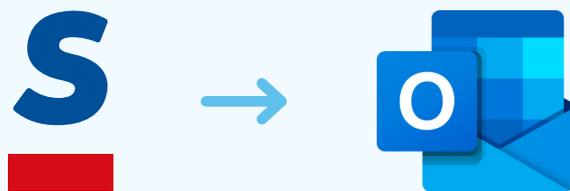


Integration with Microsoft 365

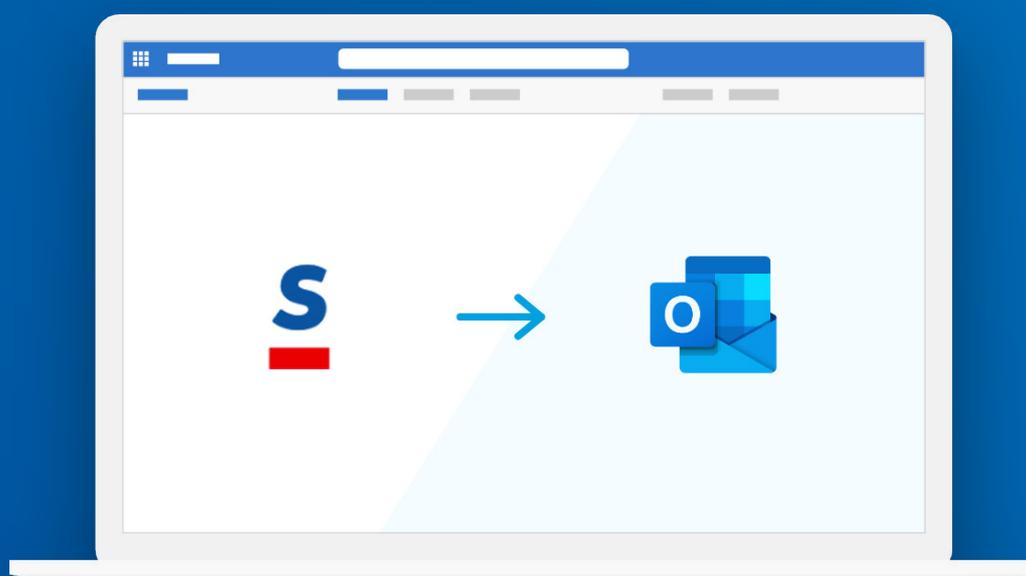


All your contacts in Sansan can now be synced to your Microsoft 365 account.

This integration is ideal if you use Outlook as your main email client.

Now you can find your quality connections from your Sansan account and get in touch with them right away.

Any additions or changes to your contacts in Sansan are automatically be synced to Outlook every 30 minutes. Your contact information will stay continually updated and accurate.



A few notes on this integration

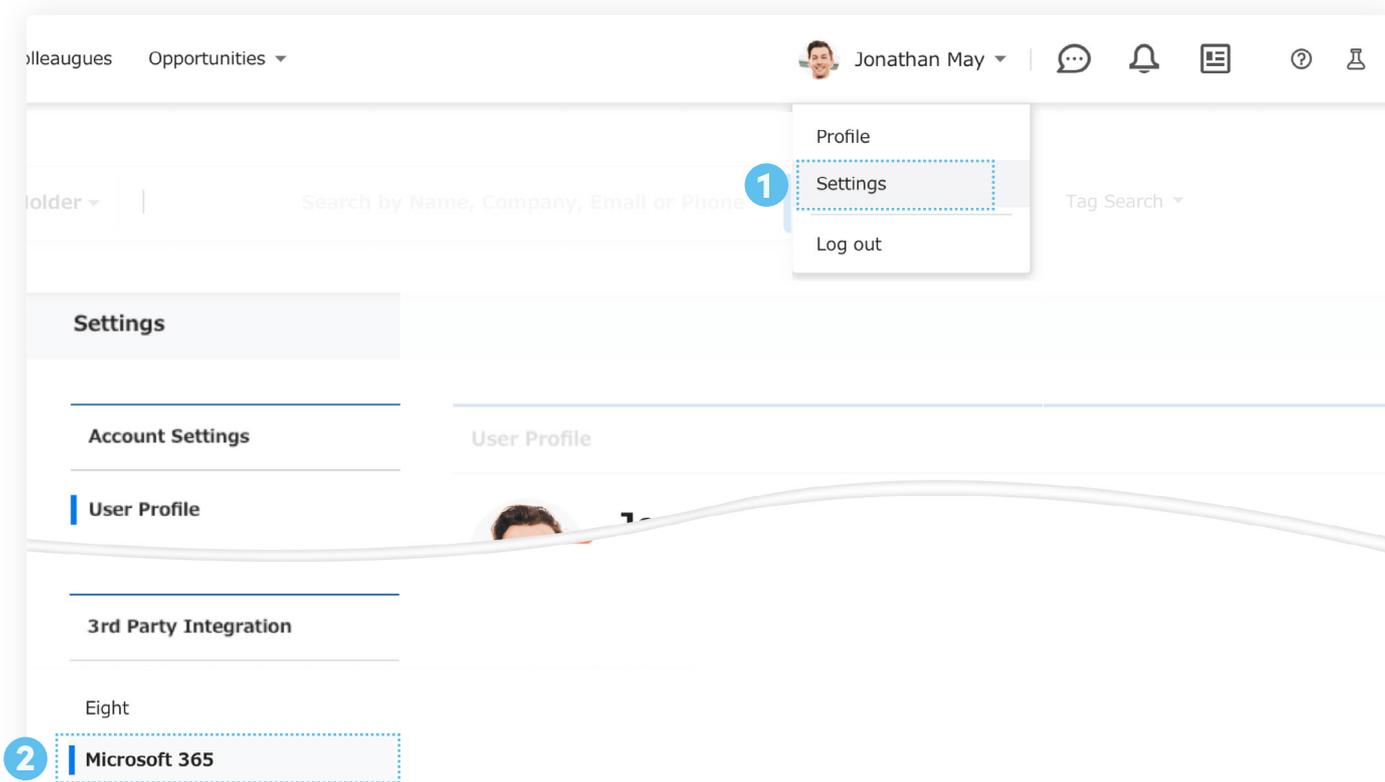
To connect with Outlook, the user must be using a Microsoft 365 plan that includes Exchange Online.

The administrator can enable Outlook Integration by filling in the Tenant ID for Microsoft 365.

When the user connects with Outlook, all their Sansan contacts will be synced to a special folder in Outlook.

Amending, editing, or deleting a contact in Sansan will also be reflected in Outlook.

Sansan communicates with Outlook periodically to sync contacts.



Settings



Setup (for Administrators)

Step 1

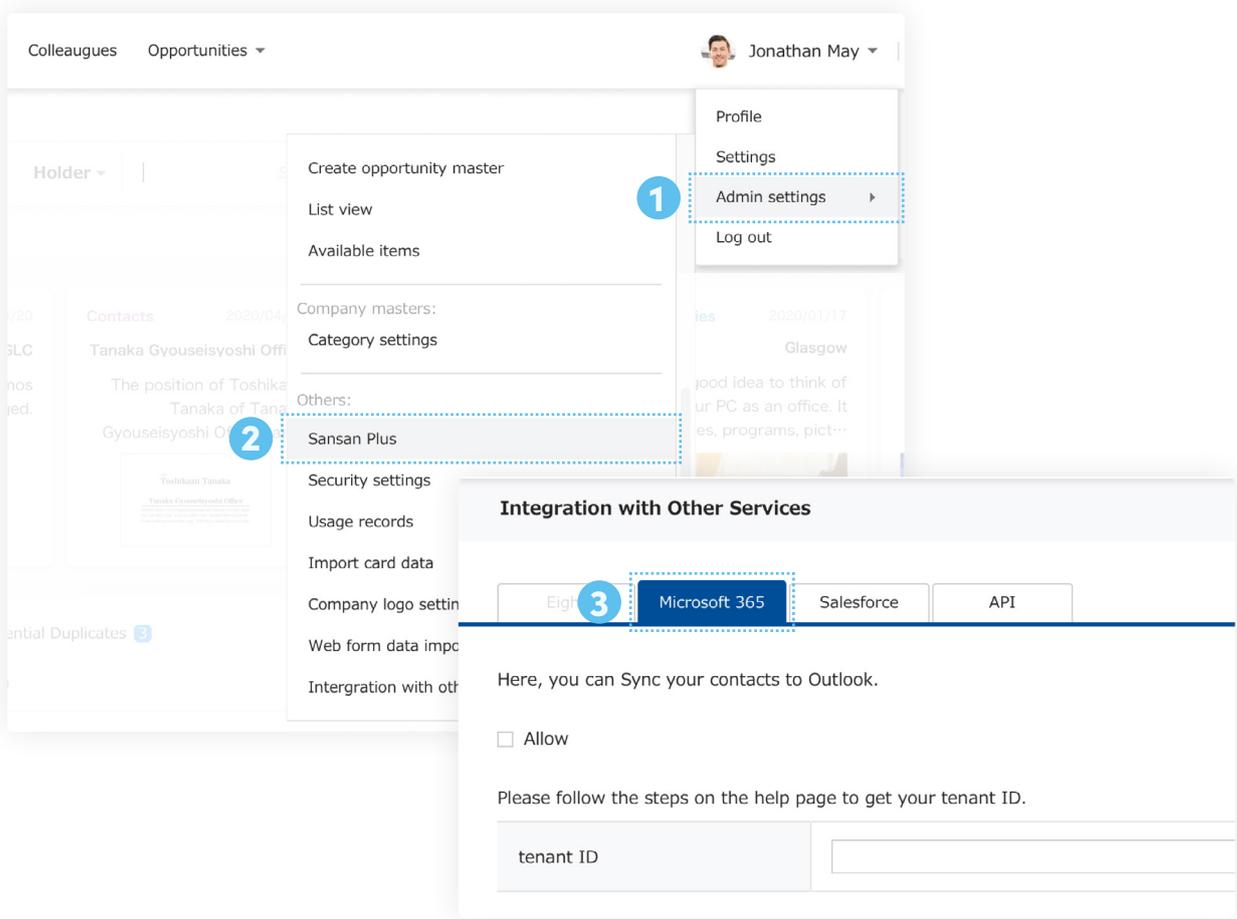
Retrieve your Tenant ID from Microsoft Azure Portal

1. Go to the Microsoft Azure portal page.
2. Access the administration page for Azure Active Directory.
3. Copy the **Tenant ID** displayed under your company name.

Step 2

Enable integration in Sansan

- Hover over **Administrator Settings** in the menu and click **Integration with other services**. Then, access the **Microsoft 365** tab.
- Check **Allow** and fill in **Tenant ID**. Then, click **Save**.

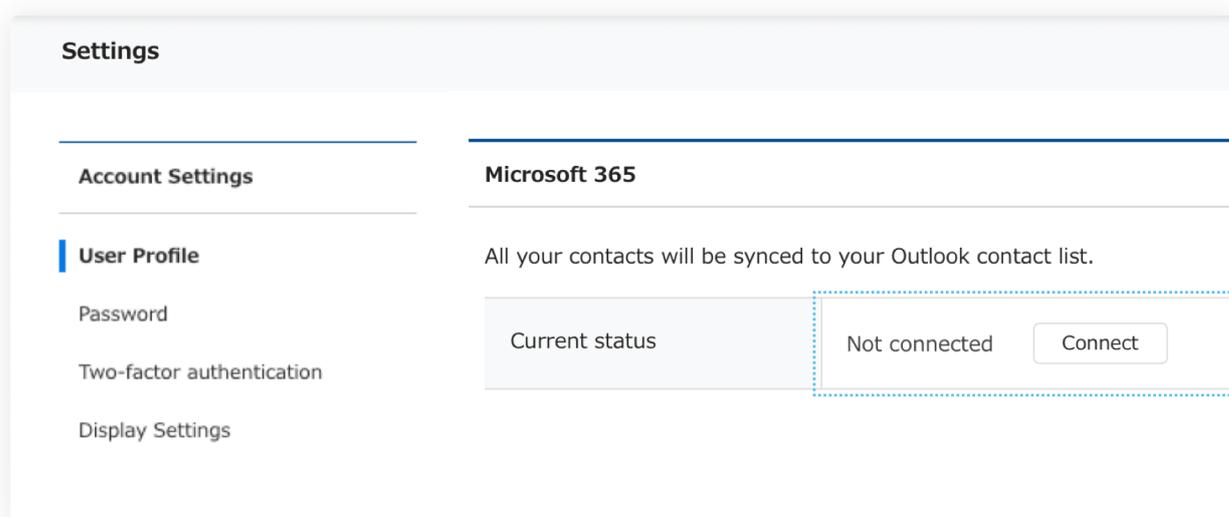


Setup (for General Users)

Connect to Microsoft 365

- Click **Settings** in the menu bar, then click **Microsoft 365** under **3rd Party Integration**.
- Click **Connect** and authenticate Microsoft 365.
- All your contacts will now be synced.

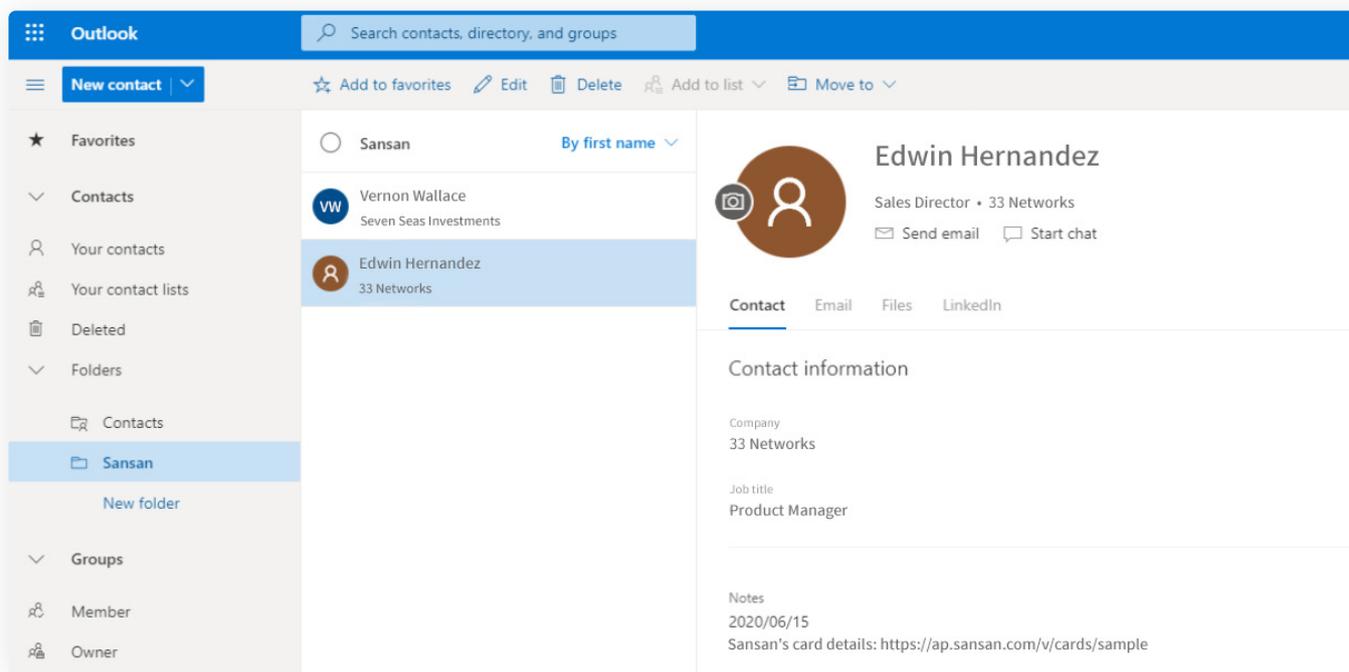
*Upon successful connection, your Sansan contacts will be synced to Outlook every 30 minutes.



What contact info will be linked to Outlook

When we sync your Sansan contacts to Outlook, we create a "Sansan" folder and save contacts there.

If you add, edit, or delete a contact in Sansan, it will be reflected in Outlook as well.



*If you disconnect Sansan from Microsoft 365, no contacts already synced will be deleted.

How your contacts will be synced to Outlook

Sansan	Outlook
Company	Company
Department	Department
Position	Job title
Last Name	Last name
First name	First Name
Last Name (Phonetic)	Yomi last name
First Name (Phonetic)	Yomi first name
Phone	Business phone
Phone2	Business phone 2
Mobile	Mobile phone number
Fax	Fax
Email	Email address
Website	Business web page
Address (Country, Postal Code, Prefecture, City, Street, Building)	Business address (Country, Postal Code, State/Province, City, Street)
--	Personal Notes

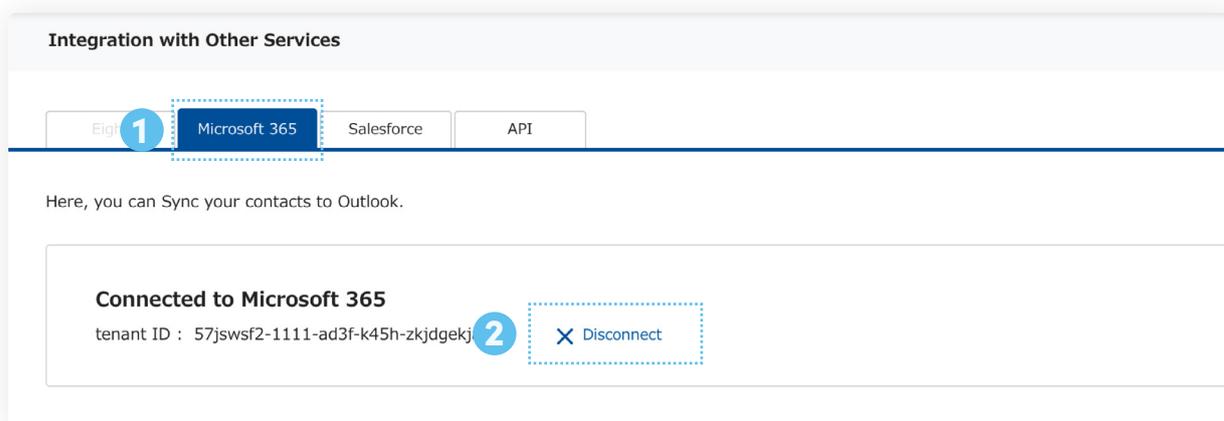
Notes

- We'll add a link for the card info in Sansan to personal notes in Outlook. When the card info is updated, a new link will be added.
- Notes created in Sansan will not be synced to Outlook.

Disconnect

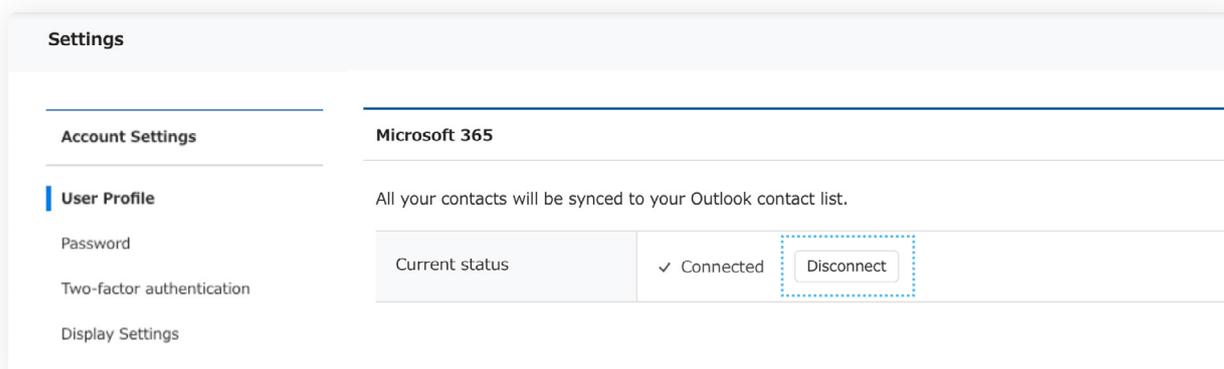
For Administrators

1. Hover over **Administrator Settings** in the menu and click **Integration with other services**. Then, open the **Microsoft 365** tab and disconnect.
2. When you disconnect, all Sansan users' connections will be invalidated.



For General Users

Click **Settings** in the menu bar, then click **Microsoft 365** under **3rd Party Integration** and disconnect.



Benefits of this integration

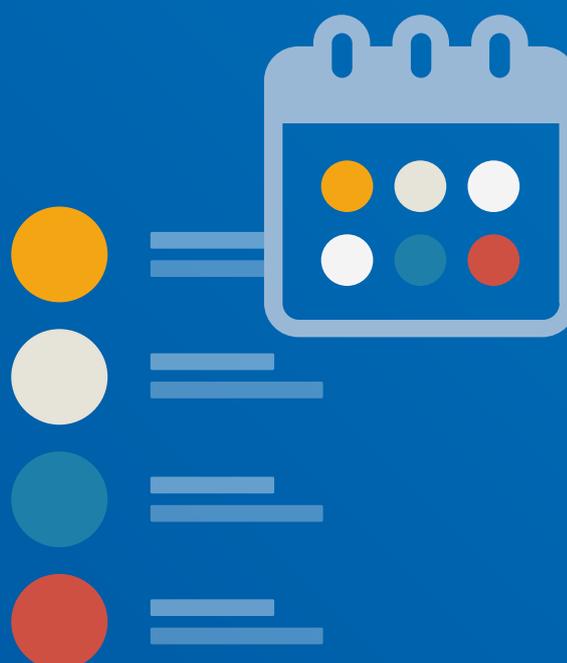


Create meeting invitations easily

Contacts can serve as your comprehensive directory for people you want to stay in touch with.

With the Sansan Microsoft 365 integration, you can create meeting invites easily by accessing your contact folder in Outlook

You can also view any appointments made or scheduled with the specific contact.



No more missed business opportunities due to typos

Have you ever...

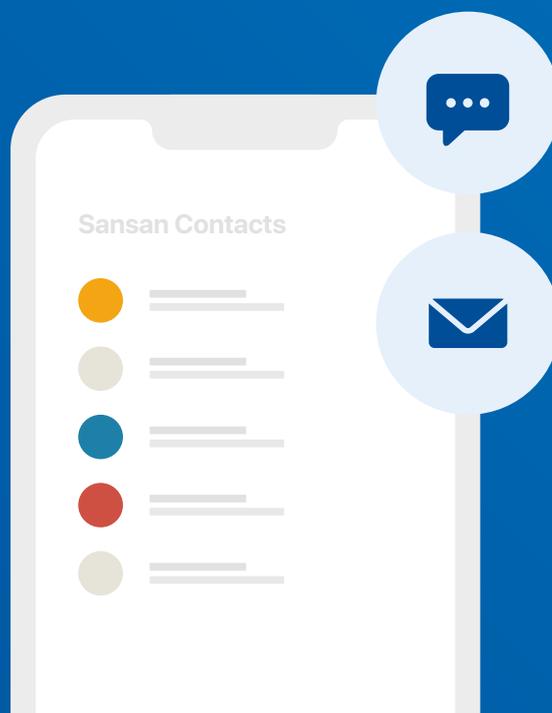
Missed out on a business opportunity because the recipient didn't get your email?

Been late to send a thank you email because you couldn't find the recipient's business card?

Been unable to quickly follow up with a customer because you didn't have their business card with you?

These little slip-ups don't have to affect your deal-making ability.

Integrate your contacts from Sansan to Microsoft 365 and you can access them anytime, anywhere.



Frequently Asked Questions



FAQ

1

If you edit your contact info in Outlook, will it be reflected to Sansan?

No, it won't.

2

Even if you update your contact info in Outlook, will it be overwritten if that same info is updated in Sansan?

Yes, it will be overwritten.

3

What happens if you import a contact from Sansan that already exists in Outlook?

When we sync your Sansan contacts to Outlook, we create a "Sansan" folder and save contacts there. This won't interfere with any other folders, so your existing contact info will not be updated.

4

Is there a way to tell in Outlook if contacts were imported from Sansan?

Just check the "Sansan" folder. You can also find out if contacts are imported from Sansan by checking the personal notes – a link to Sansan is included.

5

What contact info edited in Sansan will be reflected in Outlook?

Contact info updated in Sansan will automatically be synced to Outlook. Contact info in Outlook will be updated when:

- You manually edit your card data (other than notes and tags)
- Duplicates are combined
- Any card data is updated because of contact or colleague updates

sansan
