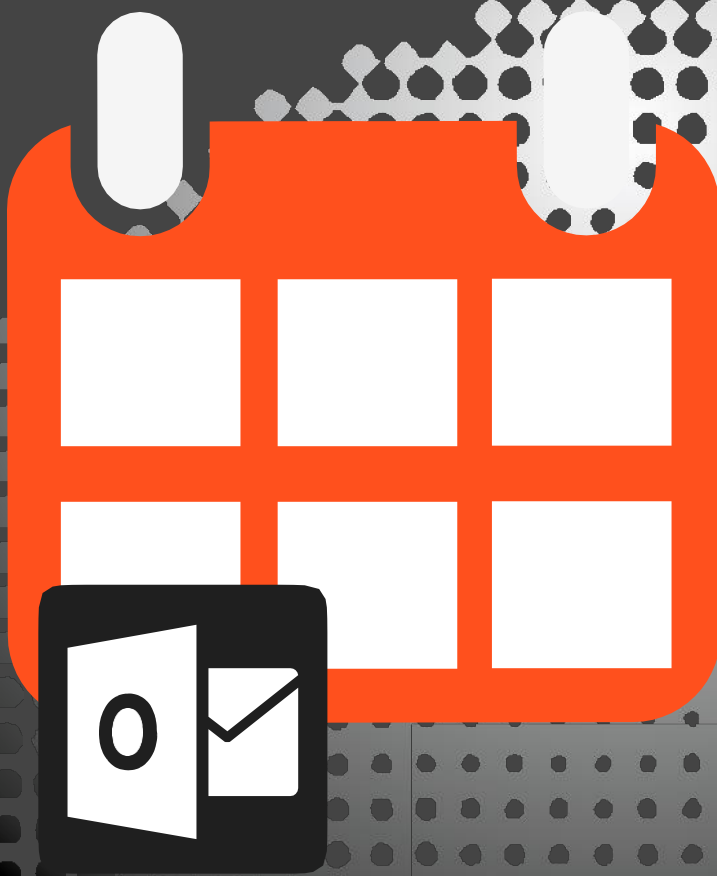


Calendar Sync

Outlook/Exchange



salesnexus

www.salesnexus.com

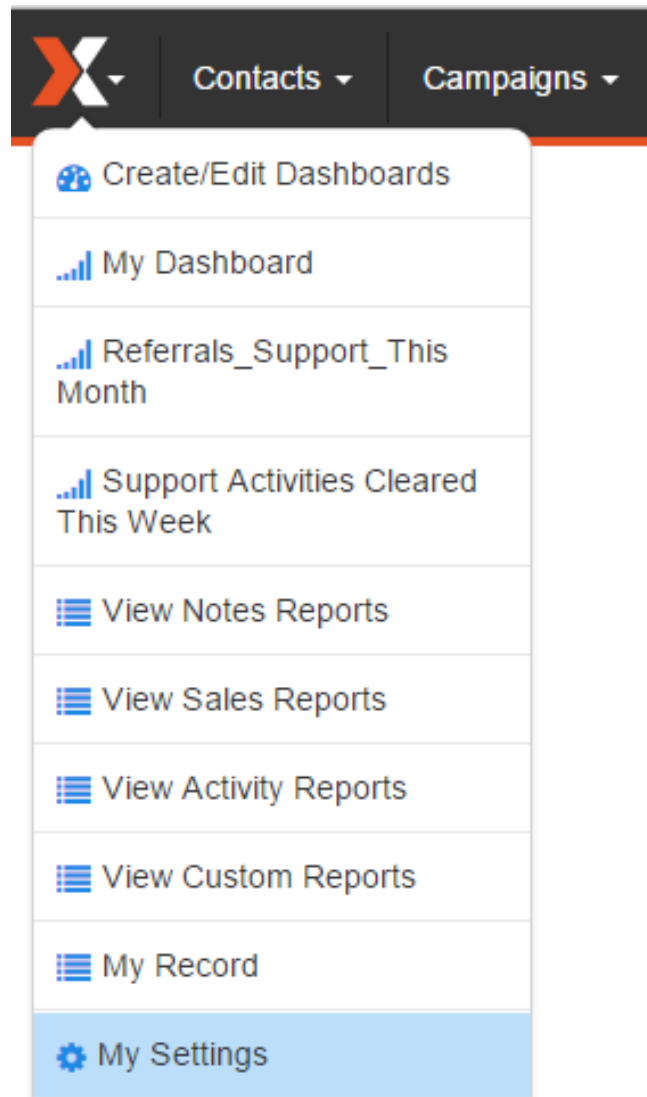
[Chat with Us Here!](#)

Overview


Once you have set up the sync process in your database, you will be able to manually sync your database calendar with your Outlook calendar with a quick click of a button.

To set up the sync


Go to My Settings > Calendar Sync Settings




Set As Default Page:

Task List 


Set Your Timezone:

(UTC-05:00) Central 

Set Your Date Time Format:

MM/dd/yyyy hh:mm 

Default Activity Type:

Call 

On mobile device , use fullsite by default

Bypass rollover screen at login

Show me getting started screen next time I logon

[Calendar Sync Settings](#)

[Ring Central Settings](#)

Save


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 Outlook / Exchange you will need:


- Email Address
- User Name (Outlook or Exchange – *not your SalesNexus username*)
- Password (Outlook or Exchange – *not your SalesNexus password*)
- Web Services URL
 - Example: <https://mail.domain.com/EWS/Exchange.asmx>

Calendar Sync Settings

Sync my calendar daily at:

12:00 AM 

My calendar account credentials:

Exchange calendar 

Email: Username:

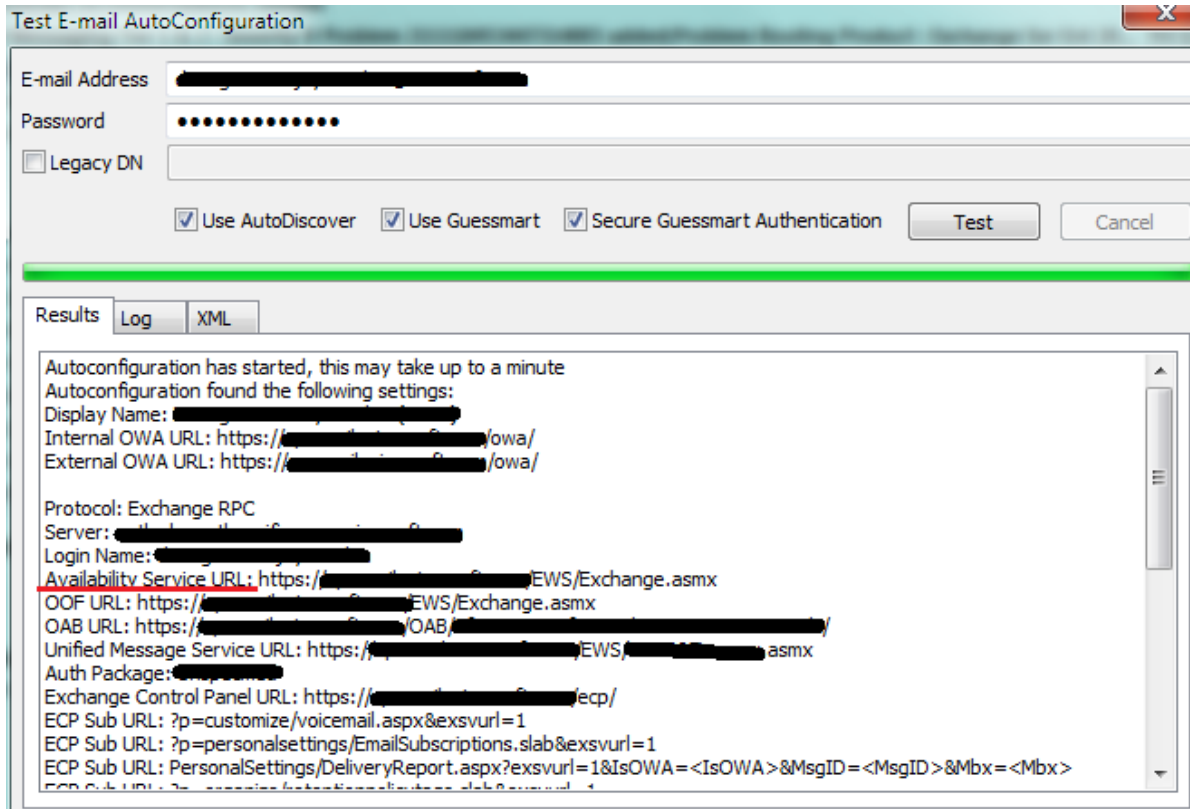
Password: Web services url:

To find the Web Services URL, follow steps below:

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'

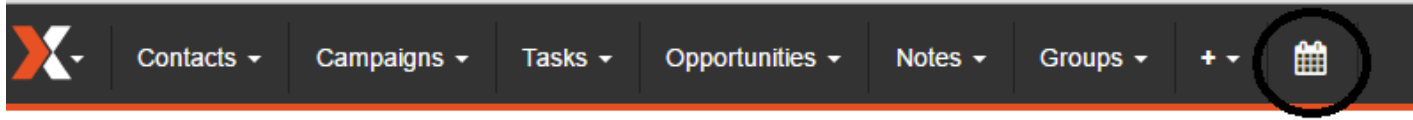


Exchange default should be enabled so users can sync Exchange calendars in their SalesNexus database. For more information regarding Exchange Web Services visit <https://blogs.msdn.microsoft.com/exchangedev/2011/09/15/disabling-ews-in-exchange-2010/>

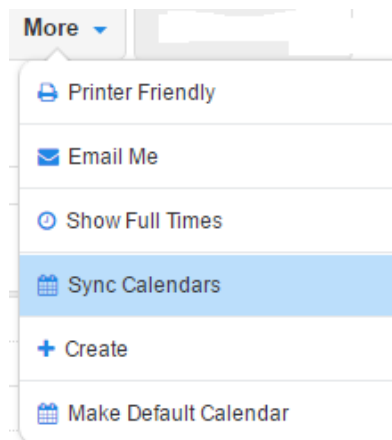
For Exchange servers, the sync is “one-way”; this means items created in the SalesNexus database will sync back to the Outlook/Exchange calendar. Any changes made to an entry in the database will also sync back to Outlook/Exchange.

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

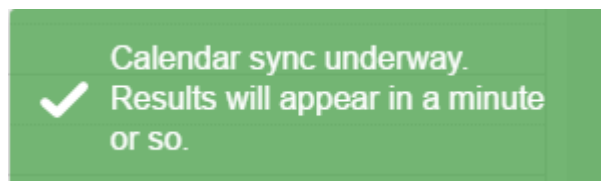
Once you have set up the sync, you can manually, at any time, sync your calendar by accessing your calendar in the database here:



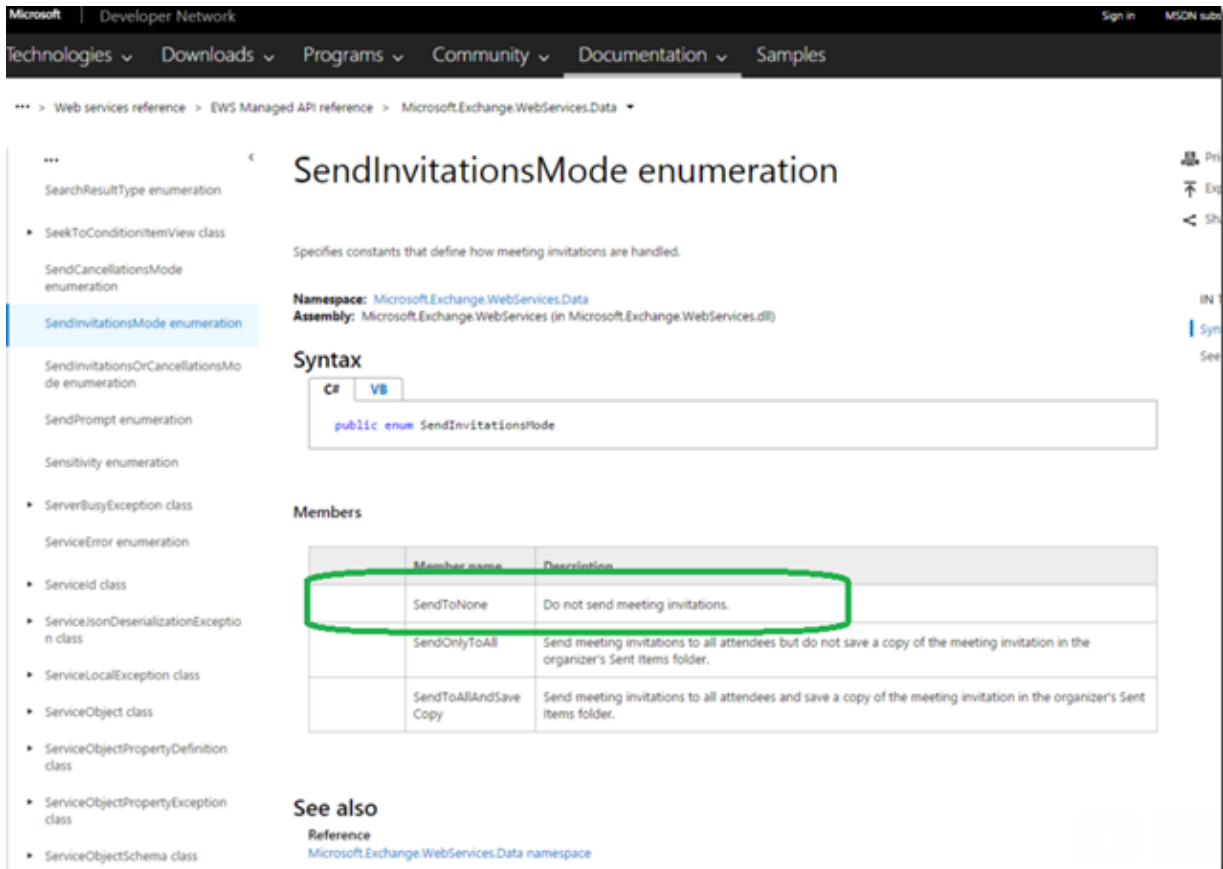
When the calendar is opened, select MORE and choose Sync Calendars



Upon selecting the “Sync Calendars” option, you will receive message that the sync is underway and you should see items begin to populate in the database calendar.



NOTE: We will log contact information in the calendar meeting notes but WILL NOT send email invites to the contact. User will send email invite in a separate action. This allows the user that control in their calendar. That logic is noted in the following screen shot:



The screenshot shows the Microsoft Developer Network documentation for the `SendInvitationsMode` enumeration. The page includes a navigation menu, a breadcrumb trail, and a sidebar with a list of related items. The main content area displays the enumeration's description, namespace, assembly, syntax, and a table of members. The `SendToNone` member is highlighted with a green box.

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*** > Web services reference > EWS Managed API reference > Microsoft.Exchange.WebServices.Data

SendInvitationsMode enumeration

Specifies constants that define how meeting invitations are handled.

Namespace: Microsoft.Exchange.WebServices.Data
Assembly: Microsoft.Exchange.WebServices (in Microsoft.Exchange.WebServices.dll)

Syntax

```
public enum SendInvitationsMode
```

Members

Member name	Description
SendToNone	Do not send meeting invitations.
SendOnlyToAll	Send meeting invitations to all attendees but do not save a copy of the meeting invitation in the organizer's Sent Items folder.
SendToAllAndSaveCopy	Send meeting invitations to all attendees and save a copy of the meeting invitation in the organizer's Sent Items folder.

See also

Reference
[Microsoft.Exchange.WebServices.Data namespace](#)