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

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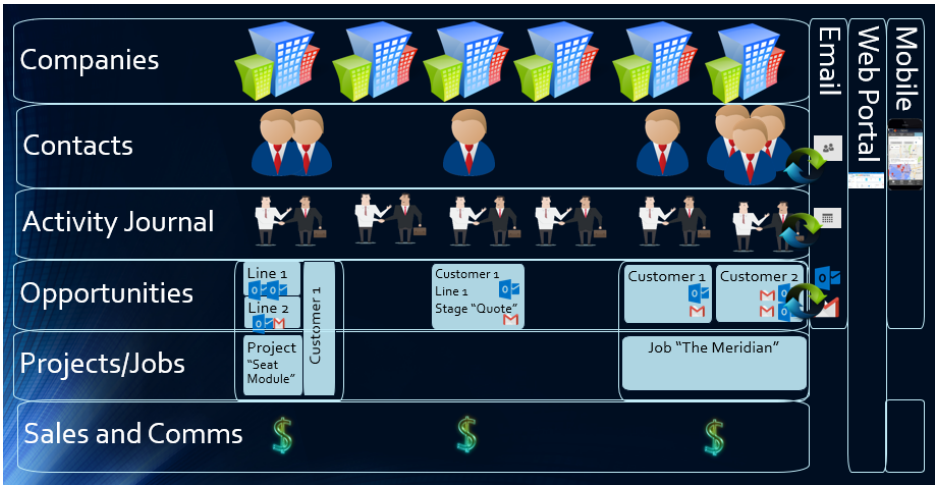
Connecting the threads of multi-line selling



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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

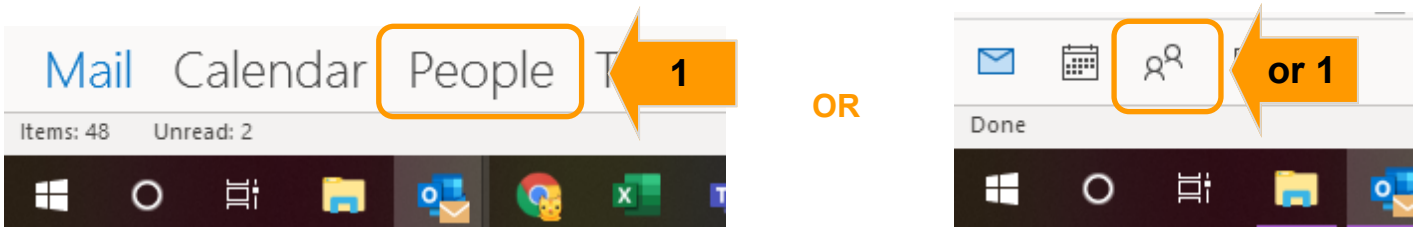
How do I determine which contacts are NOT syncing from Outlook?

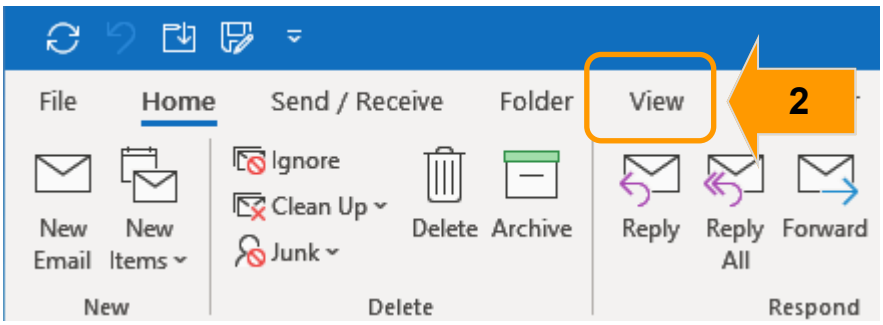
This tutorial show you where to find contacts that are not syncing between your email contacts and Repfabric. There are two methods.

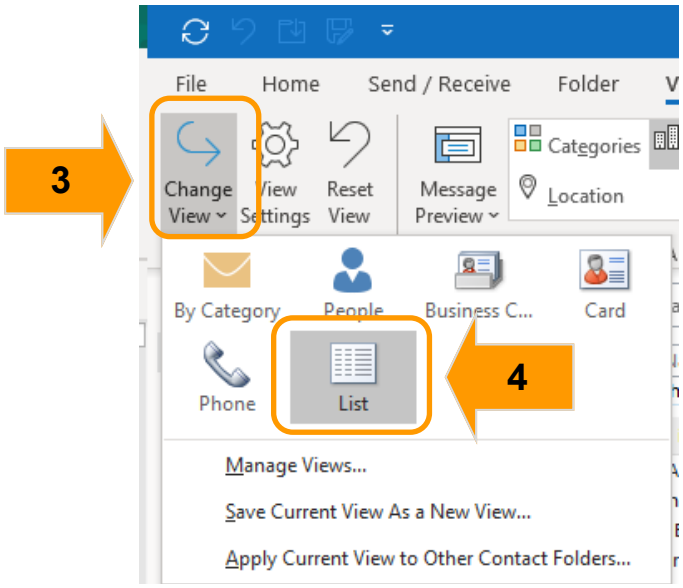
Method 1.) Review contacts whose categories are tagged with "RepfabricResolve."

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.



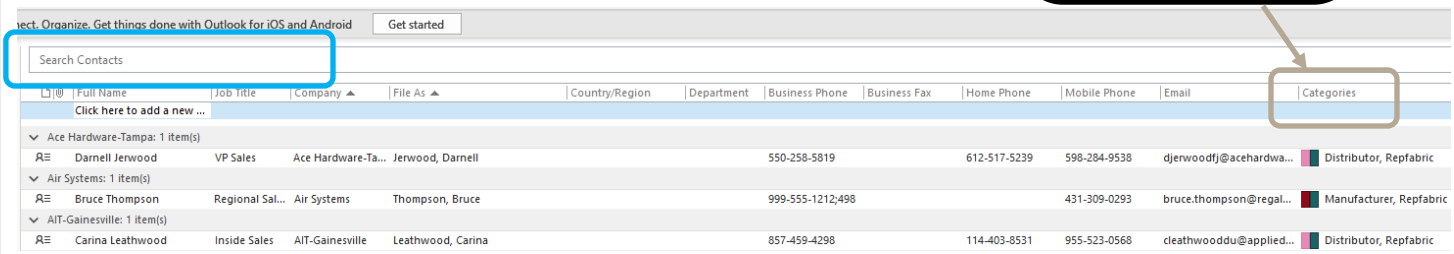




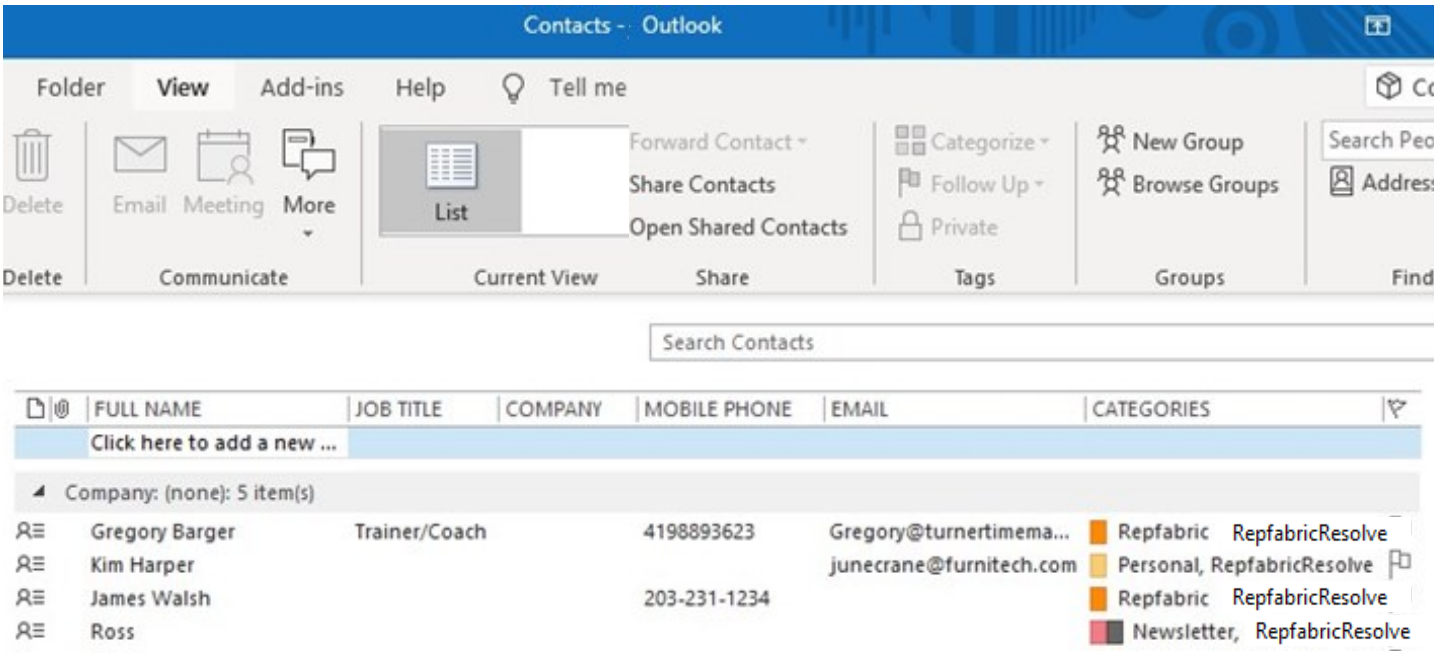
5. Left click into the contact search box, type “RepfabricResolve”

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.



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



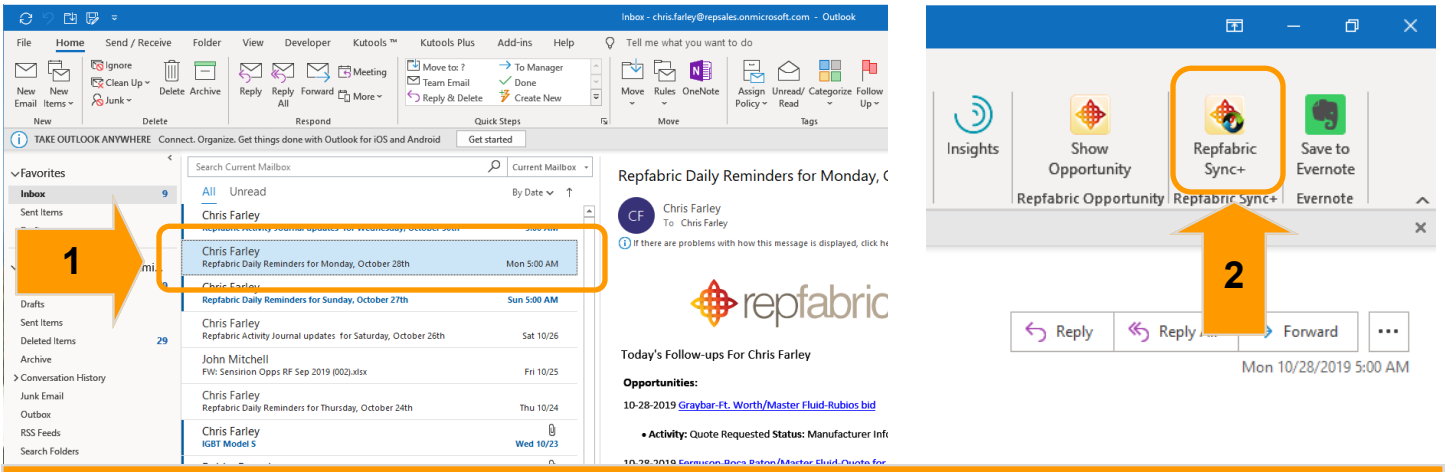
This concludes the instructions for this section

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

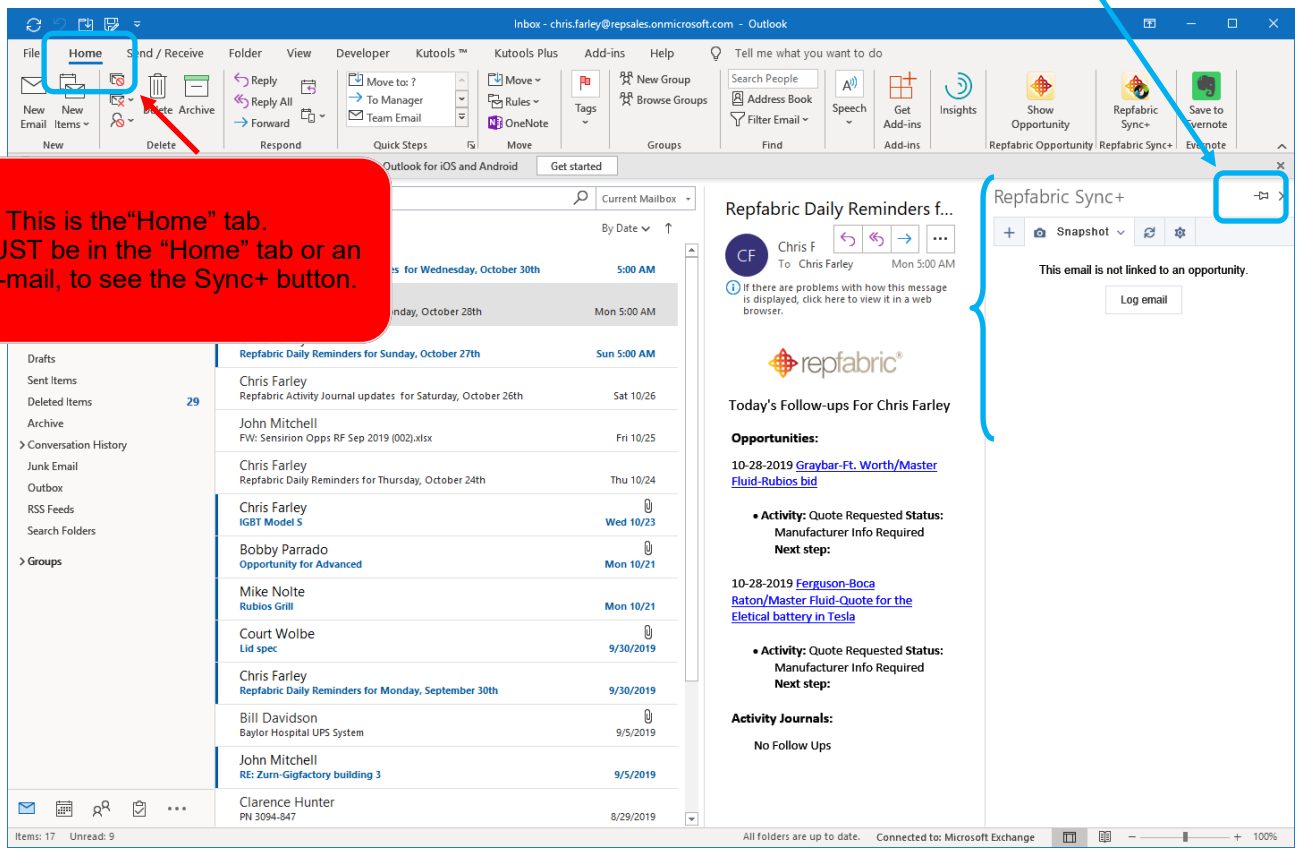
There are exceptions listed that also depict why the synchronization failed for each contact. By expanding these sections and reading the error messages, you can determine what data in the Outlook contact record is needed to fix the contact so that it can synchronize.

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.

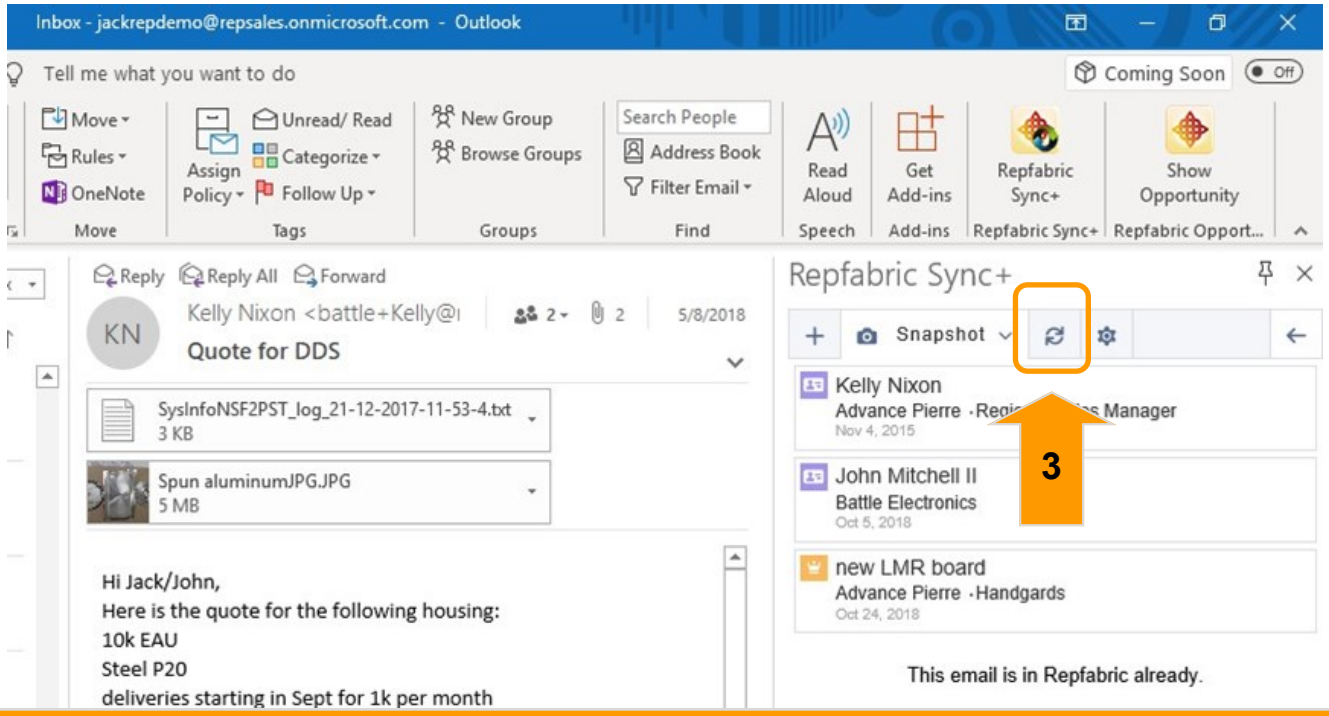


This image shows the Repfabric Sync+ window open on the far right. Click the push pin to “pin” this window in place.

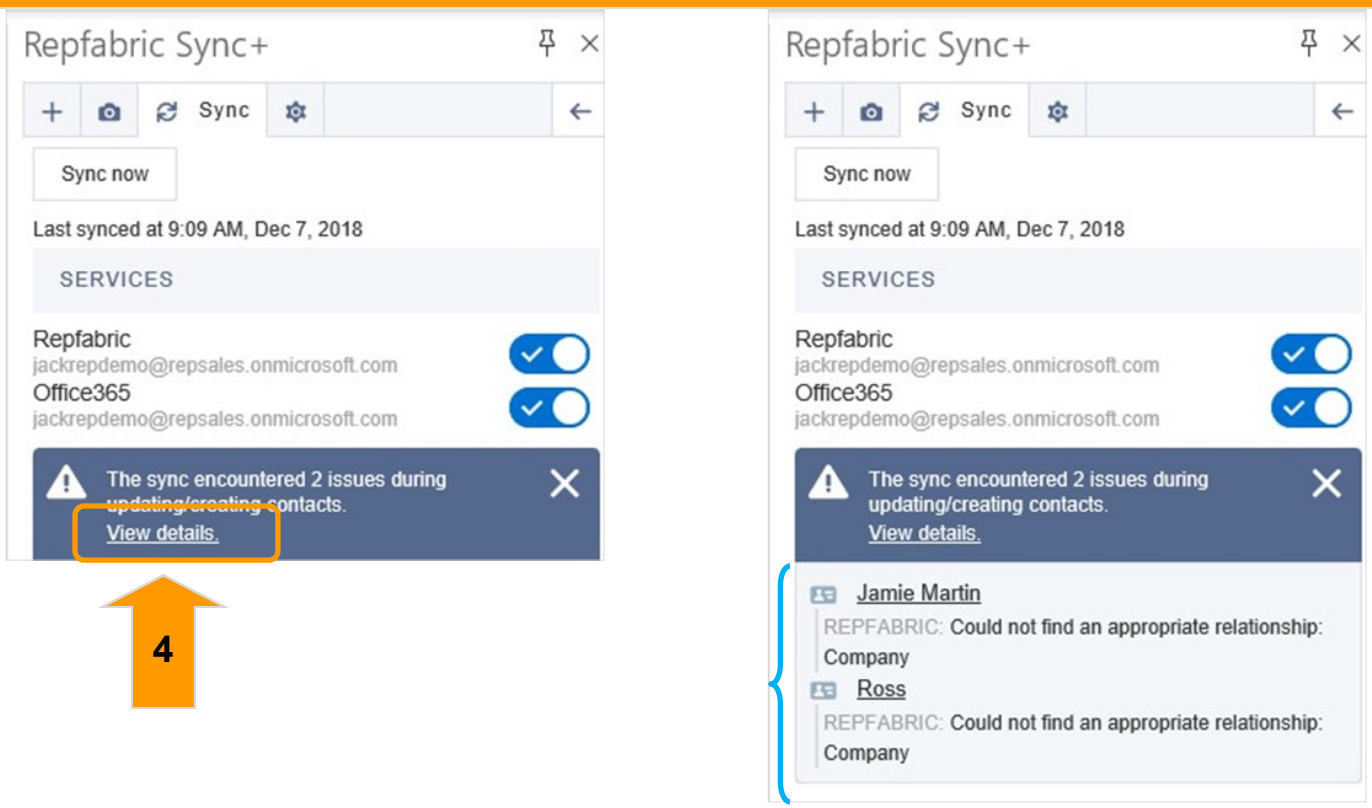


3. Left click “Sync” status button.
4. Left click “View Details.”

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

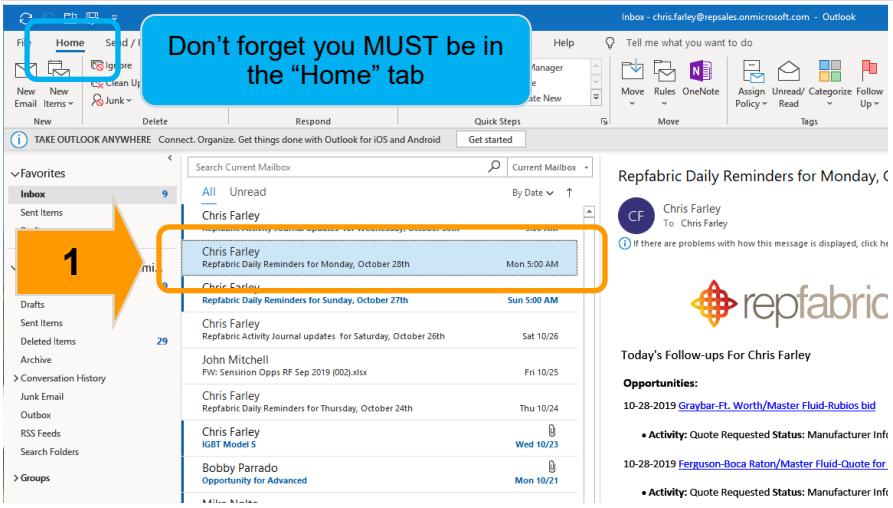
These pages show you how to troubleshoot and resolve the underlying causes of your contacts not syncing. There are several possibilities, which require you to check in both Repfabric and Outlook.

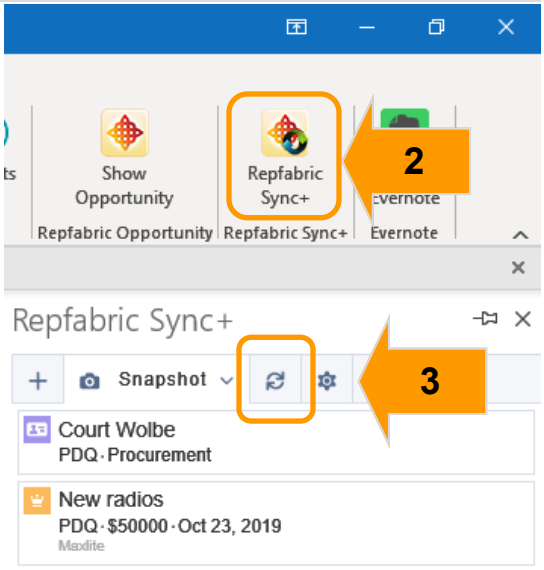
Step 1: Is my Sync+ Enabled?

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!). ssIt must not say “Enable Sync”. If is 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.

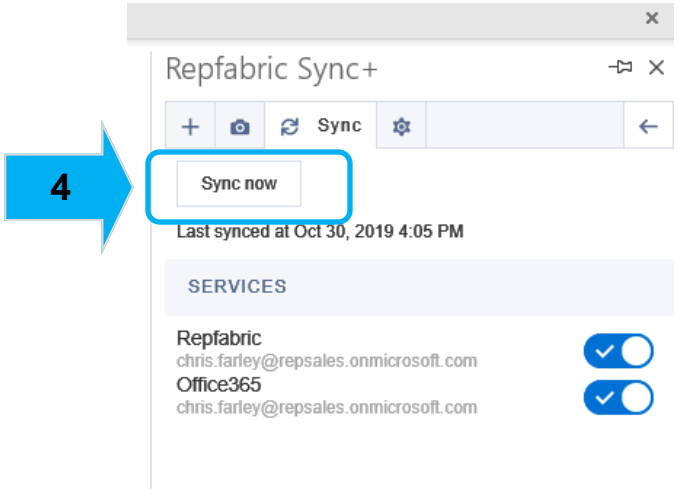
This image shows an e-mail selected and the “Repfabric Sync+” button.





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.

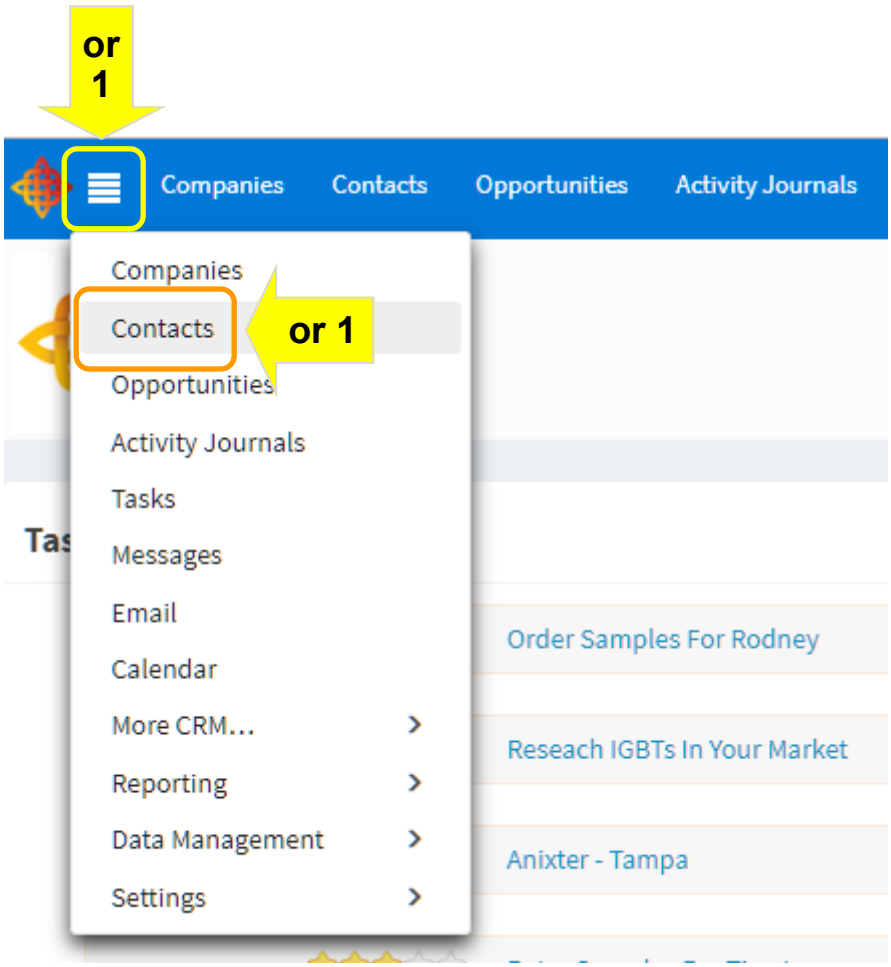


Step 2: Do I have authorization to sync this contact?
Are you a member of the sales team to which the contact belongs, so that you can "see" the contact and modify it? The contact may exist in Repfabric, but you may not have sufficient viewing and editing rights to sync the contact to your email contact 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."

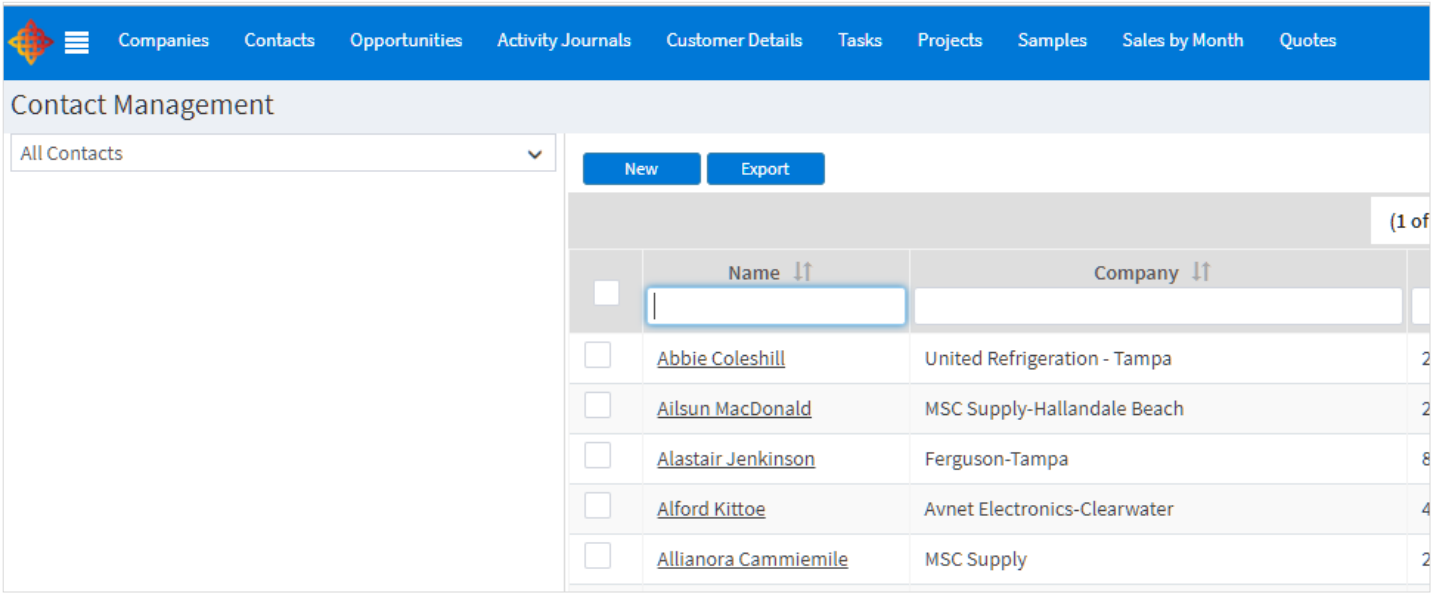


2. Type in the name to search.

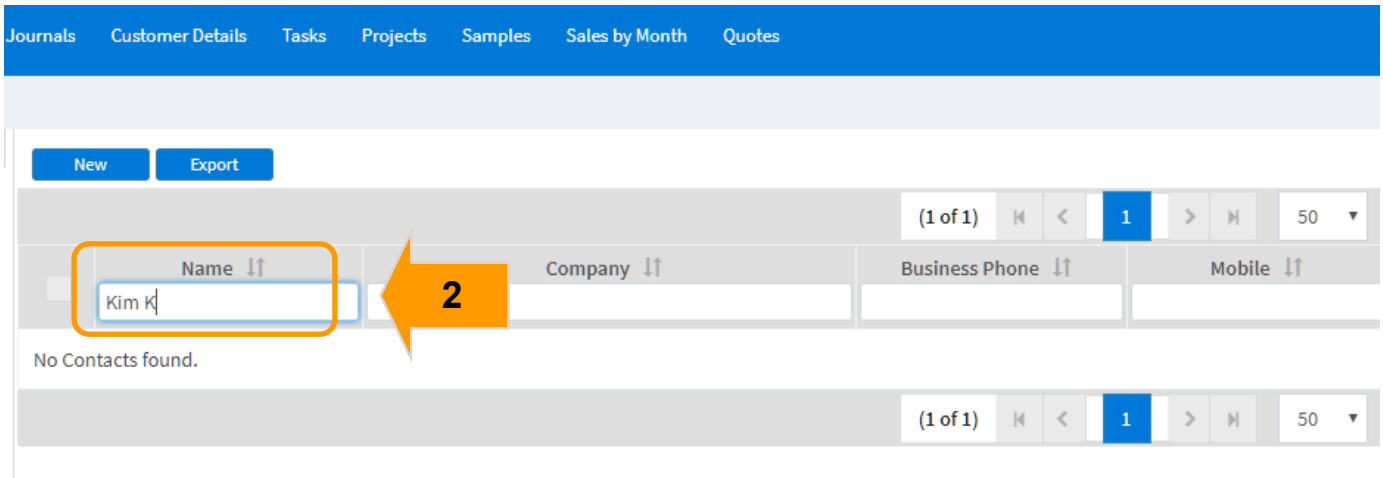
**If the contact you are searching for is not found, contact your administrator to see if they can see the contact using the same method. If they can see the contact, you do not have rights to sync the contact to your email contacts because of sales team assignments. You will still have access to the 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.



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

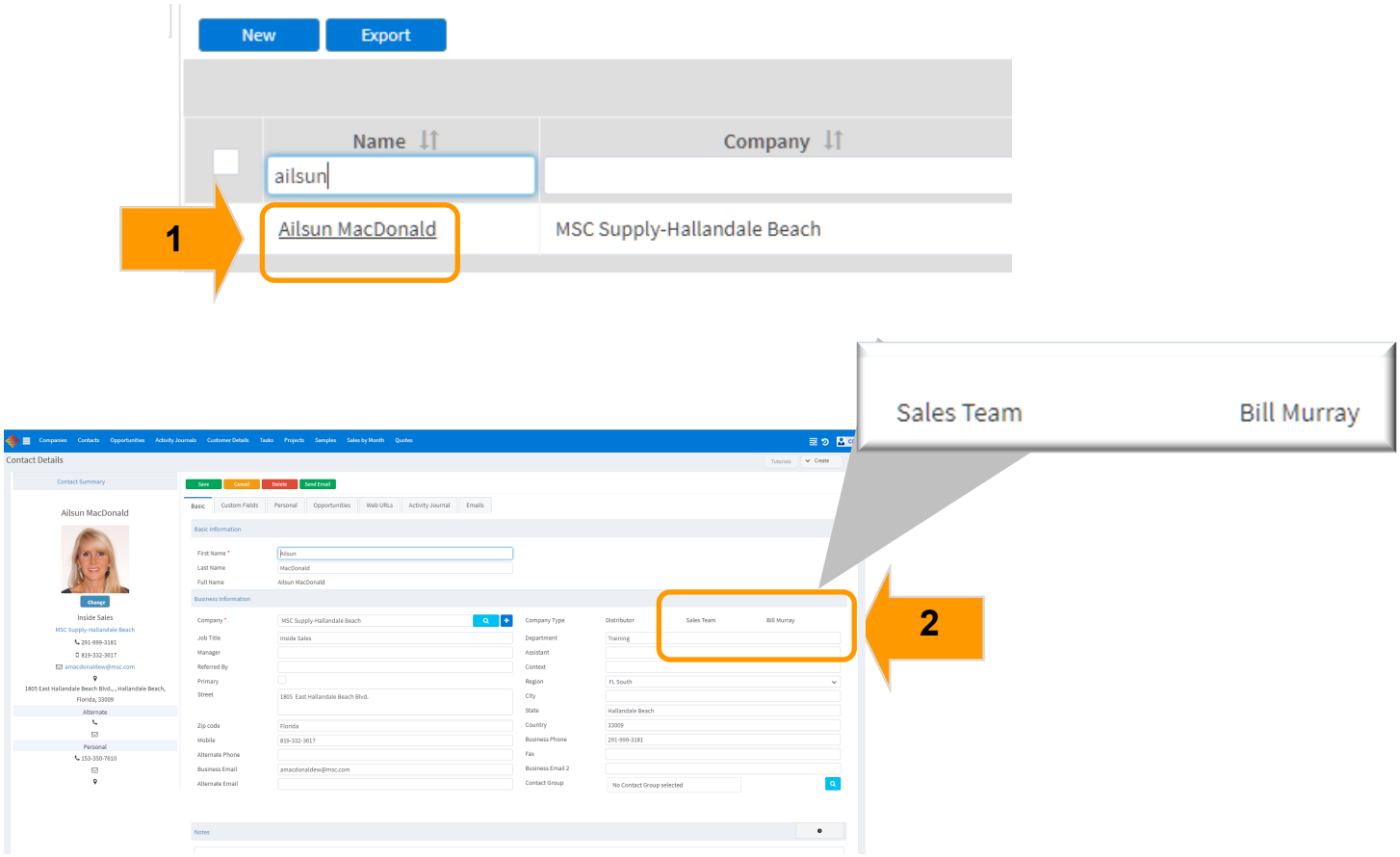


Step 3: Is my Sales team configuration for Sync correct?

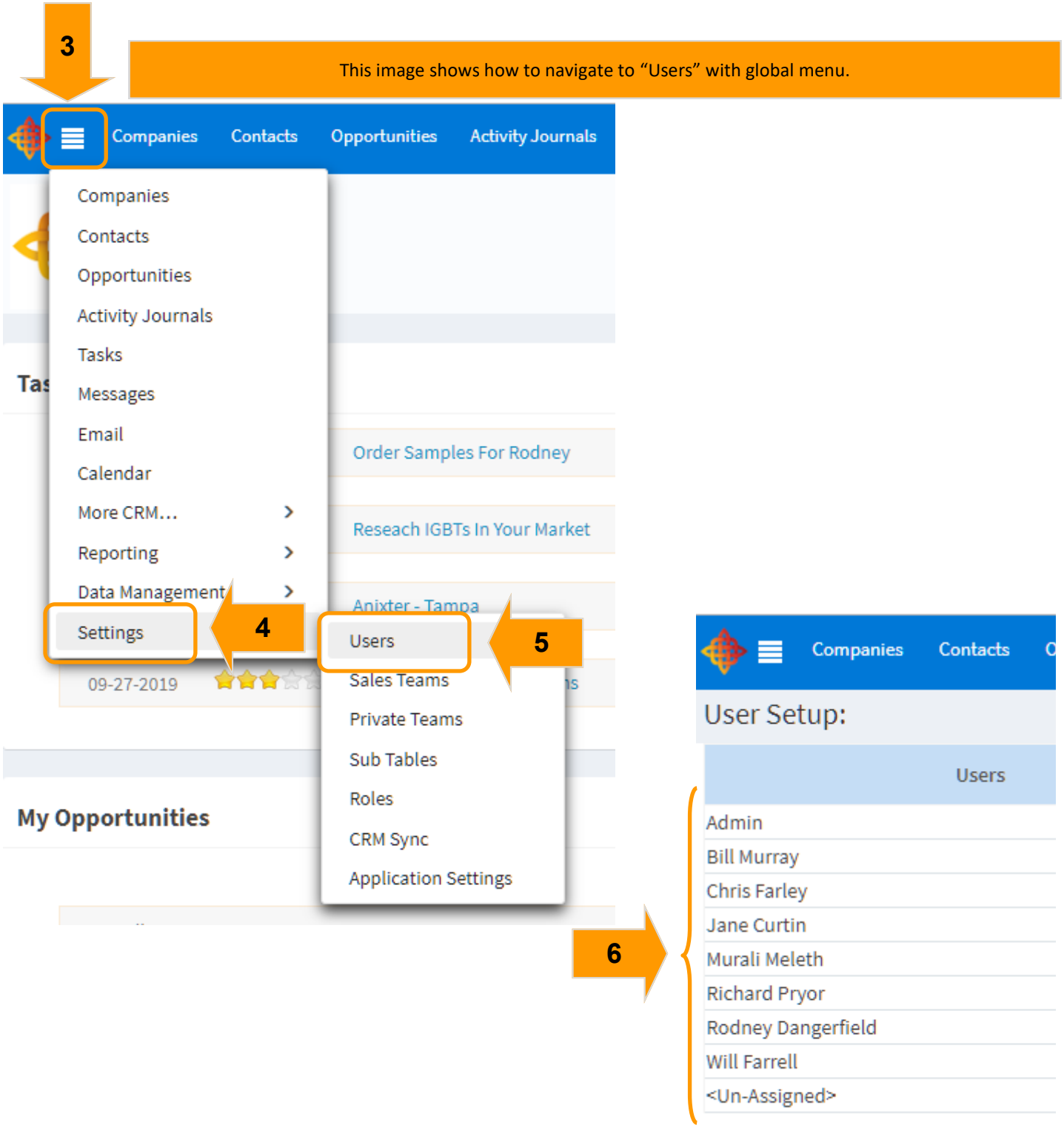
Repfabric supports the option to sync contacts of sales teams that you choose. When you are a member of multiple sales teams, you may not want the full set of contacts of a sales team to populate your email contacts (and your phone). This happens for instance where you may want visibility to contacts 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.



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.

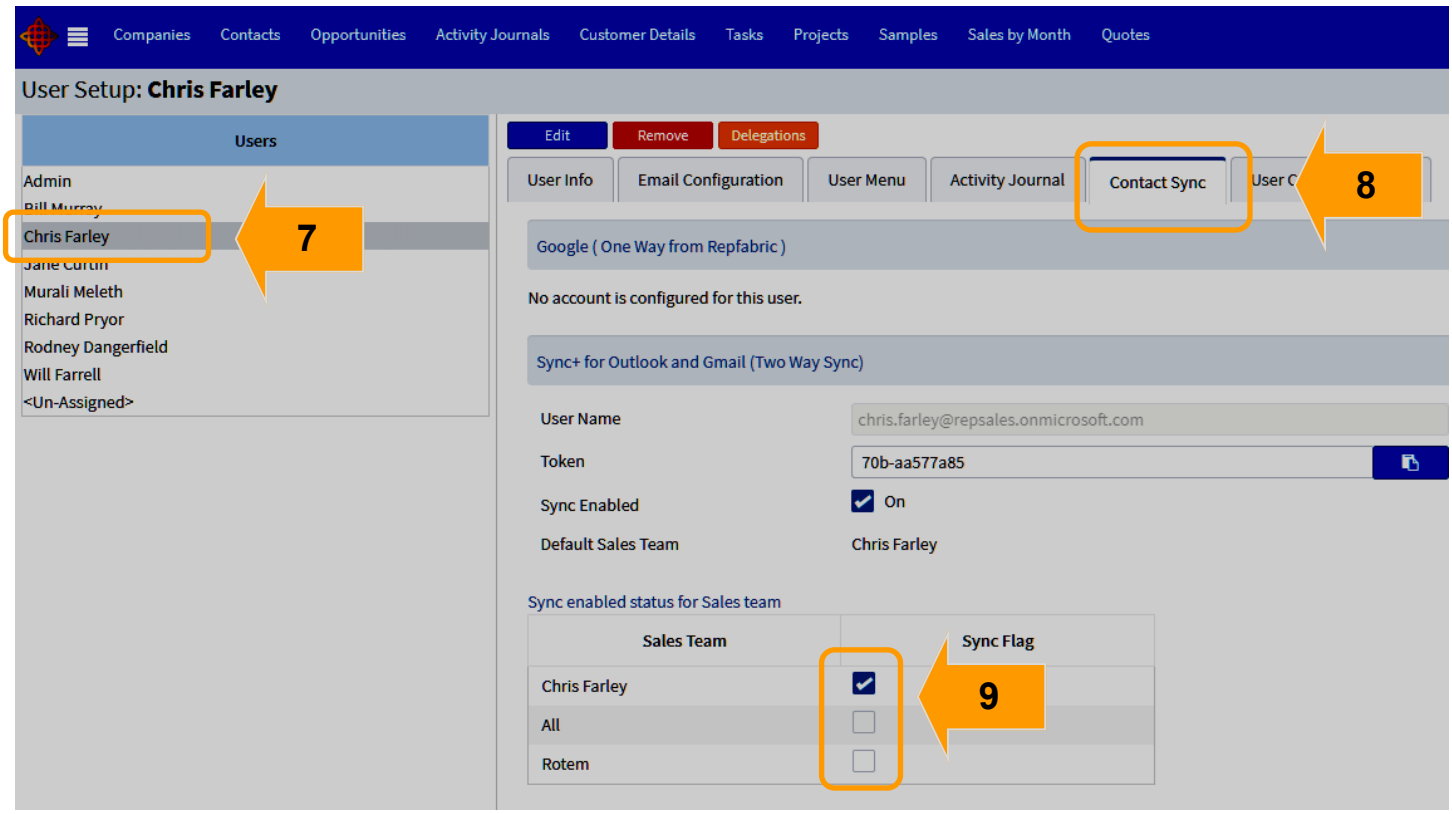


7. Left click desired sales person.
8. Left click “Contact Sync” tab.
9. Confirm the checkbox is enabled for the sales team on the contact.

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.



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.

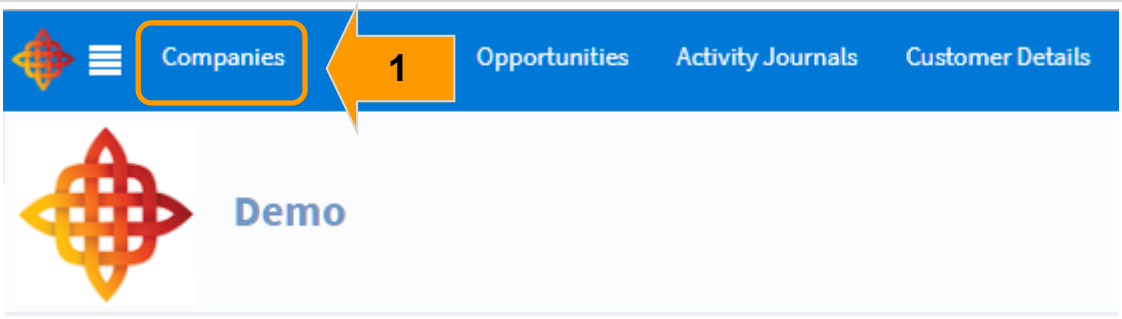
Step 4: Does the company exist in Repfabric?

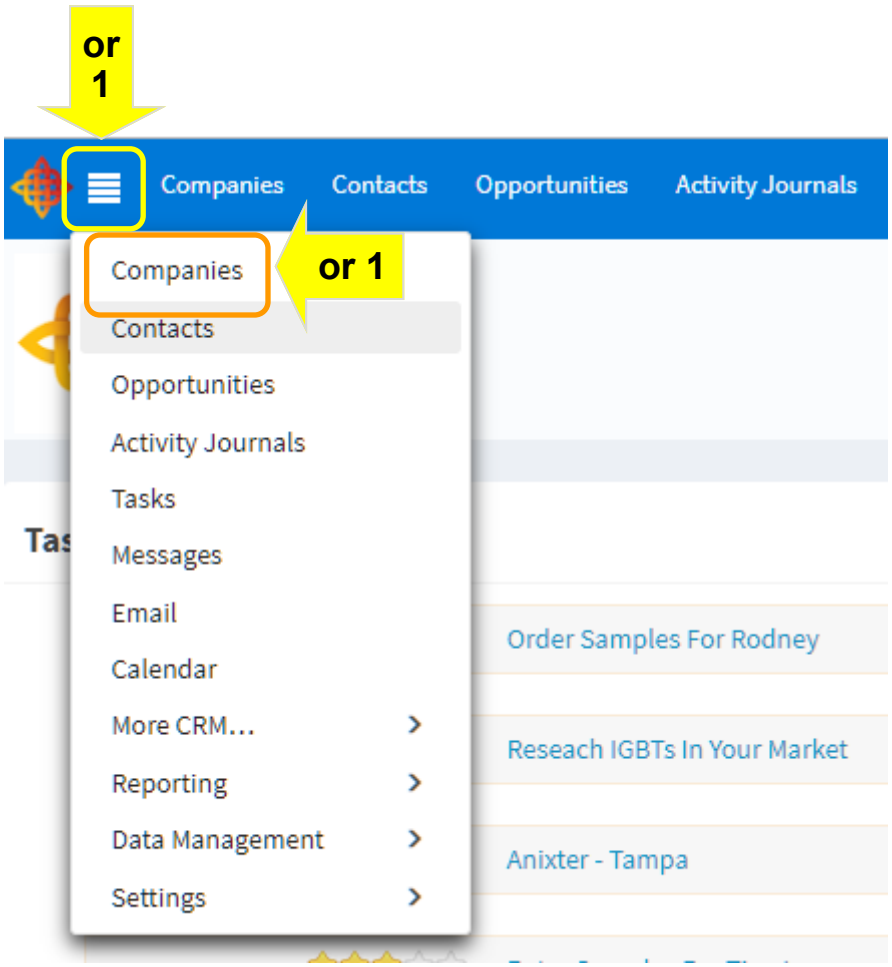
During the onboarding process of Repfabric, you create companies in Repfabric from a company in an email contact not currently in Repfabric is turned off. This is to avoid creating many "nearly the same" duplicate companies when the team has not fully scrubbed their email contacts. While this is turned 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 creation 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."



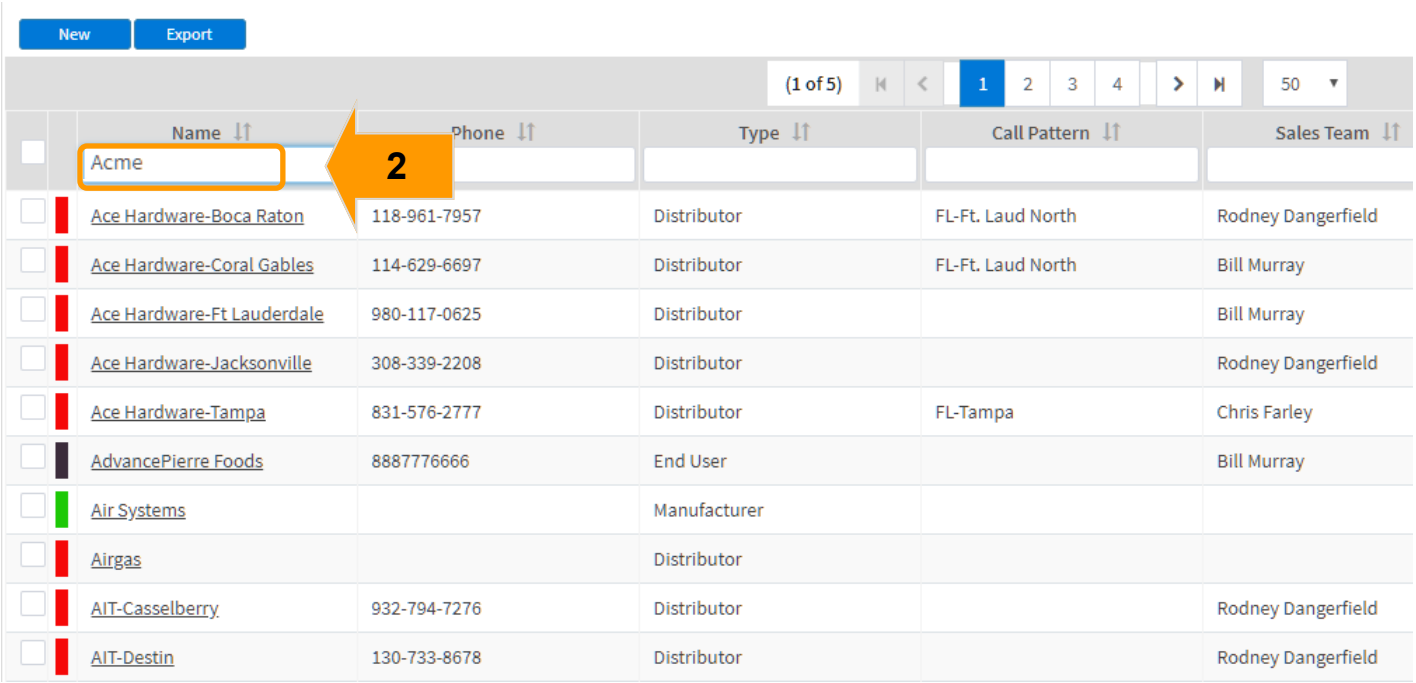


2. Search for the desired company.

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.



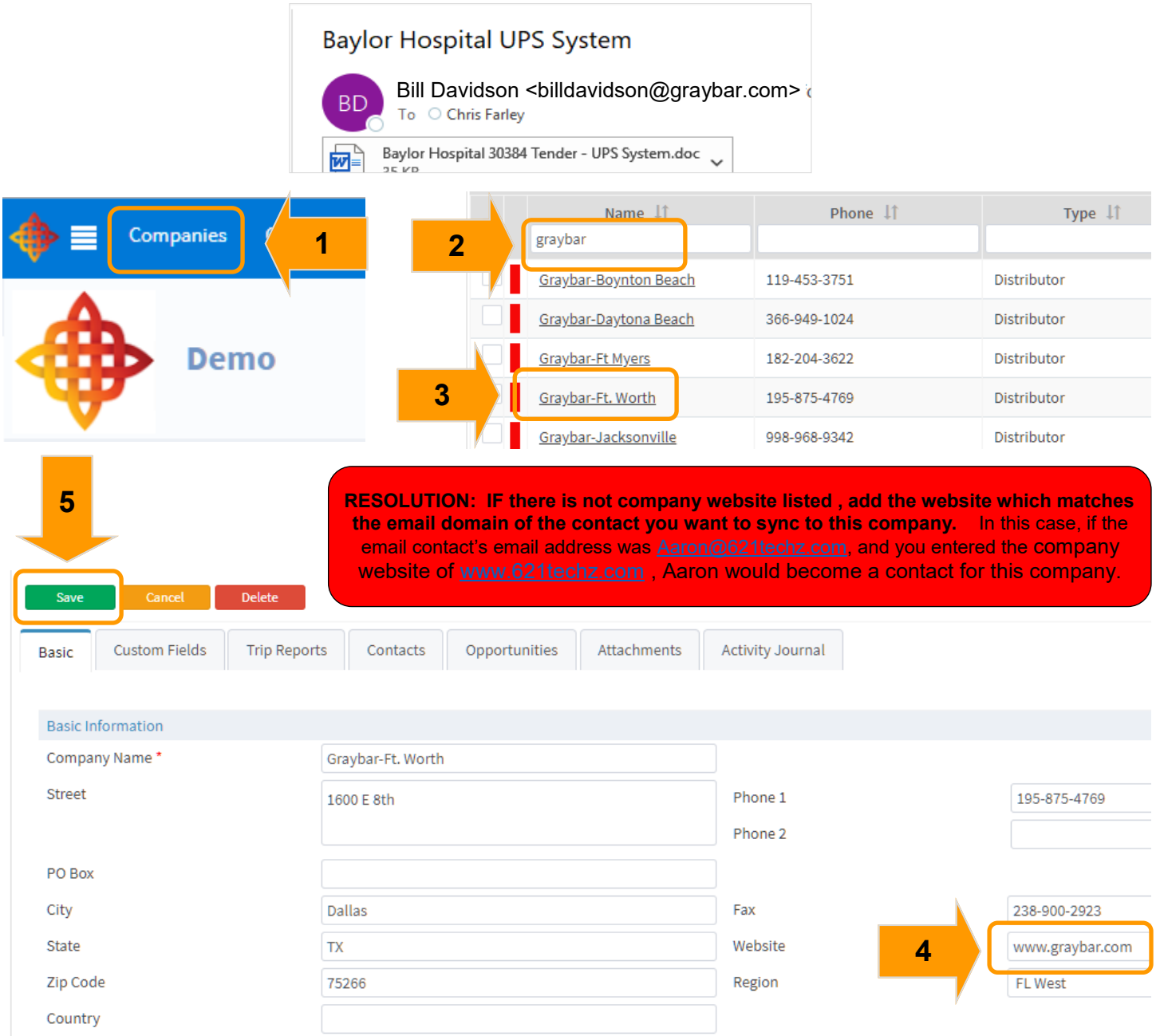
Step 5: Check the contact Email and Repfabric company domains for a match

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.



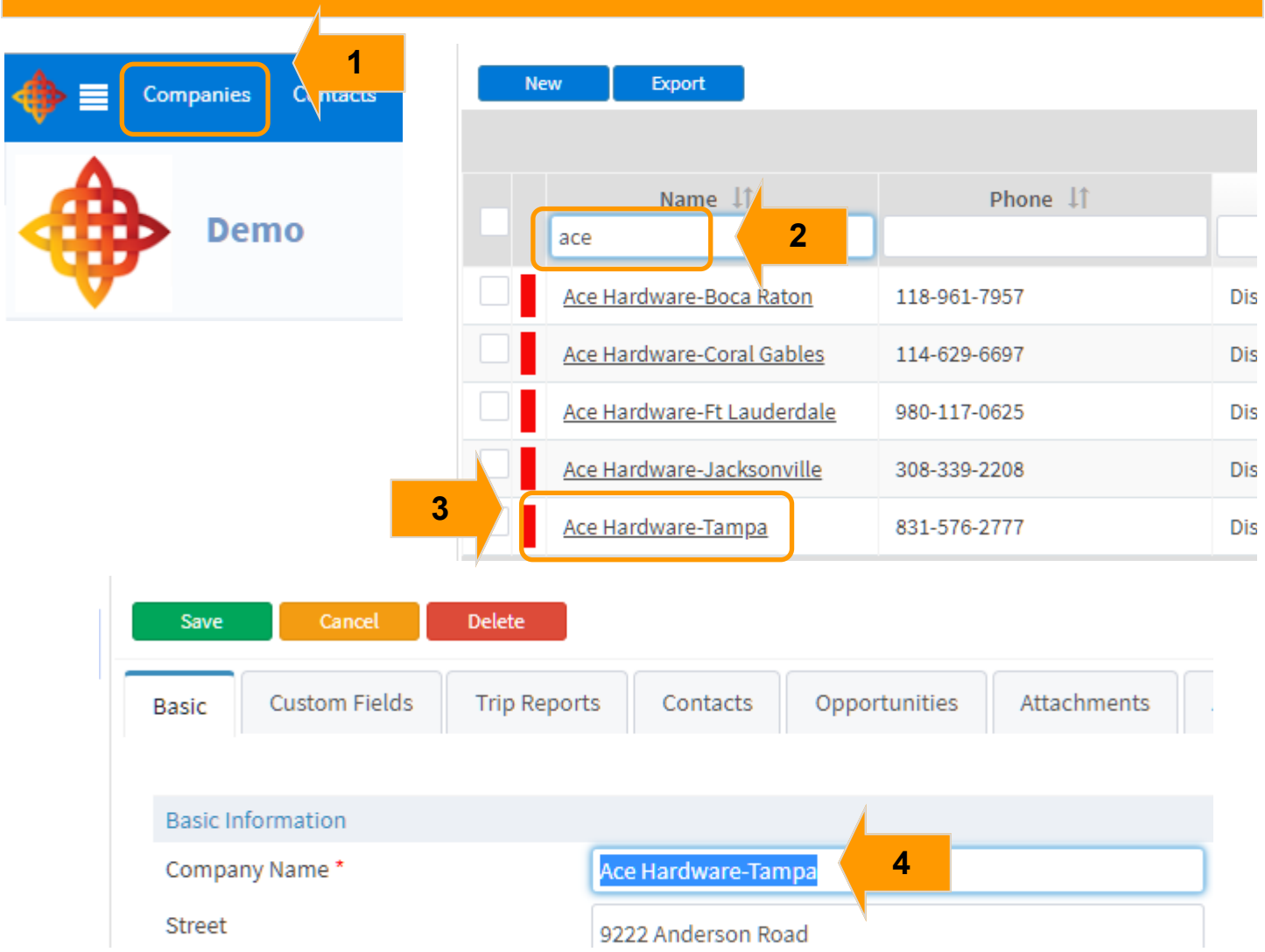
Step 6: Match the company name in the email contact with the company name in Repfabric

There are cases where too many companies in Repfabric have domains that match the email domain of the contact. It 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. When 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 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.

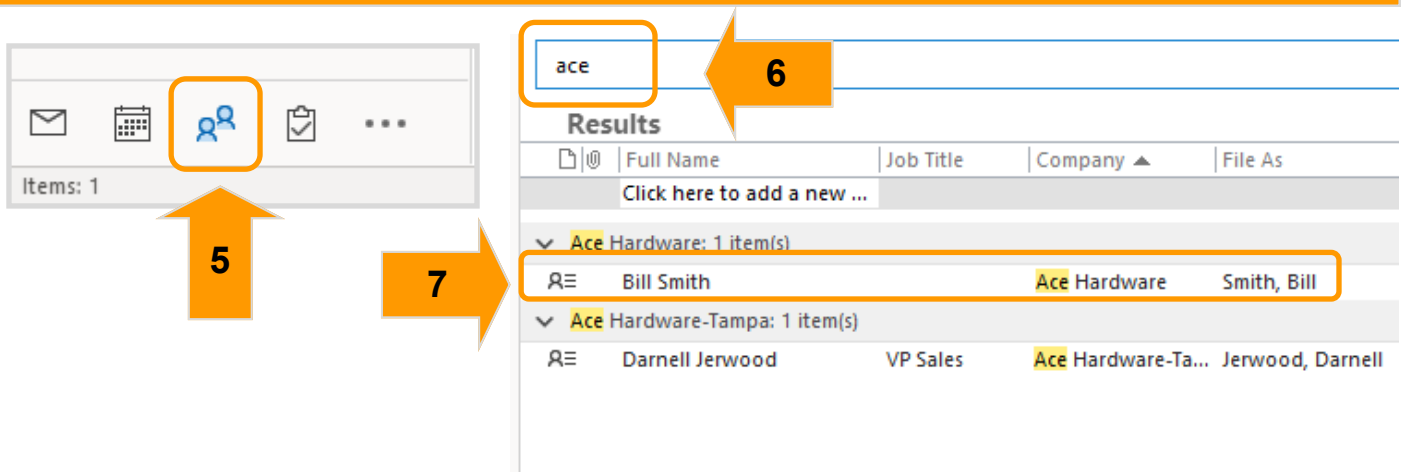
1. Left click "Companies."
2. Search for desired company.
3. Left click to open company record.
4. Highlight name and copy (CTRL + C to copy).

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

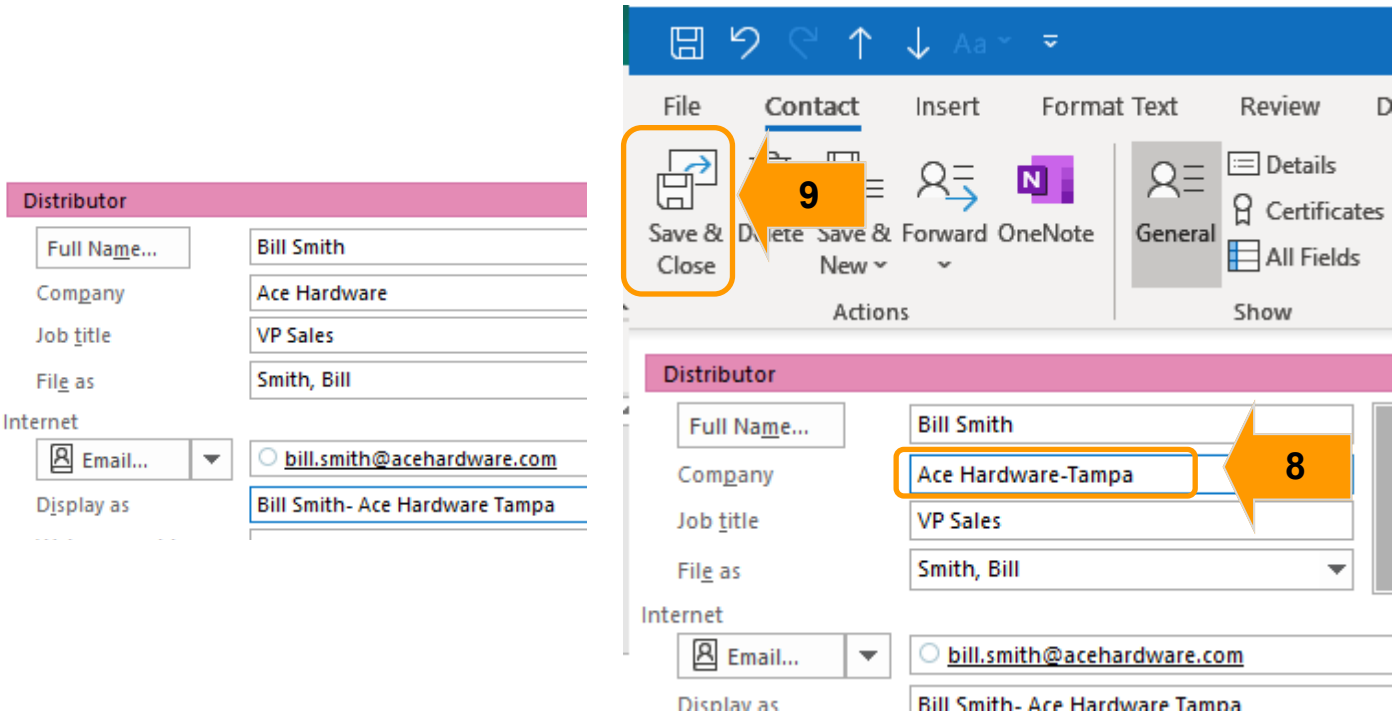


5. Open your contacts (people) in Outlook.
6. Search for desired contact.
7. Open contact.
8. Paste company name in “Company” field.
9. Left click ‘Save & Close.”

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

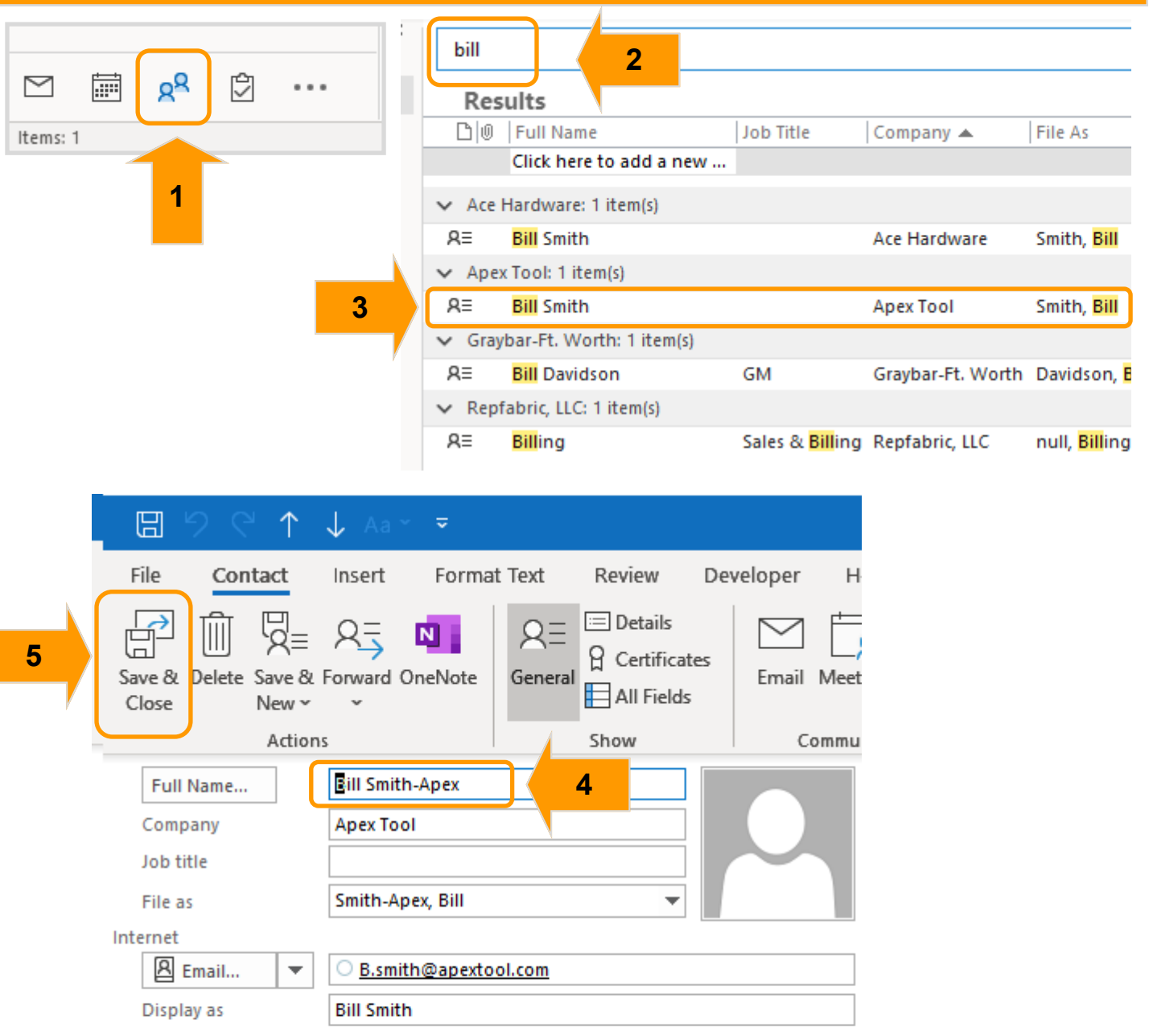


The image on the left shows Bill with only “Ace Hardware” as his company name.
The image on the left shows the corrected company name in Outlook.



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.