

Gmail Calendar Connector Admin Guide

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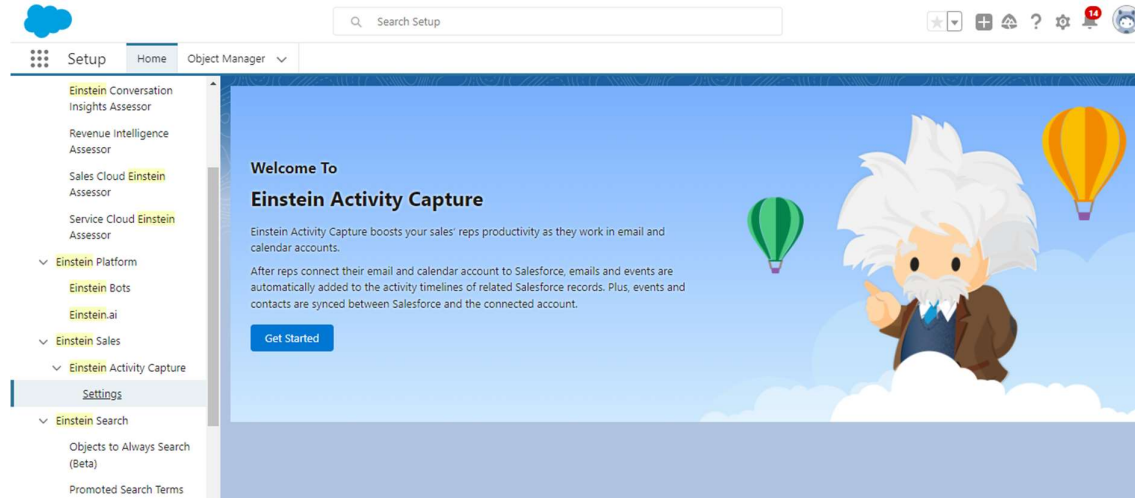
Package Pre-Installation Setup:

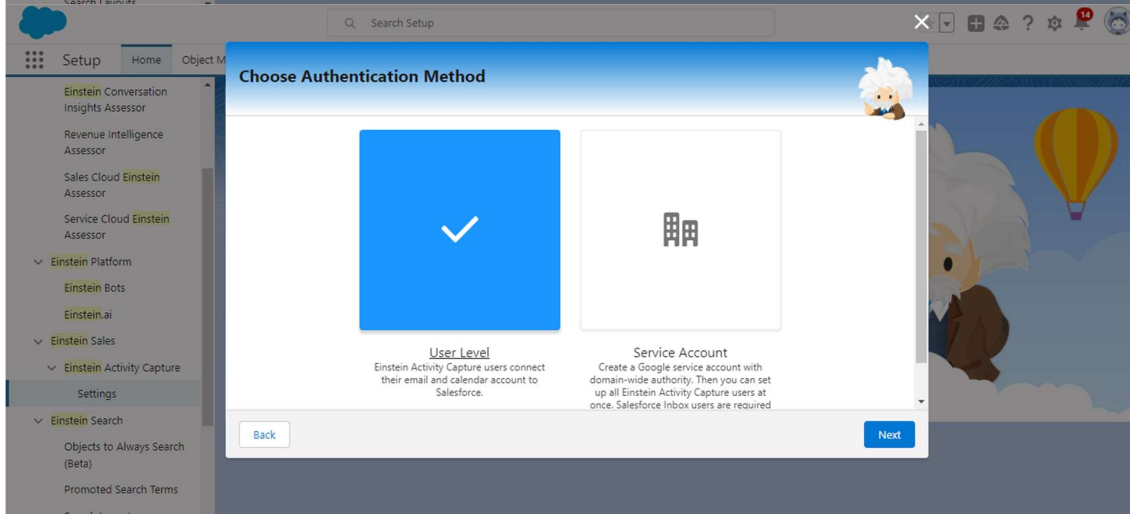
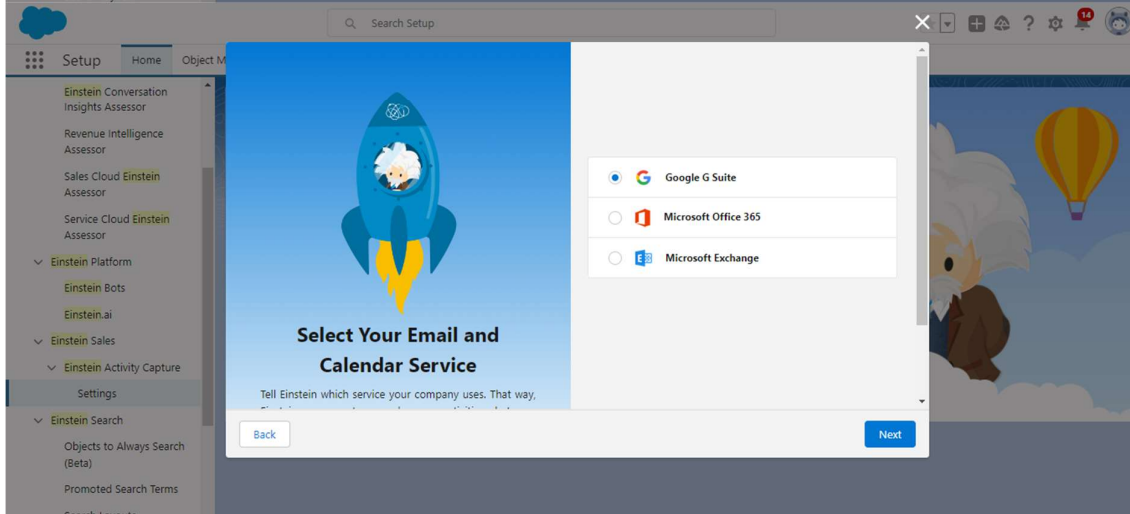
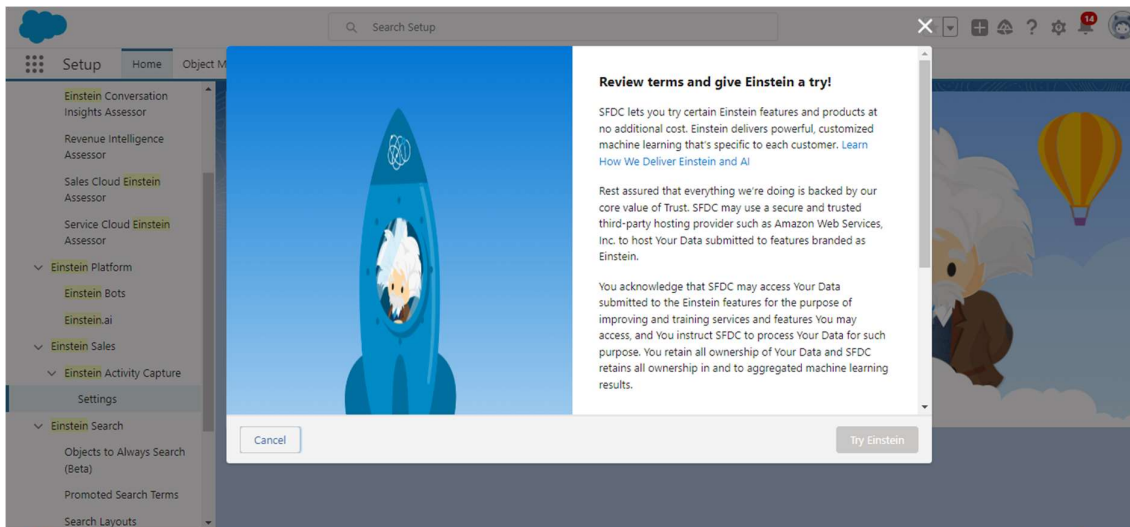
Before installing the package in the org, the admin needs to enable some settings.

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.





Setup

Home

Object Manager

Search Setup

Einstein Conversation Insights Assessor

Revenue Intelligence Assessor

Sales Cloud Einstein Assessor

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

Search Layouts

Name your Configuration

Give your configuration a unique name and describe what it does.

*Name
Google Calendar Connector

Description

☒ Active

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Object M

Search Setup

Einstein Conversation Insights Assessor

Revenue Intelligence Assessor

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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. ☒ Enabled

For the best sync experience, filter by Contacts Users Own.

Direction Both Directions Filters Contacts Users Own

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Einstein Conversation Insights Assessor

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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 ⓘ

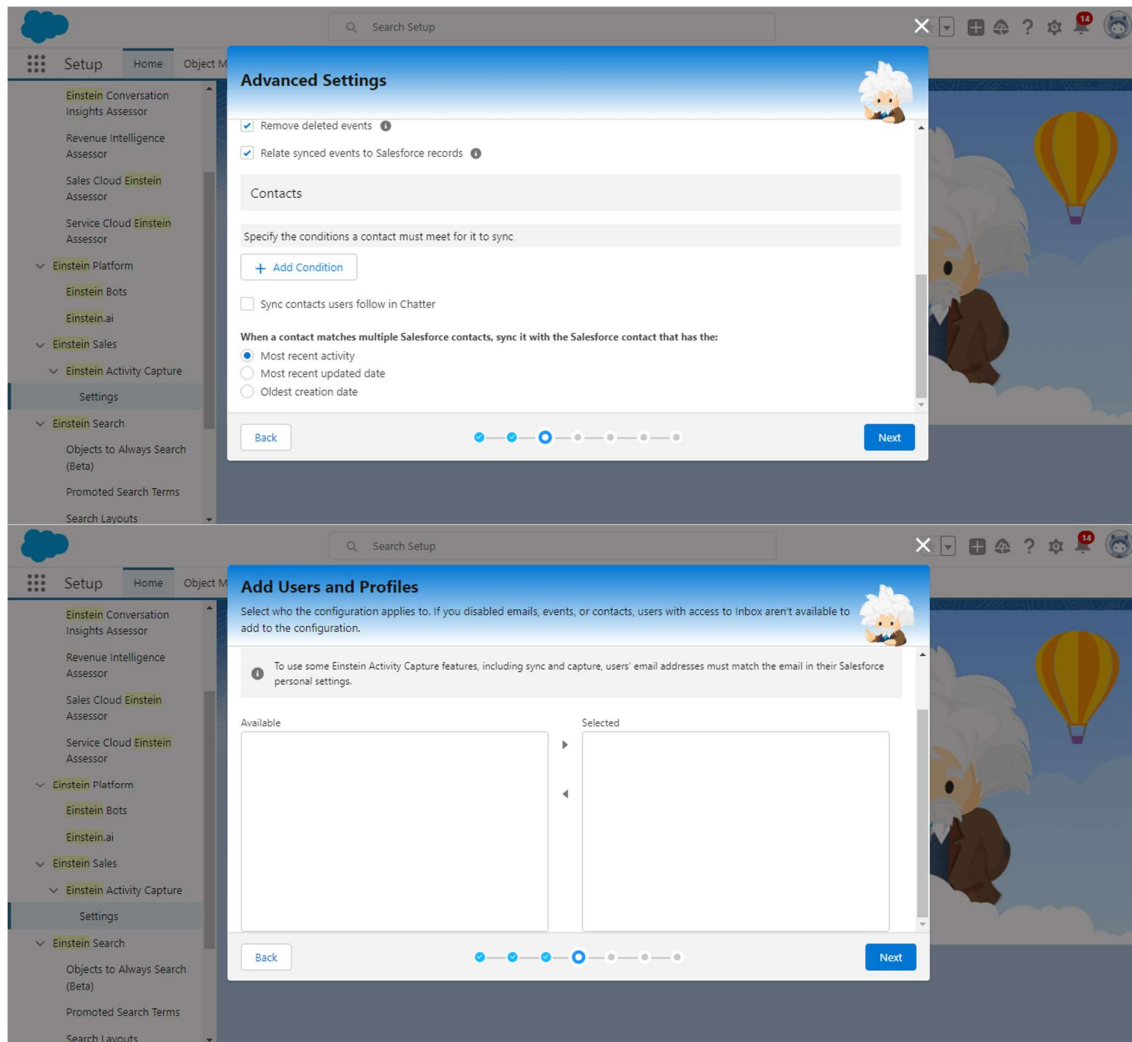
☒ Relate synced events to Salesforce records ⓘ

Contacts

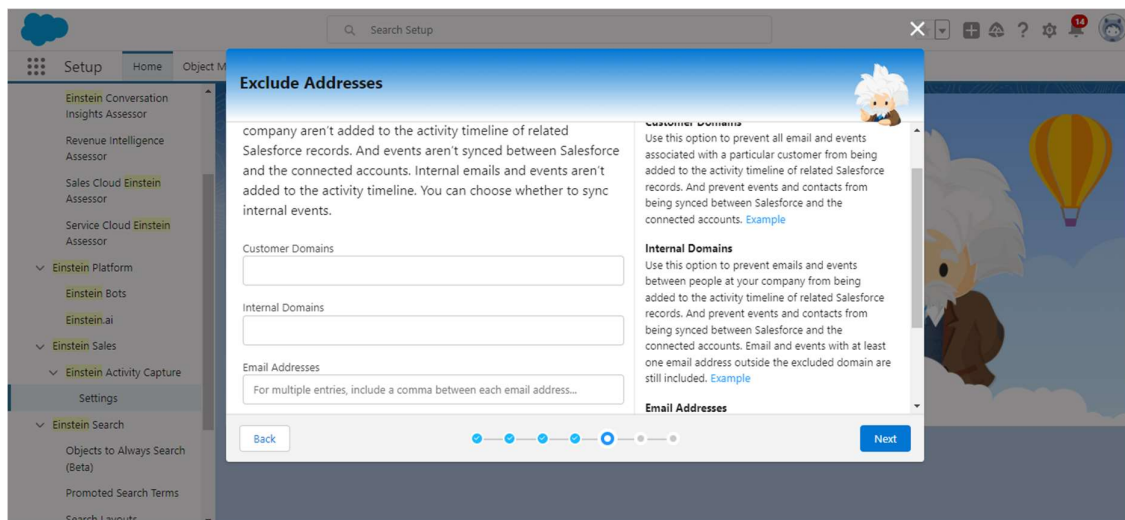
Specify the conditions a contact must meet for it to sync.

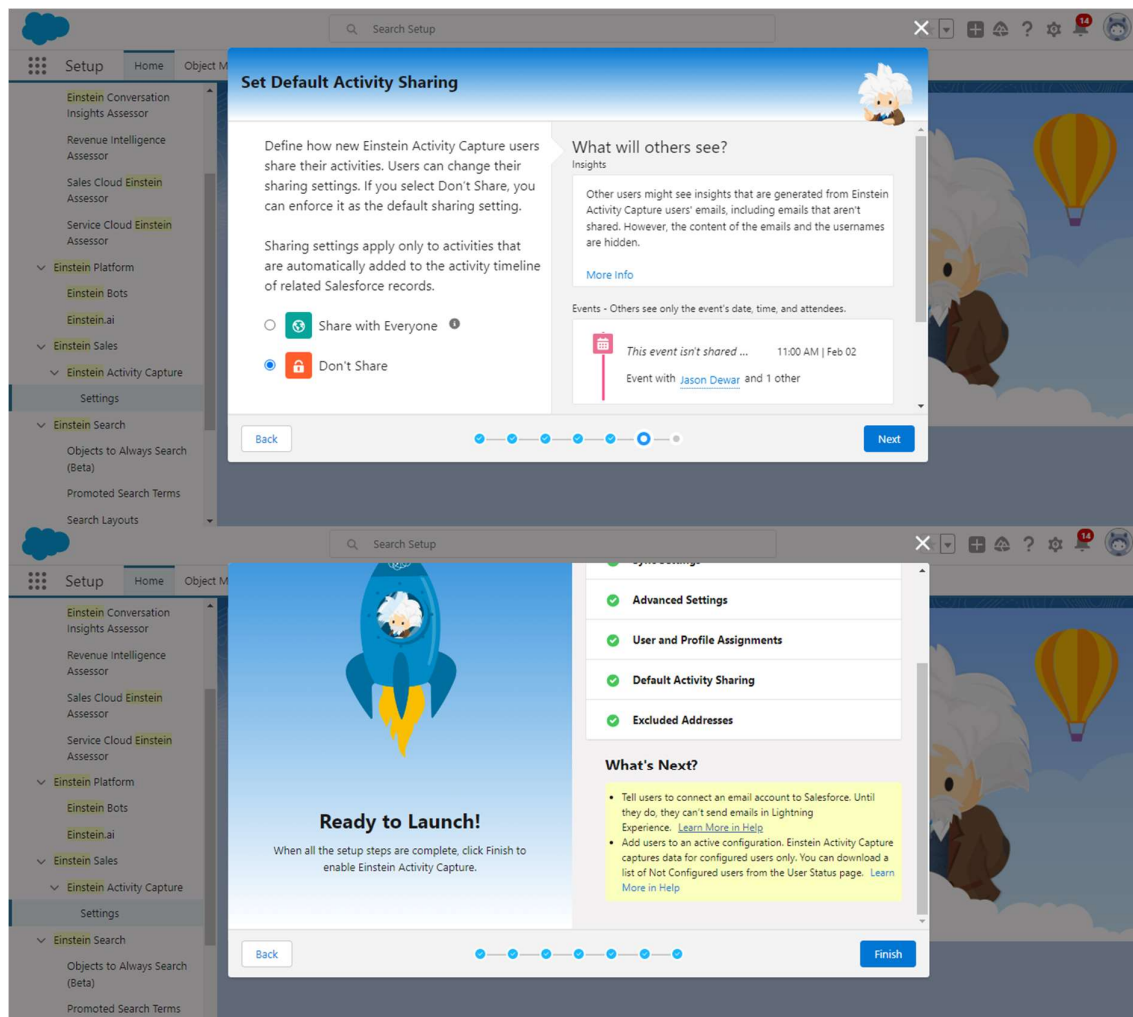
Back

Next



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.

Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.
If you enter blank business hours for a day, that means your organization does not operate on that day.

[Holidays \(1\)](#)

Business Hours Detail [Edit](#)

Business Hours Name	Our Business Hour	Time Zone
Business Hours	Sunday 24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
	Monday 9:30 AM to 6:30 PM	
	Tuesday 9:30 AM to 6:30 PM	
	Wednesday 9:30 AM to 6:30 PM	
	Thursday 9:30 AM to 6:30 PM	
	Friday 9:30 AM to 6:30 PM	
	Saturday 24 Hours	

Default Business Hours ☐

Active ☒

Created By [Dinesh Darshan](#) 3/21/2023, 11:47 AM

Last Modified By [Dinesh Darshan](#) 5/31/2023, 11:46 AM

[Edit](#)

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.

SELECT ID, Name from businesshours

Query Results - Total Rows: 4	
Id	Name
01m5i000001KUN5AA4	Default
01m5i000000bmhmAAA	Evening Business Hour
01m5i000000bmhrAAA	Our Business Hour
01m5i000000bmhwAAA	TwentyFourHours

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).

Profiles

Profile

Standard User

[Find Settings...](#) [Clone](#) [Edit Properties](#)

Profile Overview [Assigned Users](#)

Description	User License	Custom Profile
Salesforce	☒	☐

Created By [Pankaj Chittora](#) 2/28/2023, 4:14 PM

Last Modified By [Dinesh Darshan](#) 6/16/2023, 11:35 AM

Apps

[Assigned Apps](#)
Settings that specify which apps are visible in the app menu

[Assigned Connected Apps](#)
Settings that specify which connected apps are visible in the app menu

SETUP

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	standard user plus

Save Cancel

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.

User Edit

Test User 1

Save Save & New Cancel

General Information

First Name	Test	Role	SVP, Sales & Marketing
Last Name	User 1	User License	Salesforce
Alias	tuser	Profile	Standard User Plus
Email	h959767@gmail.com	Active	☒
Username	human@gmail.com	Marketing User	☐
Nickname	TestUser1	Offline User	☐
Title		Knowledge User	☐
Company		Flow User	☒
Department		Service Cloud User	☐
Division		Site.com Contributor User	☐
		Site.com Publisher User	☐
		WDC 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.

Additional Information

Business Hour

Locale Settings

Time Zone

Locale

Language

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

☐ Generate new password and notify user immediately

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.

SETUP
Queues

Queue Name and Email Address * Required Information

Enter the name of the queue and the email address to use when sending notifications (for example, when a case has been put in the queue). The email address can be for an individual or a distribution list. When an object is assigned to a queue, only the queue members will be notified.

Label

Queue Name

Queue Email

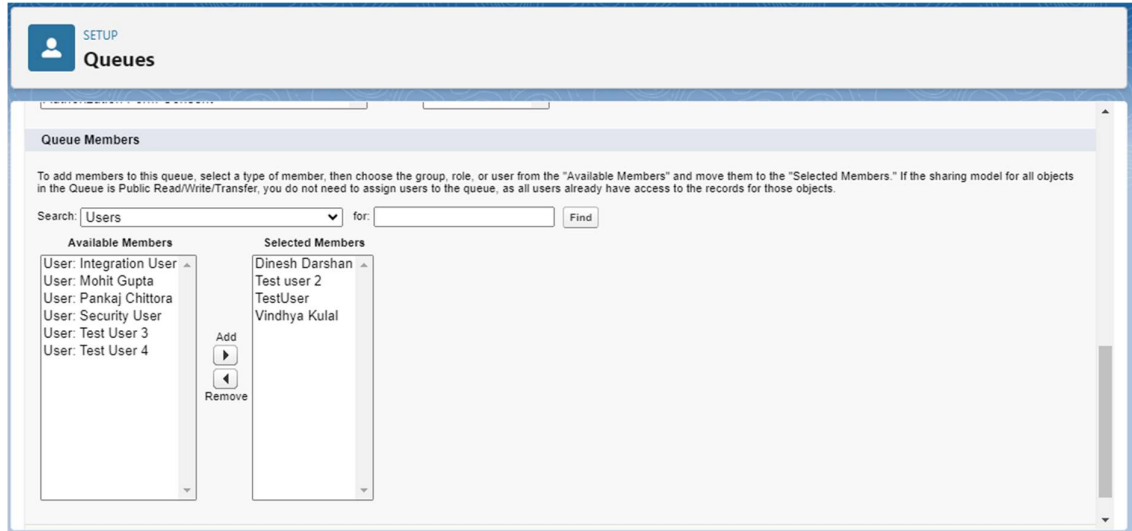
Send Email to Members ☒

Supported Objects

Select the objects you want to assign to this queue. Individual records for those objects can then be owned by this queue.

Available Objects		Selected Objects
Account Brand		Meeting Request
Action Plan		
Advanced Account Forecast Fact		
Advanced Account Forecast Fact Adjustment		
Advanced Account Forecast Set Partner		
Advanced Account Forecast Set Use		
Alternative Payment Method		
Analysis Summary		

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".

Setup Home Object Manager

Search Setup

work

Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

User Interface

Translation Workbench

Export

Import

Override

Translate

Translation Language

Workflow Rules

Workflow Rule

Email Alert to Meeting Request Owner (Managed)

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

This Workflow Rule is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Workflow Rule Detail

Clone Activate

Rule Name	Email Alert to Meeting Request Owner	Object	Meeting Request
Namespace Prefix	V2_GCC	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Installed Package	Google Calendar Connector		
Active	☐		
Description			
Rule Criteria	Meeting Request: Owner EQUALS Manager/Marketing Team		
Created By	Pankaj Chittora 7/18/2023, 6:19 PM	Modified By	Pankaj Chittora 7/19/2023, 11:16 AM

4. Clone the rule and give a name.

Setup Home Object Manager

Search Setup

work

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Workflow Rules

Edit Rule Email Alert to Meeting Request Owner

Step 2: Configure Workflow Rule

Step 2 of 3

Previous Save & Next Cancel

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Edit Rule

Object Meeting Request

Rule Name Email Alert to Meeting Reque

Description

Evaluation Criteria

Evaluate the rule when a record is:

☐ created

☒ created, and every time it's edited

You cannot add time-dependent workflow actions with this option.

5. Scroll down to Rule Criteria.

Setup Home Object Manager

Search Setup

work

Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

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Workflow Rules

You cannot add time-dependent workflow actions with this option.

☐ created, and any time it's edited to subsequently meet criteria

How do I choose?

Rule Criteria

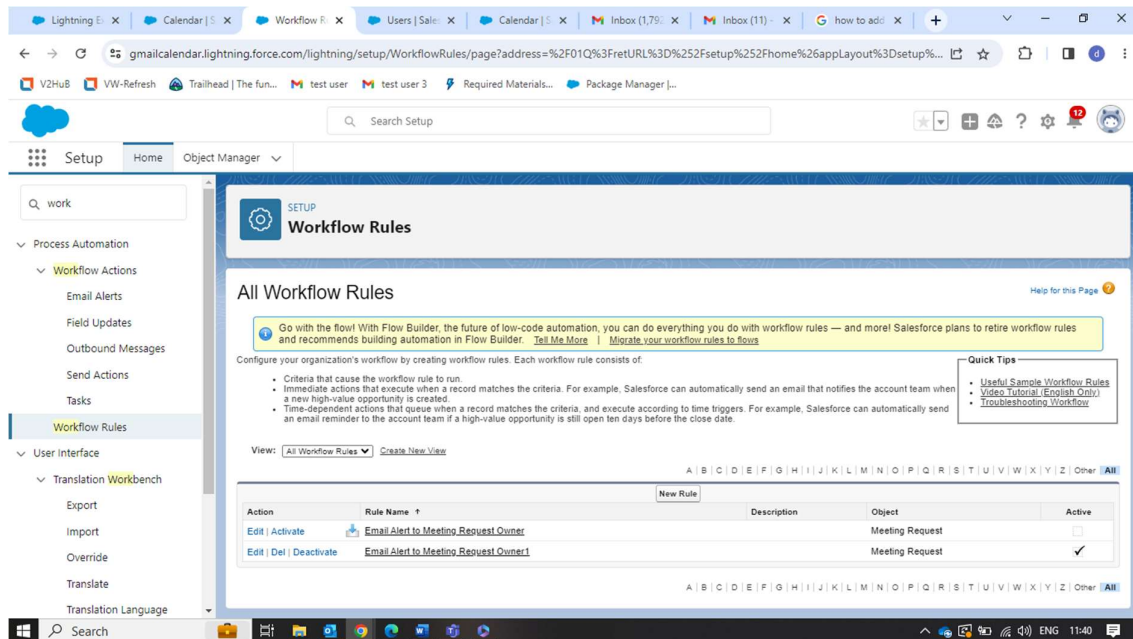
Run this rule if the criteria are met

Field	Operator	Value
Meeting Request: Owner	equals	
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

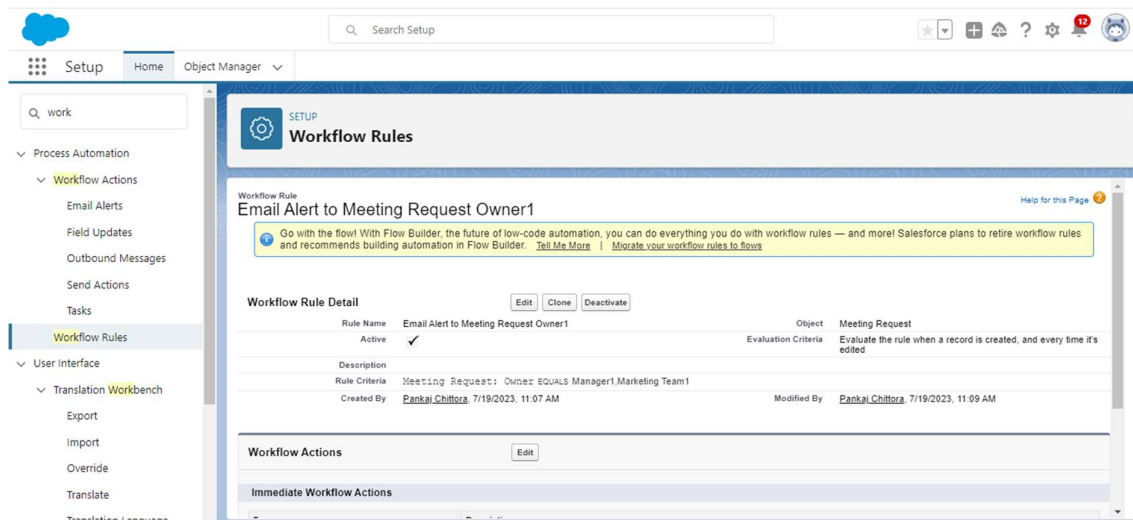
Add Filter Logic...

Previous Save & Next Cancel

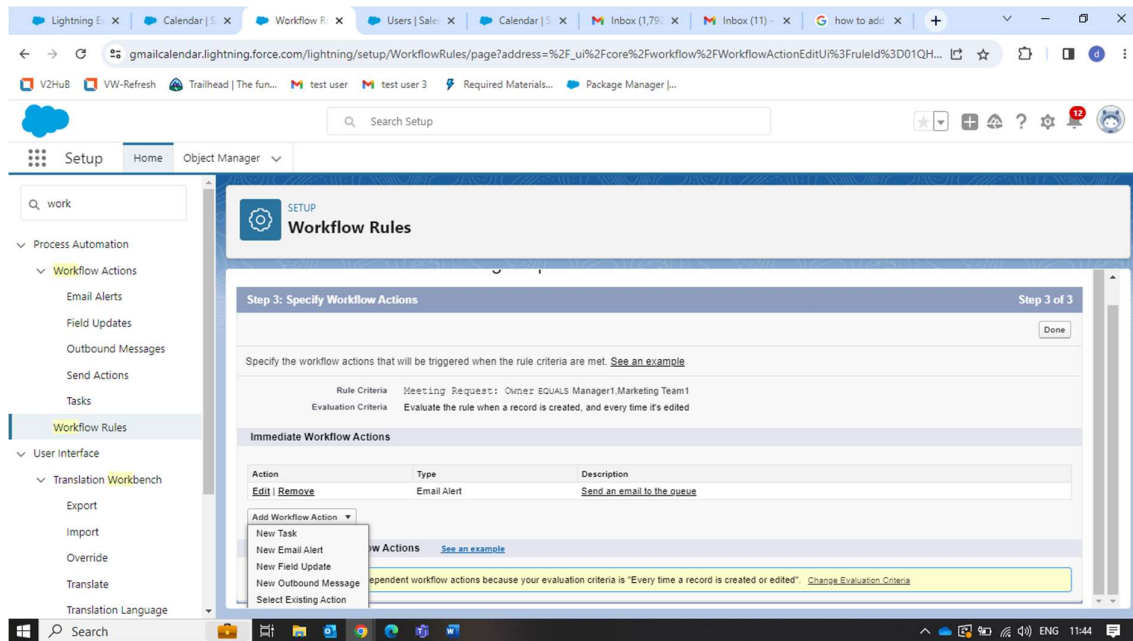
6. In the value field add your queue names that you have created by comma separated.
7. Click on save and next and then click on done.
8. Go back to workflow rules.



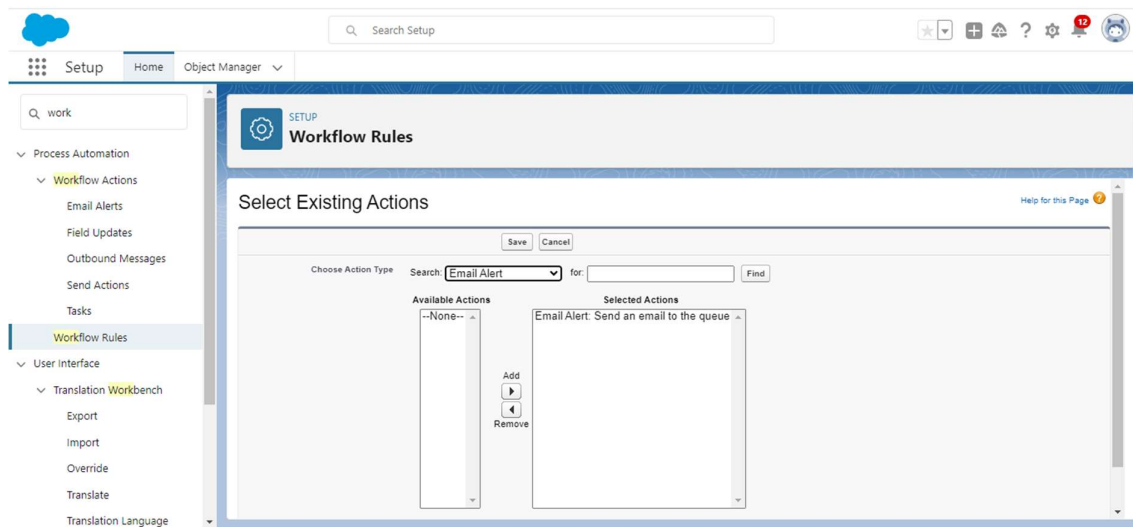
9. Click on newly cloned rule.



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.

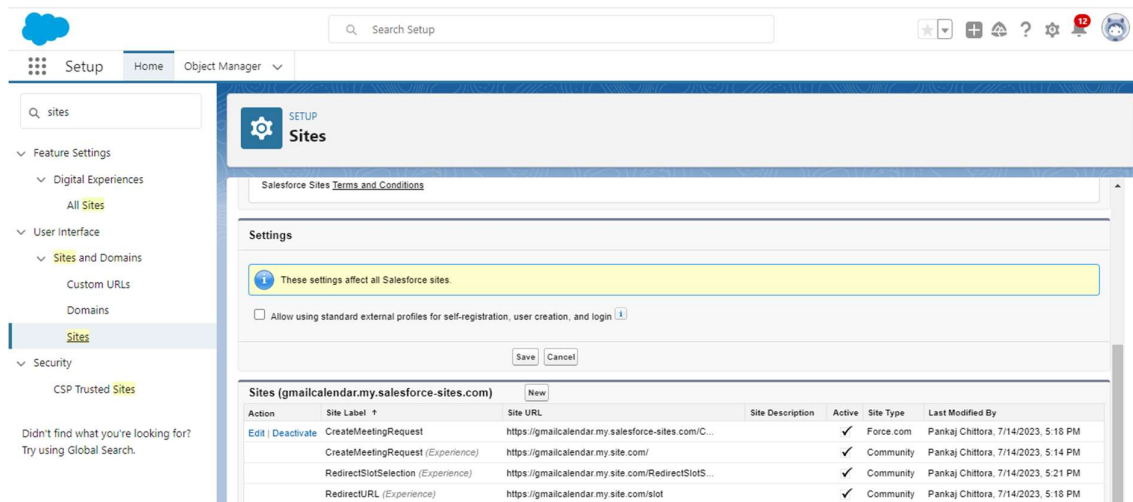


Setup Site Or Community Site:

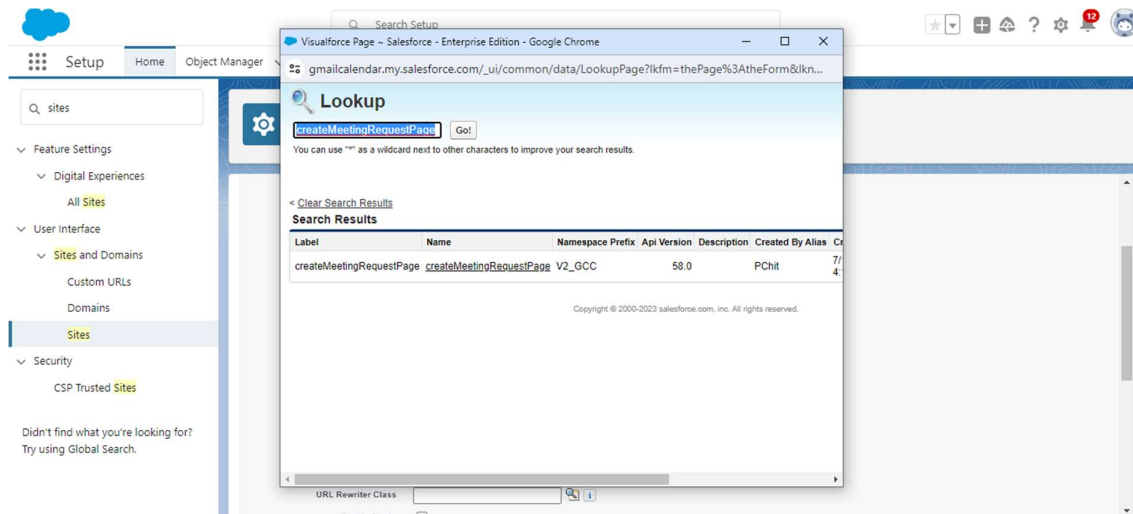
It depends on your organisation if you want to enable the digital experience and use the community site for the external usage or use the Salesforce sites. We have both the options available. Below described both Site setup and community site setup.

Site Setup:

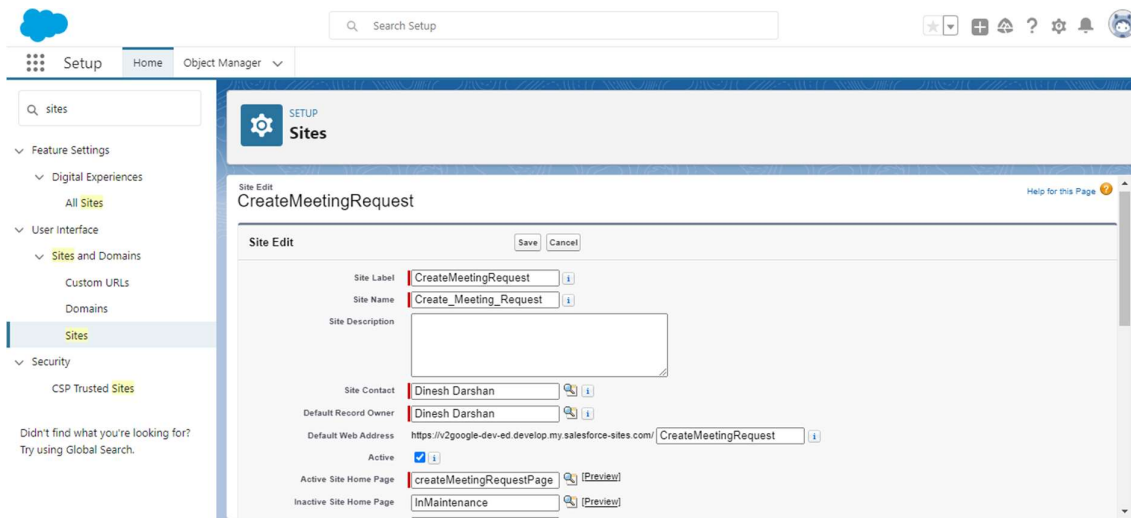
1. Go to Setup
2. Search and click on sites.
3. Setup the domain name.



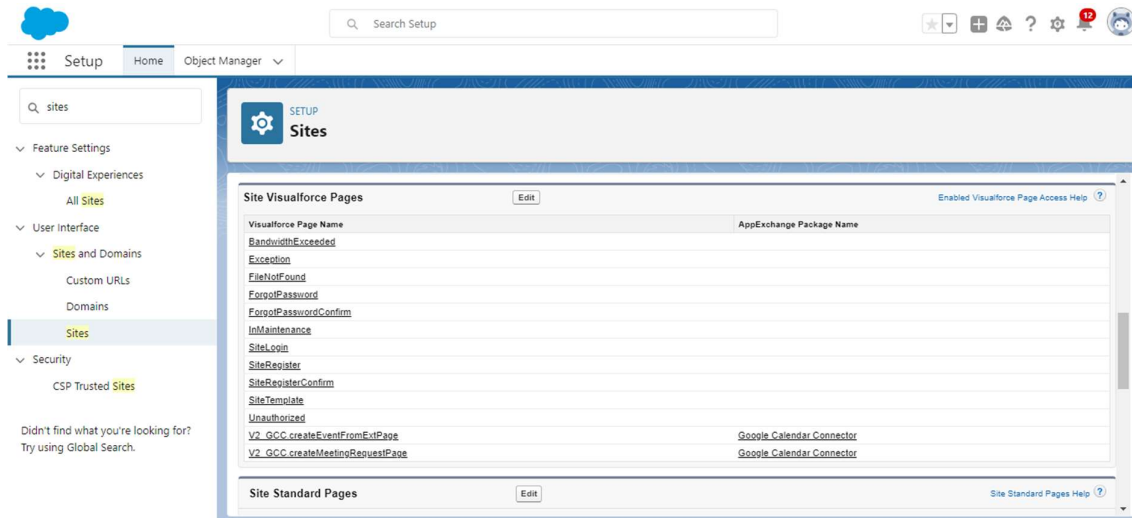
4. Click on new.
5. Enter site label.
6. Set up the Default Web Address.
7. Click Active.
8. Click on the search option in Active Site Home Page.
9. A window pops up, select the createMeetingRequestPage VF page.



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.

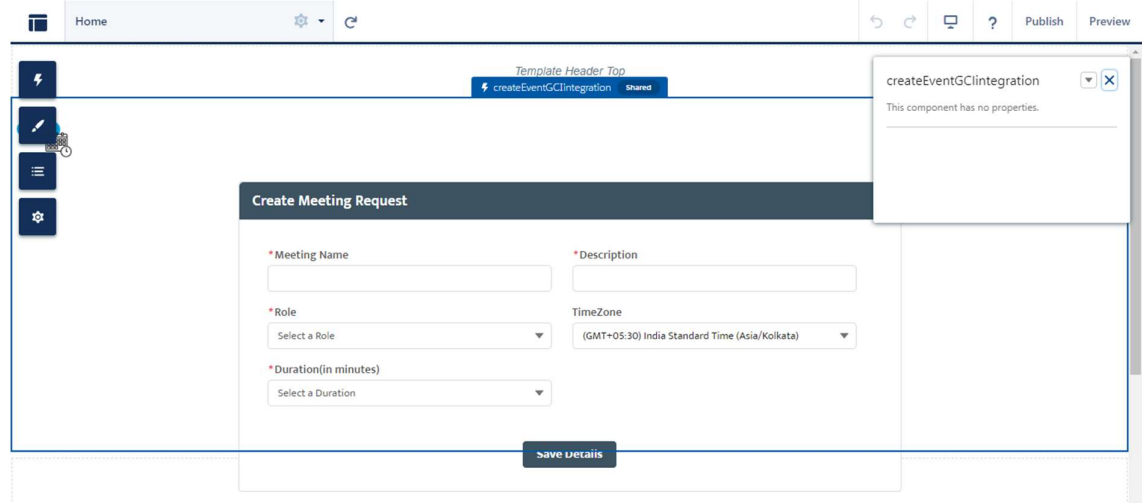
Site User Profile Setup:

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

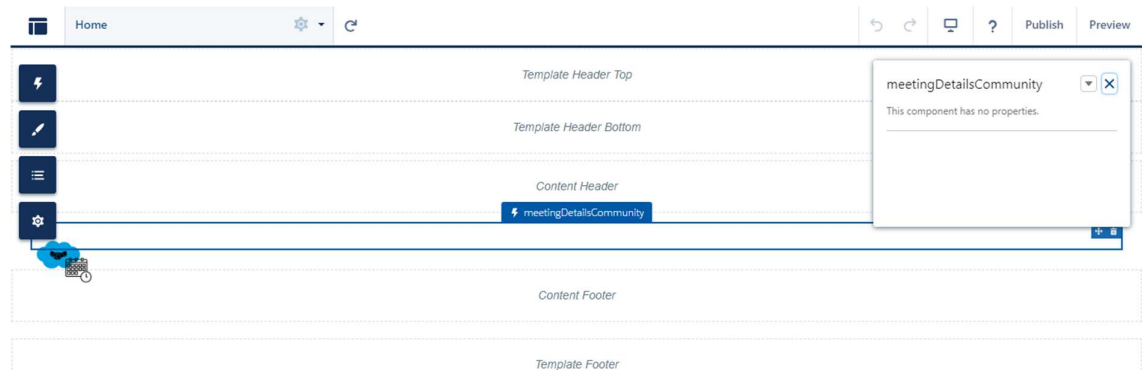
7. Go to guest profile and click on guest user and change the time zone according to your choice.

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 createEventGCIntegration 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.



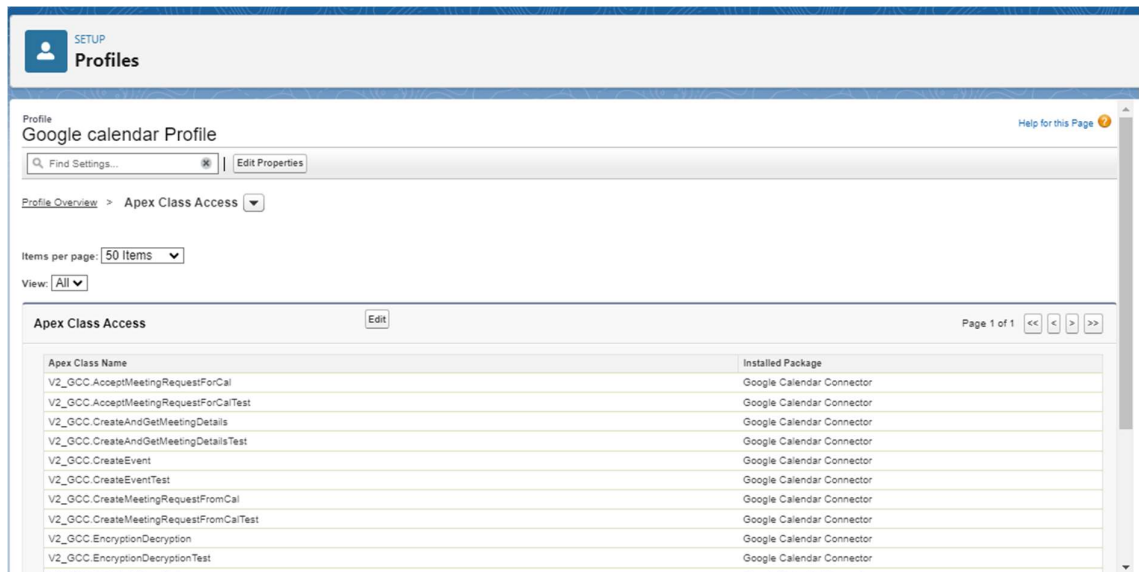
The screenshot shows the 'Admin Page' for Google Calendar. At the top, there's a navigation bar with links: Home, Accounts, Contacts, Meeting Details, Set Up, and GCC Tool. Below this, the 'Admin Page' header includes 'Information', 'Business Hour', 'URL Link', and 'More'. The main content area is titled 'Community Site URL link'. It contains a text input field with the URL 'https://v2solutions-2a-dev-ed.develop.my.site.com/slot/s' and a 'Save' button below it.

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.

The screenshot shows the 'General' settings page for a Salesforce site. The left sidebar contains a menu with options: Settings, General (selected), Theme, Languages, Navigation, Mobile Publisher, SEO, CMS Connect, Advanced, Security & Privacy, Developer, and Updates. The main content area is titled 'General' and includes the subtitle 'View and edit the main properties of your site.' Under 'Site Details', the 'Template' is set to 'Build Your Own'. The 'Public Access' section has a checked checkbox for 'Guest users can see and interact with the site without logging in'. The 'Site Title' is 'Google calendar'. The 'Published Status' shows the site is published at the URL 'https://v2solutions-2a-dev-ed.develop.my.site.com/s'. The 'Guest User Profile' section includes a link to 'Learn More' and a link to 'Google calendar Profile'.

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.

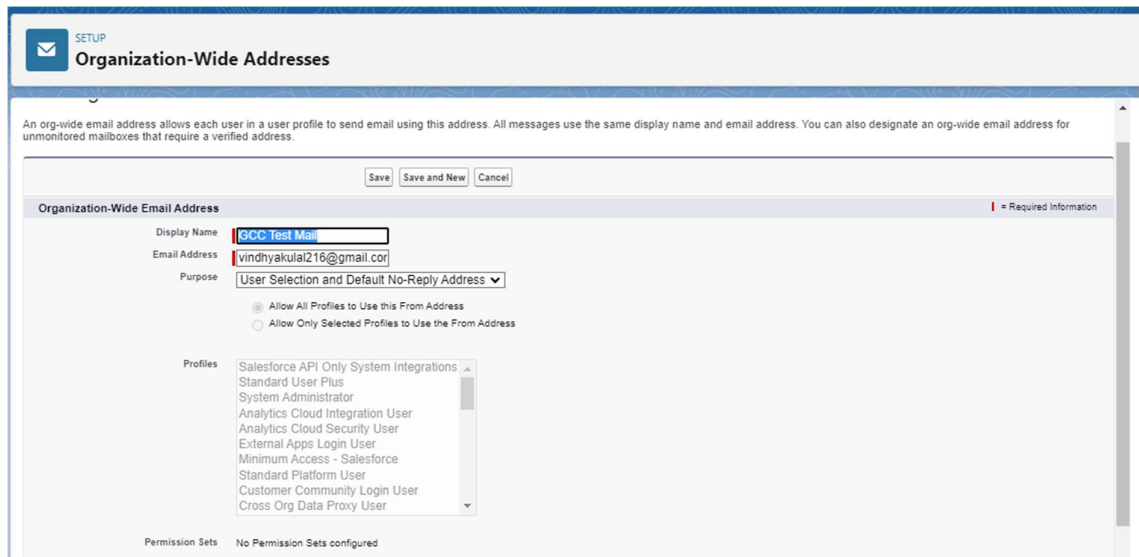


10. Click save finally.

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.

Business Hour Information

Business Hour

Business Hour

Select Business Hours ⓘ

Available

Our Business Hour

Selected

Evening Business Hour

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.

Additional Information

Lead/Contact

Contact

Number Of Days Calendar To Display(In Days)

30

☐ Check Existing Lead