

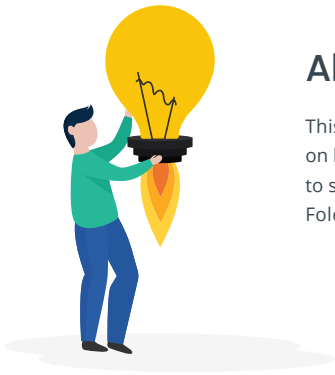
CiraSync

Tips & Tricks

Sync Contact Subsets & Phone Extensions

Add Public Folders Contacts via the Mobile App





About This Publication

This Tips & Tricks guide provides how-to instructions on how to sync contact subsets and phone extensions to smartphones plus how to add contacts to Public Folders via the Cirasync mobile app.

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Syncing Contact Subsets to a Subset of Users

Contact Collections are a CiraSync-specific functionality. For contact sync, Contact Collections can be used as a source or target. This provides tenants with great flexibility within CiraSync. With Contact Collections, tenants are able to sync a subset of their Contact List to a subset of their users.



NOTE: The example in this procedure shows how to sync subsets of the Global Address List to two different user groups.

Creating Contact Collections to Categorize Users

1. Log in to the CiraSync home dashboard.
2. Click the + in the **Contact Collections** pane.
3. Click the **pen** icon to name the collection.
4. Add users to the collection.



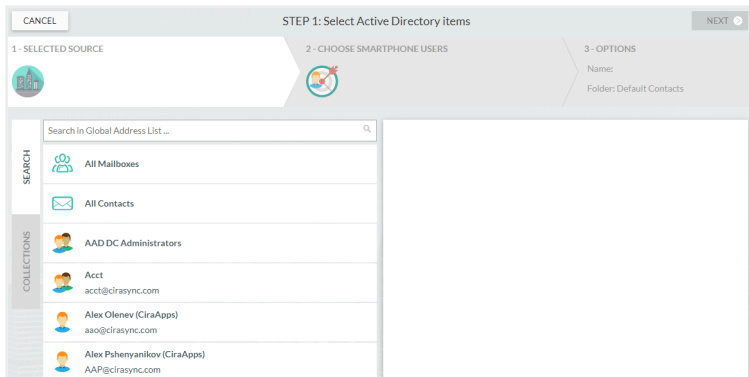
NOTE: Users can be added individually to the collection. However, we recommend using an [Office 365 Dynamic Distribution Group](#) so you can add multiple users with a single click.

Furthermore, if you do not have many users that need to be synced, you can also add **All Mailboxes** to the Collection, expand the collection, and then manually exclude undesired user mailboxes.

5. Click **SAVE**.
6. Repeat **Steps 1–5** to create multiple Contact Collections. This guide will use two Contact Collections—one called **VIP Users** and one called **Regular Users**.

Syncing Contact List Subsets to User Subsets

1. Click the + in the **Contact Lists** pane.
2. Select the **Global Address List** as the contact source type.
You will be taken to **STEP 1: Select Active Directory Items**.
(See figure below.)



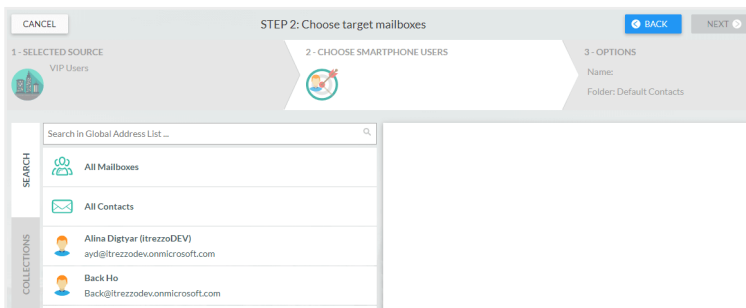
3. Select the desired contact source.



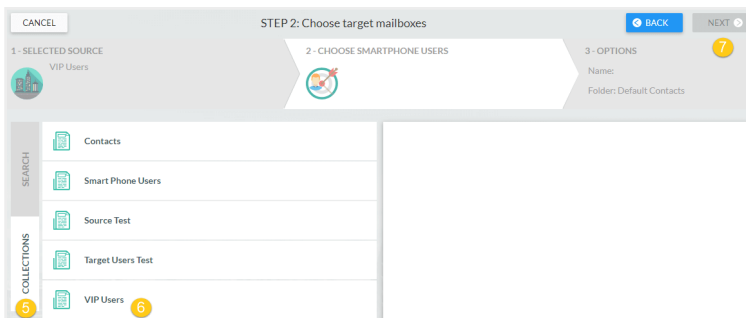
NOTE: A source can be **All Contacts and/or All Mailboxes**, a user mailbox, a Contact Collection, or a Dynamic Distribution Group. To sync a subset of the GAL, select one of the Contact Collections created in the **Creating Contact Collection Collections to Categorize Users** section of the guide. In this example, click the **COLLECTIONS** tab and select **VIP Users**.

4. Click **NEXT**.

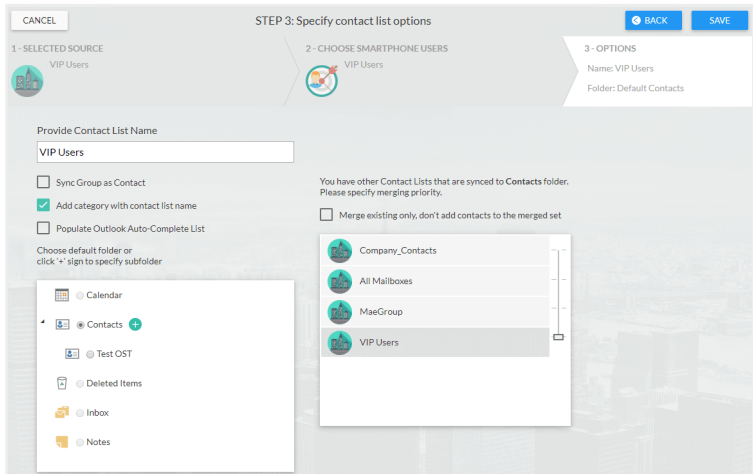
You will be taken to **STEP 2: Choose target mailboxes.** (See figure below.)



5. Click the **Collections** tab to pull up a list of CiraSync Contact Collections.
6. Select one of the Contact Collections created in the **Creating Contact Collections to Categorize Users** section of this guide.
7. Click **NEXT**. (See figure below.)

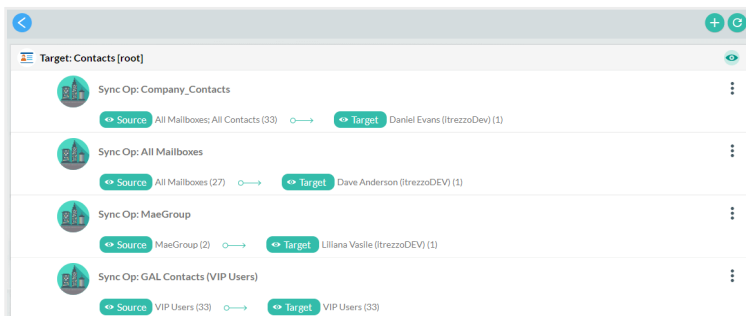


You will be taken to STEP 3: **Specify contact list options**. (See figure below.)



8. Name the contact list in the box under **Provide Contact List Name**. In this example, the contact list is named **GAL Contacts (VIP Users)**.
 - a. Check **Sync Contact Groups** to sync groups that appear in the contact list as a single contact. If you do not check this box, only members of the group will be synced as a contact.
 - b. If you keep the **Add category with contact list name** checked, all contacts synced by CiraSync will have the name of the Contact List in the Category field. If the Category field is already filled, CiraSync will not delete the data in the field. Instead, CiraSync will add the name next to that data.
 - c. Check **Populate Outlook Auto-Complete List** for the synced contacts to appear in the Outlook Auto-Complete list.
 - d. Click the + next to **Contacts** to sync the contact list as a subfolder. If you would like to sync to the main Contacts folder, skip to Step 9.

- Click **SAVE**. You will be taken to the Sync Summary dashboard.
(See figure below.)



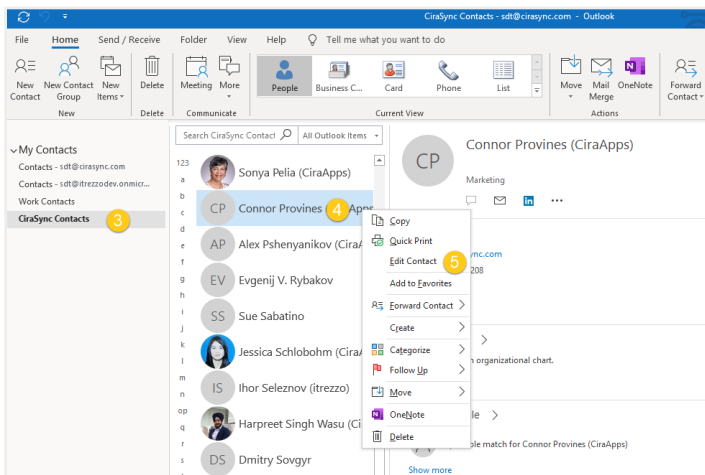
- Click the **blue back arrow** to return to the home dashboard.
- Repeat **Steps 1-10** to sync to sync other user subsets with other contact list subsets. In this example, a contact list will be created called **GAL (Regular Users)**, and it use the Contact Collection **Regular Users** as the source and target of the sync.
- Check the **Update Cache** box under the **Sync Status** pane.
- Click **SYNC NOW** to perform a manual sync.

Adding and Syncing Outlook Contacts with Phone Extensions

Users can add phone number extensions to Outlook Contacts. CiraSync can then sync these extensions to other users in the tenant. The benefit of syncing phone number extensions to smartphones is that all users can call numbers with the extension auto-dialed.

Adding the Phone Number Extension to Outlook

1. Log in to Outlook Desktop or Outlook Web Access. This example uses Outlook Desktop.
2. Click the **People** icon at the bottom of the View left-hand navigation panel to go to People View.
3. Select the Contact Folder you want to edit.
4. Right-click the contact you want to edit.
5. Click **Edit Contact**. (See figure below.)

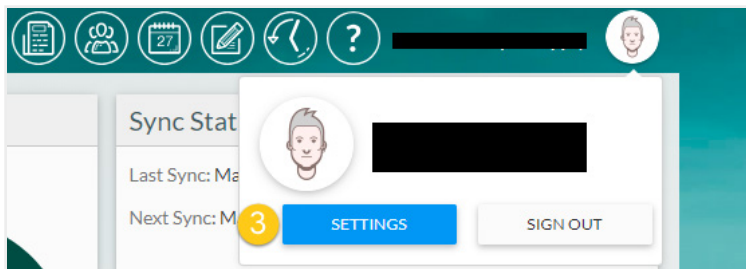


- Click one of the drop-down arrows that isn't for **Business** under **Phone numbers**.
- Select **Business 2**.
- Input the inbound number in the **Business** category.
- Input the inbound number+,,,,+extension in **Business 2**. (See figure below.)

- Click **Save & Close** at the top-left corner of the window.

Syncing the Phone Number Extension with CiraSync

- Log in to the CiraSync dashboard.
- Click the username in the top-right corner of the dashboard.
- Click **SETTINGS**. (See figure below.)



- Click **Contact Fields**.
- Scroll down to **BusinessPhone** and **BusinessPhone2**.
- Check **Overwrite** and **Clear** in both rows.
- Click **SAVE**. (See figure below.)

7 **SAVE**

About

Contact Fields 4

DisplayName	Write	Overwrite	Clear
BusinessPhone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 6	<input checked="" type="checkbox"/> 6
BusinessPhone2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 6	<input checked="" type="checkbox"/> 6
CallbackPhone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CarPhone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Search...

Select the fields that you want Cira to update and how the field values can be changed

WRITE - data will be written to the contact field only if it is currently blank.

OVERWRITE - non-blank data will replace any existing value in the contact field

CLEAR - target contact field will be cleared only if the respective source field has no value

8. Click the CiraSync logo to return to the tenant dashboard.
9. Check Update Cache under the Sync Status pane.
10. Click SYNC NOW. (See figure below.)

10 **SYNC NOW**


Last Sync: Jul 2, 12:25 PM

Next Sync: Jul 3, 12:25 PM

9 Update Cache

Sync Photo

TASK STATE

 Currently not running



Using the CiraSync Mobile App to Add Contacts to Public Folders

CiraSync is a one-way sync from the Source to the user's mailbox. The solution syncs contacts from the Office 365 GAL, Public Folders, and Shared Mailboxes to the user desktop mailbox. From there, smartphones sync the contacts using the Native Exchange Connector or the Outlook App. For Public Folders only, contacts can be added using the CiraSync mobile app.

1. [Create and share the Public Folder Contact List](#) to users.



NOTE: Make sure that the users are given permissions that will allow them to edit the contents of the Public Folder.

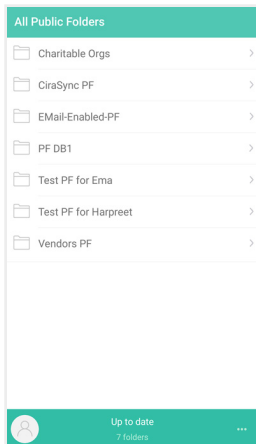
2. [Sync the Public Folder Contact List](#) to user mailboxes.
3. Have users download the **CiraSync Public Folder App for Office 365** app from the app store.



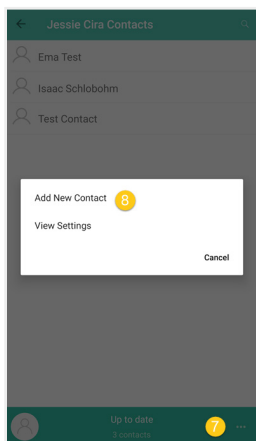
NOTE: Available on iTunes, Google Play, and Windows Store.



4. Launch the **CiraSync Public Folder App for Office 365** app.
5. Log in to the app using their Outlook/Microsoft Exchange credentials. A list of all Public Folders that users have access to will appear. (See figure below.)



6. Open the Public Folder Contact List that needs to be edited.
7. Tap the ellipsis at the bottom of the screen.
8. Tap **Add New Contact**. (See figure below.)



9. Enter contact details.

10. Tap **Save**.



NOTE: Repeat Steps 7-10 to add more contacts.

11. Exit the **CiraSync Public Folder App for Office 365** app.

12. Launch the CiraSync tenant dashboard.

13. Check the **Update Cache** box under the **Sync Status Pane** at the top-right corner of the dashboard.


14. Click **SYNC NOW** to perform a manual sync to push these edits to all user mailboxes. (See figure below.)

Sync Status 14 SYNC NOW

Last Sync: Jul 2, 12:25 PM Sync Photo

Next Sync: Jul 3, 12:25 PM 13 Update Cache

TASK STATE

 Currently not running

Support and Resources

For support and answers to commonly asked technical questions including licensing questions, check out the resources listed below:

- [CiraSync Support Homepage](#)—The Support Homepage provides technical articles and FAQs to troubleshoot any problems you may encounter on CiraSync or the capabilities of the CiraSync SaaS platform.
- [Licensing Support](#)—The Licensing Support Page provides answers to adding and removing licenses plus how to generate quotes.
- [Security FAQ](#) and [CiraSync Privacy Policy](#)—The Security and CiraSync Data Privacy Policy pages address how Cira Apps Ltd. handles user data.
- [Contact Us](#)—You can always submit a support ticket by sending an email to support@cirasync.com. Our Customer Success Team (rated 5 stars on [G2 Crowd](#) and [Capterra](#)) is happy to help you with any issues you may have!



About Cira Apps Ltd.

Cira Apps Ltd. is a SaaS company with solutions that enhance Office 365 productivity for iPhone and Android business users. CiraSync, the flagship product, is used by more than 6,000 companies to provide productivity gains and cost savings of contact and calendar automation. The company is headquartered in San Jose, California. Learn more at www.cirasync.com.

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