multiple orgs. You risk forgetting that user is included in multiple configurations, and marking the configuration as active later, by accident.

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

Before you add Marianne to a configuration in your production org, remove her from the configuration in your sandbox org. Otherwise, Marianne could experience sync issues. You also risk syncing test data onto your production org and email server.

SEE THE BIG PICTURE FOR SETTING UP LIGHTNING SYNC FOR MICROSOFT® EXCHANGE

Salesforce admins can set up Lightning Sync so reps can sync contacts and events between Microsoft® Exchange and Salesforce. Salesforce admins and IT pros complete several steps, both on your Exchange server and in Salesforce.

Important: Starting in Winter '21, Lightning Sync isn't available to new Salesforce customers. If you're on Lightning Sync, use the Lightning Sync migration assistant for a seamless transition to Einstein Activity Capture, our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

Complete these steps to set up Lightning Sync for Microsoft Exchange.

1. Choose and Configure a Method for Connecting to Microsoft® Exchange
   Salesforce admins and IT pros can choose whether to connect Microsoft Exchange to Salesforce using an Exchange service account, or OAuth 2.0, and then set up that connection. Connecting using OAuth 2.0 requires a Microsoft Office 365® account.
2. Run the Lightning Sync Connection Test for Microsoft® Exchange Users
   Salesforce admins can run the Lightning Sync connection test to confirm whether admins and IT pros have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing reps' items successfully, but suddenly stops.
3. Tell Reps How to Prevent Certain Microsoft® Outlook Calendar Events from Syncing to Salesforce
   Salesforce admins should tell reps how to manage which of their Outlook calendar events sync with Salesforce. We recommend that reps prepare events that they don't want to sync before admins kick off the sync process. However, reps can manage which events sync at any time.
4. Define Lightning Sync for Microsoft® Exchange Settings for Reps
   After reps prepare their Exchange events to sync with Salesforce, admins can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process, and determines how reps contacts and events sync between applications.
5. Tell Reps How to Sync Microsoft® Contacts with Salesforce
   It's time for Salesforce admins to tell their sales reps to manage the Microsoft contacts that reps want to sync with Salesforce.

SEE ALSO:

Salesforce Experience in Microsoft Email Trailblazer Community

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USER PERMISSIONS

To prepare your Exchange server to communicate with Salesforce:

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

To access and edit Lightning Sync Setup

- Customize Application AND Manage Users AND Manage Lightning Sync

Choose and Configure a Method for Connecting to Microsoft® Exchange

Salesforce admins and IT pros can choose whether to connect Microsoft Exchange to Salesforce using an Exchange service account, or OAuth 2.0, and then set up that connection. Connecting using OAuth 2.0 requires a Microsoft Office 365® account.

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Connect Salesforce and Microsoft® Exchange Using an Exchange Service Account

To connect Salesforce to your company's Microsoft Exchange server using a service account, you and your Exchange administrator have to complete several steps, both from Salesforce and from your Exchange server.

Connect Salesforce and Microsoft® Exchange Using OAuth 2.0

Give Salesforce access to Microsoft Exchange Online using OAuth 2.0. To complete setup, you need a Microsoft Office 365® account and help from your Office 365 global administrator to provide credentials for your company's account.

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Prepare Your Microsoft Exchange Server for Lightning Sync

To set up Lightning Sync using the service account connection method, enable these settings on your Microsoft® Exchange server: Exchange Web Services, Exchange Autodiscover Service, and Basic or NTLM authentication.

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

To set up Lightning Sync using a service account, create an Exchange service account with impersonation rights for the mailbox of each Lightning Sync user.

Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters

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

Set Up Salesforce to Communicate with Microsoft® Exchange Using a Service Account

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

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USER PERMISSIONS

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

- Administrative access to your company's Exchange server

To access and edit Lightning Sync Setup

- Customize Application AND Manage Users AND Manage Lightning Sync

Prepare Your Microsoft Exchange Server for Lightning Sync

To set up Lightning Sync using the service account connection method, enable these settings on your Microsoft® Exchange server: Exchange Web Services, Exchange Autodiscover Service, and Basic or NTLM authentication.

Important: Starting in Winter '21, Lightning Sync isn't available to new Salesforce customers. If you're on Lightning Sync, use the Lightning Sync migration assistant for a seamless transition to Einstein Activity Capture, our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

Important: Microsoft is retiring Basic Authentication for Exchange Online. When Microsoft blocks Basic Authentication in your Microsoft tenant, Lightning Sync can't sync contacts and events for customers who have selected service account as their Lightning Sync connection method. See Lightning Sync Service Account Connection Method Availability for Customers on Microsoft Office 365.

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

Enable these settings on your Exchange server.

1. Enable Exchange Web Services (EWS) on an SSL connection.
   a. Make sure that your Exchange server has a signed certificate from one of the Salesforce-approved Certificate Authorities.
   b. If your organization has configured a firewall, allow an inbound connection to your Exchange client access server on port 443.
2. Enable Exchange Autodiscover Service.
3. Enable Basic or NTLM authentication on your Exchange server and on your Autodiscover server. If Basic and NTLM are enabled, Lightning Sync gives connection preference to Basic.

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

To set up Lightning Sync using a service account, create an Exchange service account with impersonation rights for the mailbox of each Lightning Sync user.

Important: Starting in Winter '21, Lightning Sync isn't available to new Salesforce customers. If you're on Lightning Sync, use the Lightning Sync migration assistant for a seamless transition to Einstein Activity Capture, our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

Important: Microsoft is retiring Basic Authentication for Exchange Online. When Microsoft blocks Basic Authentication in your Microsoft tenant, Lightning Sync can't sync contacts and events for customers who have selected service account as their Lightning Sync connection method. See Lightning Sync Service Account Connection Method Availability for Customers on Microsoft Office 365.

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, work with your Exchange admin to complete these steps on your Exchange server.

Watch a Demo:

- Set Up a Microsoft® Exchange Service Account to Sync with Salesforce (for administrators using Office 365™ Admin Center) (English only)
- Set Up a Microsoft® Exchange Service Account to Sync with Salesforce (for administrators using command shell) (English only)

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

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USER PERMISSIONS

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

- Administrative access to your company's Exchange server

1. Create an Exchange user with a mailbox that acts as the service account. You use this email address later 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 reenter the command to let your server process the requests.

   If you're using Exchange 2019, 2016, or 2013, complete these extra steps.

   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}
   ```

   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. 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}
   ```

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

a. Create a management scope to define a filter that groups the Exchange users who sync with Lightning Sync. For example, if you want only sales reps to sync, and their Exchange mailboxes have the same value *Sales* for the filterable property *Department*, 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

Salesforce admins can run the Remote Connectivity Analyzer—the free web-based tool provided by Microsoft—to confirm whether Salesforce admins and their Exchange admins have set up Lightning Sync for Microsoft Exchange successfully. Or, admins can run the Remote Connectivity Analyzer if Lightning Sync for Microsoft Exchange was syncing 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 selected your preferred connection method so that Exchange and Salesforce can communicate. 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 your email server 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:

`Target mailbox email address`	The email address of a sales rep you've set up to be impersonated by your Lightning Sync service account
`Service Account User Name (Domain\User Name or UPN)`	The service account domain\user name or UPN you've set up for Lightning Sync
`Service Account Password`	The service account password you've set up for Lightning Sync

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USER PERMISSIONS

To get the necessary parameters to run the test:

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

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**.
    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 Using a Service Account

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

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1. From Salesforce Setup, enter *`Sync`* in the `Quick Find` box, then select **Outlook Integration and Sync**.
2. Select **Let users sync contacts, events, or both between Microsoft Exchange and Salesforce** to enable Lightning Sync.
3. Click **Let users sync contacts, events, or both between Microsoft Exchange and Salesforce** to see additional setup steps.
4. Select **Service Account** as your preferred connection method.
5. 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`*

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USER PERMISSIONS

To access Lightning Sync setup in Salesforce:

- Manage Users

  AND

  Manage Lightning Sync

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.

6. Enter your service account password.
7. 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.
8. Click **Save**.

Connect Salesforce and Microsoft® Exchange Using OAuth 2.0

Give Salesforce access to Microsoft Exchange Online using OAuth 2.0. To complete setup, you need a Microsoft Office 365® account and help from your Office 365 global administrator to provide credentials for your company's account.

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1. From Setup, enter `Sync` in the `Quick Find` box, then select **Outlook Integration and Sync**.
2. Select **Let users sync contacts, events, or both between Microsoft Exchange and Salesforce** to enable Lightning Sync.
3. Click **Let users sync contacts, events, or both between Microsoft Exchange and Salesforce** to see additional setup steps.
4. Select **OAuth 2.0** as your preferred connection method.
5. Have your Office 365 global administrator log in to your Office 365 account.
6. When the Microsoft Azure™ login page opens, accept Lightning Sync access to your account by following the prompts until you're directed back to Salesforce.
7. From Salesforce, under Provide your Office 365 ID, click **Connect**.

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USER PERMISSIONS

To access and edit Lightning Sync setup:

- Manage Users

  AND

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To prepare Exchange Online to communicate with Salesforce:

- Global administrator access to your company's Office 365 account

Run the Lightning Sync Connection Test for Microsoft® Exchange Users

Salesforce admins can run the Lightning Sync connection test to confirm whether admins and IT pros have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing reps' items successfully, but suddenly stops.

After taking the necessary steps to prepare your Microsoft Exchange server and Salesforce to sync, you're ready to run the Lightning Sync connection test.

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

Salesforce Admins setting up Lightning Sync for Microsoft® Exchange should run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer to test their connectivity between their servers and Salesforce. The tests differ slightly, so running both gives admins more information about the connection status. Admins setting up Lightning Sync for Google need only run the Lightning Sync connection test.

The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between your email server 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 *`Sync`* in the `Quick Find` box, then select **Outlook integration and Sync**.
2. Under Test your connection, provide the email address for one of the reps you've set up to sync on your email server.
3. Click **Test**.
   Lightning Sync checks the connection between Salesforce and your email server and summarizes your connection status.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To run the connection test:

- Manage Users

  AND

  Manage Lightning Sync

Tell Reps How to Prevent Certain Microsoft® Outlook Calendar Events from Syncing to Salesforce

Salesforce admins should tell reps how to manage which of their Outlook calendar events sync with Salesforce. We recommend that reps prepare events that they don't want to sync before admins kick off the sync process. However, reps can manage which events sync at any time.

Reps can prevent some of their calendar events —like personal events—from syncing to Salesforce.

Later in the setup process, admins have to define reps' sync settings in Lightning Sync configurations. If admins define sync settings for events, all events from a rep's default calendar sync to Salesforce—unless admins tell reps to manage those events now.

Reps can prevent personal events from syncing from their calendars to Salesforce in different ways.

- Reps can create a separate calendar in their calendar application to track personal events. (Lightning Sync is designed to sync only a reps' default calendar to Salesforce.)
- When admins define sync settings in Lightning Sync configurations, admins choose whether to sync reps' private events. If admins opt not to sync private events, reps can prevent events from syncing by assigning the private option to events from their calendar applications.

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

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Define Lightning Sync for Microsoft® Exchange Settings for Reps

After reps prepare their Exchange events to sync with Salesforce, admins can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process, and determines how reps contacts and events sync between applications.

Before admins roll out Lightning Sync to reps, admins can familiarize themselves with our Lightning Sync Considerations. There's potential for Lightning Sync to overwrite data or sync data between Salesforce orgs unless admins are considerate about how they roll out the product.

Defining sync settings lets admins define how their reps sync. Admins can decide:

- Which reps sync
- Whether contacts, events, or both items sync
- Which direction items sync
- To create filters to limit certain contacts or events from syncing
- Whether reps' private events sync
- Whether reps' event series sync (Lightning Experience, Salesforce app)
- Whether all events sync, or only events that users log to Salesforce records using the Outlook integration
- Whether syncing events that reps delete in one system are automatically removed from the other system
- Whether important events are automatically related to the appropriate Salesforce contacts or lead

1. From Setup, enter *Sync* in the `Quick Find` box, then select **Outlook Integration and Sync**.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

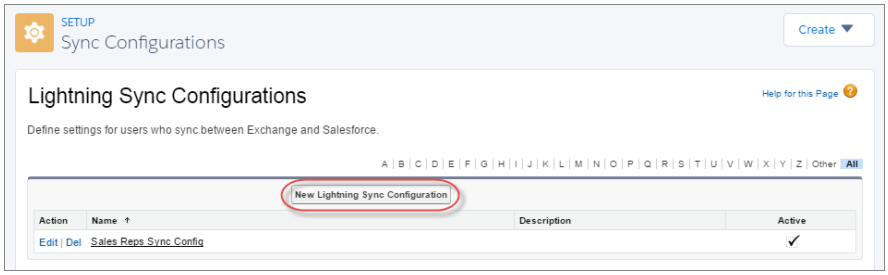
To access Lightning Sync setup:

- Manage Users

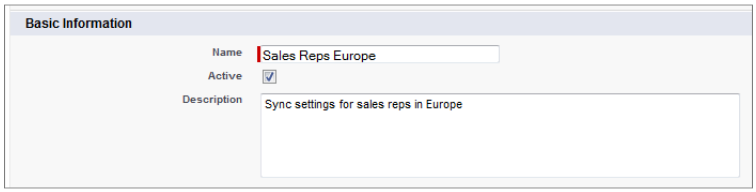
  AND

  Manage Lightning Sync

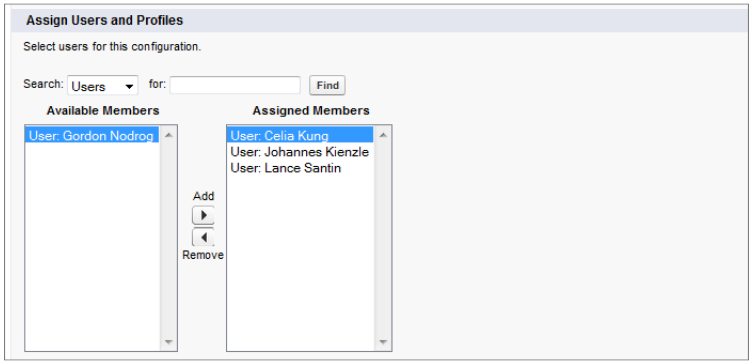
2. Click **Let users sync contacts, events, or both between Microsoft Exchange and Salesforce** to see more setup steps.
3. From the Set Sync Settings and Check Status section, click **New Config**.
4. Click **New Lightning Sync Configuration**.



5. 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`.

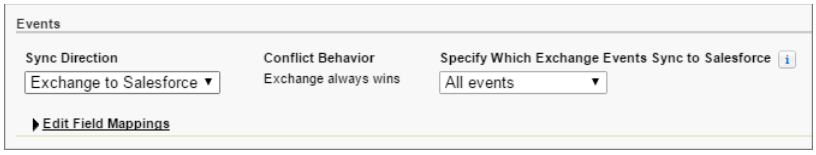


6. Assign users and profiles to this configuration.

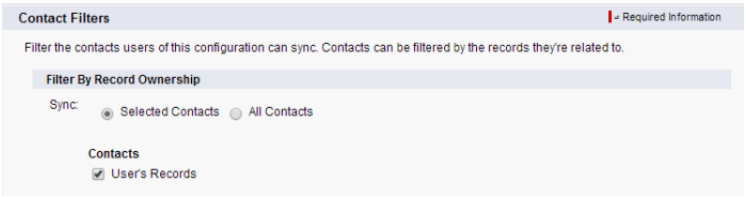


7. Indicate the sync direction for your users' contacts or person accounts.
8. To change field mappings between Salesforce and Exchange contacts, click **Edit Field Mappings**.
9. Indicate the sync direction for your users' events.
10. Indicate whether you want all Exchange events to sync to Salesforce, or only the events that your users select.
    - If you select All events, all of the events on a user's default Outlook calendar syncs with Salesforce.
    - If you select Events users select, events users log to Salesforce from the Outlook integration start syncing from Microsoft Exchange to Salesforce. To finish setting up that option, you're required to enable the Outlook integration, and your users are required to

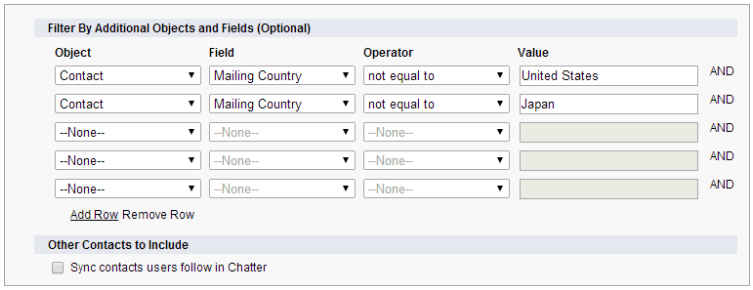
complete the integration setup in Outlook. To learn more about how this setting works, see Use the Outlook or Gmail Integration to Select Which Events Sync.



11. To change field mappings between Salesforce and Exchange events, click **Edit Field Mappings**.
12. Click **Save**.
13. 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**.



If you wish, set more sync filters. 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.



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 on page 4 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.
15. Select `Sync private events` to sync events your users have marked private either in Salesforce or their calendars.
16. Select `Delete synced events` to let reps delete Exchange events and Salesforce events in one action.

17. Select `Automatically relate Exchange events to Salesforce records` to let Lightning Sync review reps' calendars and intelligently relate important events to the appropriate Salesforce contacts or leads automatically.
18. Select `Sync event series` to let reps sync repeating events (Lightning Experience, Salesforce mobile app). Event series created in Salesforce Classic (also known as recurring events) don't sync with Microsoft Outlook.
19. Click **Save**.

Syncing has begun for users in this Lightning Sync configuration.

SEE ALSO:

- Lightning Sync Considerations for Companies With Multiple Salesforce Organizations
- How Salesforce Manages Sync Conflicts Between Products

Tell Reps How to Sync Microsoft® Contacts with Salesforce

It's time for Salesforce admins to tell their sales reps to manage the Microsoft contacts that reps want to sync with Salesforce.

If you've set up reps to sync contacts from only Salesforce to Microsoft Exchange, you can skip this step: Reps' contacts and events are already syncing.

Reps set up to sync contacts from Exchange to Salesforce or sync both ways can kick off sync by choosing which Microsoft contacts sync to Salesforce. If you've set up reps to sync both ways, we recommend that you or your reps create relevant Salesforce accounts before you roll out contact sync. Otherwise, if reps don't resolve unmatched Salesforce contacts before the next sync cycle, Lightning Sync removes the company from Microsoft contacts.

After you define reps' sync settings by adding them to active Lightning Sync configurations, Lightning Sync creates a folder called Salesforce_Sync within each reps' email account. Lightning Sync nests Salesforce_Sync within reps' Contacts directories.

Reps choose the contacts that sync by moving those contacts into the Salesforce_Sync folder. When reps can see and access the Salesforce_Sync folder in their email application, they can start moving contacts into it.

Note: Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce_Sync folder for new contacts in Outlook. See EAC - New Contacts Created In Outlook with 'Salesforce_Sync' Category Do Not Sync to Salesforce.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

MANAGE LIGHTNING SYNC USERS

After you've set up Lightning Sync, manage how your sales reps experience the feature and assist users in troubleshooting problems.

Important: Starting in Winter '21, Lightning Sync isn't available to new Salesforce customers. If you're on Lightning Sync, use the Lightning Sync migration assistant for a seamless transition to Einstein Activity Capture, our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

Fix Sync Issues for Lightning Sync Users

If an Lightning Sync user has trouble syncing between your email server 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.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Fix Sync Issues for Lightning Sync Users

If an Lightning Sync user has trouble syncing between your email server 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.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

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Check Lightning Sync Users' Sync Statuses

If Lightning Sync users can't sync, Salesforce admins can check their individual sync statuses—and the sync status of Lightning Sync setup—to troubleshoot the problem.

Build and Run a Lightning Sync Error Report

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

Reset Sync for Lightning Sync Users

If a rep has trouble syncing between your email server and Salesforce, Salesforce admins can reset that rep's sync process. Resetting sync clears out and then restores the connections between a rep's email and calendar applications and Salesforce records. Resetting the sync process doesn't affect information stored in those records.

Test the Connection Between Your Server and Salesforce

Salesforce Admins setting up Lightning Sync for Microsoft® Exchange should run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer to test their connectivity between their servers and Salesforce. The tests differ slightly, so running both gives admins more information about the connection status. Admins setting up Lightning Sync for Google need only run the Lightning Sync connection test.

Lightning Sync for Microsoft® Exchange Statuses

Understanding Lightning Sync for Microsoft Exchange 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 Lightning Sync users can't sync, Salesforce admins can check their individual sync statuses—and the sync status of Lightning Sync setup—to troubleshoot the problem.

1. From Setup, enter *Sync* in the Quick Find box, then select **Gmail Integration and Sync** or **Lightning for Outlook and Sync**, depending on which product you use.
2. Click **Let users sync contacts, events, or both between Google and Salesforce** to see additional setup steps.
3. From the Set Sync Settings and Check Status section, click **Check**.
4. 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, admins 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 for Microsoft® Exchange Statuses.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To access Lightning Sync statuses:

- Manage Users

  AND

  Manage Lightning Sync

Build and Run a Lightning Sync Error Report

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

First, you create a custom report type using a Lightning Sync Error Report custom object we've set up for you in Salesforce. Then create a Lightning Sync error report. Finally, 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 Sync Error**.
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 to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To create or update the Lightning Sync Error Report:
- View All Data

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 rep has trouble syncing between your email server and Salesforce, Salesforce admins can reset that rep's sync process. Resetting sync clears out and then restores the connections between a rep's email and calendar applications and Salesforce records. Resetting the sync process doesn't affect information stored in those records.

1. If set up to sync contacts using Lightning Sync for Microsoft Exchange, make sure that the reps' `Salesforce_Sync` folder contains only contacts the rep wants to sync with Salesforce. Lightning Sync for Google users can ignore this step.
2. If set up to sync events, make sure that events that the rep doesn't want to sync are managed from the rep's calendar application.
3. From Salesforce Setup, enter *`Lightning Sync Status`* in the `Quick Find` box, then select **Lightning Sync Status**.
4. Type a rep's name, and click **Reset Sync**.
   During the next sync cycle, Lightning Sync:
   - Syncs all contacts between the rep's `Salesforce_Sync` folder (Microsoft Exchange) or `Salesforce Sync` group (Google Contacts) and Salesforce. Lightning Sync excludes contacts that fall outside of the filters you set in the rep's sync configuration.

     Note: Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce_Sync folder for new contacts in Outlook. See EAC - New Contacts Created In Outlook with 'Salesforce_Sync' Category Do Not Sync to Salesforce.
   - Syncs all events from the rep's calendar application to Salesforce. Lightning Sync excludes events that fall outside of the filters you set in the rep's sync configuration, or events that the rep prevented from syncing.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To access rest sync:

- Manage Users

  AND

  Manage Lightning Sync

Test the Connection Between Your Server and Salesforce

Salesforce Admins setting up Lightning Sync for Microsoft® Exchange should run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer to test their connectivity between their servers and Salesforce. The tests differ slightly, so running both gives admins more information about the connection status. Admins setting up Lightning Sync for Google need only run the Lightning Sync connection test.

Test your connection status to confirm whether you and your IT pros 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 your email server 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.

- Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters
- Run the Lightning Sync Connection Test for Microsoft® Exchange Users
- Run the Lightning Sync Connection Test for Google Users

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

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:

- Manage Users

  AND

  Manage Lightning Sync

Lightning Sync for Microsoft® Exchange Statuses

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

Example:

Note: Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce_Sync folder for new contacts in Outlook. See EAC - New Contacts Created In Outlook with 'Salesforce_Sync' Category Do Not Sync to Salesforce.

EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

System Statuses

Table 1: Configuration Setup Statuses

If	Provides this status	This status means that
Microsoft Exchange service account provided:	`Your Service Account User Name`	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 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.
Outlook integration enabled:	Yes	You've enabled the Outlook integration in Setup. If you've set up sales reps to select which Microsoft events sync to Salesforce, reps select events using the Outlook integration.
	No	You haven't enabled the Outlook integration in Setup. If

If	Provides this status	This status means that
		you've set up sales reps to select which Microsoft events sync to Salesforce, reps can't select events until you've enabled the Outlook integration.
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.

If	Provides this status	This status means that
	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 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

If	Provides this status	This status means that
		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 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

If	Provides this status	This status means that
		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 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.

If	Provides this status	This status means that
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 Outlook integration:	Yes	This sales reps has set up the Outlook integration. If you've set up reps to select which Microsoft events sync to Salesforce, reps select events using the Outlook integration.
	No	This sales rep hasn't set up the Outlook integration. If you've set up reps to select which Microsoft events sync to Salesforce, reps can't select events until they've set up the Outlook integration.

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.
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.

If	Provides this status	This status means that
	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 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.

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 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.
	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 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,

If	Provides this status	This status means that
		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 `private` 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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