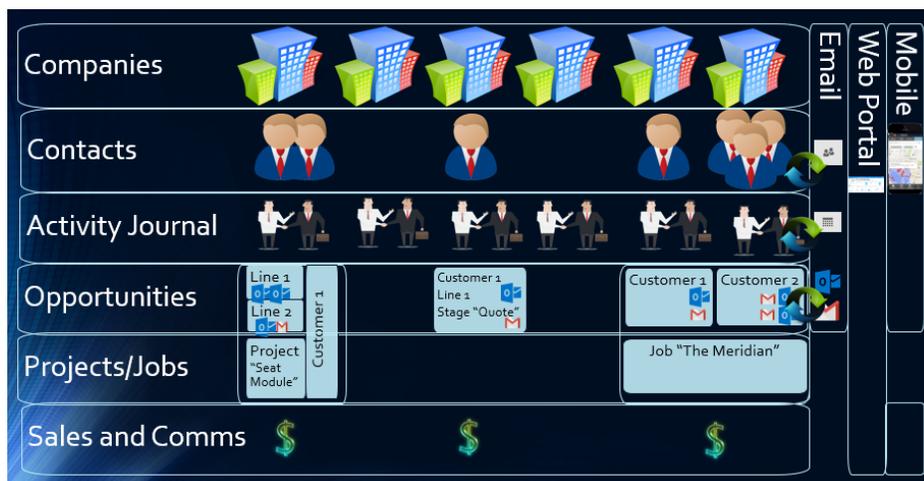


# How to Resolve Contacts that Fail to Sync to Repfabric in Outlook



repfabric®

Connecting the threads of multi-line selling



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# Need help?

Email:

**Support@repfabric.com**

Or call

**(844) 737-7253**

For videos and more tutorials, log on to:

**<https://support.repfabric.com>**





## How to Resolve Contacts that Fail to Sync to Repfabric in 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:

- How to determine which contacts are not syncing to Repfabric
- 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



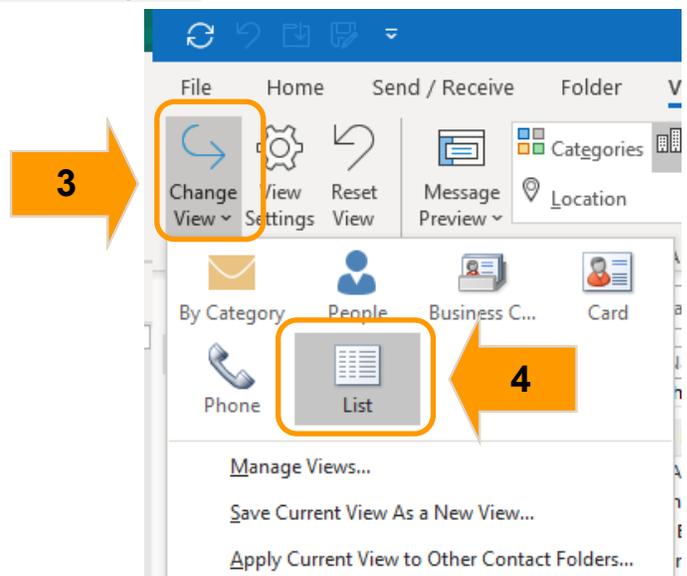
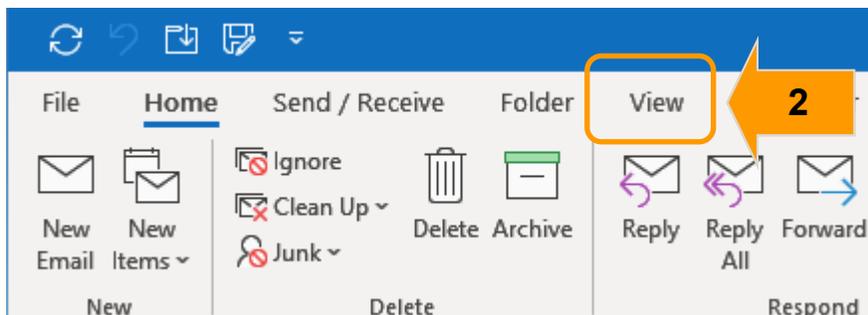
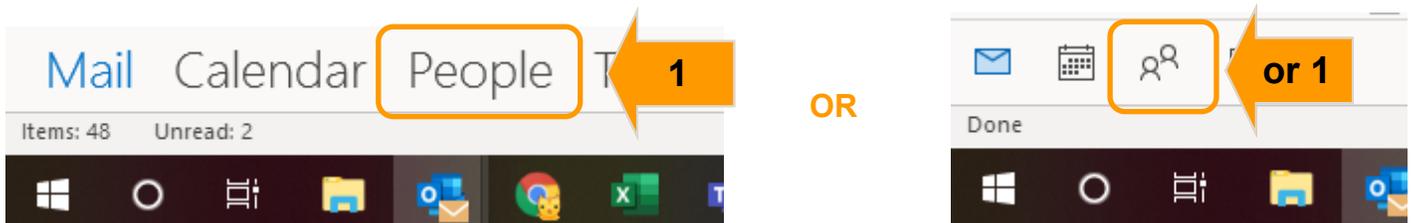
## How do I determine which contacts are NOT syncing from Outlook?

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 “People” (contacts) icon in Outlook.
2. Left click “View” tab.
3. Left click “Change View.”
4. Left click “List.”

These images show the “People” icons and “Change View” button.





### 5. Left click into the contact search box, type “RepfabricResolve”

This image shows the search box above your list of contacts.  
The top image has been enlarged to show detail.

It's helpful to have  
“Categories” as a  
column when you are  
viewing your list of  
contacts.



Search Contacts

Full Name	Job Title	Company	File As	Country/Region	Department	Business Phone	Business Fax	Home Phone	Mobile Phone	Email	Categories
Click here to add a new ...											
Ace Hardware-Tampa: 1 item(s)											
Darnell Jerwood	VP Sales	Ace Hardware-Ta...	Jerwood, Darnell			550-258-5819		612-517-5239	598-284-9538	djerwoodfj@acehardwa...	Distributor, Repfabric
Air Systems: 1 item(s)											
Bruce Thompson	Regional Sal...	Air Systems	Thompson, Bruce			999-555-1212;498			431-309-0293	bruce.thompson@regal...	Manufacturer, Repfabric
AIT-Gainesville: 1 item(s)											
Carina Leathwood	Inside Sales	AIT-Gainesville	Leathwood, Carina			857-459-4298		114-403-8531	955-523-0568	cleathwooddu@applied...	Distributor, Repfabric

This is the list of contacts that are NOT syncing to Repfabric and need attention.

Contacts - Outlook

Folder View Add-ins Help Tell me

Delete Communicate Current View Share Tags Groups Find

Search Contacts

Full Name	Job Title	Company	Mobile Phone	Email	Categories
Click here to add a new ...					
Company: (none): 5 item(s)					
Gregory Barger	Trainer/Coach		4198893623	Gregory@turnertimema...	Repfabric RepfabricResolve
Kim Harper				juneccrane@furnitech.com	Personal, RepfabricResolve
James Walsh			203-231-1234		Repfabric RepfabricResolve
Ross					Newsletter, RepfabricResolve

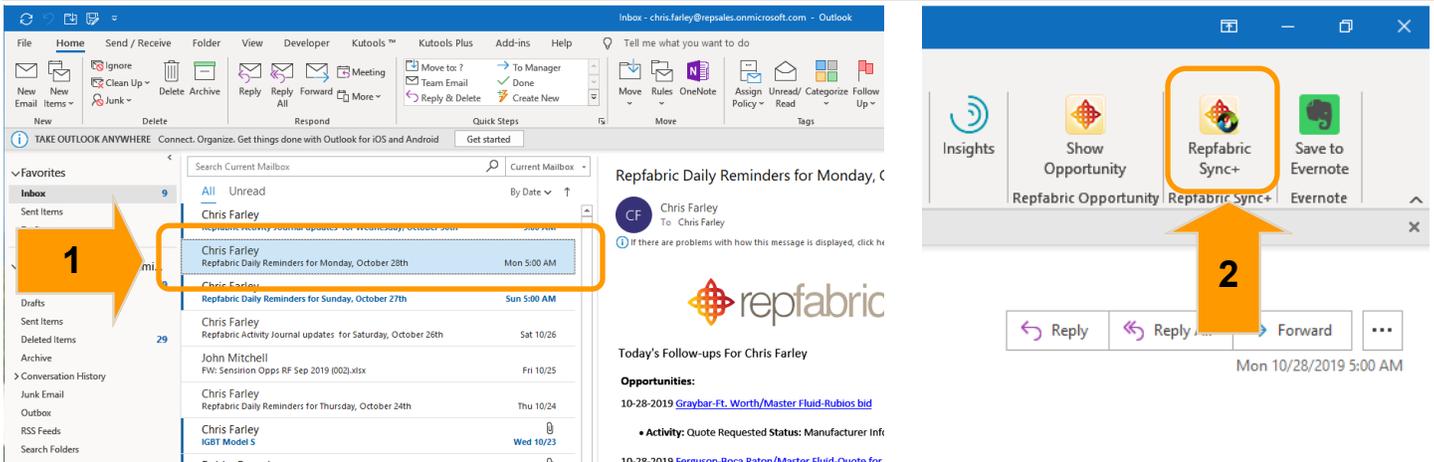
This concludes the instructions for this section

Method 2.) From within the Sync+ Connector, determine which contacts are not syncing.

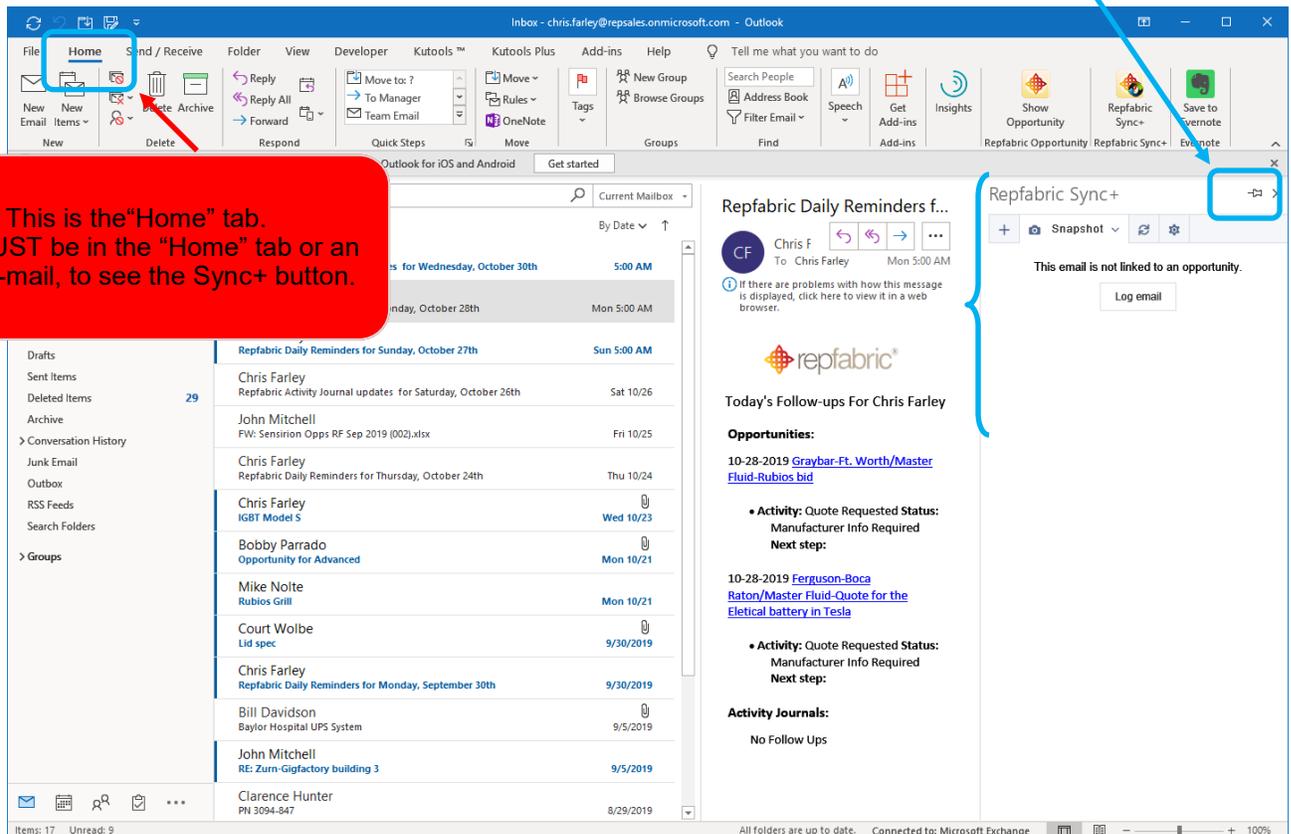
There are exceptions listed that also depict why the synchronization failed for each contact. By expanding these sections and reading the error messages, you can determine what data in the Outlook contact record is needed to fix the contact so that it can synchronize.

1. Left click any e-mail message.
2. Left click "Repfabric Sync+" button.

This image shows an e-mail selected and the "Repfabric Sync+" button.



This image shows the Repfabric Sync+ window open on the far right. Click the push pin to "pin" this window in place.

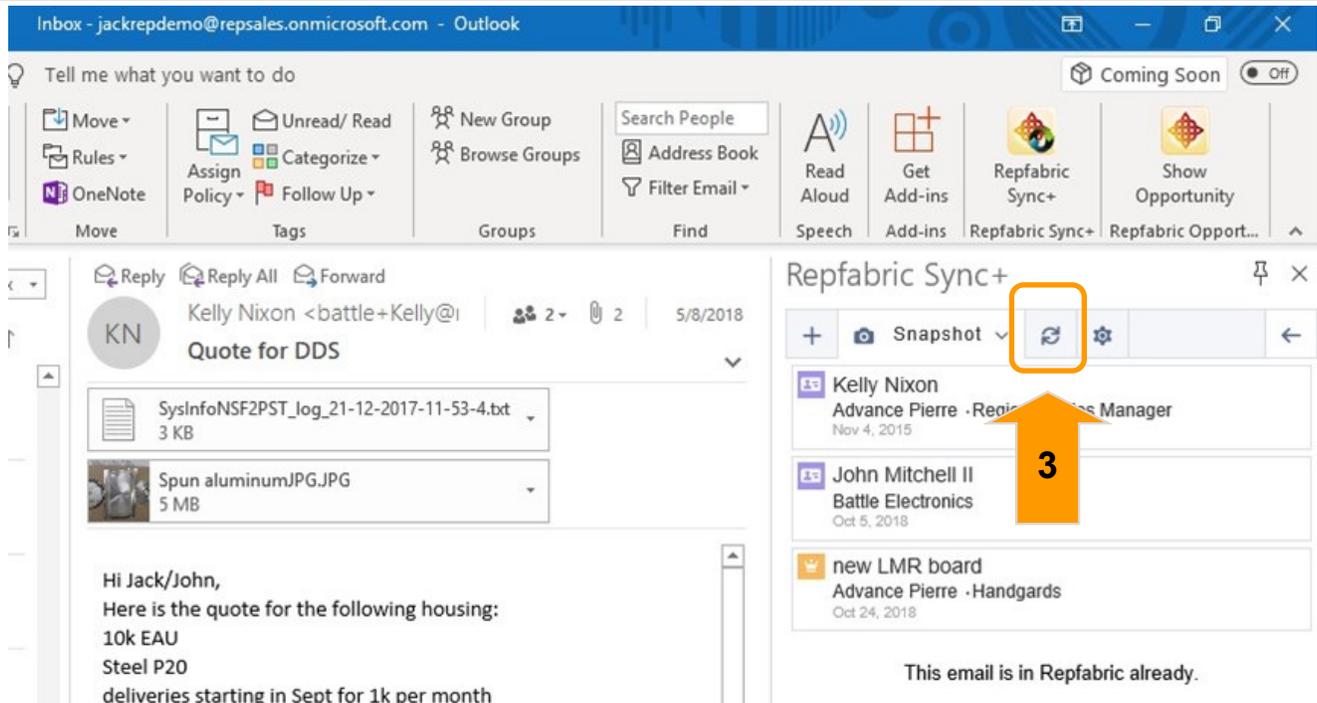




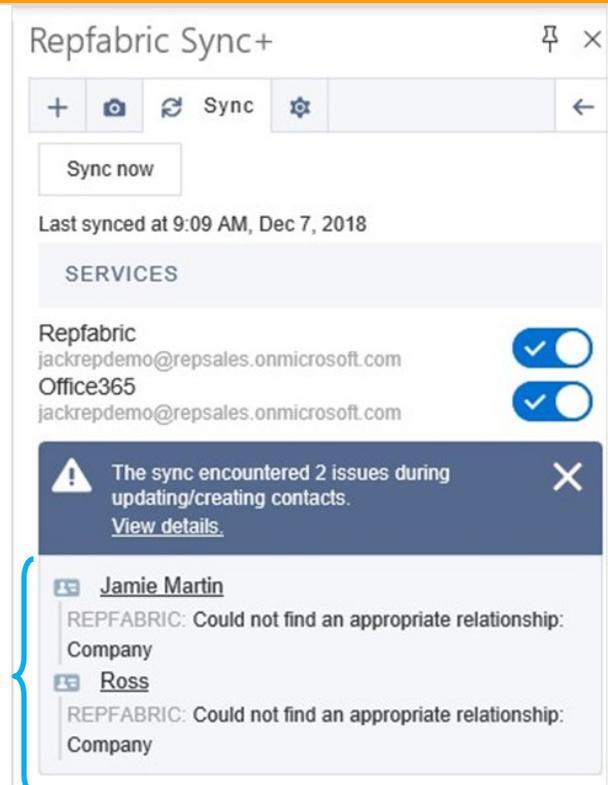
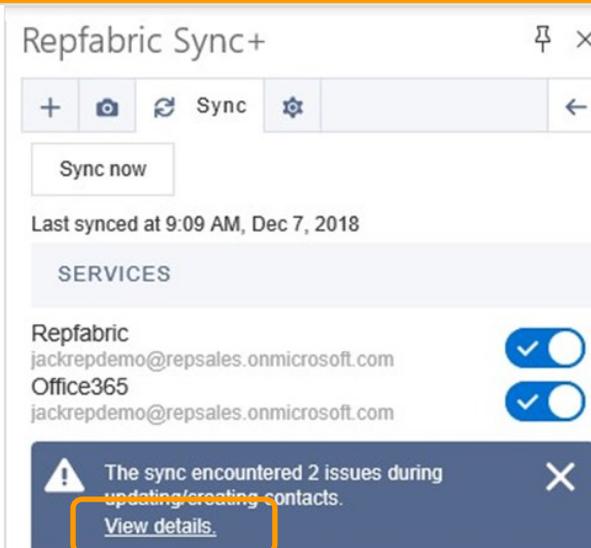
## How to Resolve Contacts that Fail to Sync to Repfabric in Outlook (continued...)

3. Left click "Sync" status button.
4. Left click "View Details."

This image shows the "Sync" status button.



This image shows the Sync issues warning message with "View Details".  
The second image shows the actual detailed list of issues.





## How to Resolve Contact Sync Issues

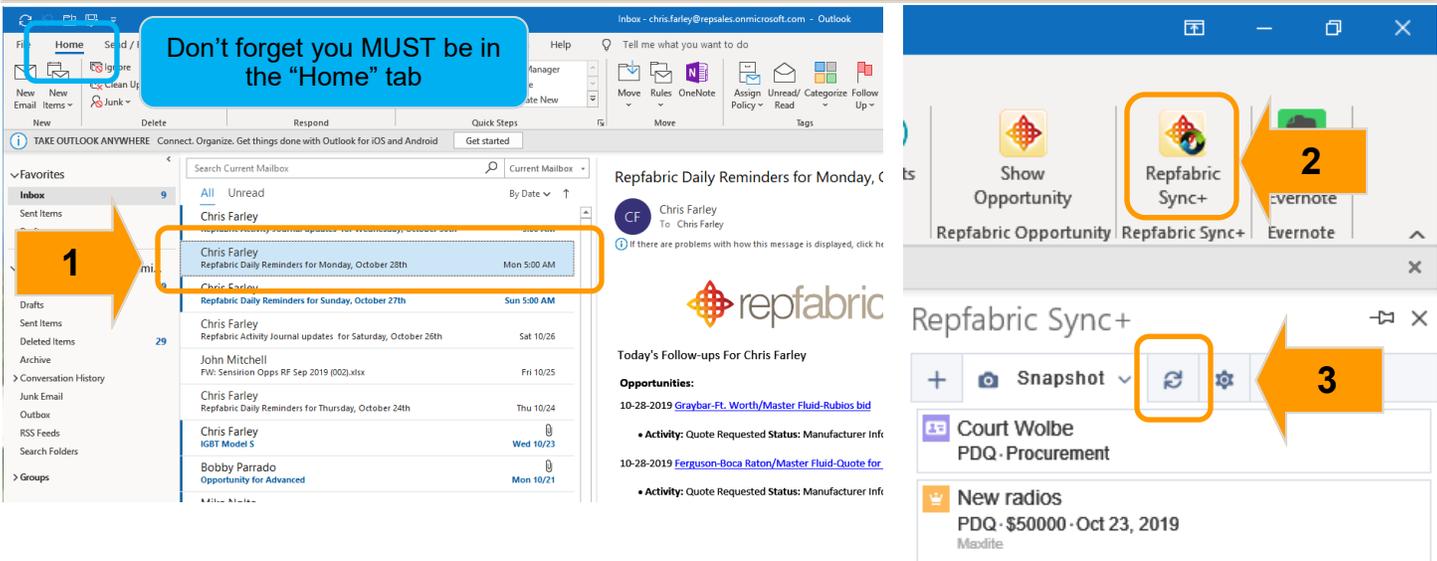
These pages show you how to troubleshoot and resolve the underlying causes of your contacts not syncing. There are several possibilities, which require you to check in both Repfabric and Outlook.

### 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?

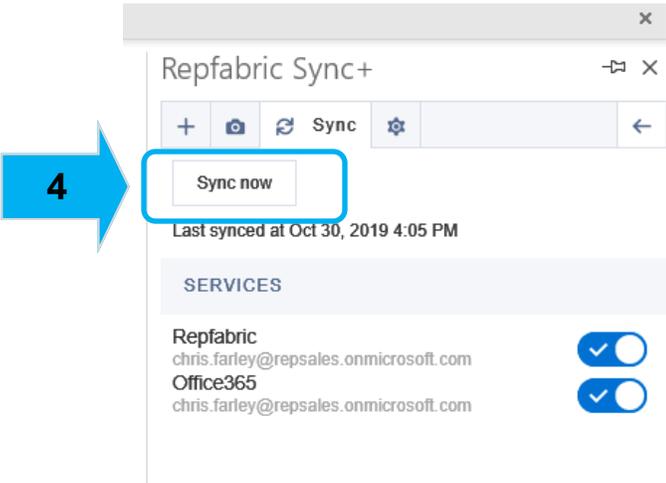
1. Left click any email message.
2. Left click "Repfabric Sync+" button.
3. Left click "Sync" status button.
4. **ONLY VERIFY** that the screen says "Sync Now" (**DO NOT PRESS** "Sync Now" button!). sslt must not say "Enable Sync". If it does, the sync engine is not turned on for your email. Please contact [support@repfabric.com](mailto: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.

This image shows an e-mail selected and the "Repfabric Sync+" button.



**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.



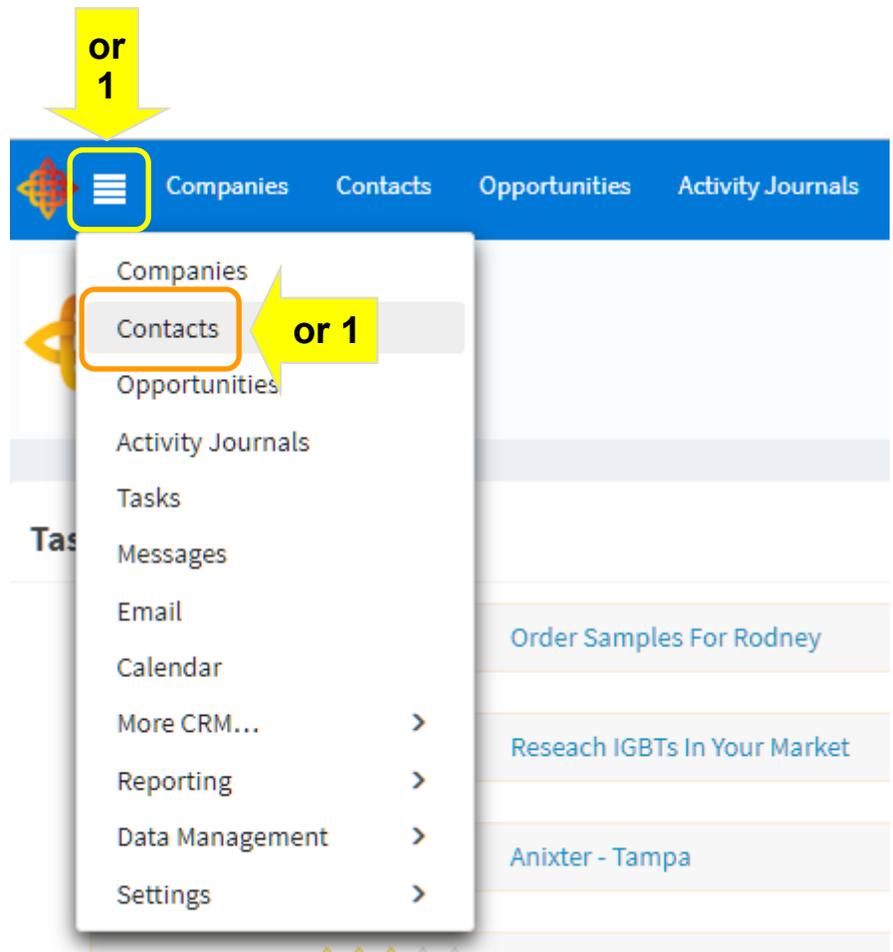


## Step 2: Do I have authorization to sync this contact?

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. Left click “Contacts” shortcut.  
**OR** left click four lines (global menu) then select “Contacts.”

These images show the two different options to navigate to “Contacts.”

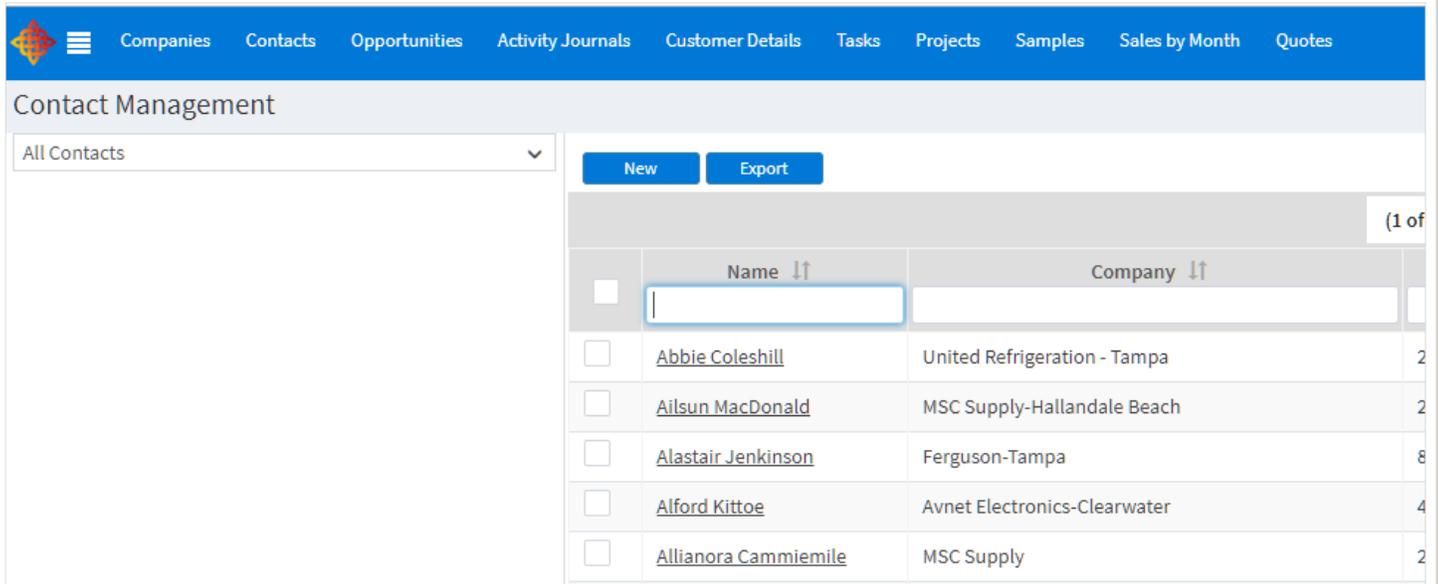


2. Type in the name to search.

*\*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.*

**If the contact does show up in Repfabric, proceed to next page to make it available in Outlook Sync+**

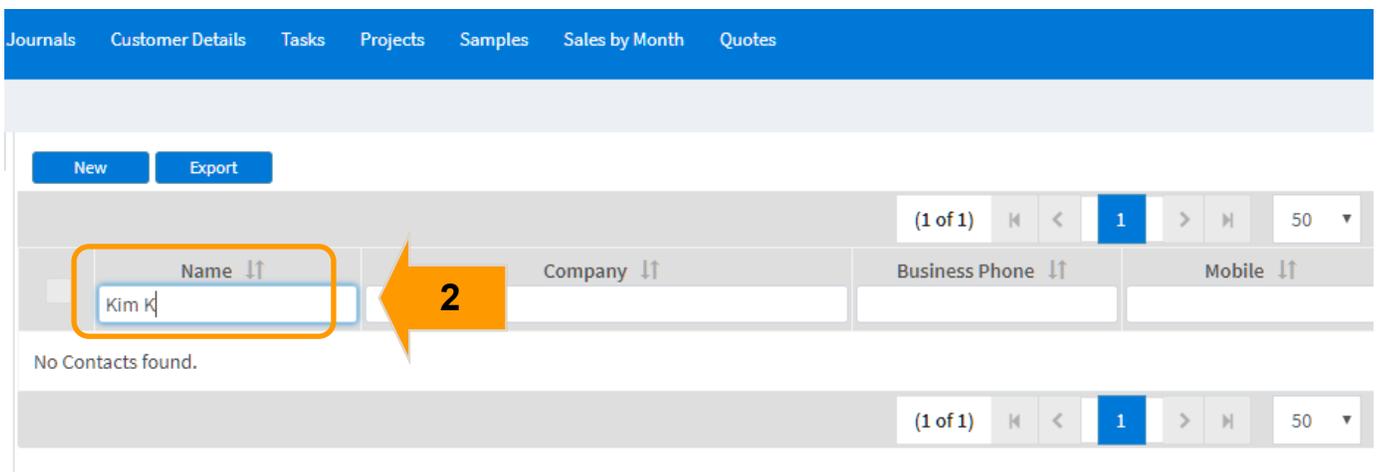
This image shows a sample list of contacts I can see.



The screenshot shows the 'Contact Management' interface. At the top, there is a navigation bar with options: Companies, Contacts, Opportunities, Activity Journals, Customer Details, Tasks, Projects, Samples, Sales by Month, and Quotes. Below this, there is a dropdown menu set to 'All Contacts' and two buttons: 'New' and 'Export'. The main area displays a table of contacts with columns for Name and Company. The table contains the following data:

	Name ↑↓	Company ↑↓	
<input type="checkbox"/>	<input type="text"/>		(1 of 1)
<input type="checkbox"/>	<a href="#">Abbie Coleshill</a>	United Refrigeration - Tampa	2
<input type="checkbox"/>	<a href="#">Ailsun MacDonald</a>	MSC Supply-Hallandale Beach	2
<input type="checkbox"/>	<a href="#">Alastair Jenkinson</a>	Ferguson-Tampa	8
<input type="checkbox"/>	<a href="#">Alford Kittoe</a>	Avnet Electronics-Clearwater	4
<input type="checkbox"/>	<a href="#">Allianora Cammiemile</a>	MSC Supply	2

This image shows that I am NOT able to view the customer I am looking for.



The screenshot shows the 'Contact Management' interface with a search for 'Kim K'. The search results are empty, displaying 'No Contacts found.' An orange arrow with the number '2' points to the search input field. The interface includes a navigation bar with options: Journals, Customer Details, Tasks, Projects, Samples, Sales by Month, and Quotes. Below this, there are 'New' and 'Export' buttons. The table header shows columns for Name, Company, Business Phone, and Mobile. The search results area shows a pagination control for '(1 of 1)' and a dropdown menu set to '50'.



### 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 the sync is disabled.

- A. Determine the sales team to which the contact belongs.
  1. Left click desired contact to open.
  2. Double check the sales team assignment.

This image shows an example contact that had sync issues in Outlook, but I located it in Repfabric.

The screenshot displays the Repfabric contact management interface. At the top, there are 'New' and 'Export' buttons. Below is a table with columns for 'Name' and 'Company'. A search filter 'ailsun' is applied to the 'Name' column. The first row shows 'Ailsun MacDonald' from 'MSC Supply-Hallandale Beach'. An orange arrow labeled '1' points to this row. Below the table, the 'Contact Details' page for Ailsun MacDonald is shown. The 'Business Information' section includes fields for 'Company', 'Company Type', 'Distributor', 'Department', 'Assistant', 'Contact', 'Region', 'City', 'State', 'Country', 'Business Phone', 'Fax', 'Business Email 1', and 'Contact Group'. The 'Distributor' field is set to 'Sales Team' and the 'Assistant' field is set to 'Bill Murray'. An orange arrow labeled '2' points to the 'Sales Team' dropdown menu, which is highlighted by a callout box labeled 'Sales Team' containing 'Bill Murray'.

3. Left click global menu (four lines in upper left).
4. Hover over "Settings."
5. Left click "Users."
6. Verify that your name appears in the list of users.

3

This image shows how to navigate to "Users" with global menu.

The screenshot illustrates the navigation process in the Repfabric application. It shows the main navigation bar with a global menu icon (three horizontal lines) highlighted by an orange box and labeled '3'. A dropdown menu is open, showing various options. The 'Settings' option is highlighted by an orange box and labeled '4'. A sub-menu is open under 'Settings', and the 'Users' option is highlighted by an orange box and labeled '5'. An orange arrow labeled '6' points from the 'Users' option to a separate screenshot of the 'User Setup' page, which displays a list of users: Admin, Bill Murray, Chris Farley, Jane Curtin, Murali Meleth, Richard Pryor, Rodney Dangerfield, Will Farrell, and <Un-Assigned>.

Companies Contacts Opportunities Activity Journals

Companies  
Contacts  
Opportunities  
Activity Journals  
Tasks  
Messages  
Email  
Calendar  
More CRM... >  
Reporting >  
Data Management >  
Settings

Users

Sales Teams  
Private Teams  
Sub Tables  
Roles  
CRM Sync  
Application Settings

User Setup:

Users

Admin  
Bill Murray  
Chris Farley  
Jane Curtin  
Murali Meleth  
Richard Pryor  
Rodney Dangerfield  
Will Farrell  
<Un-Assigned>



7. Left click desired sales person.
8. Left click "Contact Sync" tab.
9. Confirm the checkbox is enabled for the sales team on 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 (shown on page xx of this tutorial).

The top image shows that ONLY Chris Farley has sync enabled on his sales team.  
The bottom image shows Bill Murray in Sales hasn't even enabled set up for Sync+ in Outlook yet.

The screenshot displays the 'User Setup: Chris Farley' page. On the left, a list of users includes Admin, Bill Murray, Chris Farley (highlighted with a yellow box and arrow '7'), Jane Curtin, Murali Meleth, Richard Pryor, Rodney Dangerfield, Will Farrell, and <Un-Assigned>. The main content area has tabs for 'Edit', 'Remove', 'Delegations', 'User Info', 'Email Configuration', 'User Menu', 'Activity Journal', 'Contact Sync' (highlighted with a yellow box and arrow '8'), and 'User C...'. Under 'Contact Sync', there are sections for 'Google (One Way from Repfabric)' (noting 'No account is configured for this user.') and 'Sync+ for Outlook and Gmail (Two Way Sync)'. The 'Sync Enabled' checkbox is checked. Below, a table titled 'Sync enabled status for Sales team' has columns 'Sales Team' and 'Sync Flag'. The table contains three rows: 'Chris Farley' with a checked checkbox (arrow '9'), 'All' with an unchecked checkbox, and 'Rotem' with an unchecked checkbox.

Chris Farley has his own sales team and also belongs to two other sales teams, "All" and "Rotem." In this case, only contacts on Chris Farley sales team will sync to his email contacts in Outlook. Contacts on "All" and "Rotem" sales teams will NOT sync to Chris Farley's email contacts in Outlook.



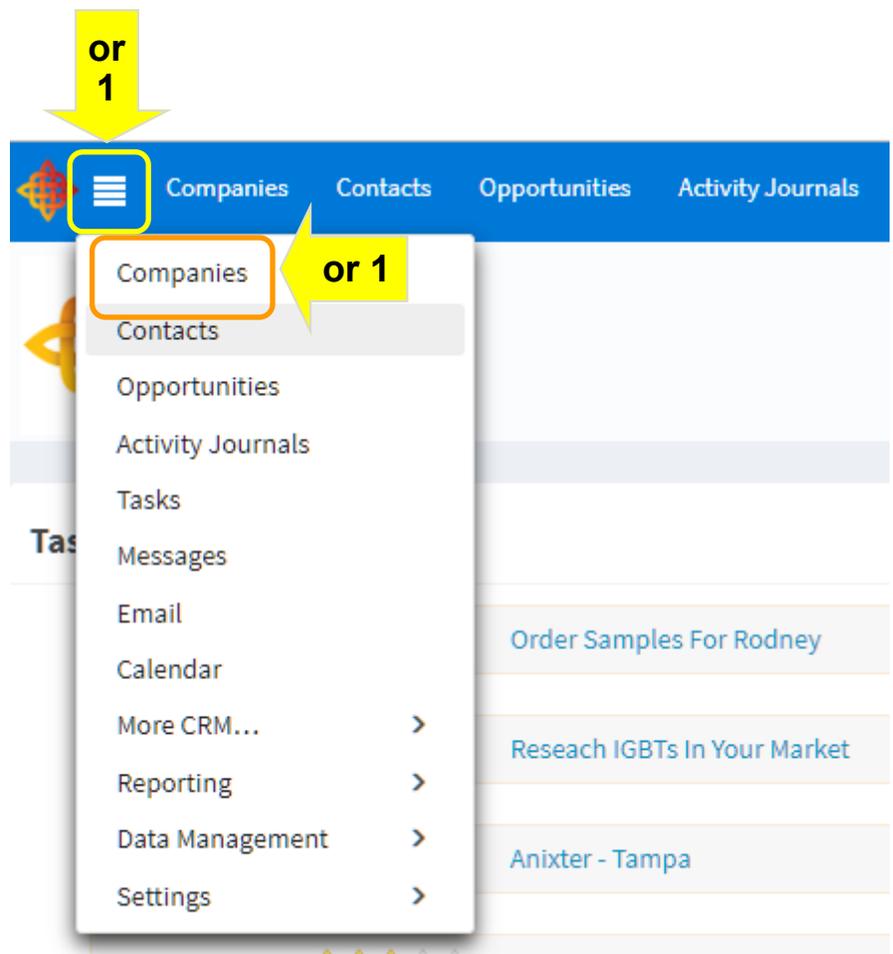
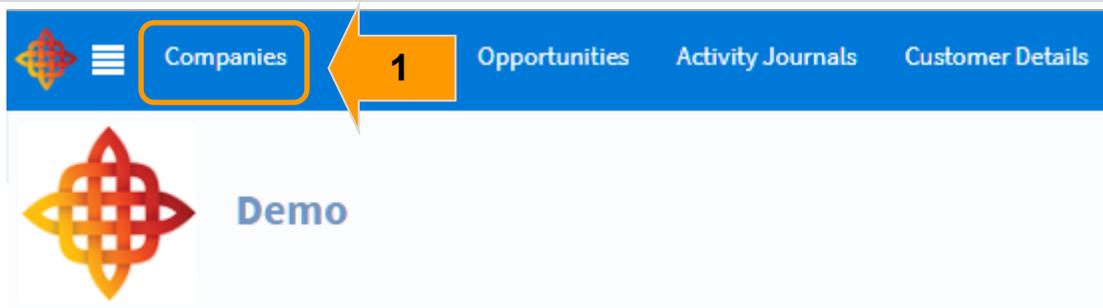
#### Step 4: Does the company exist in Repfabric?

During the onboarding process of Repfabric, you 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. Left click “Companies” shortcut.

**OR** left click four lines (global menu) then select “Companies.”

These images show the two different options to navigate to “Contacts.”





### 2. Search for the desired company.

If the company comes up in the search, proceed to the next page.

**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 company name in your email contact.**

This image shows searching for a company name.

New
Export

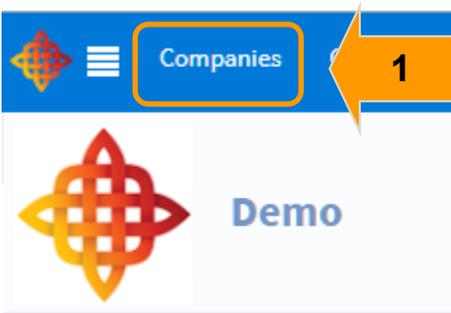
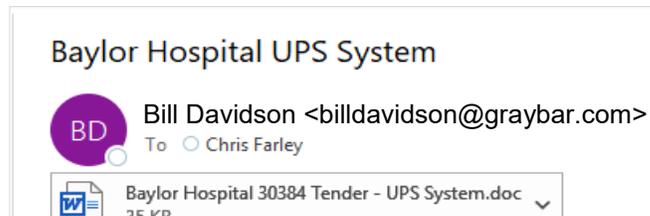
(1 of 5)   < 1 2 3 4 >   50					
	Name ↑↓	Phone ↑↓	Type ↑↓	Call Pattern ↑↓	Sales Team ↑↓
<input type="checkbox"/>	Acme				
<input type="checkbox"/>	<a href="#">Ace Hardware-Boca Raton</a>	118-961-7957	Distributor	FL-Ft. Laud North	Rodney Dangerfield
<input type="checkbox"/>	<a href="#">Ace Hardware-Coral Gables</a>	114-629-6697	Distributor	FL-Ft. Laud North	Bill Murray
<input type="checkbox"/>	<a href="#">Ace Hardware-Ft Lauderdale</a>	980-117-0625	Distributor		Bill Murray
<input type="checkbox"/>	<a href="#">Ace Hardware-Jacksonville</a>	308-339-2208	Distributor		Rodney Dangerfield
<input type="checkbox"/>	<a href="#">Ace Hardware-Tampa</a>	831-576-2777	Distributor	FL-Tampa	Chris Farley
<input type="checkbox"/>	<a href="#">AdvancePierre Foods</a>	8887776666	End User		Bill Murray
<input type="checkbox"/>	<a href="#">Air Systems</a>		Manufacturer		
<input type="checkbox"/>	<a href="#">Airgas</a>		Distributor		
<input type="checkbox"/>	<a href="#">AIT-Casselberry</a>	932-794-7276	Distributor		Rodney Dangerfield
<input type="checkbox"/>	<a href="#">AIT-Destin</a>	130-733-8678	Distributor		Rodney Dangerfield

**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. In the email address BDavidson@Graybar.com - Graybar.com is the domain

1. Left click “Companies.”
2. Search for desired company.
3. Left click to open company record.
4. If there is not a company web address, enter it in “Website” field.
5. Left click “Save.”

If the website is already correct in the company record, proceed to the next page.

These images show a sample e-mail address and how to add “Website” to a company record.



Name	Phone	Type
graybar		
Graybar-Boynton Beach	119-453-3751	Distributor
Graybar-Daytona Beach	366-949-1024	Distributor
Graybar-Ft Myers	182-204-3622	Distributor
Graybar-Ft. Worth	195-875-4769	Distributor
Graybar-Jacksonville	998-968-9342	Distributor



**RESOLUTION:** IF there is not company website listed , 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](mailto:Aaron@621techz.com), and you entered the company website of [www.621techz.com](http://www.621techz.com) , Aaron would become a contact for this company.

Basic Custom Fields Trip Reports Contacts Opportunities Attachments Activity Journal

**Basic Information**

Company Name \* Graybar-Ft. Worth

Street 1600 E 8th Phone 1 195-875-4769

Phone 2

PO Box

City Dallas Fax 238-900-2923

State TX Website **www.graybar.com**

Zip Code 75266 Region FL West

Country





## 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 “Ace Hardware-Boca Raton” and “Ace Hardware-Tampa” companies in Repfabric, both having a domain of [www.acehardware.com](http://www.acehardware.com). When [Bill.smith@acehardware.com](mailto:Bill.smith@acehardware.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.

1. Left click “Companies.”
2. Search for desired company.
3. Left click to open company record.
4. Highlight name and copy (CTRL + C to copy).

These images show how to search for, open, and copy company name.

The screenshot illustrates the steps to find and copy a company name in Repfabric. It shows the 'Companies' tab selected, a search for 'ace' yielding a list of Ace Hardware branches, and the 'Ace Hardware-Tampa' record selected. The 'Basic Information' section of the record shows the company name 'Ace Hardware-Tampa' highlighted.

	Name ↑↓	Phone ↑↓	
<input type="checkbox"/>	ace		
<input type="checkbox"/>	<a href="#">Ace Hardware-Boca Raton</a>	118-961-7957	Dis
<input type="checkbox"/>	<a href="#">Ace Hardware-Coral Gables</a>	114-629-6697	Dis
<input type="checkbox"/>	<a href="#">Ace Hardware-Ft Lauderdale</a>	980-117-0625	Dis
<input type="checkbox"/>	<a href="#">Ace Hardware-Jacksonville</a>	308-339-2208	Dis
<input type="checkbox"/>	<a href="#">Ace Hardware-Tampa</a>	831-576-2777	Dis

Buttons: Save, Cancel, Delete

Tabs: Basic, Custom Fields, Trip Reports, Contacts, Opportunities, Attachments

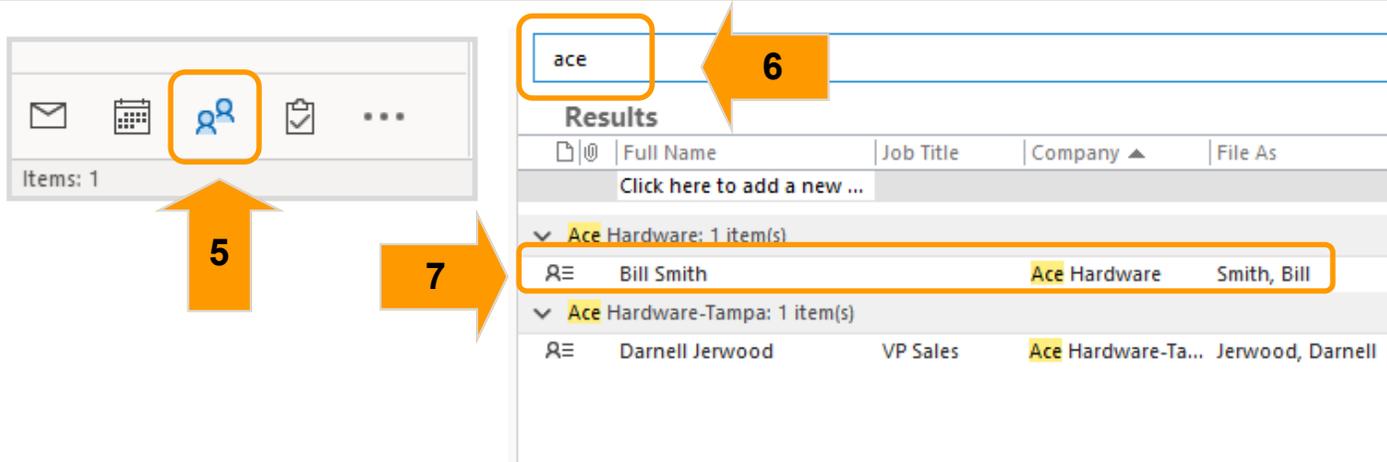
Basic Information

Company Name \*

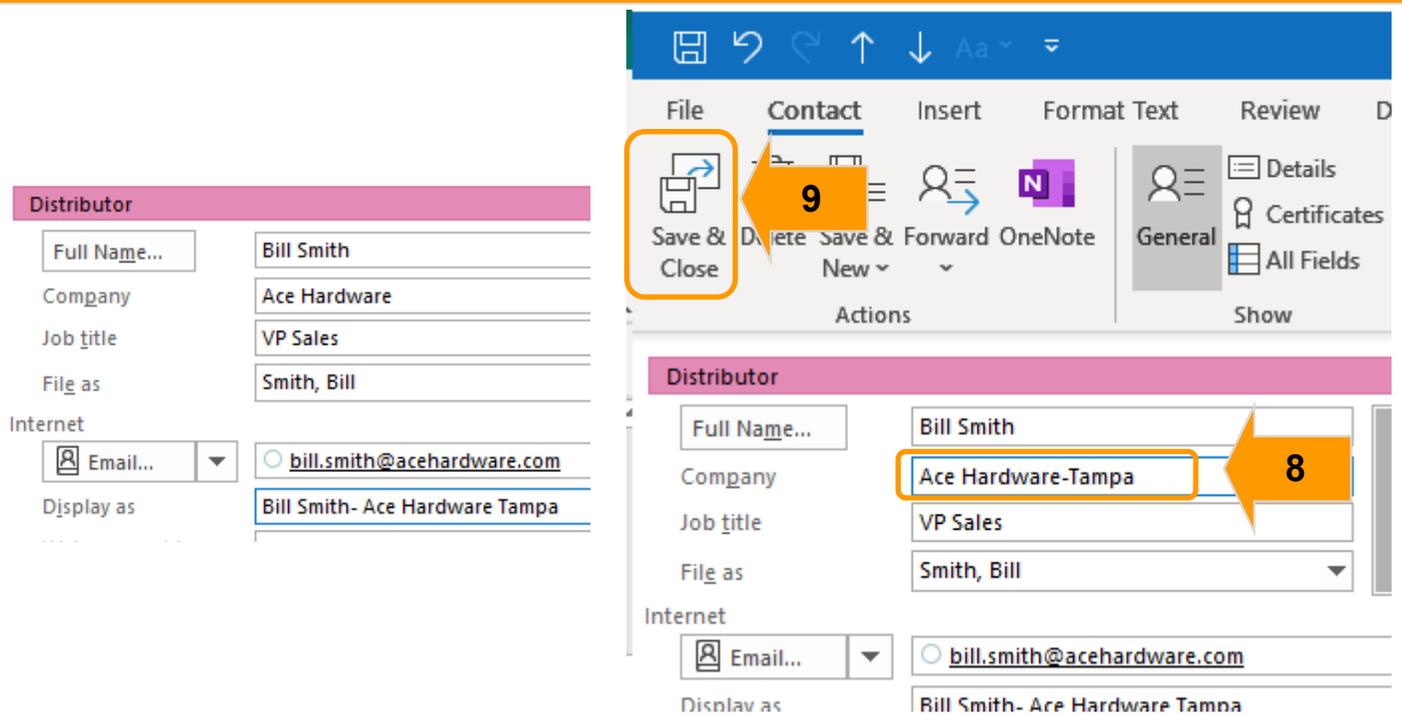
Street

5. Open your contacts (people) in Outlook.
6. Search for desired contact.
7. Open contact.
8. Paste company name in "Company" field.
9. Left click 'Save & Close.'

These images show how to open "Contacts/People" and search for a contact.



The image on the left shows Bill with only "Ace Hardware" as his company name. The image on the right shows the corrected company name in Outlook.





## 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. Open your contacts (people) in Outlook.
2. Search for desired contact.
3. Open contact.
4. Add company name (or other text) to the "Full Name" field.
5. Left click 'Save & Close.'

These images show how to add to the name field to distinguish this contact from the other Bill Smith.

