

salesforce

Sync Your Contacts and Events with Lightning Sync

Salesforce, Spring '24



 @salesforcedocs

Last updated: November 9, 2023

CONTENTS

Lightning Sync: Keep Your Microsoft® Items in Sync with Salesforce	1
Get Ready to Sync Events with Lightning Sync for Microsoft® Exchange	3
Get Ready to Sync Contacts with Lightning Sync for Microsoft® Exchange	5
Fix Sync Issues	8

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.

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.

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.

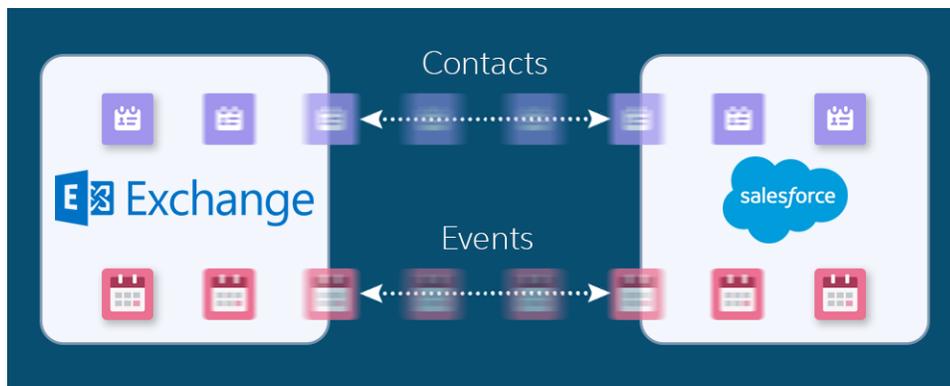
Depending on the settings your administrator selected, Lightning Sync syncs contacts or events between your email application and Salesforce. Items can sync in both directions, or one direction.

EDITIONS

Sync available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and the Salesforce mobile app

Set up available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



Your administrator can select more settings to define your sync experience. Ask your administrator 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 [Outlook Integration](#)?
- 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 (beta) in Lightning Experience?

Lightning Sync for Microsoft Limitations

Currently, Lightning Sync doesn't. See [Lightning Sync Considerations](#) for more details.

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

USER PERMISSIONS

To sync events both ways:	Read and Edit on events AND Event sync direction set to Sync both ways in an active Lightning Sync configuration
To sync events from Salesforce to Exchange:	Read on events AND Event sync direction set to Salesforce to Exchange in an active Lightning Sync configuration
To sync events from your calendar to Salesforce:	Create on events AND Event sync direction set to Exchange to Salesforce in an active Lightning Sync configuration* *If admins enable the Automatically relate events to Salesforce records option in a user's sync configuration, users should also have Read on contacts and leads to take advantage of that feature.

EDITIONS

Sync available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and the Salesforce mobile app

Set up available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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

If your administrator has set up Lightning Sync for Microsoft Exchange, your events sync automatically between your Microsoft calendar to Salesforce. Events sync when you create or update them. If you've got many events, your first sync could take some time.

Admins decide in what direction your events sync: between Salesforce and your Microsoft Exchange server, or just one way. Ask your admin in which direction you're set up to sync, so you know where to update your events.

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

Prevent Personal Events from Syncing

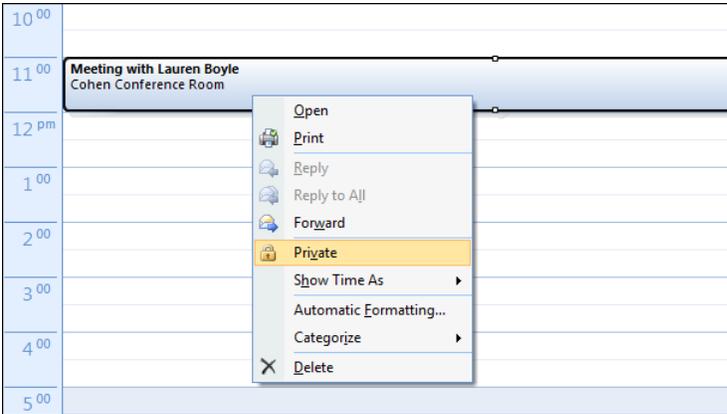
You can prevent events from syncing with Salesforce in different ways.

- Create a separate calendar in your calendar application to keep track of your personal events. Lightning Sync is designed to sync only your default Microsoft Exchange calendar to Salesforce.

Get Ready to Sync Events with Lightning Sync for Microsoft® Exchange

- 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.



Respond to Event Invitations from Your Microsoft Calendar

Your responses to event invitations don't sync from Salesforce to your Microsoft Exchange-based calendar. To avoid overwriting your attendance status, [learn where is best to accept and decline event invitations based on your sync direction](#).

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

Get Ready to Sync Contacts with Lightning Sync for Microsoft® Exchange

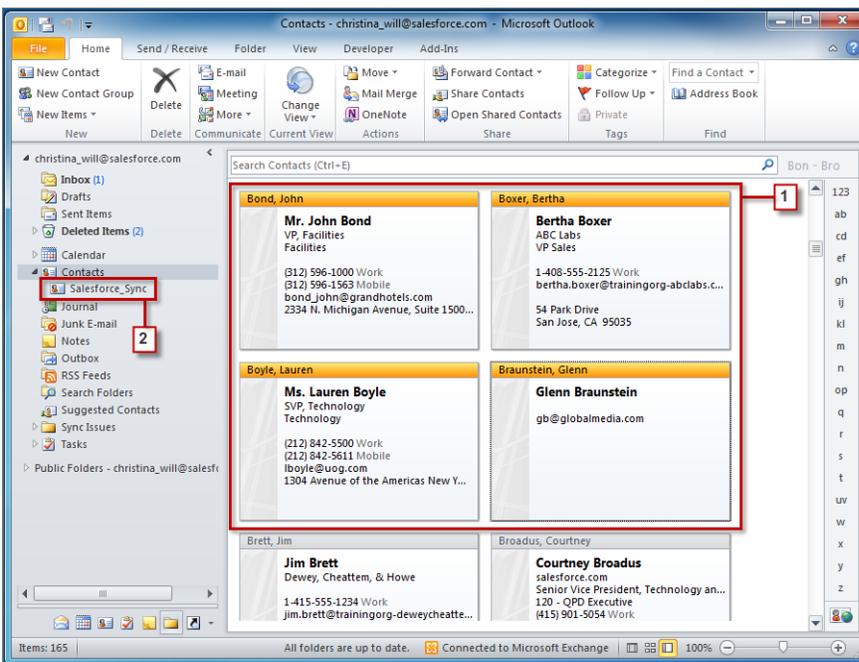
Learn how to sync contacts between your company's email application and Salesforce using Lightning Sync.

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.

Note: If you're set up to sync both ways, we recommend that you or your admin create relevant Salesforce accounts before rolling out contact sync. Otherwise, if you don't resolve unmatched Salesforce contacts before the next sync cycle, Lightning Sync removes the company from the Microsoft contact.

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.



EDITIONS

Sync available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and the Salesforce mobile app

Set up available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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 an active Lightning Sync configuration

To sync contacts from Salesforce to Exchange:

- Read on contacts

AND

Contact sync direction set to Salesforce to Exchange in an active Lightning Sync configuration

To sync contacts from Exchange to Salesforce:

- Create on contacts

AND

Contact sync direction set to Exchange to Salesforce in an active Lightning Sync configuration

Get Ready to Sync Contacts with Lightning Sync for Microsoft® Exchange

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.

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.

EDITIONS

Sync available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and the Salesforce mobile app

Set up available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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