Gmail Calendar Connector Admin Guide

Contents

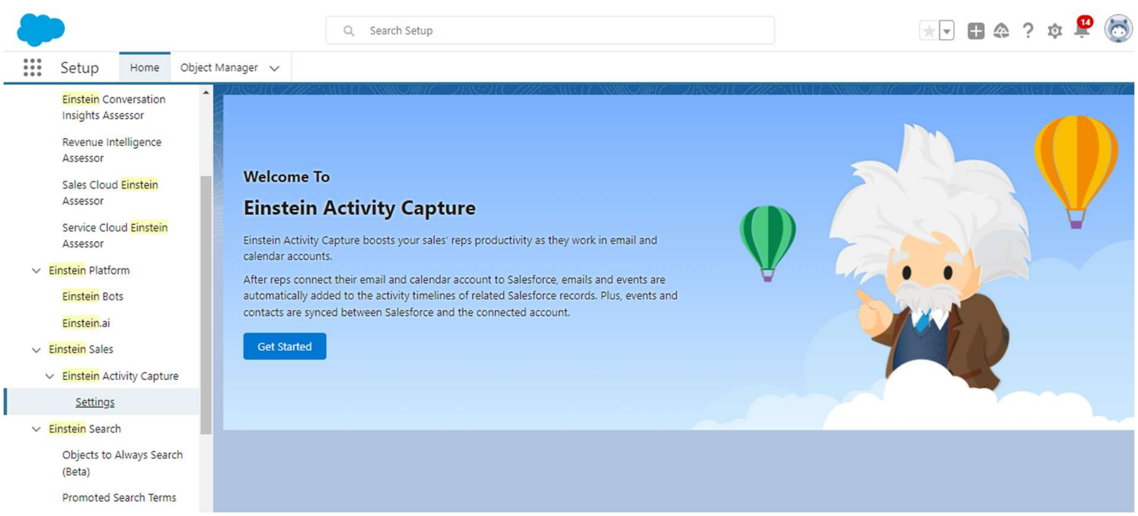
Package Pre-Installation Setup:

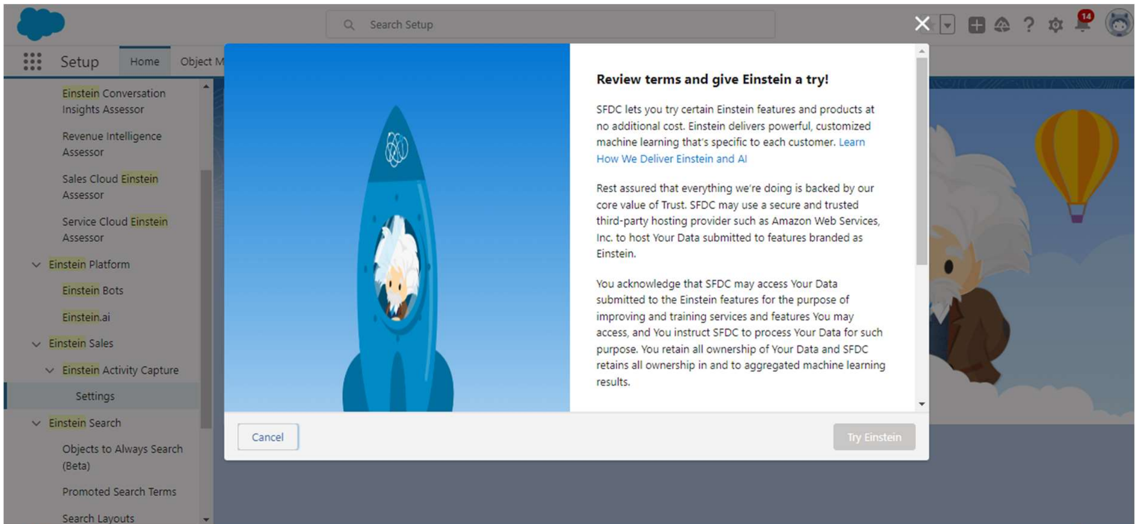
Before installing the package in the org, the admin needs to enable some settings.

1. Go to Setup.
2. Customize
3. Activities
4. Activity Settings.
5. Allow Users to Relate Multiple Contacts to Tasks and Events.
   Checking this checkbox adds the missing "ManyWho" feature to your org. Note that provisioning this feature may take a little while... Salesforce will send you an email when it is done.

Set Up Einstein Activity Capture

1. Give users access to Einstein Activity Capture through a permission set.
2. From Setup, enter Einstein Activity Capture in the Quick Find box, and then select Settings. The guided setup flow guides you through the following steps.
3. Connecting to Google.
4. Creating a configuration that controls what to capture and sync.
5. Assigning users to a configuration.
6. If you use Einstein Activity Standard, turn on email insights. If you use Einstein Activity Capture through an add-on license, email insights is turned on by default.





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Service Cloud Einstein Assessor
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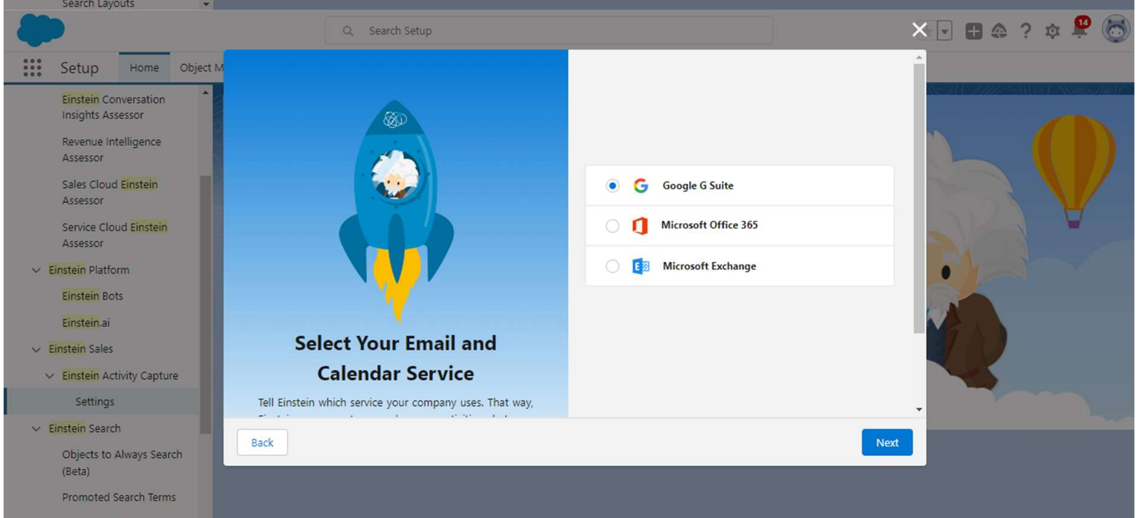
Einstein Bots
Einstein.ai
Einstein Sales
Einstein Activity Capture
Settings
Einstein Search
Objects to Always Search (Beta)
Promoted Search Terms
Search Layouts
Review terms and give Einstein a try!
SFDC lets you try certain Einstein features and products at no additional cost. Einstein delivers powerful, customized machine learning that's specific to each customer. Learn How We Deliver Einstein and AI
Rest assured that everything we're doing is backed by our core value of Trust. SFDC may use a secure and trusted third-party hosting provider such as Amazon Web Services, Inc. to host Your Data submitted to features branded as Einstein.
You acknowledge that SFDC may access Your Data submitted to the Einstein features for the purpose of improving and training services and features You may access, and You instruct SFDC to process Your Data for such purpose. You retain all ownership of Your Data and SFDC retains all ownership in and to aggregated machine learning results.
Cancel
Try Einstein



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Einstein Sales
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Einstein Search
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Select Your Email and Calendar Service
Tell Einstein which service your company uses. That way,
Google G Suite
Microsoft Office 365
Microsoft Exchange
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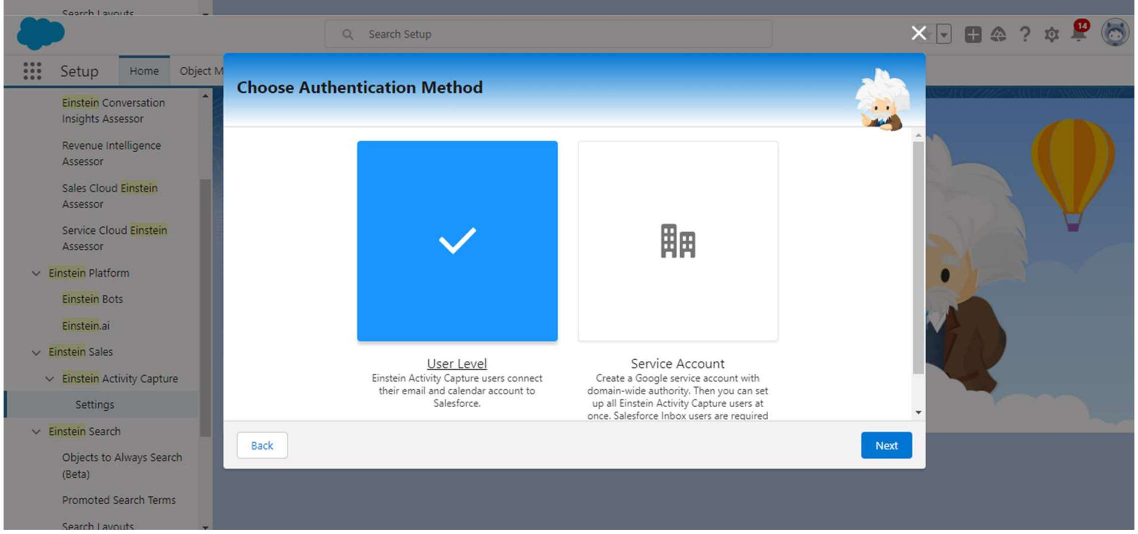
Next



Search Setup
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Service Cloud Einstein Assessor
Einstein Platform
Einstein Bots
Einstein.ai
Einstein Sales
Einstein Activity Capture
Settings
Einstein Search
Objects to Always Search (Beta)
Promoted Search Terms
Choose Authentication Method
User Level
Einstein Activity Capture users connect their email and calendar account to Salesforce.
Service Account
Create a Google service account with domain-wide authority. Then you can set up all Einstein Activity Capture users at once. Salesforce Inbox users are required
Back
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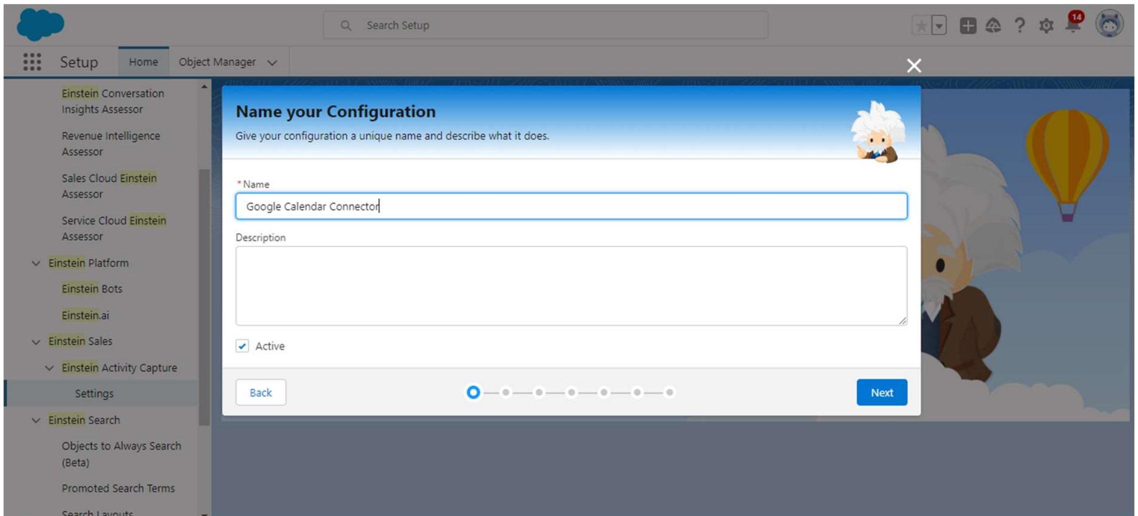
Search Setup
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Einstein.ai
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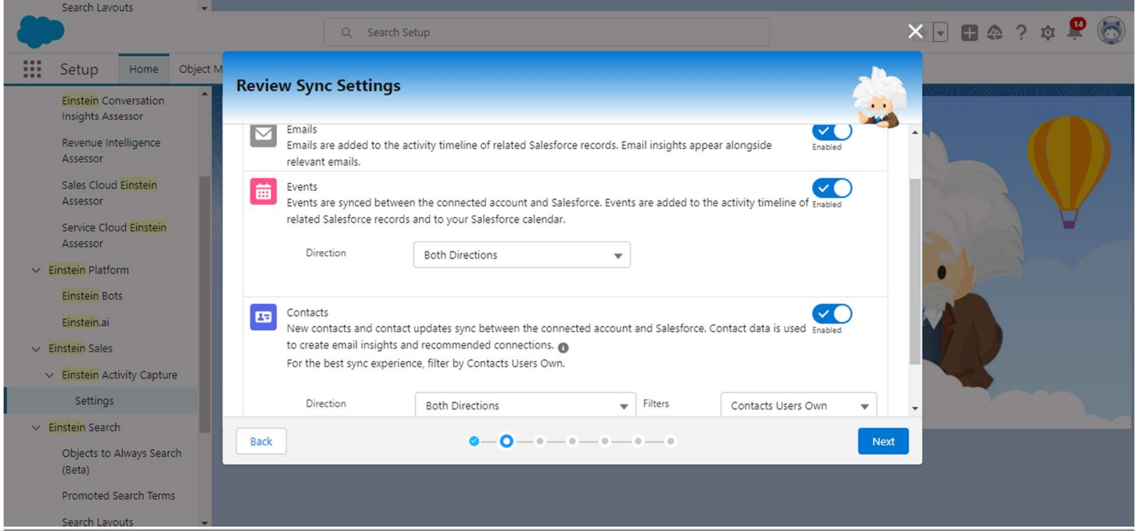
Promoted Search Terms
Search Layouts
Name your Configuration
Give your configuration a unique name and describe what it does.
* Name
Google Calendar Connector
Description
Active
Back
Next


Search Setup
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Einstein.ai
Einstein Sales
Einstein Activity Capture
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Einstein Search
Objects to Always Search (Beta)
Promoted Search Terms
Search Layouts
Review Sync Settings
Emails
Emails are added to the activity timeline of related Salesforce records. Email insights appear alongside relevant emails.
Enabled
Events
Events are synced between the connected account and Salesforce. Events are added to the activity timeline of related Salesforce records and to your Salesforce calendar.
Enabled
Direction
Both Directions
Contacts
New contacts and contact updates sync between the connected account and Salesforce. Contact data is used to create email insights and recommended connections.
For the best sync experience, filter by Contacts Users Own.
Enabled
Direction
Both Directions
Filters
Contacts Users Own
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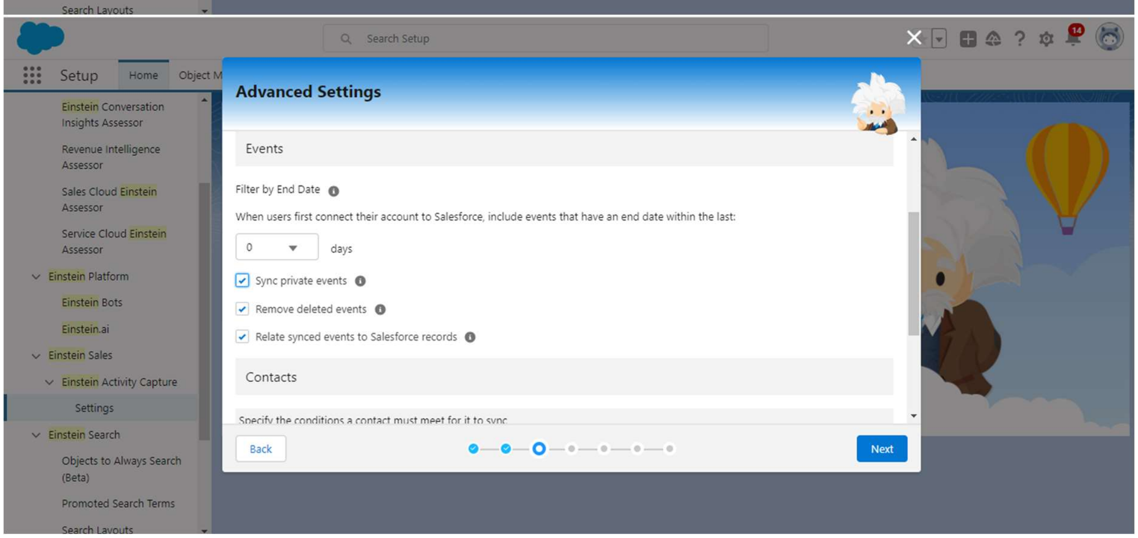
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Einstein.ai
Einstein Sales
Einstein Activity Capture
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Einstein Search
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Search Layouts
Advanced Settings
Events
Filter by End Date
When users first connect their account to Salesforce, include events that have an end date within the last:
0
days
Sync private events
Remove deleted events
Relate synced events to Salesforce records
Contacts
Specify the conditions a contact must meet for it to sync
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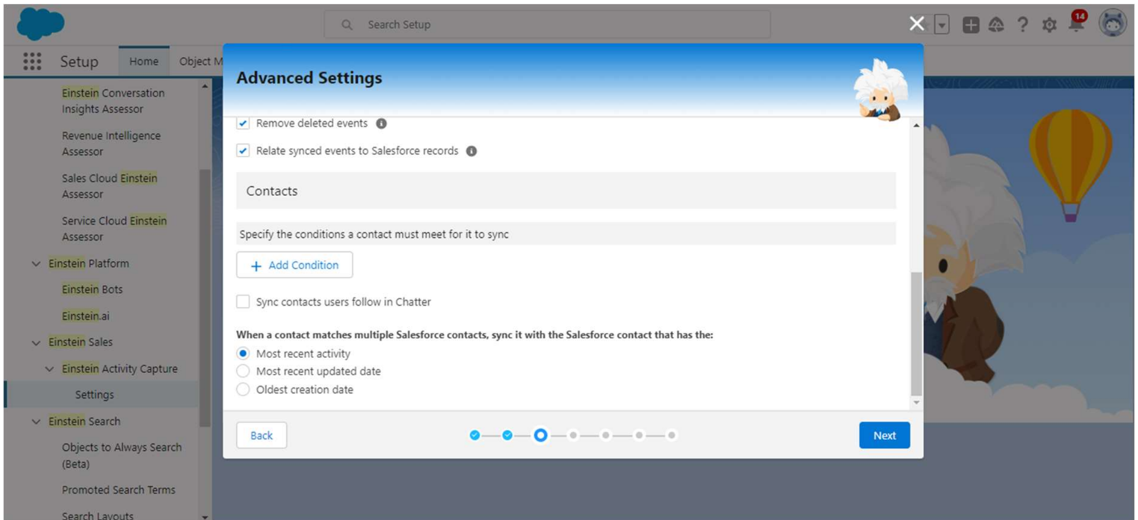
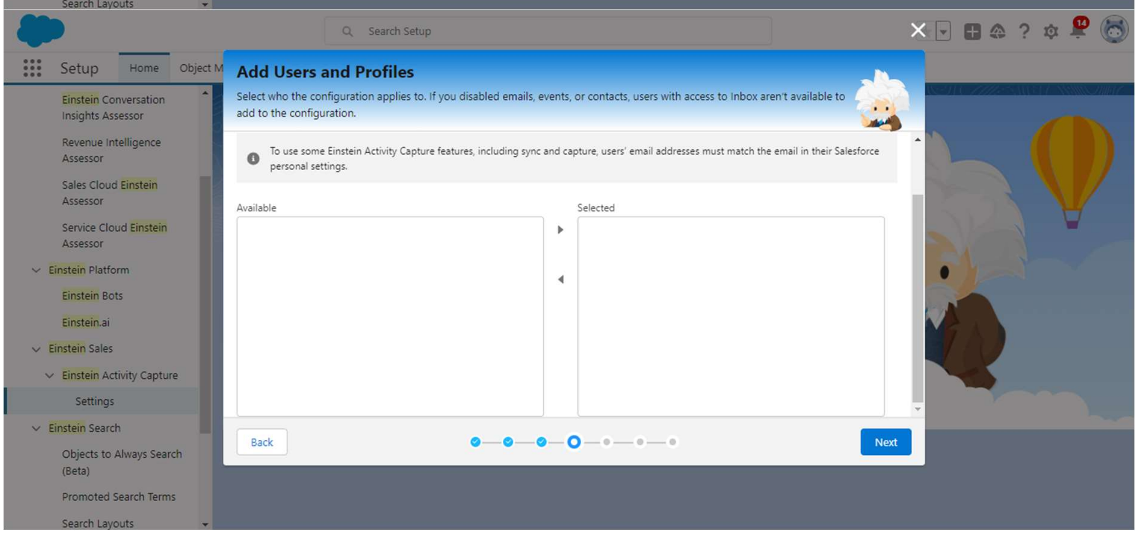
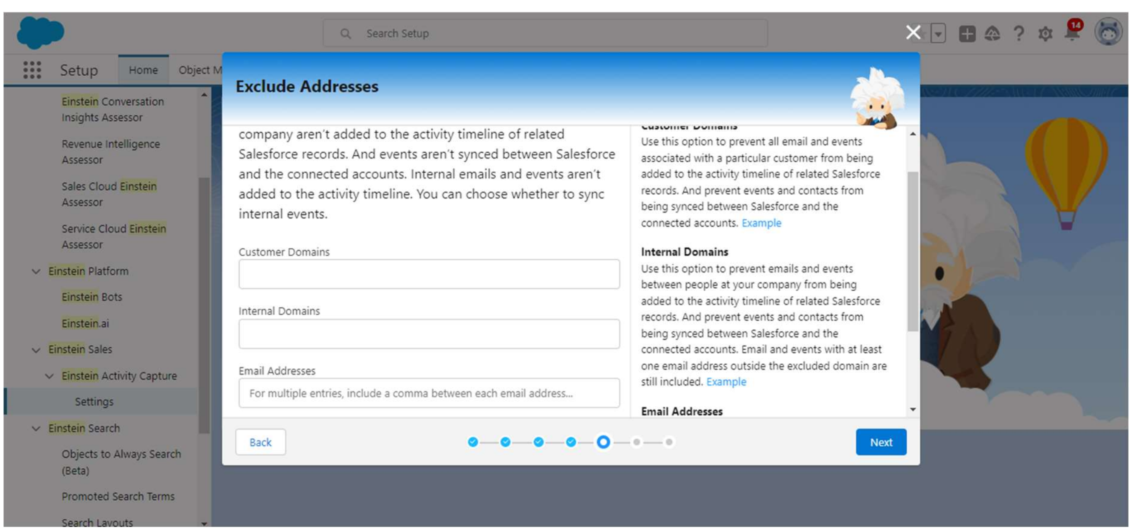
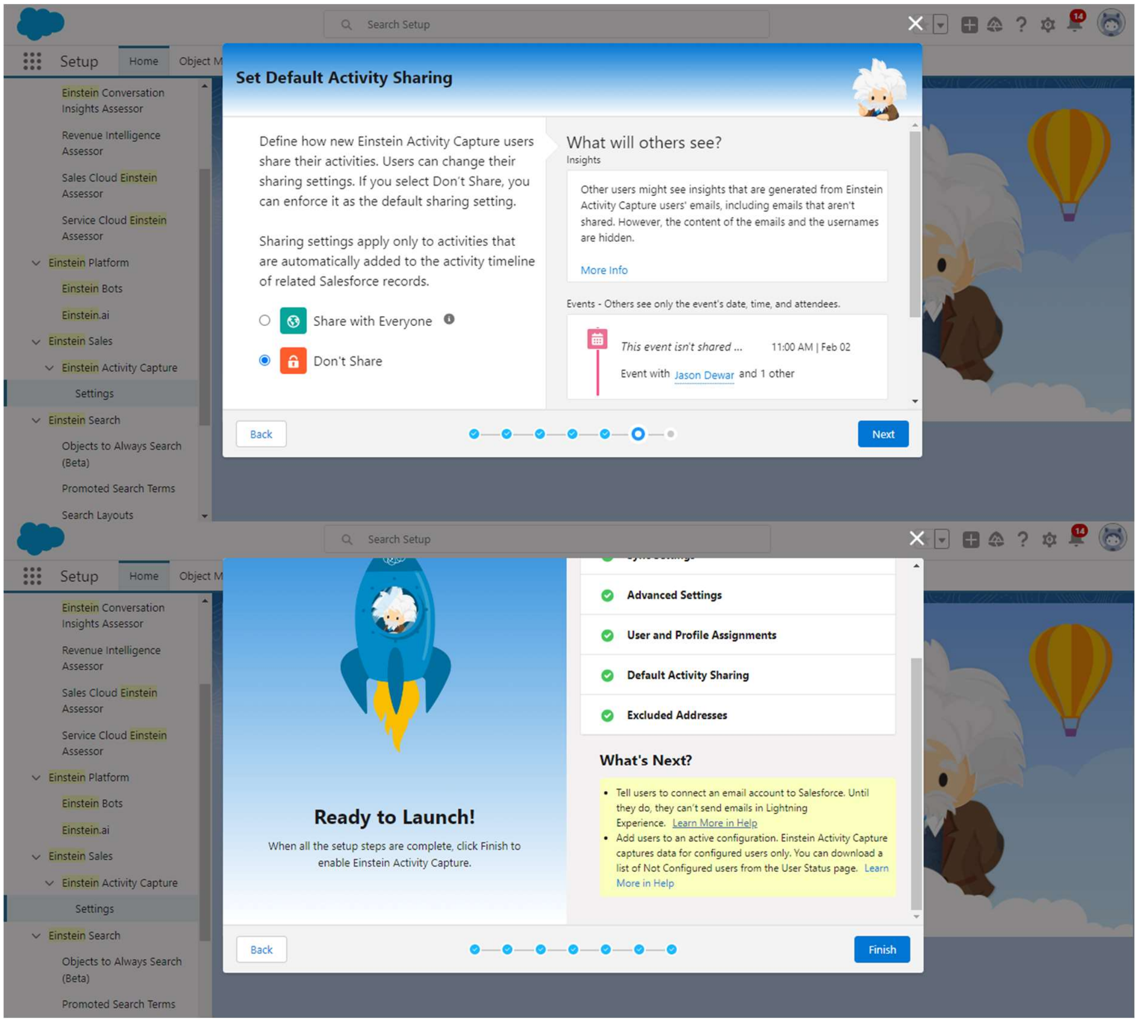




If you have assigned the Einstein Activity Standard permission to the users, then those users name will be appearing in the available section and you can move them to selected section.





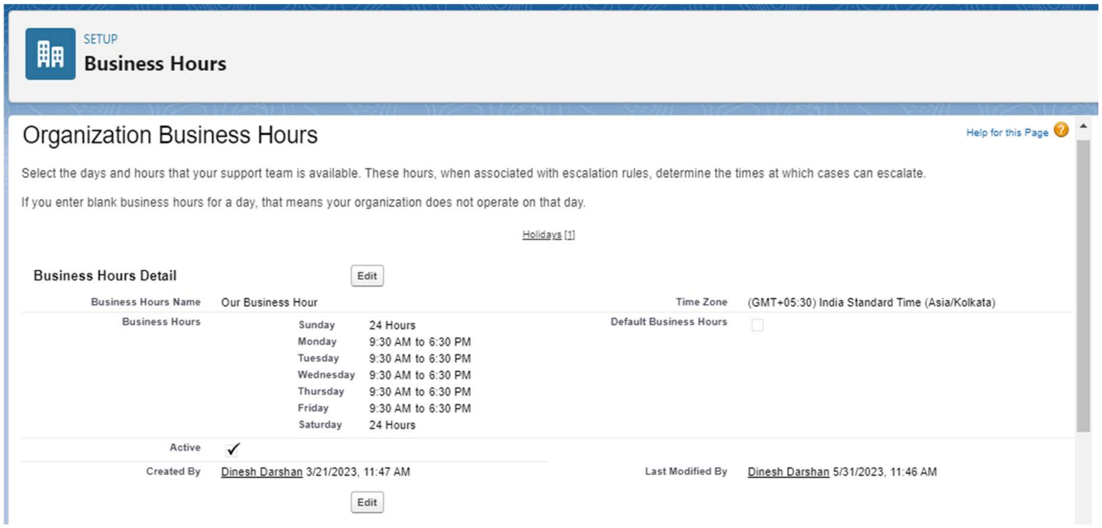
Note: As this is a setup for Google Calendar only, so the host needs to have a Gmail account. However, participants can have any email address.

Set up the Prerequisites for the org:

Create Business Hours:

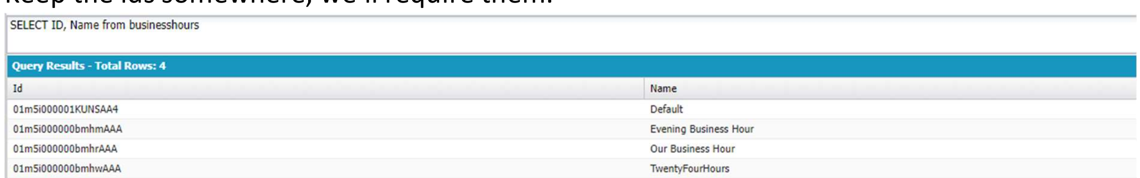
1. Search and select Business Hours from quick find in setup.
2. Click New Business Hours.
3. Give Business Hour Name.
4. Check the Active checkbox.
5. Select desired time zone for the business hour.
6. Set Business hours for all 7 days of the week or working days.
7. Click save.

8. Create as many business hours required in your organization.



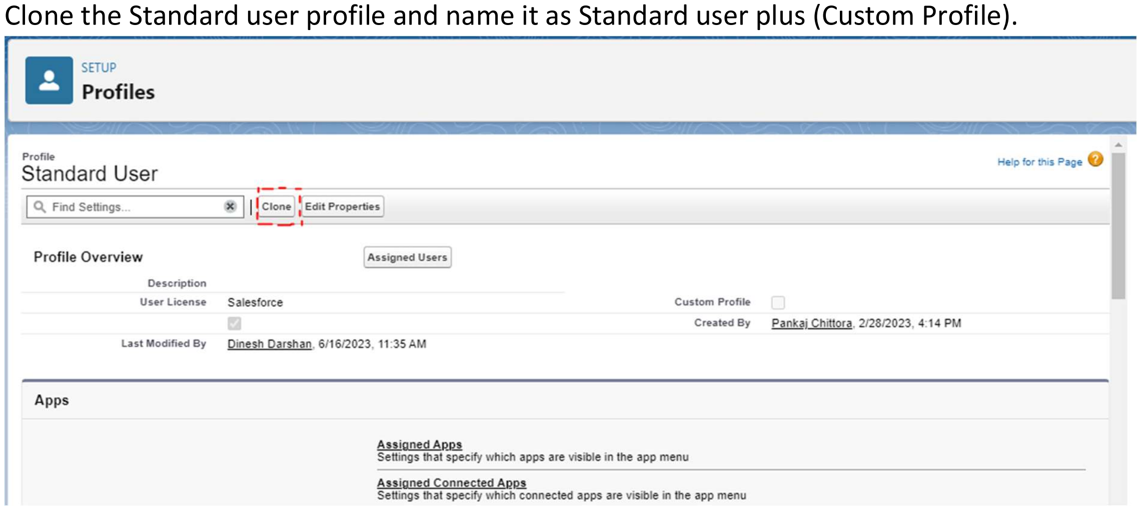
Fetch Business Hour IDs:

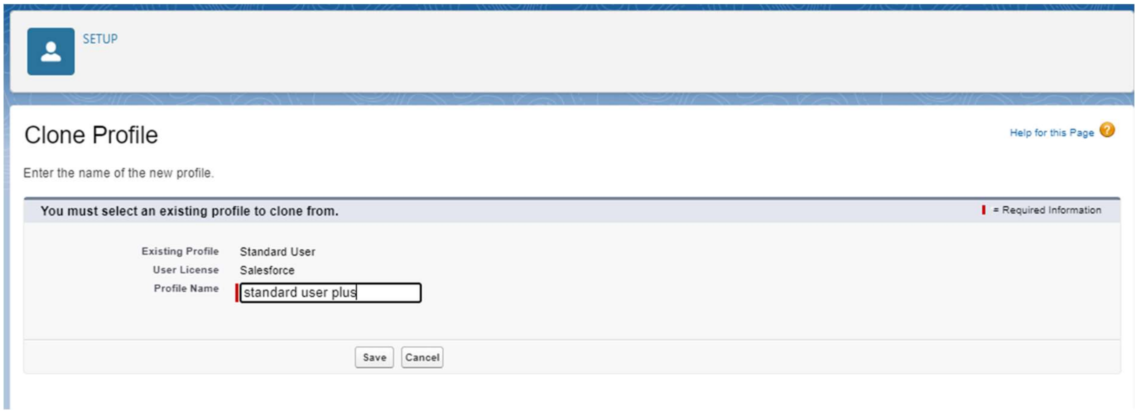
1. Click the gear icon on the right corner.
2. Click Developer Console.
3. Query the Business hour ids in query editor.
4. Keep the ids somewhere, we'll require them.



Create profile for standard user:

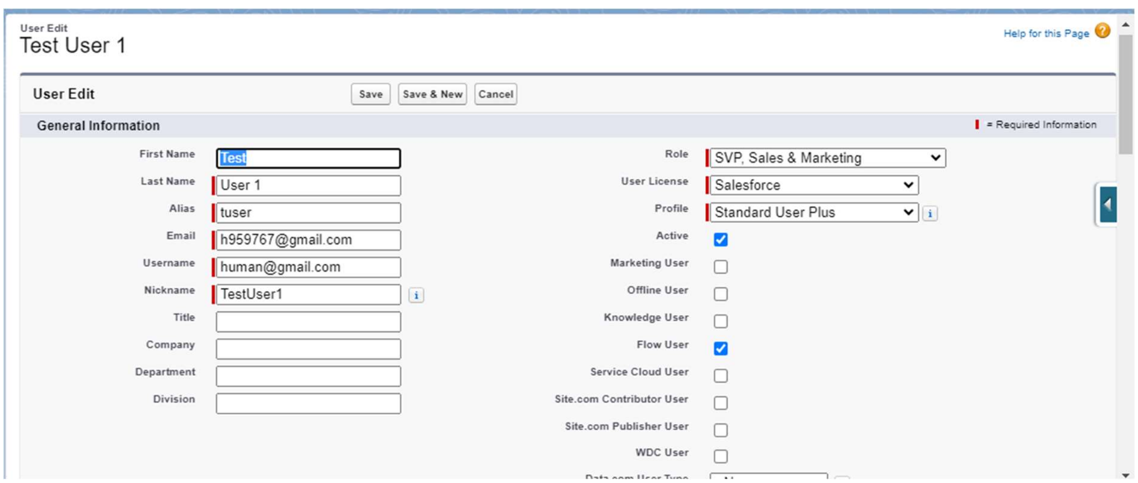
1. Go to setup.
2. Search and select profiles.
3. Clone the Standard user profile and name it as Standard user plus (Custom Profile).



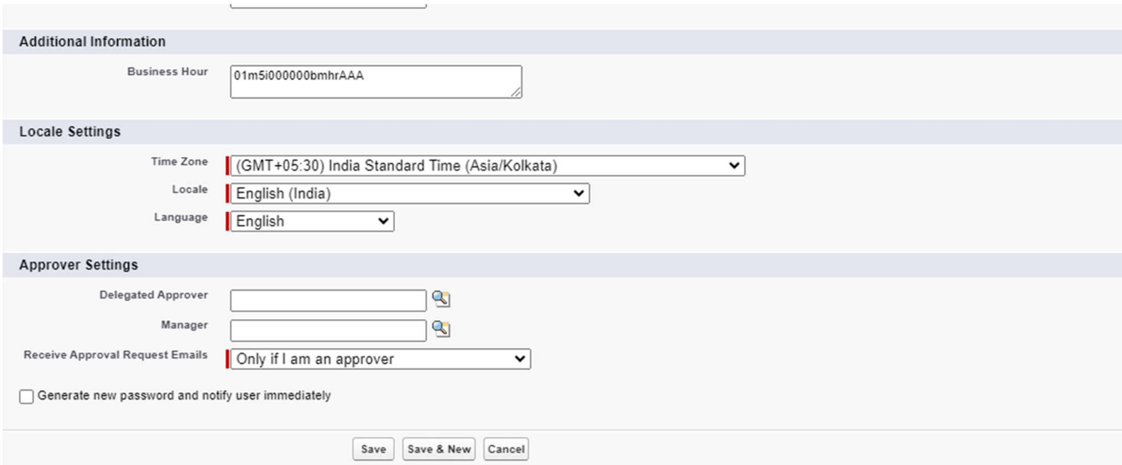


Create internal users:

1. Go to setup.
2. Search Users in quick find and select users.
3. Click new user.
4. Fill all necessary details.
5. Select user license as Salesforce.
6. Select profile as Standard user plus (Custom Profile).
7. Select flow user.



8. Select your desired time zone for that user in Locale Settings.
9. Enter the business hour id for this user in additional information (We have already fetched it from query editor in developer console).
   *We have added the Business Hour field in the package, but the admin needs to add the field in the page layout in the Additional Information section.



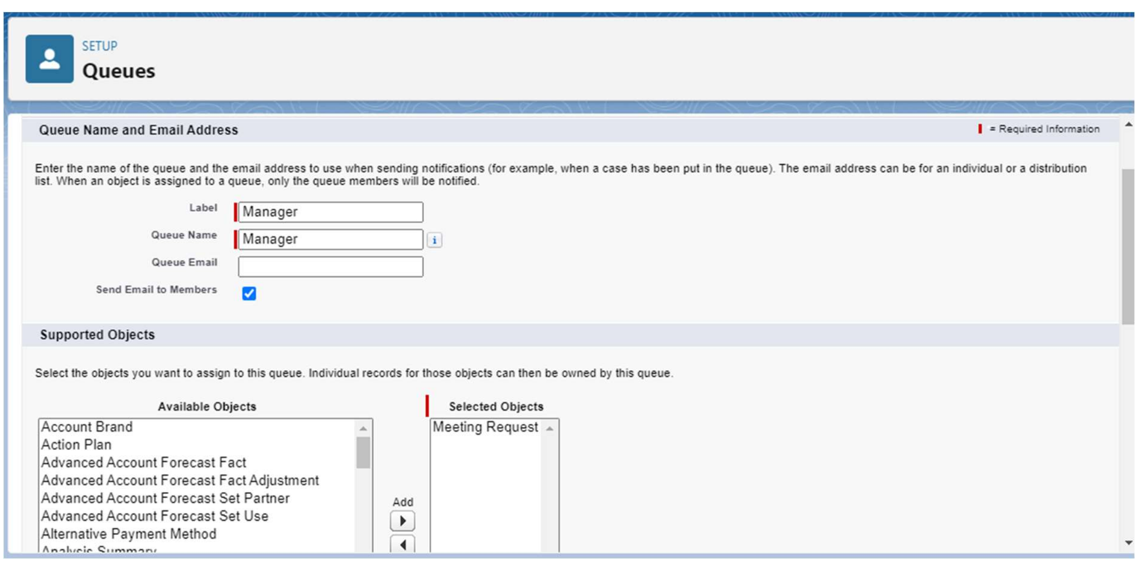
10. Click save.
11. Add as many users there in the organization.

Update Company Business Hour in Company Information:

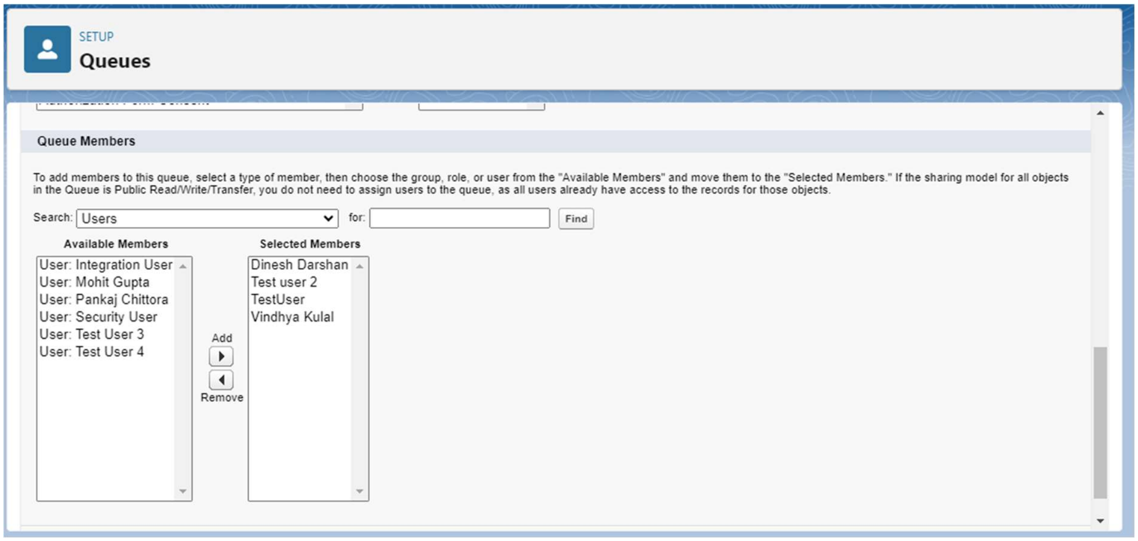
1. Go to setup.
2. Search and click on company information.
3. Click on edit.
4. Change the Default Time zone as per your organisation time zone.

Create Queues for the organization:

1. Go to setup.
2. Search and select Queues.
3. Click on New.
4. Add Label to the queue.
5. Add Queue Name.
6. Check the Send Email to Members checkbox.
7. Select Supported Object as Meeting Request.



8. Add user to different queues as per your requirement.
   (e.g., All the managers of Technical Department are added in one queue named as Technical Managers and all the Software engineers of Java competency are added in a queue named as Java Software Engineers.



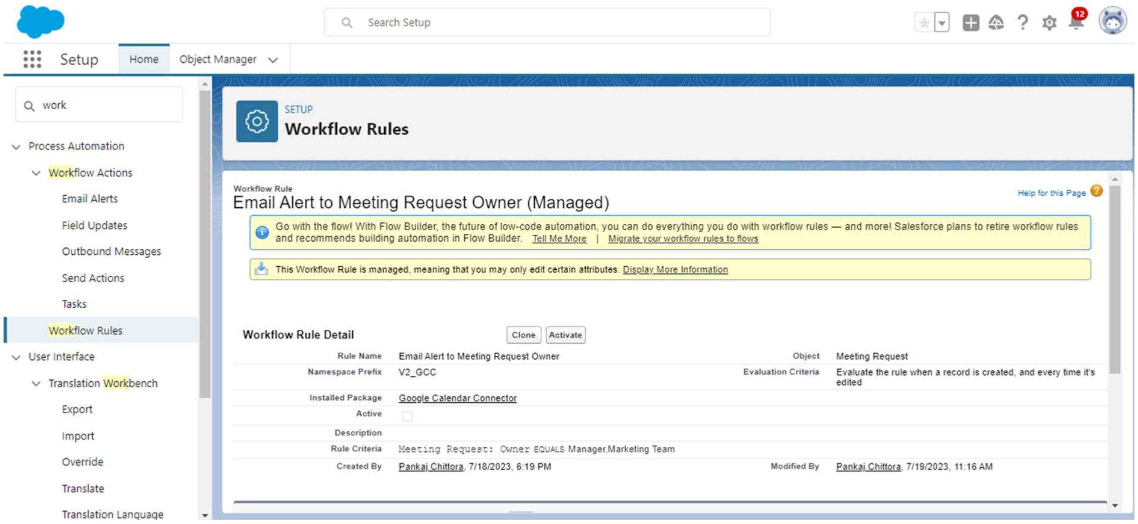
9. Click save.
10. Create as many queues required to show in the Community site.

Give access to Meeting Details Object to Standard Users:

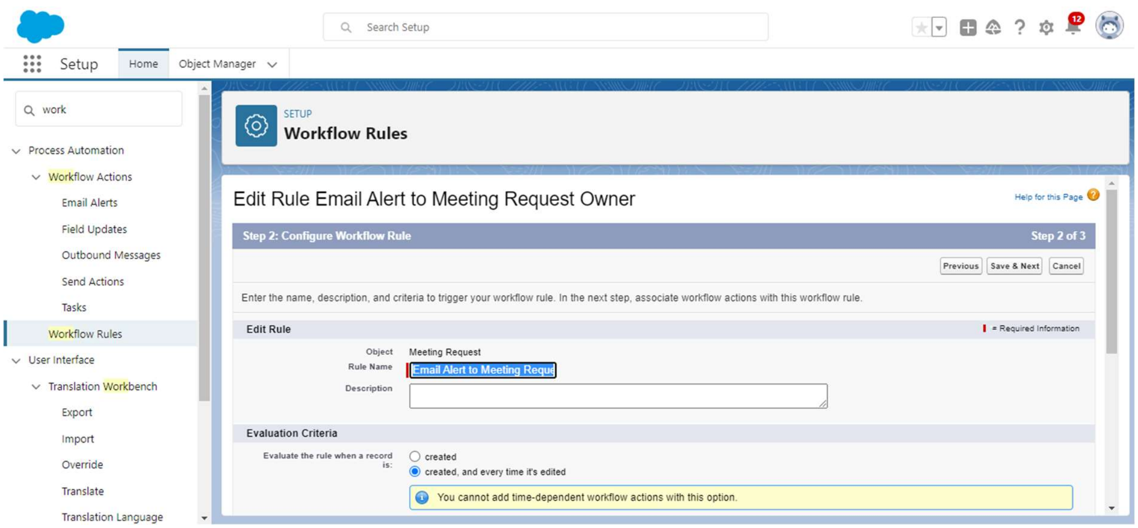
1. Go to setup.
2. Search and click on profiles.
3. Click on the standard user plus profile.
4. Go to Object settings.
5. Search for Meeting Details and click on it.
6. Click on edit.
7. Check the Read, Create, Edit and Delete checkboxes.
8. Click save.

Setup Email Alert:

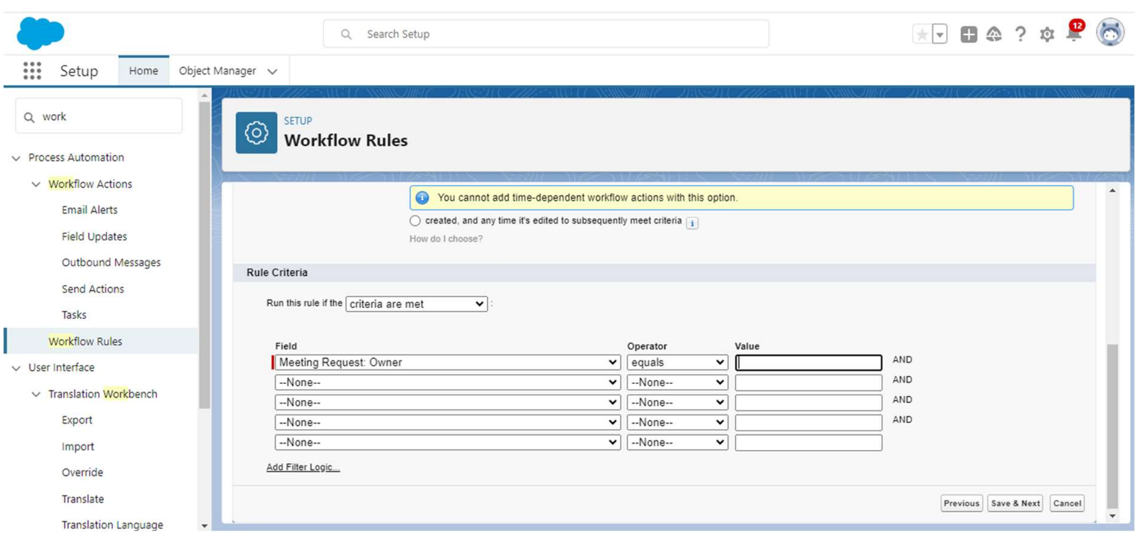
1. Go to setup and search workflow rules.
2. Click on workflow rules.
3. Click on “Email Alert to Meeting Request Owner”.



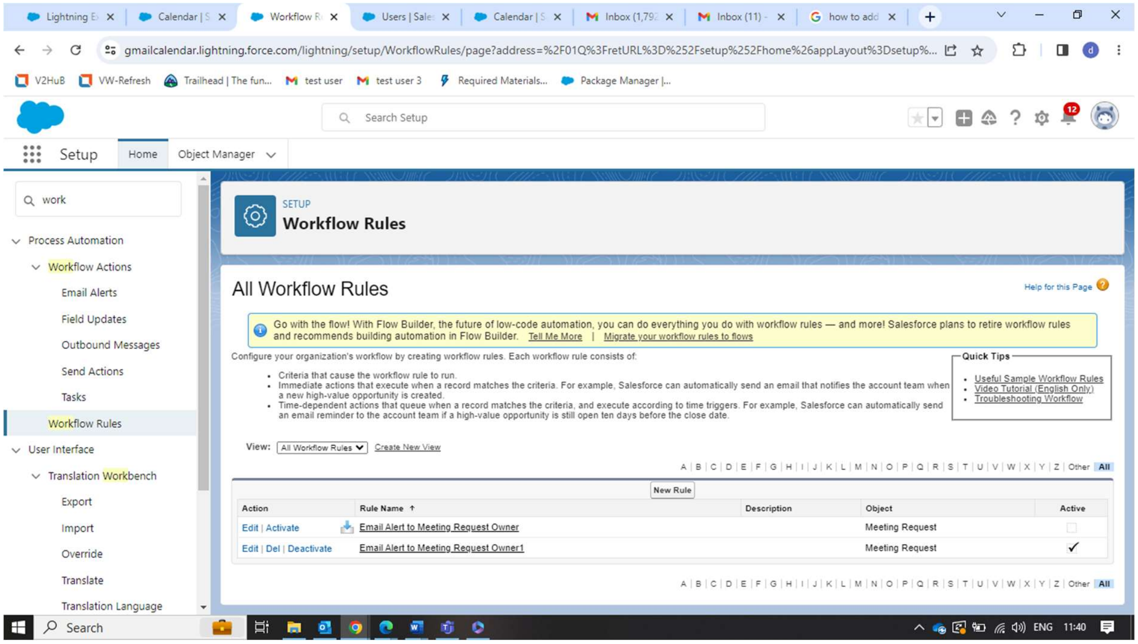
4. Clone the rule and give a name.



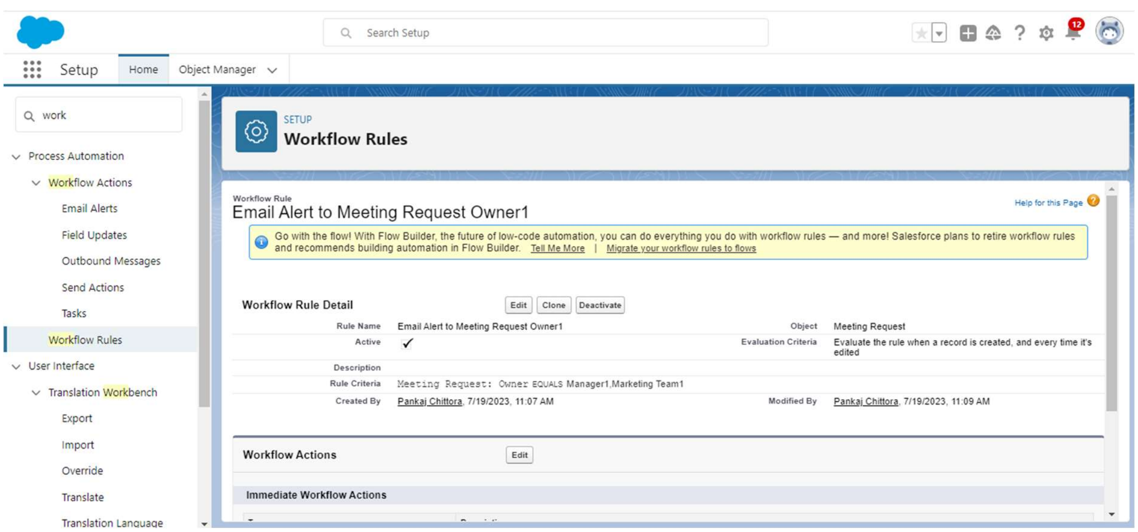
5. Scroll down to Rule Criteria.



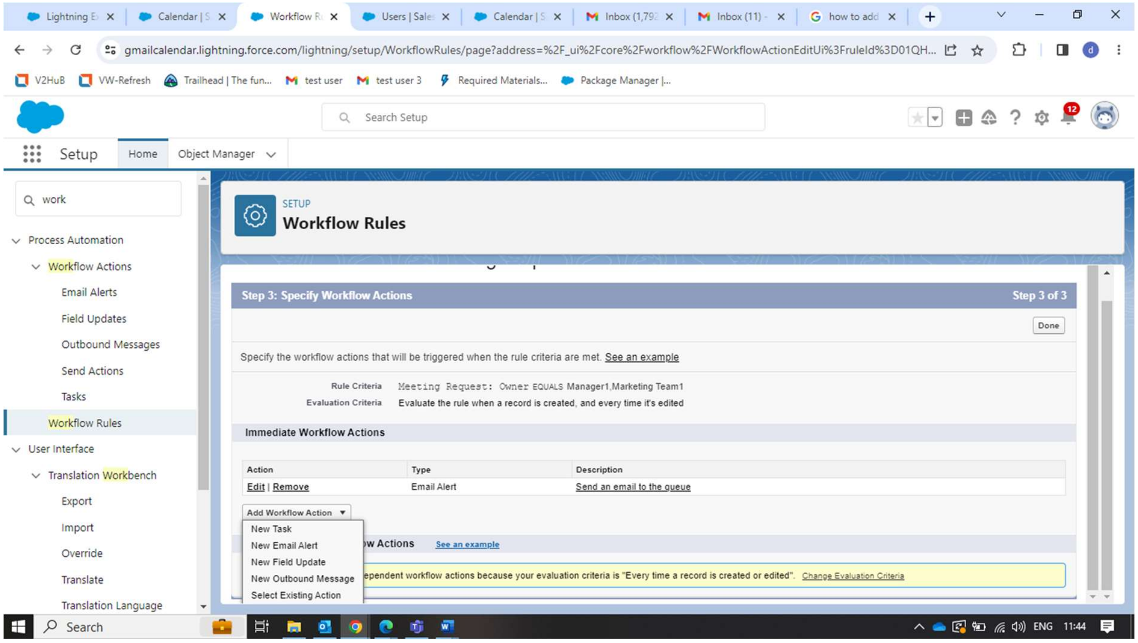
6. In the value field add your queue names that you have created by comma separated.
7. Click on save and next and then click on done.
8. Go back to workflow rules.



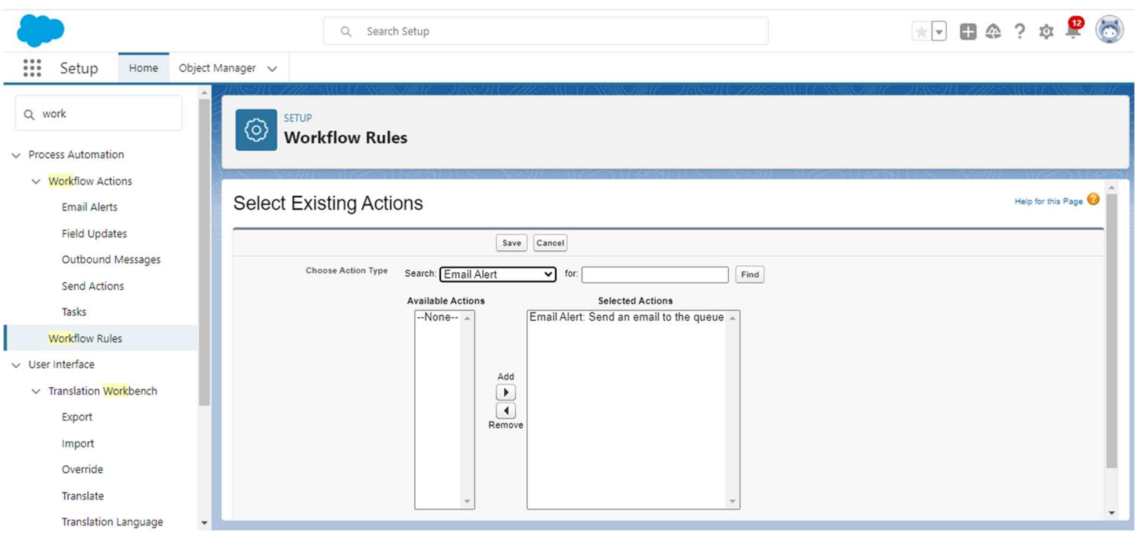
9. Click on newly cloned rule.



10. Scroll down to workflow action.
11. Click on edit.
12. Click on add workflow action, a dropdown will appear.



13. Click on “Select Existing Action”.
14. A new page will appear.
15. Choose email alert from the dropdown.
16. Add Send an email to the queue email alert there and save it.

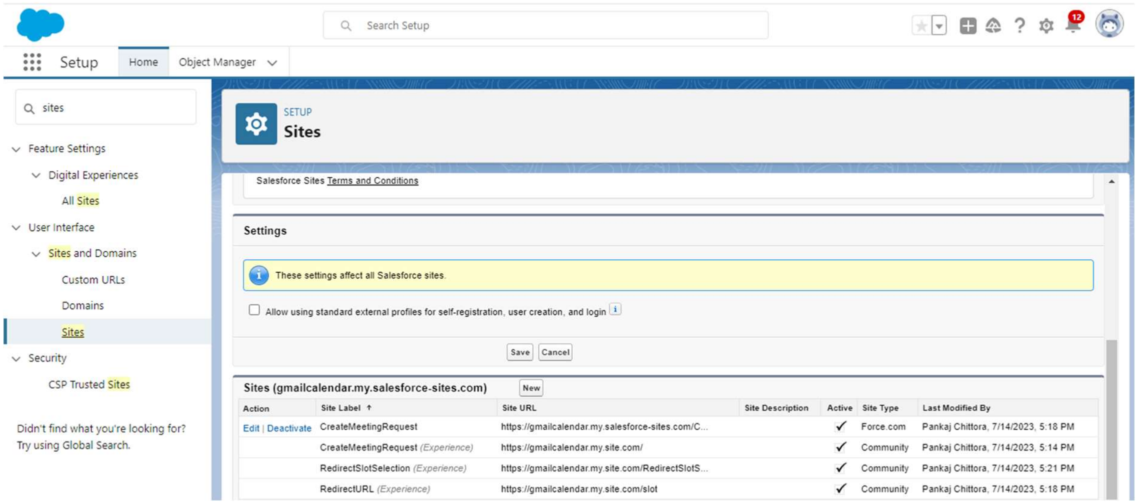


Setup Site Or Community Site:

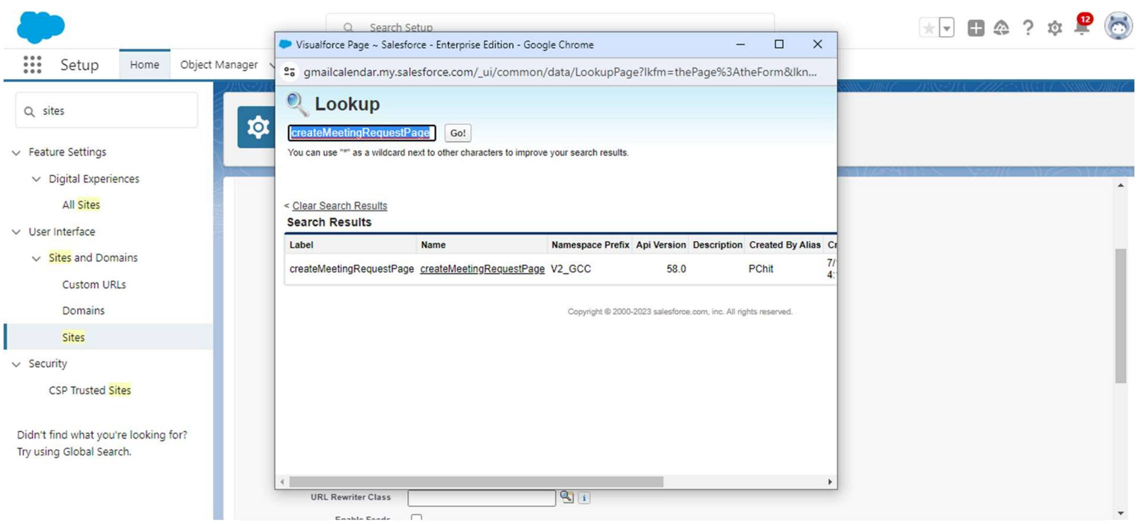
It depends on your organisation if you want to enable the digital experience and use the community site for the external usage or use the Salesforce sites. We have both the options available. Below described both Site setup and community site setup.

Site Setup:

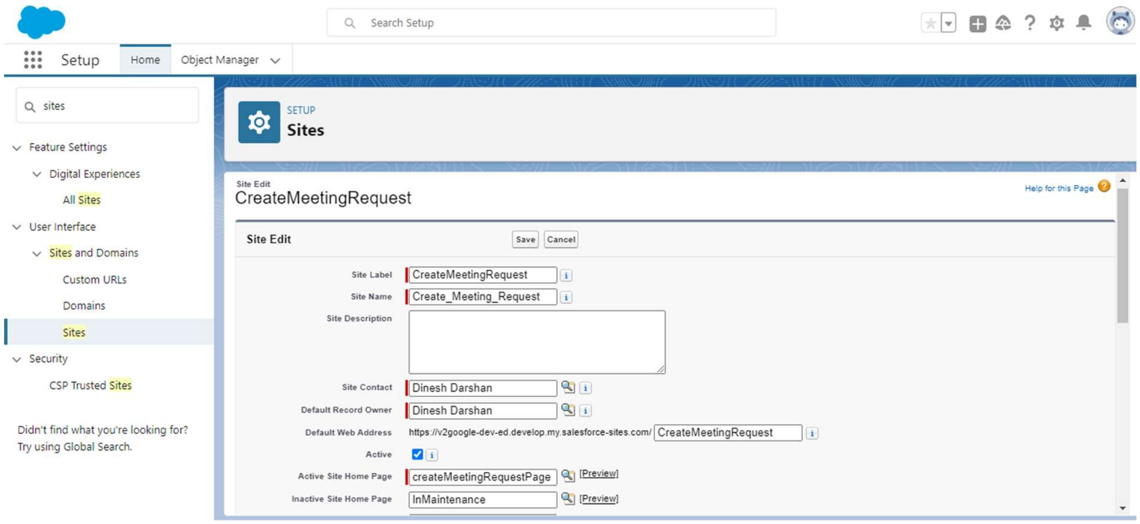
1. Go to Setup
2. Search and click on sites.
3. Setup the domain name.



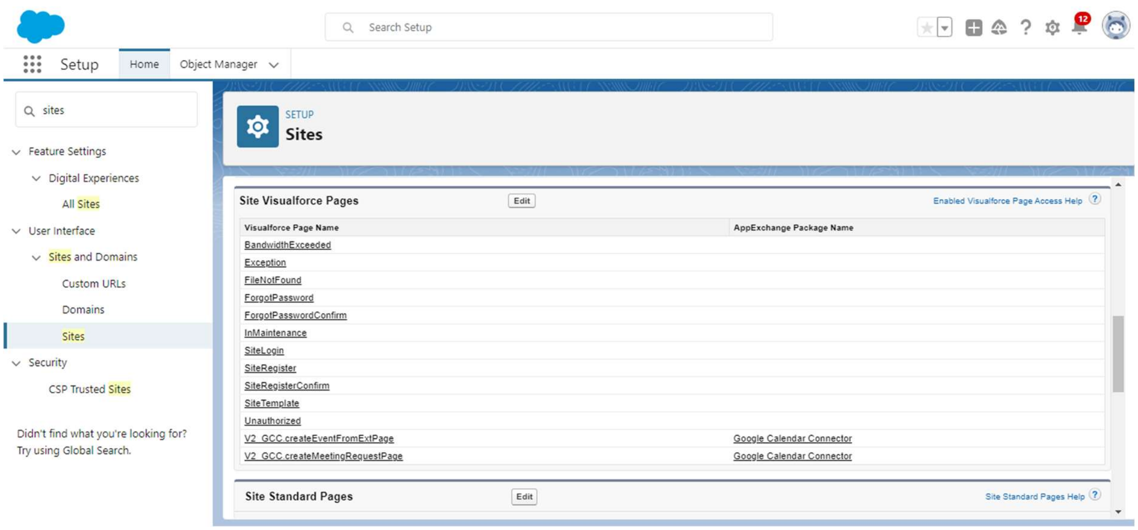
4. Click on new.
5. Enter site label.
6. Set up the Default Web Address.
7. Click Active.
8. Click on the search option in Active Site Home Page.
9. A window pops up, select the createMeetingRequestPage VF page.



10. Click on save.



11. Scroll down and click on site visual force pages.
12. Enable another VF page called createEventFromExtPage.



13. Scroll down and click on page assignments.
14. Click the search icon in Page Not Found, one window pops up.
15. Select and add the createEventFromExtPage VF page.
16. Click save.

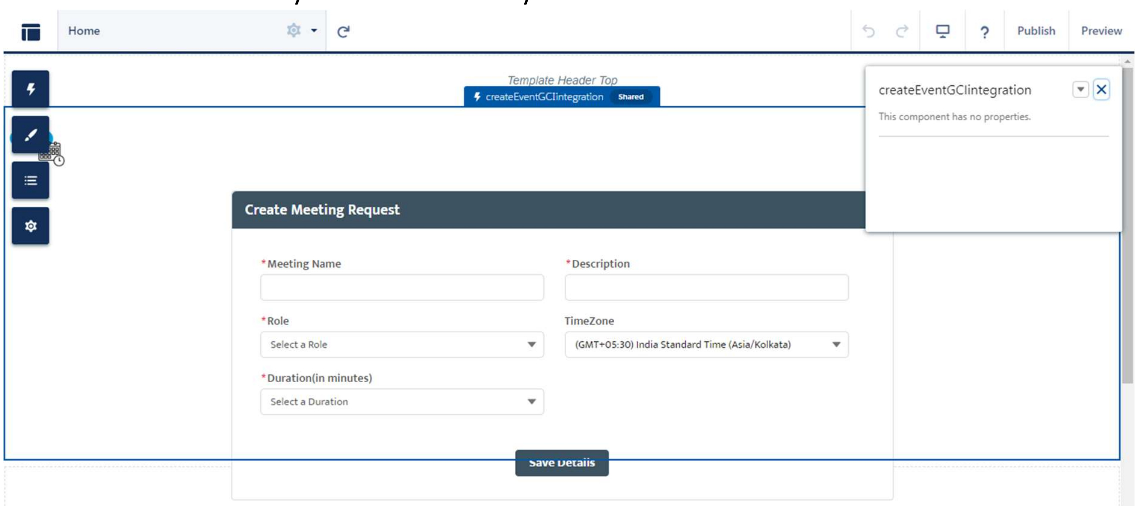
Site User Profile Setup:

1. Click on Public Access Setting for your site, you'll be redirected to the guest user profile.
2. Go to Object settings and give Read, Create access for Meeting Request, Account, Contact and Lead object.
3. Also go to each of these objects' field level security and give access to all required fields to create a record.
4. Go back to the profile and click on Apex Class Access.
5. Give access to the V2_GCC classes.
6. Give access to Custom Metadata types: Google Calendar Connector.V2_GCC.Gmail Calendar Connector

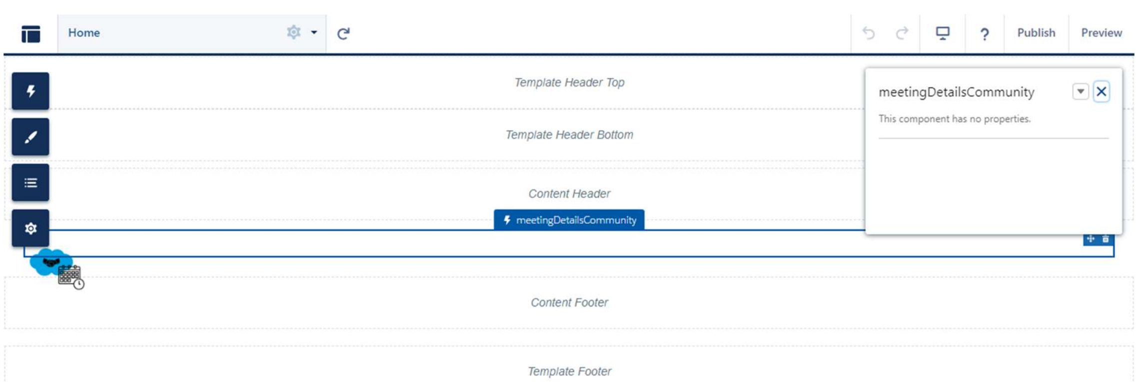
7. Go to guest profile and click on guest user and change the time zone according to your choice.

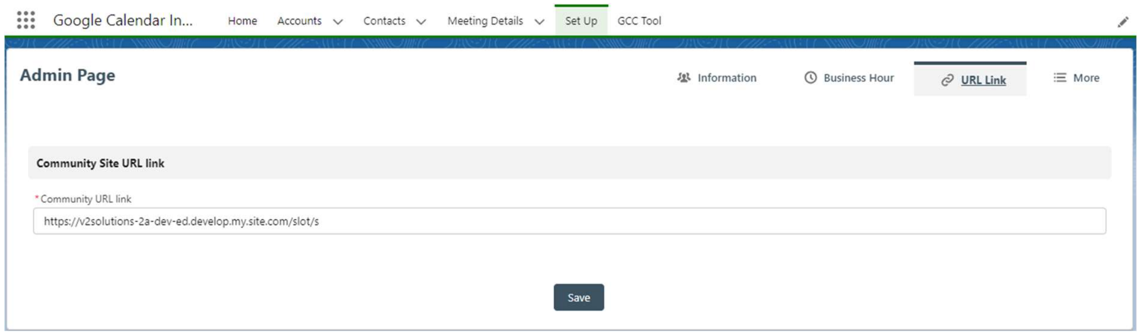
Community site setup:

1. Search and click on All Sites in quick find in setup page.
2. Click on new.
3. Create a community site as per your layout interest.
4. Add the createEventGCIintegration component in the community site home page.
5. Publish the site.
6. Let's call this community site as community site 1.



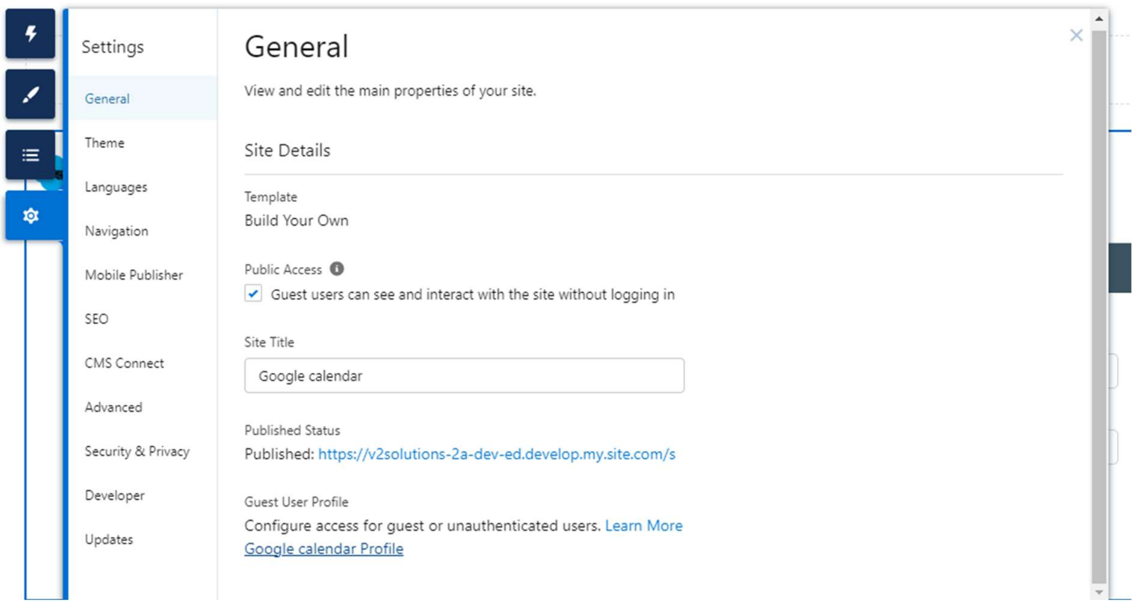
7. Create another community site or create a new page in community site 1.
8. Add the meetingDetailsCommunity component there.
   This site link needs to be added in the URL Link section of the setup page in application. This site will be used by the client to choose available slot and schedule a meeting.
   Note: If you have created separate community site for this, then add that community site link. Or if you have created a new page in community site 1 and added the meetingDetailsCommunity component, then open that page in browser and copy the link and paste in the setup page.
9. Publish the site.



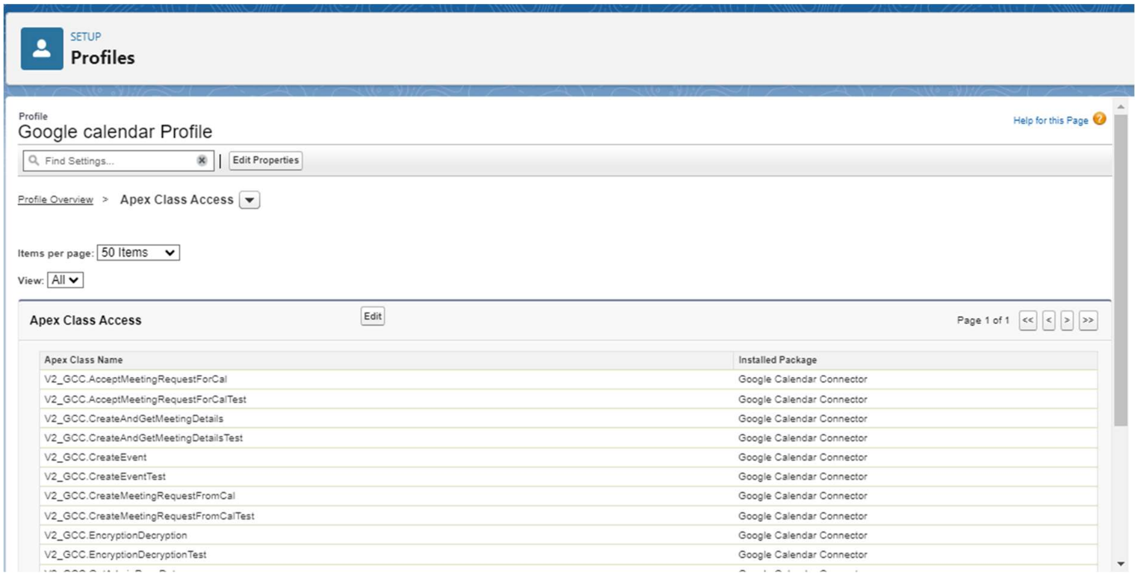


Community site user profile setup:

1. Go to All sites.
2. Click on Builder for community site 1.
3. On the left side, click on settings.
4. Click on the “Guest users can see and interact with the site without logging in” check box.



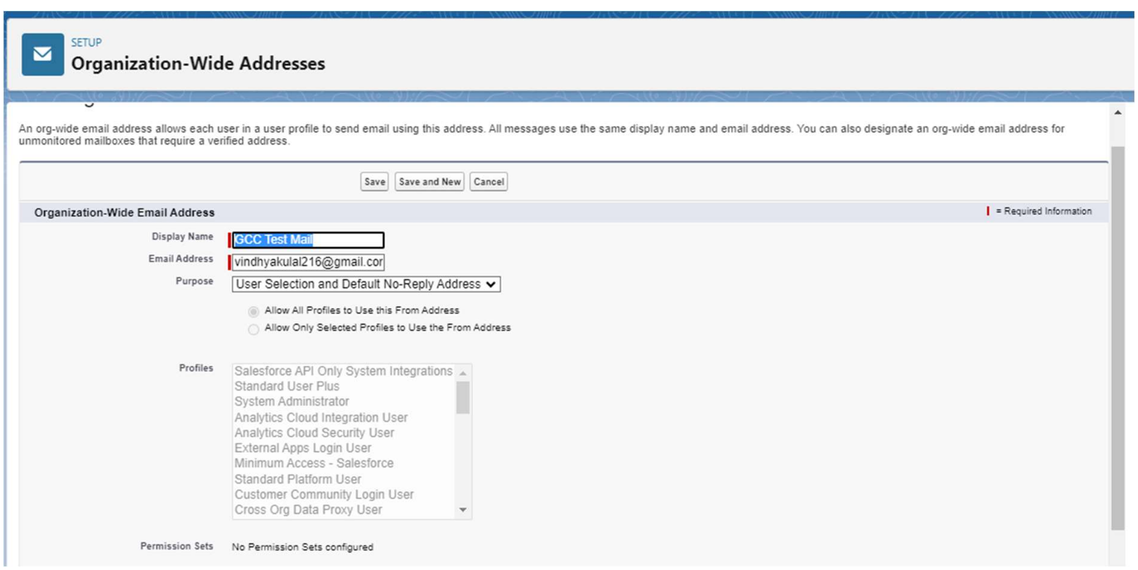
5. Click on the Guest User Profile.
6. Go to Object settings and give Read, Create access for Meeting Request, Account, Contact and Lead object.
7. Also go to each of these objects’ field level security and give access to all required fields to create a record.
8. Go back to the profile and click on Apex Class Access.
9. Give access to the V2_GCC classes.



10. Click save finally.
11. Go to guest profile and click on guest user and change the timezone according to your choice.

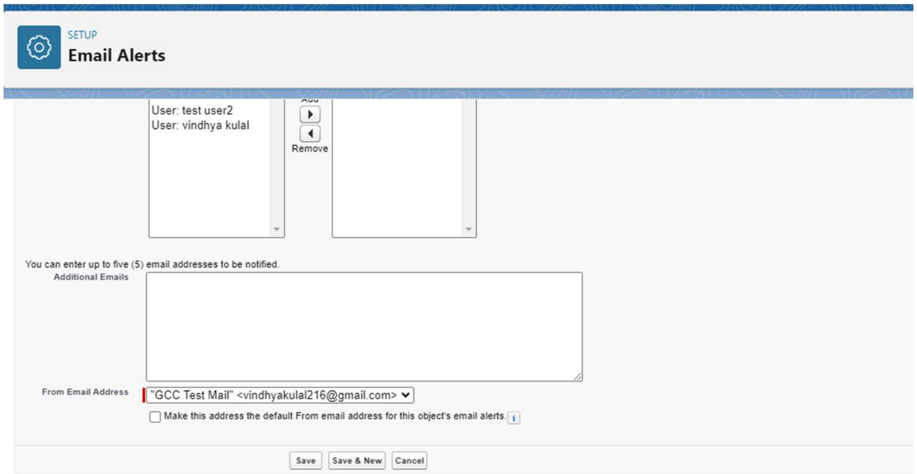
Setup Org email id for email alert:

1. Search and click on Org-Wide Addresses in quick find in setup page.
2. Click on Add.
3. Enter Display Name and Org Email Address.
4. Select User Selection and Default No-Reply Address.
5. Click on save.



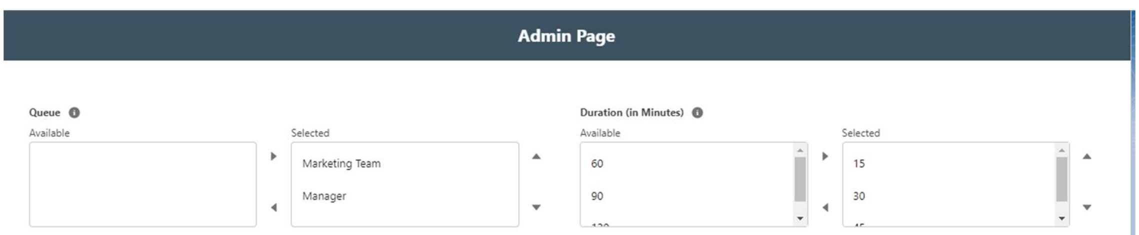
6. It will ask to verify the email address.
7. You will receive an email to verify.
8. Search and click on Email Alerts in quick find from setup.
9. Click on the Send an email to the queue.

10. Click on edit.
11. Scroll down to From Email Address.
12. Select the newly added Org email address.
13. Click on save.

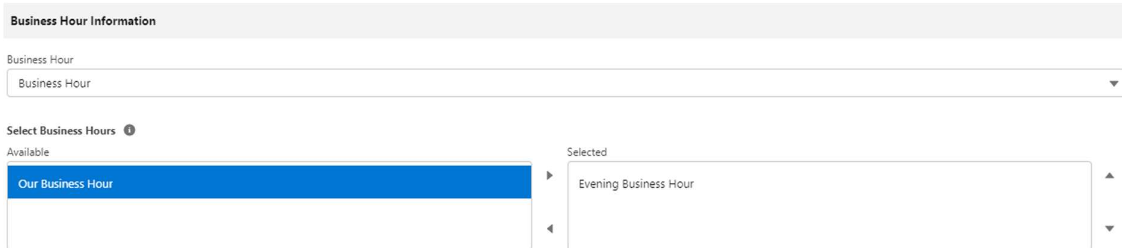


Set Up the Metadata for the community page:

1. Go to the Setup tab.
2. In the Information section, select queues which will be available in the community site.
3. Select Durations which will be available in the community site.



4. Check the Break checkbox if break time is needed.
5. If the break checkbox is checked, then specify the break time in minutes.
6. Click save and refresh the page once.
7. Go to the Business Hour section.
8. Choose if Business Hour or 24-hour system is required.
9. If Business Hour is chosen, then again choose which business hours to be selected.
10. Click save and refresh the page once.



11. Go to the URL link section.
12. Paste the Salesforce site/Community site link which is for the client.
13. Click save and refresh the page once.

Note: For site, Go to sites and open your site link in a new window. Add ”/” and createEventFromExtPage after that and press enter. Copy this link and page in the url link section.

For community site, we have explained it in Community site setup section of this document.

14. Go to the Additional Information section.
15. Select Lead or Contact, this will specify whether the external user will be a lead or contact. Also, can check for existing lead or contact if required with a check box provided.
16. Choose number of days to be displayed in the calendar.
17. Click save and refresh the page once.