

Tutorial – Resolving contacts that fail to synchronize to Repfabric (Outlook)

Repfabric Sync+ will not synchronize contacts in your email contact list to Repfabric in some cases to avoid mismatches between your contacts in Outlook and the company and contacts belonging to companies already in Repfabric. This tutorial describes:

- a) How to determine which contacts are not syncing to Repfabric
- b) How to correct them so that they can begin syncing to Repfabric

If you do not want specific contacts to sync to Repfabric, please see the **Tutorial – How to mark contacts “Private” in Outlook**.

What contacts do not sync from my email to Repfabric?

The Repfabric sync engine will not sync contacts coming from your email contact list for the following reasons:

1. [You do not have the Sync+ enabled](#)
2. [The contact in your email is in Repfabric already, but is on another person’s sales team to which you do not belong](#)
3. [The contact in your email is on a sales team you belong to, but you have the sync for that sales team disabled in your sync settings](#)
4. [The contact in your email does not have a Company Name, and no email address that matches a website of a company currently in Repfabric](#)
5. [The contact in your email does not have an email address whose email domain matches any company’s website domain currently in Repfabric](#)
6. [The contact in your email matches more than one company currently in Repfabric \(such as several locations of the same company, such distributor branches\)](#)
7. [You have exactly the same name of 2 contacts in Outlook – one will not be able to sync](#)

How do I determine which contacts are NOT syncing from Outlook?

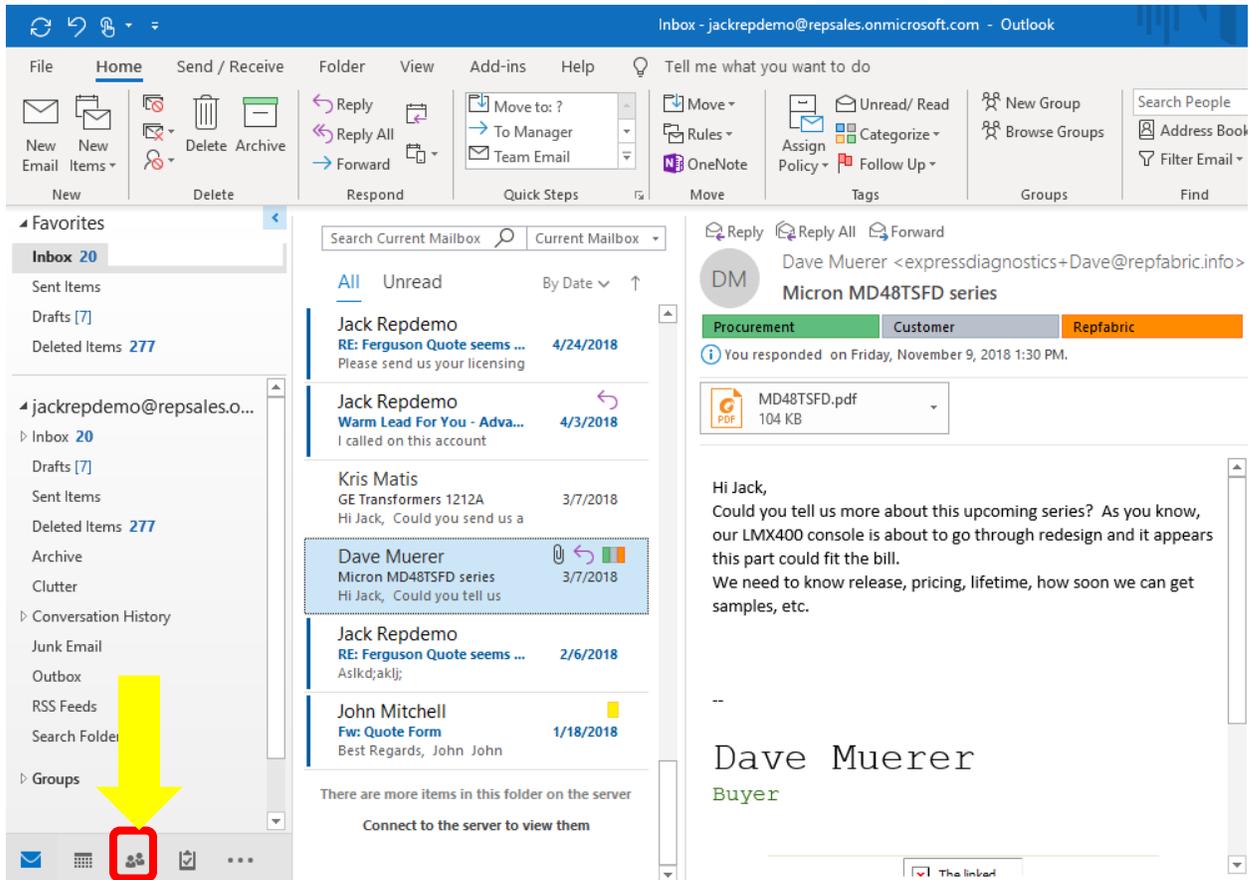
This tutorial show you where to find contacts that are not syncing between your email contacts and Repfabric.

There are two methods.

Method 1) Review contacts whose categories are tagged with “RepfabricResolve”

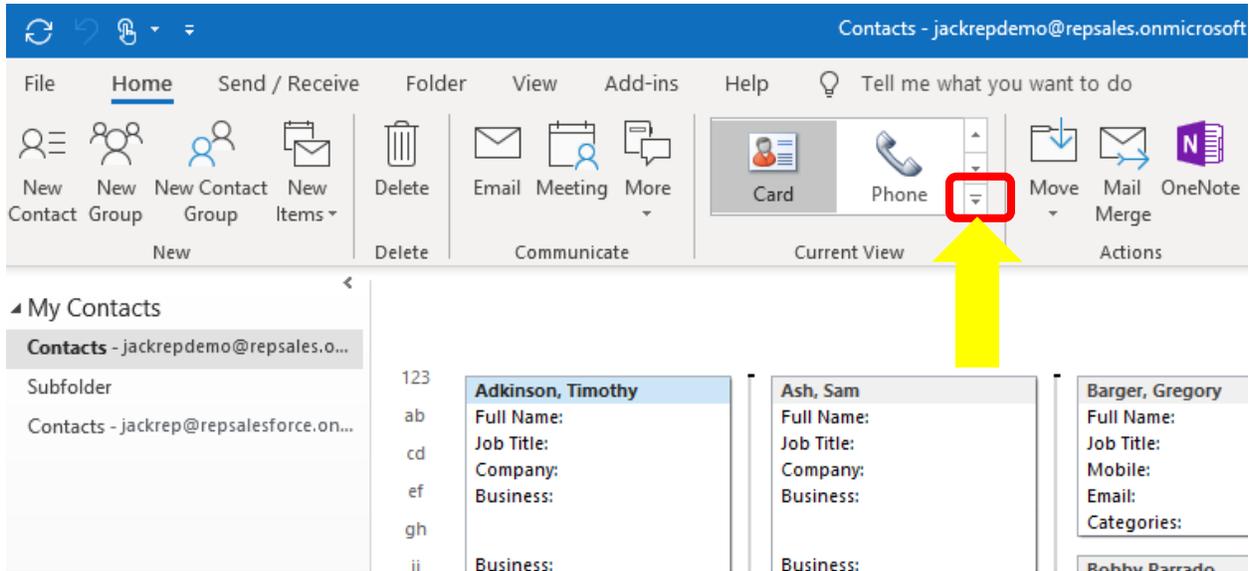
1. Left click your Contacts folder

This image is how to navigate to Contacts

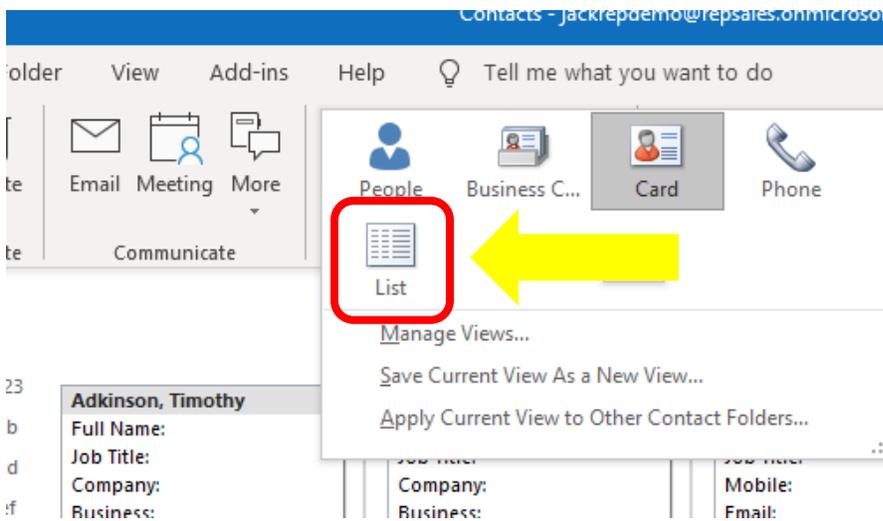


1. Put your Contacts Folder in "List" view.

The image below shows your Contacts view and how to switch to List view

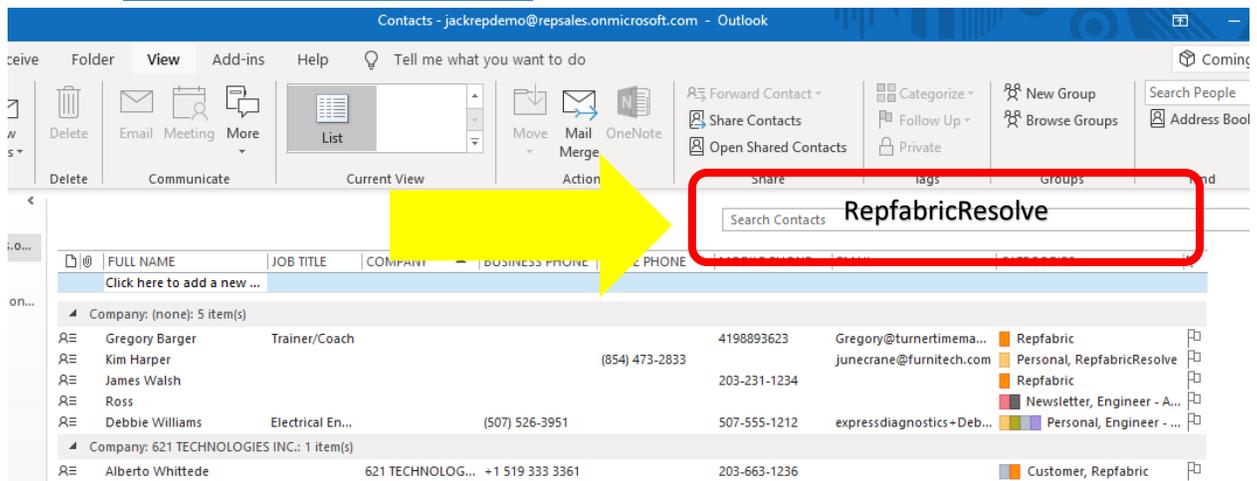


This image shows your Contacts view and switching to List



2. Left click into the Contact Search box.
3. Search Contacts for the term "RepfabricResolve"

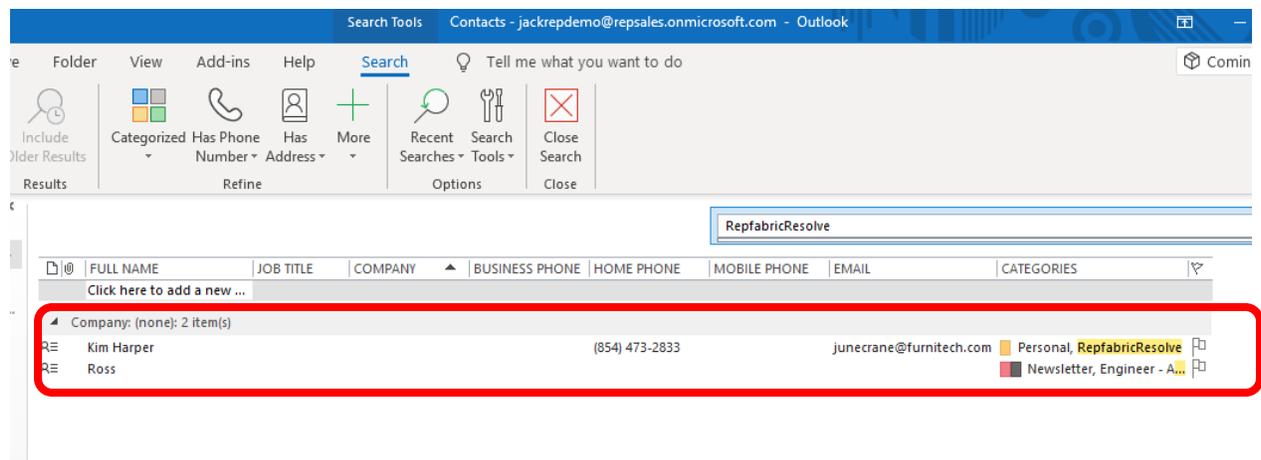
This image of where to search for contacts



Note: you may find it beneficial to list your Contact Categories in the column views of your contacts. Right click on any column name and remove/reorder/choose field.

- The resulting list is the list of contacts that are not syncing to Repfabric and need your attention.

This image is of the search results of contacts needing attention.

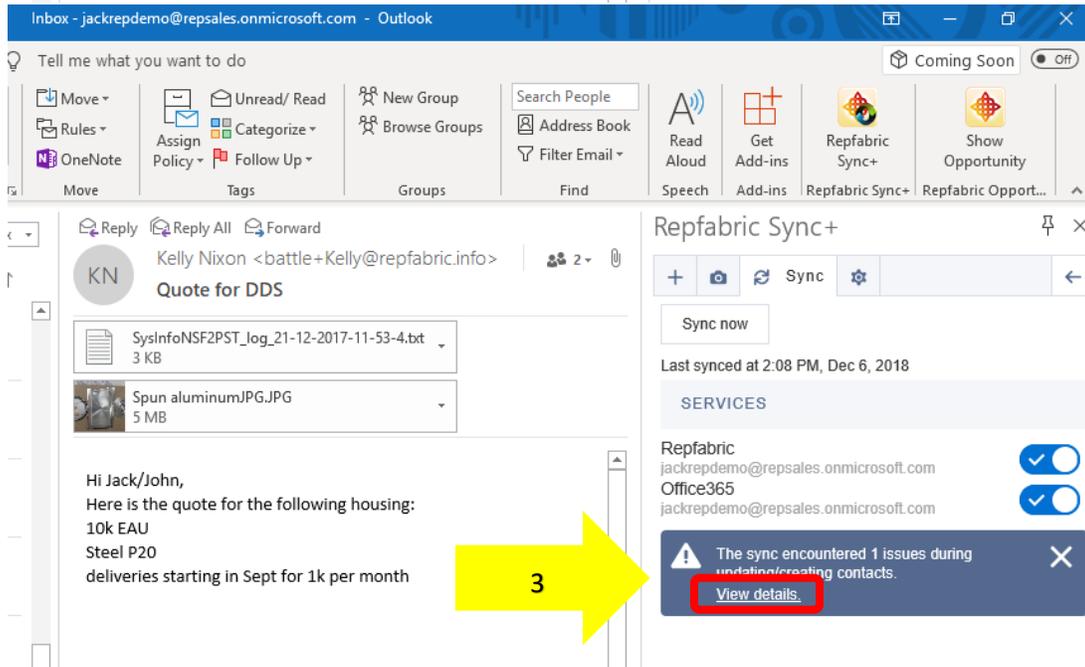
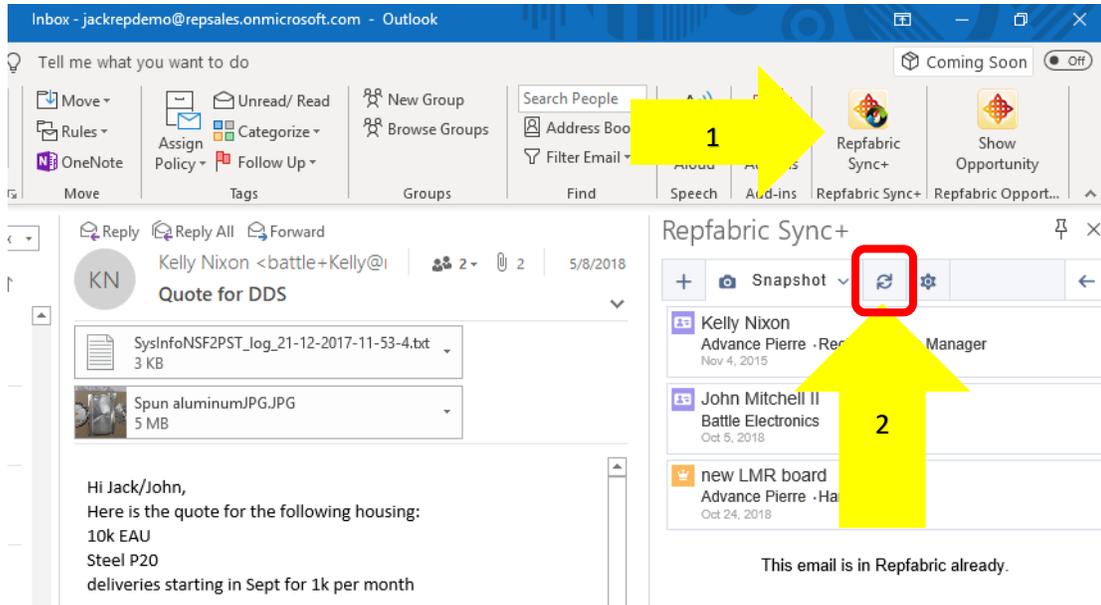


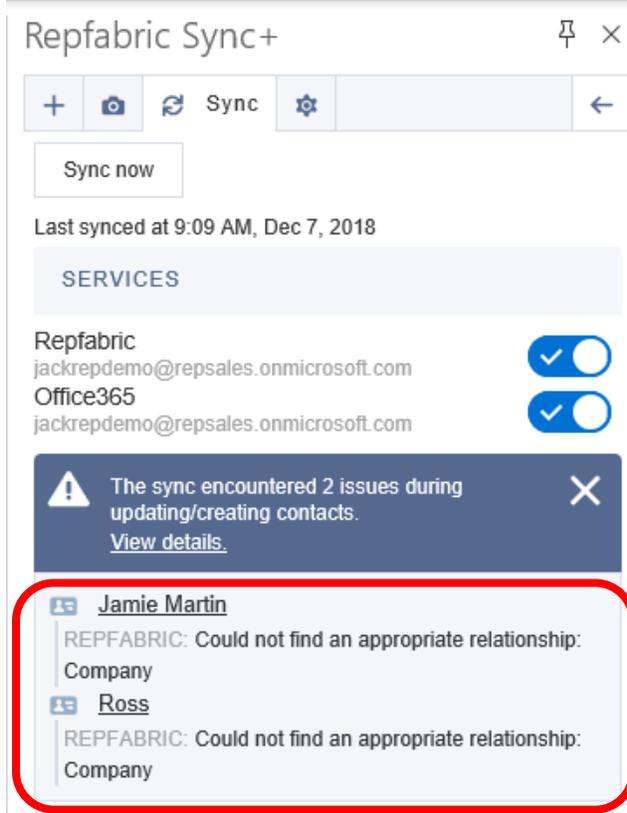
Method 2) From within the Sync+ Connector, determine which contacts are not syncing. Within the Outlook Sync+ connector, there are exceptions listed that also depict why the synchronization failed for individual contacts. By expanding these sections and reading the error messages, you can determine what data in the Outlook contact record is needed to fix the contact so that it can synchronize.

- Left click the Sync+ icon in the Outlook ribbon

2. Left click the Sync tab within the Sync+ side bar
3. Left click to expand the list of exceptions to see more details
4. Follow the procedures below to resolve issues

This image shows how to navigate to the Sync status tab





Resolving Contact Sync Issues

This tutorial shows you how to troubleshoot and resolve the underlying causes of your contacts not syncing. There are several possibilities, which require your checks in both Repfabric and Outlook.

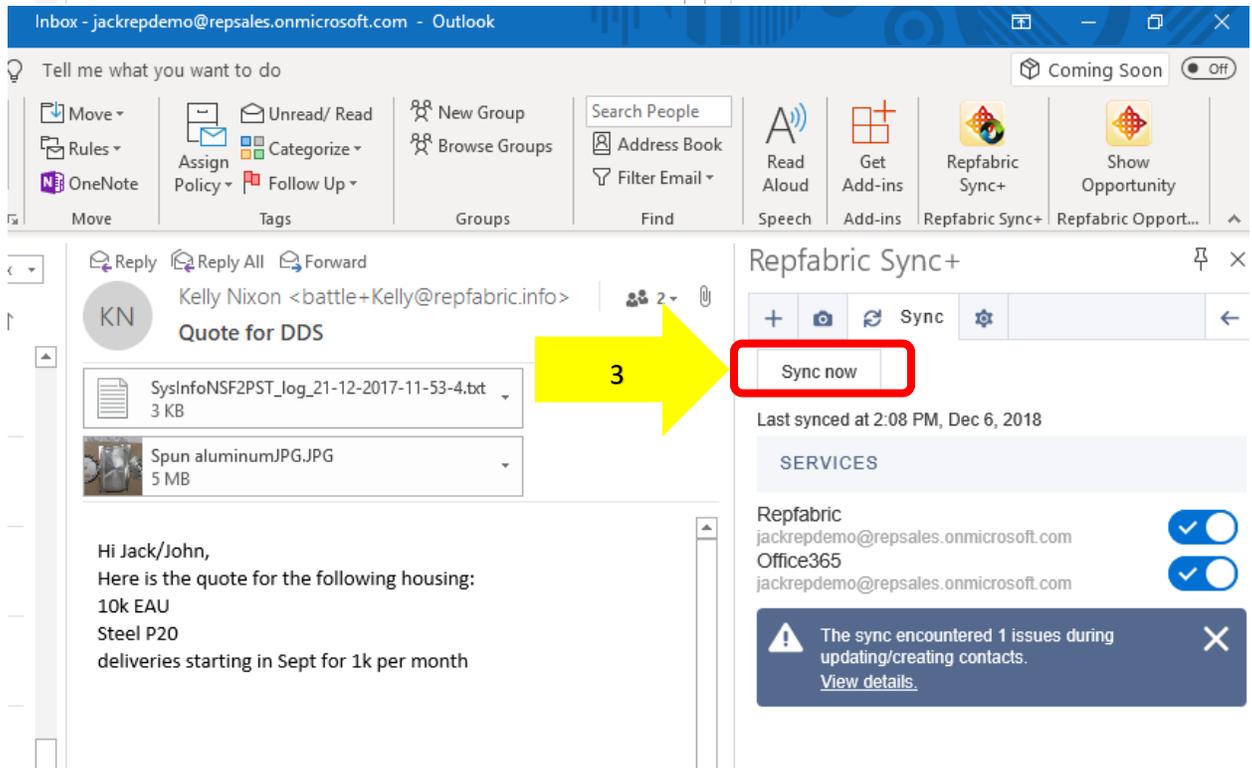
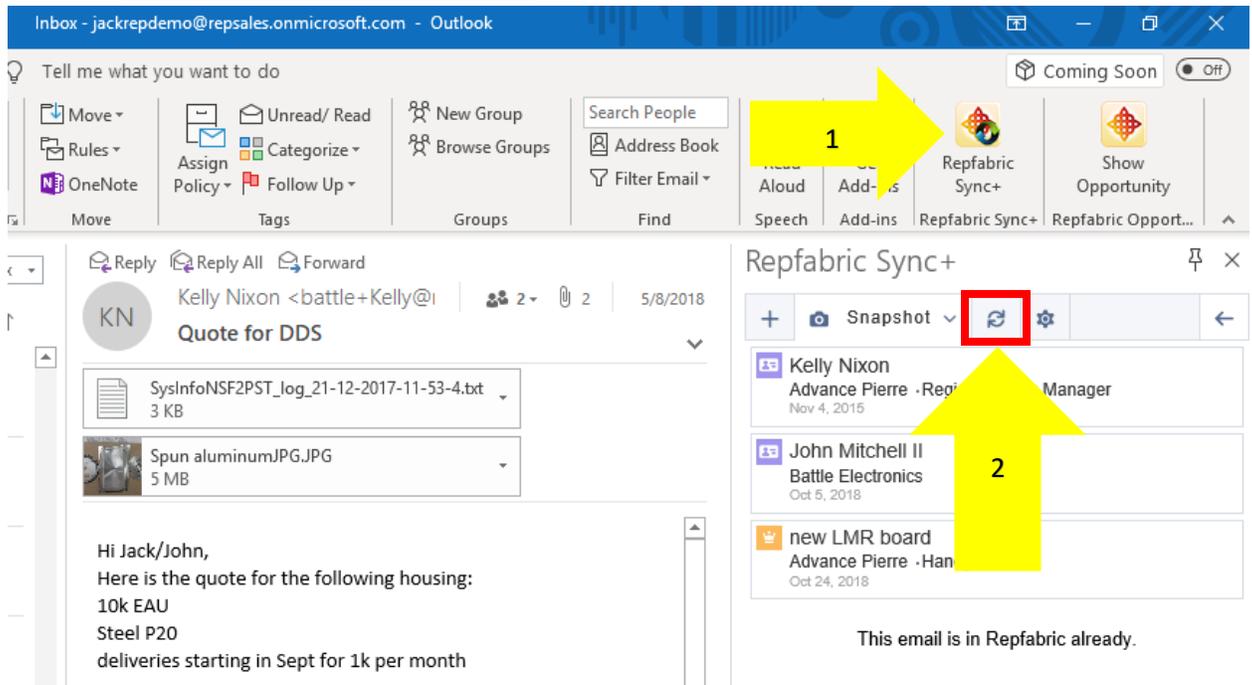
Step 1: Is my Sync+ Enabled?

Have I turned on Sync+ within Outlook? Are my user settings in Repfabric allowing me to turn it on?

1. Open the Sync+ connector within Outlook
2. Left click the “Sync” icon
3. Confirm that the screen says “Sync Now”. It must not say “Enable Sync”. If it does, the sync engine is not turned on for your email. Please contact support@repfabric.com to review your contacts prior to sync to avoid any duplicate companies and contacts from being created by mistake if you have never sync’d before.

NOTE: You do not need to push “Sync Now”, which causes an immediate sync request. Once enabled, the sync engine automatically starts every 20-30 minutes whether you have Outlook open or not.

This image shows how to navigate to the sync tab within Sync+



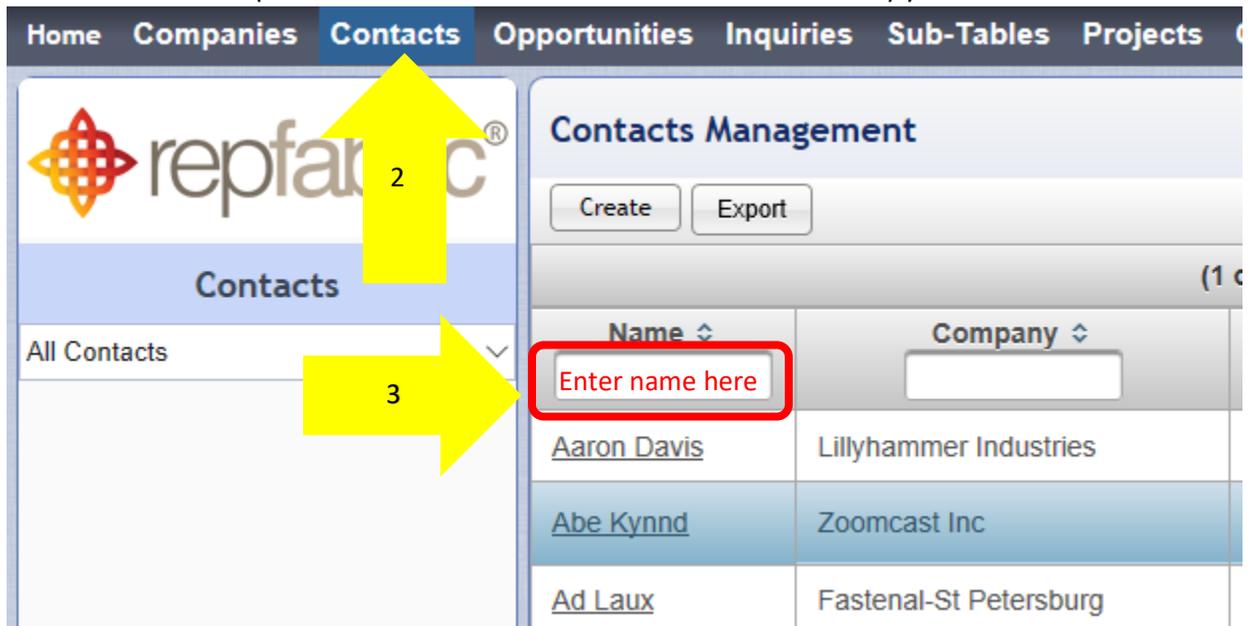
Step 2: Do I have authorization to sync this contact?

Are you a member of the sales team to which the contact belongs, so that you can “see” the contact and modify it? The contact may exist in Repfabric, but you may not have sufficient viewing and editing rights to sync the contact to your email contact because someone else “owns” the contact.

1. From “Home”, select “OppLoop”



2. Left click “Contacts” in the menu bar
3. Search for the Contact name
4. If the contact you are searching for is not found, contact your administrator to see if they can see the contact using the same method. If they can see the contact, you do not have rights to sync the contact to your email contacts because of sales team assignments. You will still have access to the contact in your email as you do today, but changes will not sync between your email contact and Repfabric. Modifications to sales teams can be made by your administrator.

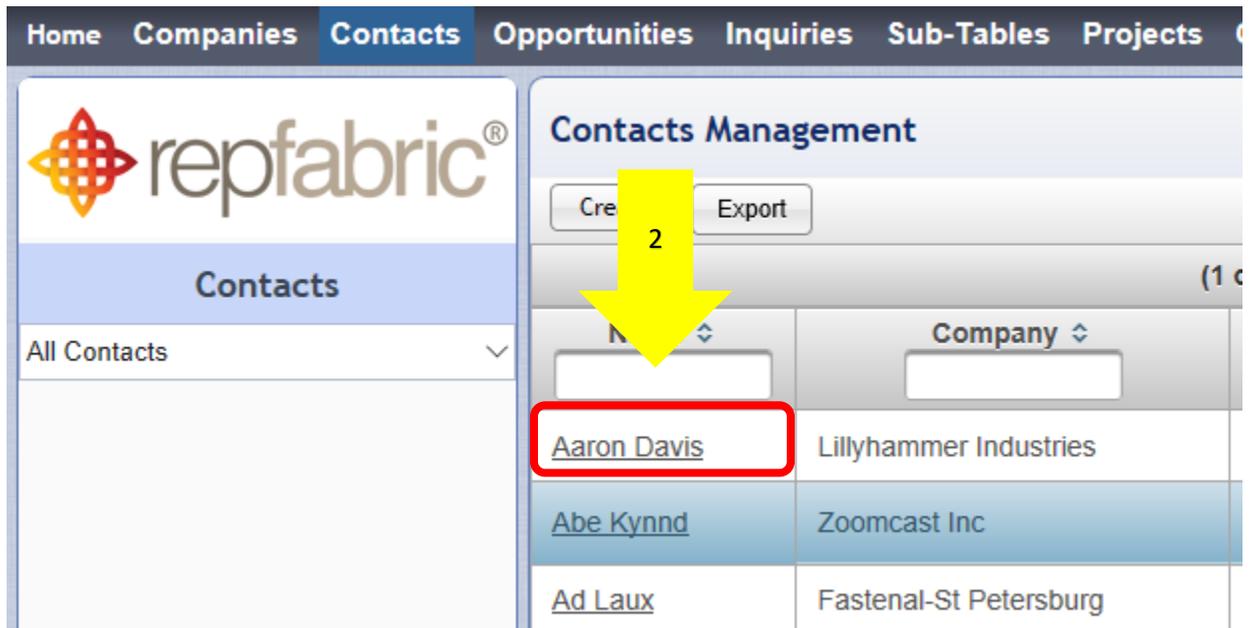


Step 3: Is my Sales team configuration for Sync correct?

Repfabric supports the option to sync contacts of sales teams that you choose. When you are a member of multiple sales teams, you may not want the full set of contacts of a sales team to populate your email contacts (and your phone). This happens for instance where you may want visibility to contacts in another territory, but you do not need them in your phone because rarely do you use them. However, because of the sales team sync settings, you may not be syncing contacts that are currently in Repfabric, but on a sales team to which you have the sync disabled.

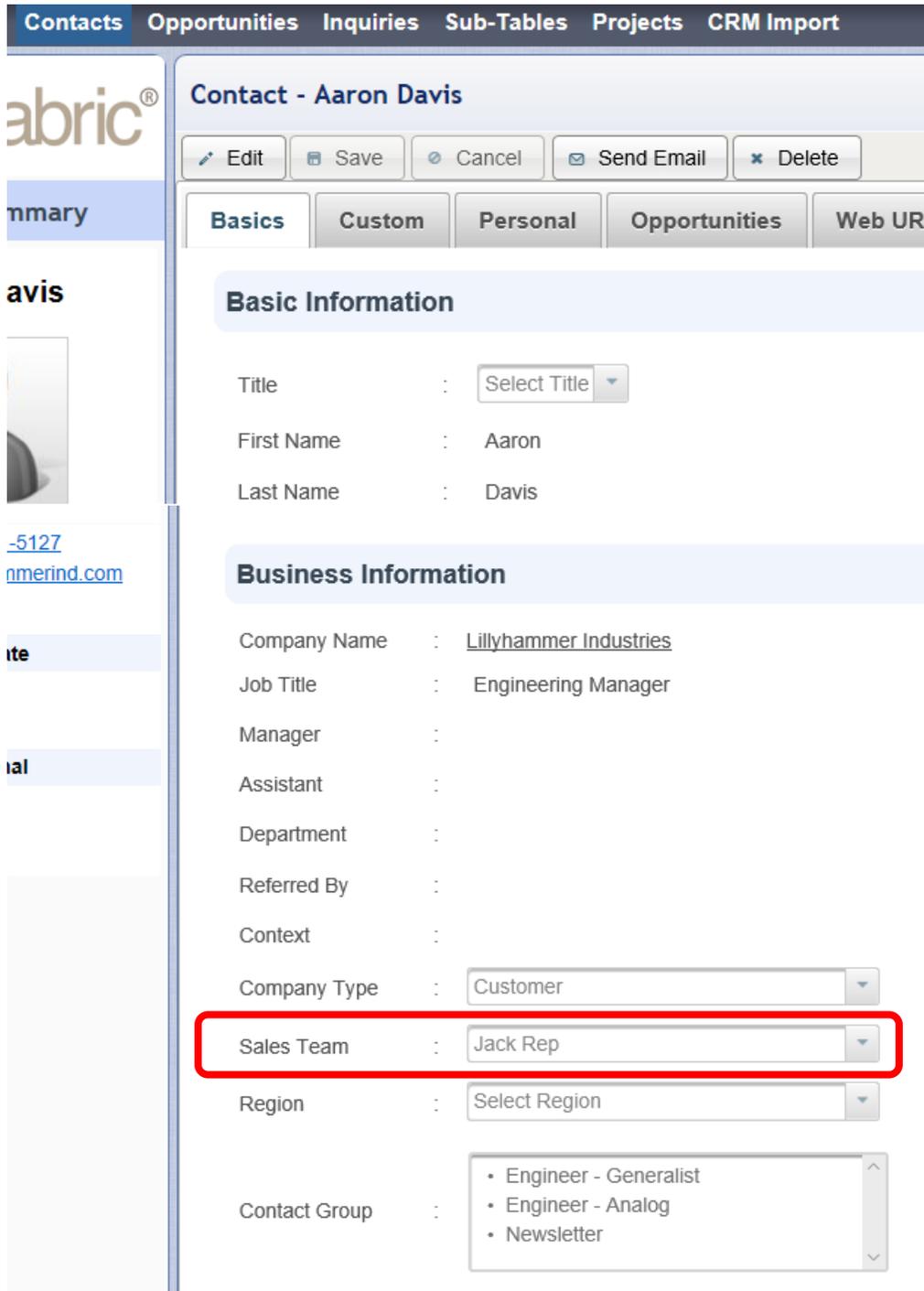
- A) Determine the Sales Team to which the Contact Belongs
 1. REPEAT STEP 2 ABOVE – Step 2: Do I have authorization to sync this contact
 2. Left click the contact name to open the Contact Detail view

This image depicts opening a contact from the contact list view



- 3. Review the sales team assignment of the contact. Continue to B)

This image shows where to find the sales team assigned to a contact



The screenshot displays the 'Contact - Aaron Davis' page in the repfabric CRM. The interface includes a top navigation bar with tabs for 'Contacts', 'Opportunities', 'Inquiries', 'Sub-Tables', 'Projects', and 'CRM Import'. Below this is a sidebar with the repfabric logo and a list of tabs: 'Summary', 'Notes', 'Attachments', 'History', 'Related', 'Recent', 'Favorites', 'Alerts', 'Calendar', 'Tasks', 'Reports', 'Settings', and 'Help'. The main content area is titled 'Contact - Aaron Davis' and contains several sections: 'Basic Information', 'Business Information', and 'Contact Group'. The 'Basic Information' section includes fields for Title (a dropdown menu), First Name (Aaron), and Last Name (Davis). The 'Business Information' section includes fields for Company Name (Lillyhammer Industries), Job Title (Engineering Manager), Manager, Assistant, Department, Referred By, Context, Company Type (Customer), Sales Team (Jack Rep), and Region (Select Region). The 'Contact Group' section includes a list of groups: Engineer - Generalist, Engineer - Analog, and Newsletter. The 'Sales Team' dropdown menu is highlighted with a red box.

In this case, the sales team of Aaron Davis is the “Jack Rep” sales team. This must match the settings described below for sync to work for this contact.

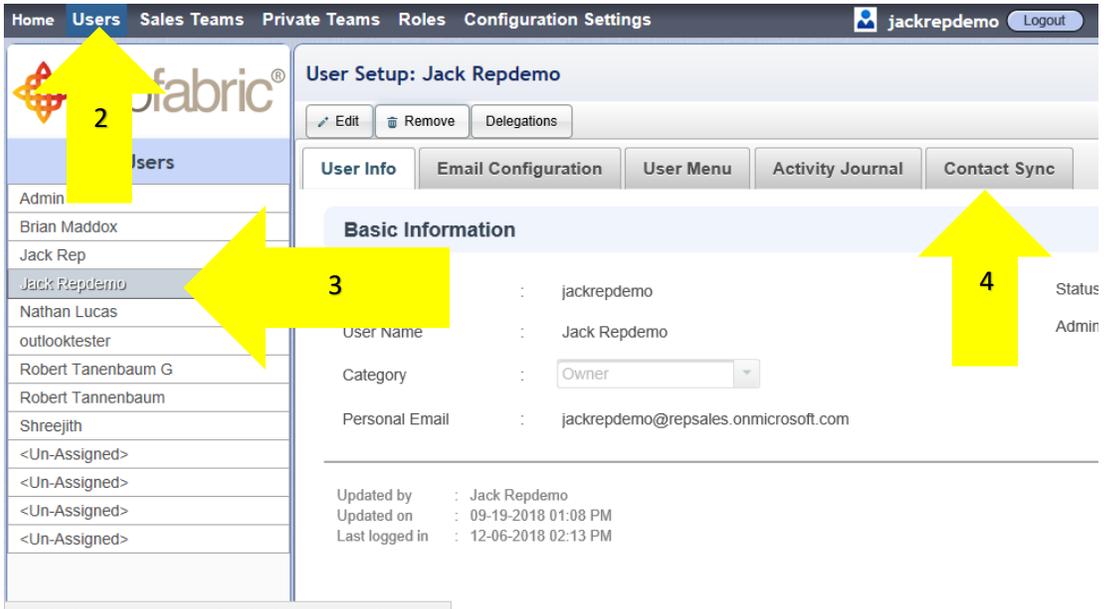
B) Confirm your Sync setting for that Sales team is Enabled

1. From “Home”, left click “Setup”



2. Confirm you are in the ribbon menu of “Users” and have your name selected.
3. Left click “Contact Sync” tab
4. Confirm the Sync checkbox is enabled for the sales team of the contact.

NOTE: This will also synchronize ALL contacts on that sales team, not just the contact in question. If you prefer to NOT do this, this contact can either be moved to a shared sales team between you and the contact owner or you can simply not establish the sync to Repfabric for this contact. Mark it “Private” to avoid the sync engine processing this contact with each sync cycle.



Home Users Sales Teams Private Teams Roles Configuration Settings jackrepdemo Logout

repfabric®

User Setup: Jack Repdemo

Edit Remove Delegations

User Info Email Configuration User Menu Activity Journal Contact Sync

Basic Information

Admin			
Brian Maddox			
Jack Rep			
Jack Repdemo	jackrepdemo		Status Admin
Nathan Lucas			
outlooktester			
Robert Tanenbaum G			
Robert Tannenbaum			
Shreejith			
<Un-Assigned>			

User Name : Jack Repdemo

Category : Owner

Personal Email : jackrepdemo@repsales.onmicrosoft.com

Updated by : Jack Repdemo
Updated on : 09-19-2018 01:08 PM
Last logged in : 12-06-2018 02:13 PM

The image below shows what sales teams contacts are enabled for synchronization

ivate Teams Roles Configuration Settings

User Setup: Jack Repdemo

Google (One Way from Repfabric)

No account is configured for this user.

Sync+ for Outlook and Gmail (Two Way Sync)

User Name :
 Token : b87-8b51be49
 Sync Enabled : On
 Default Sales Team : Jack Rep

Sync enabled status for Sales team

Robert Tanenbaum	<input type="checkbox"/>
Jack Rep	<input checked="" type="checkbox"/>
Nathan Lucas	<input type="checkbox"/>

In this case, only contacts on the Jack Rep sales team will sync to the email contacts. Contacts on the Robert Tanenbaum and Nathan Lucas sales teams will not sync to email contacts.

Thus the contact ‘Aaron Davis’ mentioned above, who belongs to Jack Rep sales team will sync.

Step 4) Does the company exist in Repfabric?

During the onboarding process of Repfabric, by default the ability to create companies in Repfabric from a company in an email contact not currently in Repfabric is turned off. This is to avoid creating many “nearly the same” duplicate companies when the team has not fully scrubbed their email contacts. While this is turned off, a new company will not be created within Repfabric from the company listed in your email contact. You will need to check the existence of the company in Repfabric and if it is truly a new company that needs to be created first in Repfabric. Otherwise the contact will not be allowed to sync because creating the contact’s company is forbidden.

1. From "Home", select "Opp Loop"



2. Left click the Companies menu at the top
3. Search for the company name in question
4. Left click the company name to open it once found



RESOLUTION: IF the company is NOT found, and you have administrative rights, the company needs to be created in Repfabric. The company name should be an exact match to the contact company name in your email contact.

IF the company IS found, continue below.

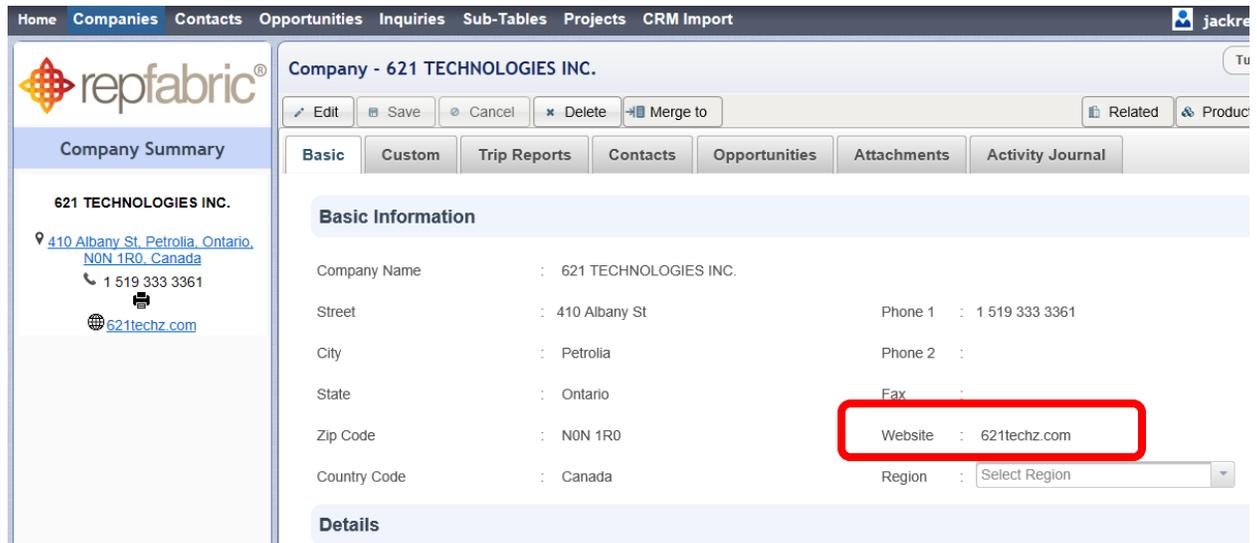
Step 5) Check the contact Email and Repfabric company domains for a match

The strongest link between an email contact and the Repfabric company to which the contact syncs is a match of web domains. The sync runs properly when the domain of only one company in Repfabric MATCHES the domain of the email address of the contact.

1. Determine the email address of the contact in your email

2. REPEAT STEP 4 above: Step 4: Does the company exist in Repfabric?
3. Open the company's detail screen
4. Review the company's website domain to match the email domain of the contact in question

This image shows where to find a company's web domain from the company detail view.



RESOLUTION: IF there is not company website listed in the view above, add the website which matches the email domain of the contact you want to sync to this company.

In this case, if the email contact's email address was Aaron@621techz.com, and you entered the company website of www.621techz.com, Aaron would become a contact for this company.

IF after confirming the contact in email has the same email domain as the company in Repfabric and they still do not sync, continue below.

Step 6) Match the company name in the email contact with the company name in Repfabric

There are cases where too many companies in Repfabric have domains that match the email domain of the contact. In these cases, the sync engine cannot resolve which company the contact should be associated to. This is especially common with distributors that have many branches, where each branch shares the same domain name as other branches (all of which match the email domain of the contact in Outlook). An example of this would be "Fastenal 1" and "Fastenal 2" companies in Repfabric, both having a domain of www.fastenal.com. When Bill.smith@fastenal.com gets tried for sync, the engine cannot resolve which Fastenal branch he belongs to.

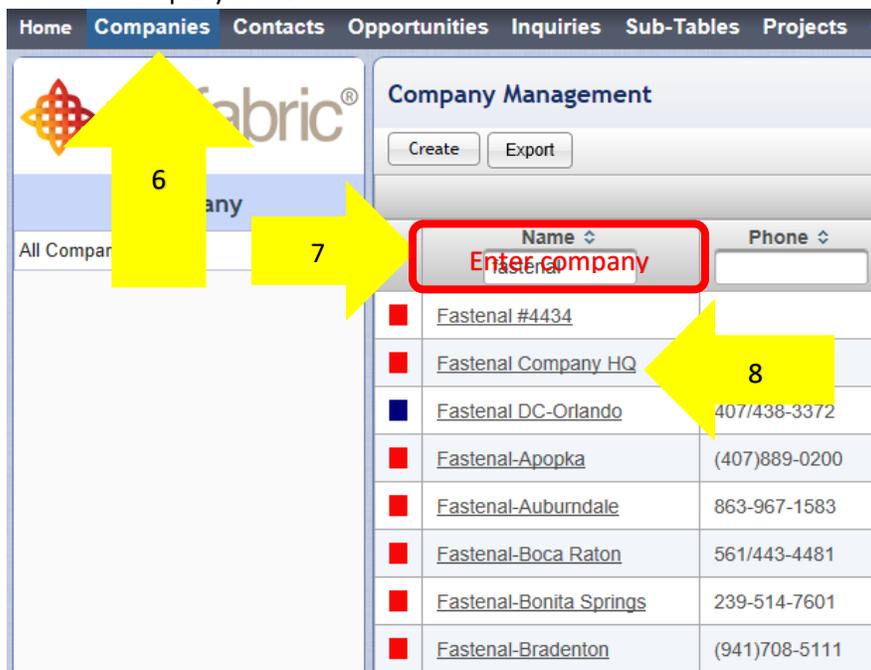
The sync engine then considers the company name of Bill Smith in the email contact to determine if it is a near match to a company name in Repfabric with the same website domain of Fastenal.com. When that matching fails, Bill Smith is tagged “RepfabricResolve” for manual fixing.

RESOLUTION: Make the Repfabric company name exactly match the company name in the email contact.

5. From “Home”, select “Opp Loop”



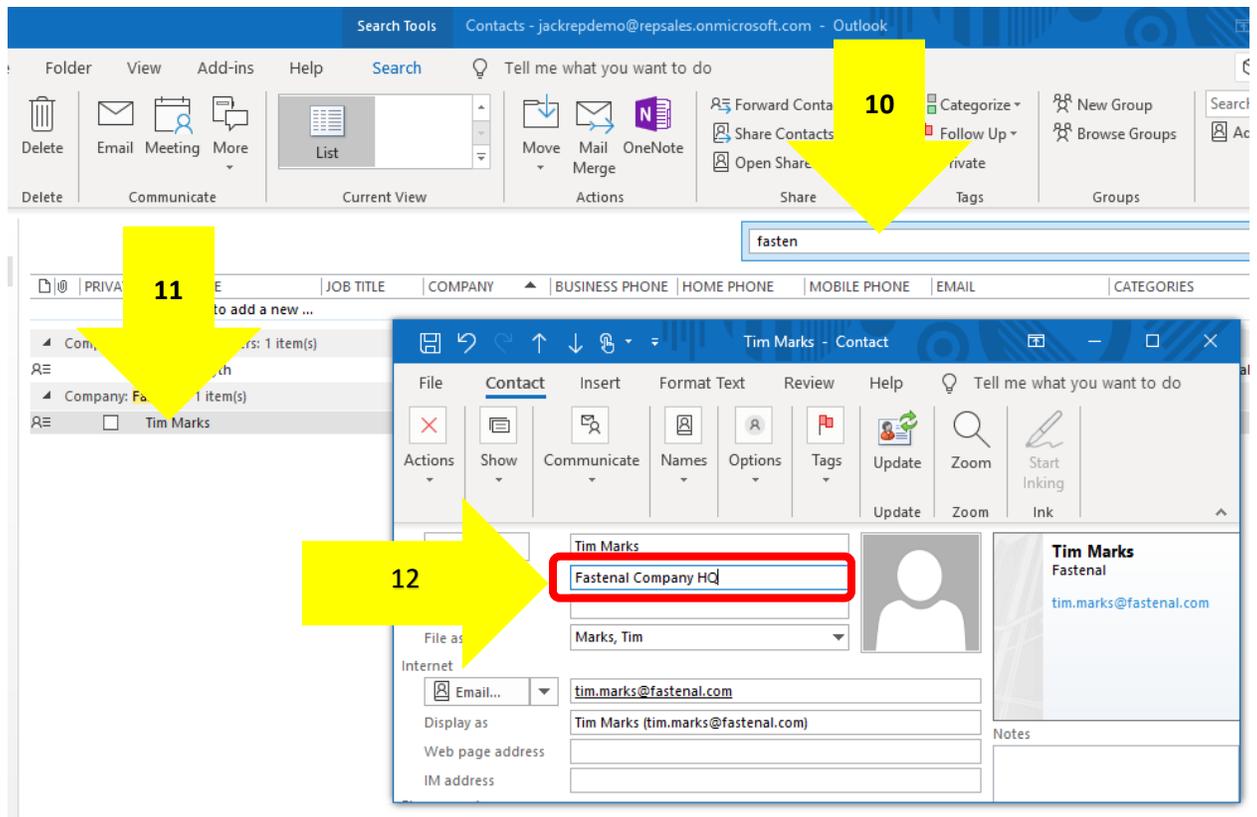
6. Left click the Companies menu at the top
7. Search for the company name in question
8. Record the company name via copy/paste or another method – it will be entered into the email contact Company field.



In this example, we will use the company name in Repfabric of “Fastenal Company HQ”

9. Open your Outlook email Contacts
 10. Search for the unsync'd contact in your Contacts folder
 11. Open the contact in question
 12. Update the contact's Company field to match the Repfabric company name (in this case, from "Fastenal" to "Fastenal Company HQ")
2. Left click your Contacts folder

This image shows finding the contact and updating the company name of the contact to match the company name in Repfabric

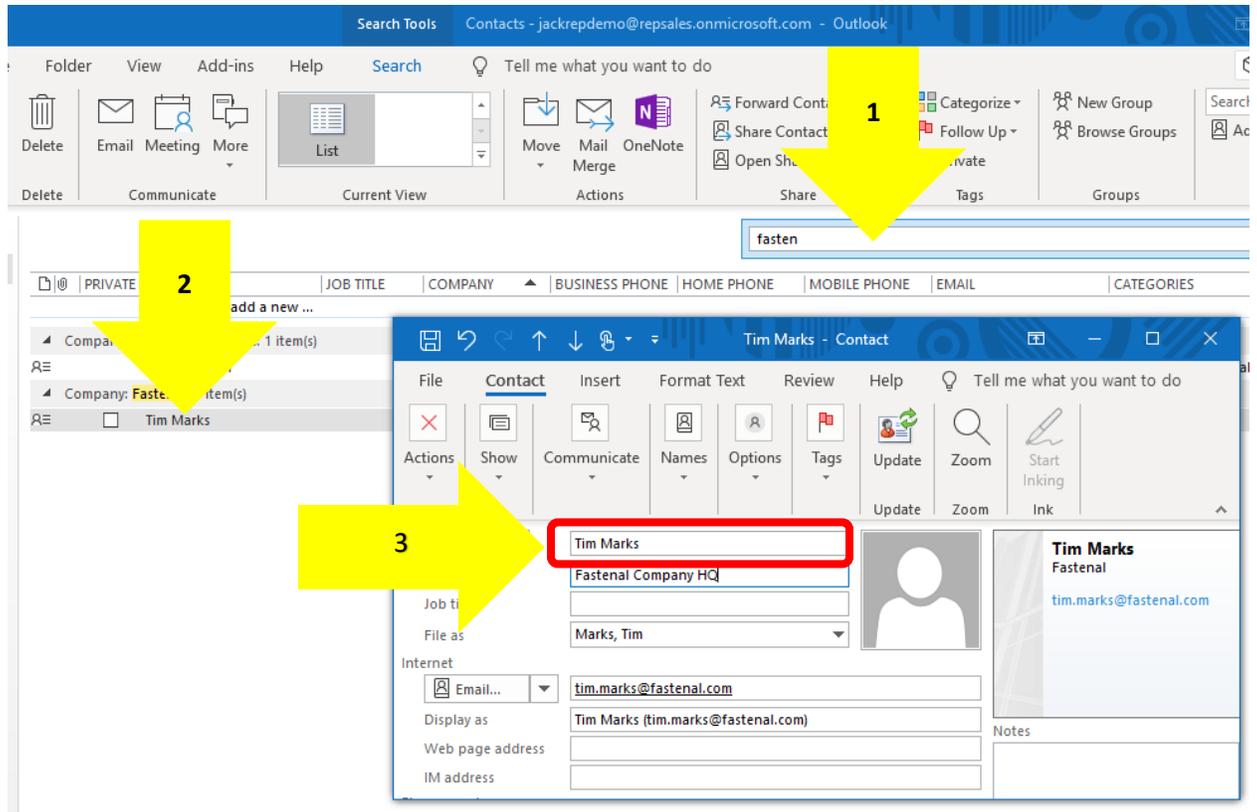


Step 7) The contact full name in Outlook contacts is a duplicate, and thus cannot sync to Repfabric.

Repfabric currently prevents the same contact name from existing in Repfabric. There are various reasons for this restriction. However, when you have two contacts with exactly the same full name, only one will be able to synchronize to Repfabric. The other will be tagged for resolution. By making the contact full name unique, such as by appending the company name to which they belong, the new contact becomes unique and will synchronize.

1. Search for contact to resolve in your Contacts folder
2. Open the contact in question
3. Update the contact's full name with something that makes it unique. "Tim Marks (Fastenal)"

This image shows finding the contact and updating contact name to be unique



Troubleshooting

- If you cannot resolve particular contacts, please contact support@repfabric.com with the contact name and email address (if known)