Calendar Sync

Outlook/Exchange
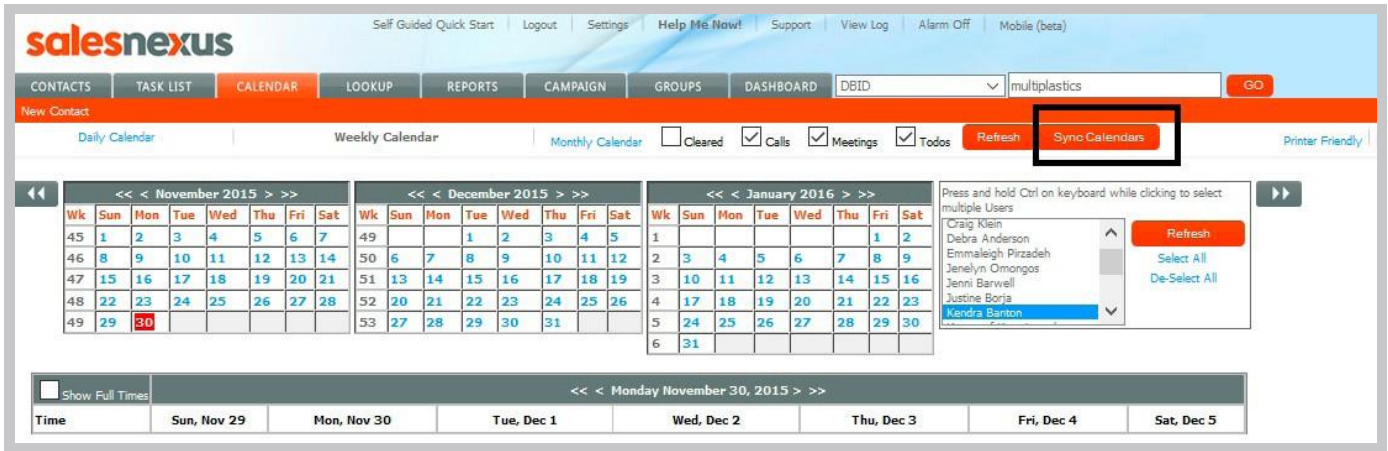
Overview

The screen shot below is of the SalesNexus calendar. On this screen, there will be a button that you can click to sync your SalesNexus calendar with your Outlook/Exchange calendar once you have it set up.

To set up the sync

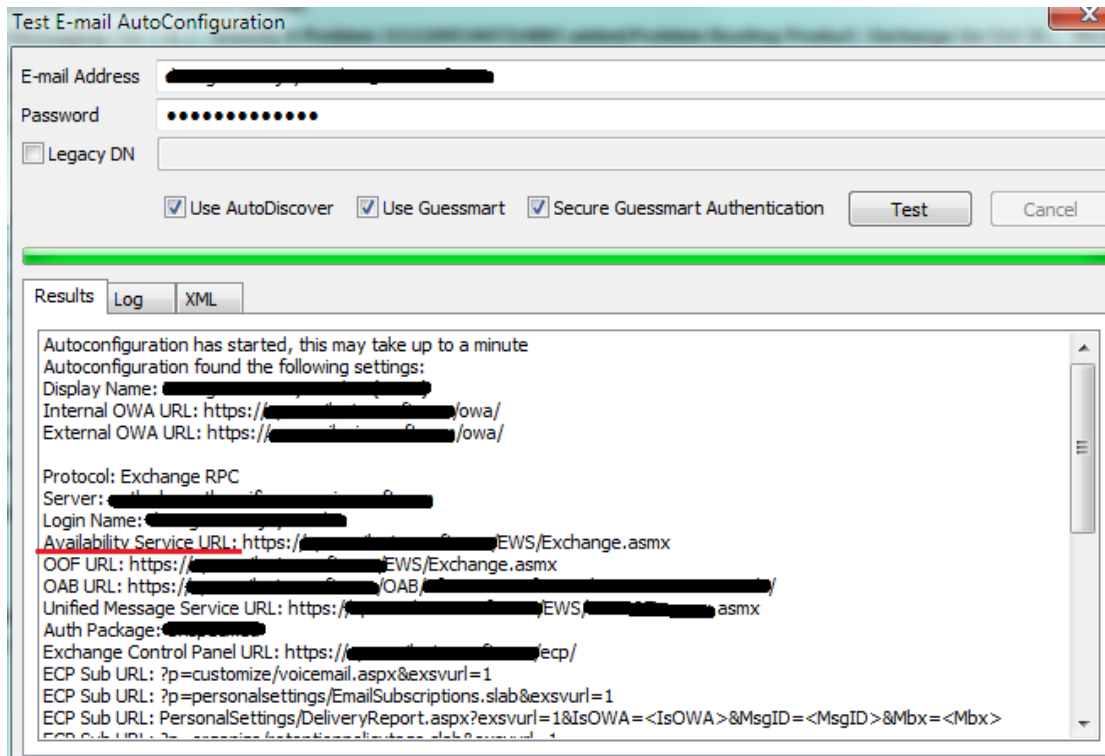Go to Settings > User Admin > Calendar Sync Settings

You will have the ability to specify times during a 24-hour period when the sync will occur. However, we suggest a limit of no more than hourly as you want to make sure the sync is completed before the next one occurs.

User will need to have the details of the email address, user name, password, and the server connection. You will want to make sure you have the appropriate information from your IT staff. For Exchange you will need:

- Email Address
- User Name
- Password
- Web Services URL
    - Example: https://mail.domain.com/EWS/Exchange.asmx
    - Find this URL by following these steps:

Use Microsoft Outlook that connects to the same Exchange EWS Connector.

- Hold the Ctrl key and right click on the Outlook Icon in the system tray
- Select "Test E-mail Auto Configuration" from the menu
- Type in an email address located on the desired Exchange server
- Click Test
- The URL is listed as 'Availability Service URL'

You can specify more than one auto-sync per day as in this example

Exchange default should be enabled so users can sync Exchange calendars in their SalesNexus database. For more information regarding Exchange Web Services visit https://blogs.msdn.microsoft.com/exchangedev/2011/09/15/disabling-ews-in-exchange-2010/

For Exchange servers, the sync is "one-way"; this means items created in the SalesNexus database will sync back to the Outlook/Exchange calendar. Any changes made to an entry in the database will also sync back to Outlook/Exchange.

Items created originally in the Outlook/Exchange calendar will not sync into SalesNexus database.