



Outlook Exchange synch with Android Mobile Phone Setup & Considerations

(Phone used for test, Android, Samsung Galaxy Note20 Ultra. Similar functionality applies for iPhones – may be slightly different instructions)

Feature Explanation:

One of the many advantages of using MS Outlook with MS Exchange, is that you can synch everything from Outlook with your mobile phone, and vice versa. Change or add a contact in your phone, appears in Outlook almost simultaneously. Change or add a contact in your desktop Outlook, these changes are reflected in your phone almost simultaneously. One data entry point, but information is accessible and synched everywhere you need.

In a single user situation, you can simply set up your Phone synch with your Exchange account, and you will receive all contacts, appointments, tasks and emails on your phone, with a 2 way synch.

With a multi-user situation, we can also do all of this, and control which folders contacts are added to, provided we follow the below.

Individual User Instructions:

We need to create a new Exchange user. The profile is added to each person's Exchange account in both Outlook desktop, and on their mobile. This also allows the shared contact folder to be used as an Outlook address book.

1. Create a new Exchange user, called "Shared" or "CRM". You will need your Hosted Exchange provider, or your IT firm, to do this.
2. Add the new user as another account in your existing Outlook profile (you might need help as above, or follow [These instructions](#)).
3. Log on as the new Shared user, (whomever set up Step 1 above will have this information), go to Contacts | Right click on the contact folder and select Properties | Permissions.
4. For each user – in Outlook – go to File | Open and Export | Other user's folder.

Open



Open Calendar
Open a calendar file in Outlook (.ics, .vc



Open Outlook Data File
Open an Outlook data file (.pst).



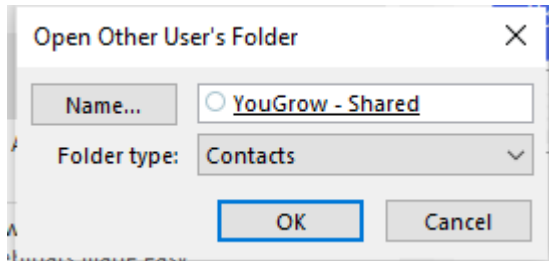
Import/Export
Import or export files and settings.



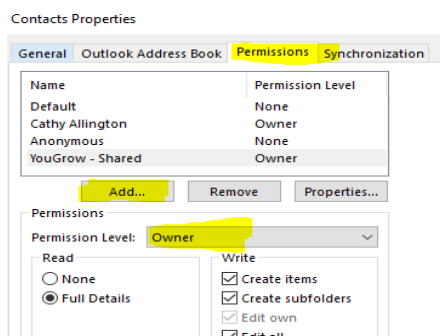
Other User's Folder
Open a folder shared by another user.

5. Click on the "Name..." and select the CRM user from the list. Next to Folder Type, click the down arrow and select "Contacts"

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6. Now we need to give owner permissions only on the default contact folder to each CRM user. (Although, there could be a scenario where you might wish to use the Inbox as a central email repository, in which case, add owner permissions to the Inbox for each user)
 - a. Right click on the contact folder and select Properties | Permissions
 - b. Click "Add" and then add each user from your organisation whom you want to give access to. Ensure the permission level is "Owner".
 - c. Click "Add" again, you can select multiple users at the same time.
 - d. Click OK, and exit.



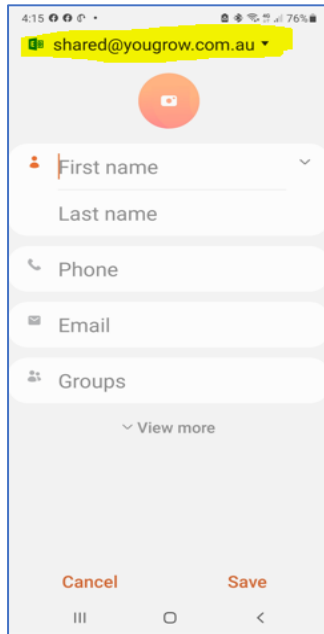
7. Add the new Exchange Active Sync user account to your mobile and ensure Synch is turned on for contacts – and email if you are using. (Settings | Account and Backup | Manage Accounts | Scroll right to the bottom and click on "Add Account". Select "Microsoft Exchange Active Synch" and add the relevant details for the new account.

Scenarios and Testing:

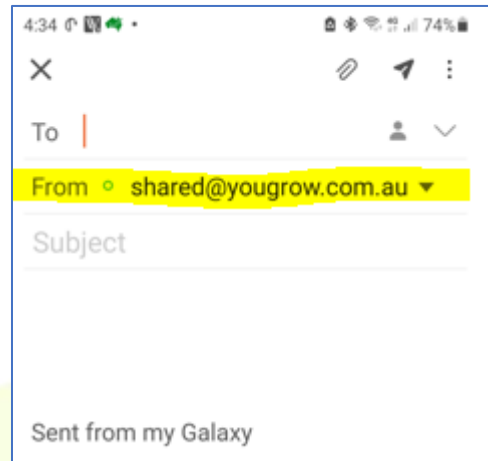
1. Add a new contact in the CRM user contact folder, it appears almost immediately in your Android. (There is no way of knowing which folder it is in from your phone – ie the Shared CRM Contact folder or your own contact folder. But if you have followed the instructions on point 6 below, it will be in the correct Outlook contact folder.
2. Delete a contact in your phone, is deleted in your OL contact folder
3. Change contact info in OL, updated in phone
4. Updated a note in an OL contact – updated in phone
5. Updated a note in Phone contact, updated in OL contact
6. Add a new contact in your Android, and click the down arrow to select which user profile you want it added to – by clicking on the down arrow for the relevant profile. It will be added either to your default contact folder, of the Shared User default contact folder.
7. To send a new email, you also have the option of selecting which account you want to send from. It will default to the last used account.
8. The shared user will also show as an Outlook address book.



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When adding a new contact on your phone, click on the down arrow as highlighted above, to select which contact folder it will be stored in your Outlook desktop



When sending a new email from your mobile, select which account you want it sent from. In most cases, you will leave it as your own user account. It will default to the last used account.

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