

Google Calendar Connector User Guide

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Type of Users:

1. External User (Community Site User)
2. Internal User (Salesforce User)

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

Type of Flows:

1. External to Internal Flow.
2. Internal to External Flow.
3. Internal to Internal Flow.

External to Internal Flow:

Steps to Create a Meeting Request:

Scenario: If the external user is not an existing client of the organisation and wants to schedule a meeting with an internal user of the organisation.

1. Click on the site or community site URL from the company website.



Create Meeting Request

* Meeting Name

* Description

* Role

Select a Role

TimeZone

(GMT+05:30) India Standard Time (Asia/Kolkata)

* Duration(in minutes)

Select a Duration

Save Details

2. In community site, fill up the meeting details.
 - a. Enter Meeting name.
 - b. Enter Description.



Create Meeting Request

* Meeting Name

check

* Description

check

* Role

Select a Role

TimeZone

(GMT+05:30) India Standard Time (Asia/Kolkata)

* Duration(in minutes)

Select a Duration

Save Details

- c. Select the Role (Designation) with whom you want to schedule a meeting.



Create Meeting Request

* Meeting Name

check

* Description

check

* Role

Select a Role

Manager

Marketing Team

TimeZone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Save Details

- d. Time zone, whichever time zone you are in.



Create Meeting Request

* Meeting Name
check

* Role
Manager

* Duration(in minutes)
Select a Duration

* Description
check

TimeZone
(GMT+05:30) India Standard Time (Asia/Kolkata)

Save Details

e. Duration of the Meeting.



Create Meeting Request

* Meeting Name
check

* Role
Manager

* Duration(in minutes)
Select a Duration

* Description
check

TimeZone
(GMT+05:30) India Standard Time (Asia/Kolkata)

Save Details

- f. After selecting the duration, the calendar shows up where you can select slots whichever is suitable.
- g. Can select multiple time slots.

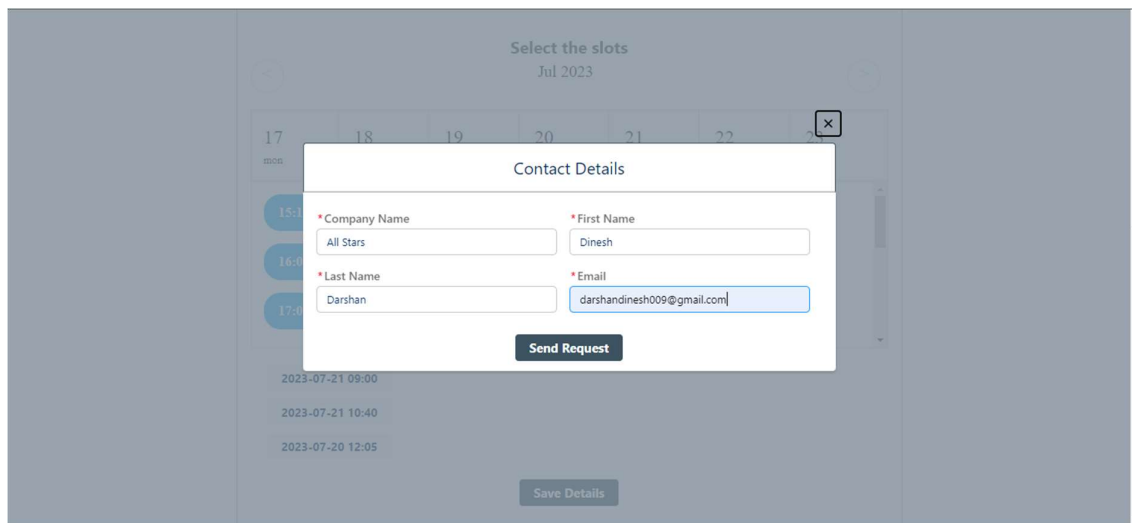
Select the slots
Jul 2023

17 mon	18 tue	19 wed	20 thurs	21 fri	22 sat	23 sun
15:10	09:00	09:25	09:00	09:00		
16:05	09:55	10:20	11:10	10:40		
17:00	10:50	11:15	12:05	11:35		

2023-07-21 09:00
2023-07-21 10:40
2023-07-20 12:05

Save Details

3. Click save details.
4. Enter Company Name, First Name, Last Name and Email Address and click send request.



The screenshot shows a web interface for creating a meeting. A modal titled "Contact Details" is open, displaying input fields for Company Name, First Name, Last Name, and Email. The background shows a calendar for July 2023 with a "Select the slots" header and a "Save Details" button at the bottom.

Select the slots
Jul 2023

17 18 19 20 21 22

15:00 16:00 17:00

2023-07-21 09:00
2023-07-21 10:40
2023-07-20 12:05

Save Details

Contact Details

*Company Name: All Stars

*First Name: Dinesh

*Last Name: Darshan

*Email: darshandinesh009@gmail.com

Send Request



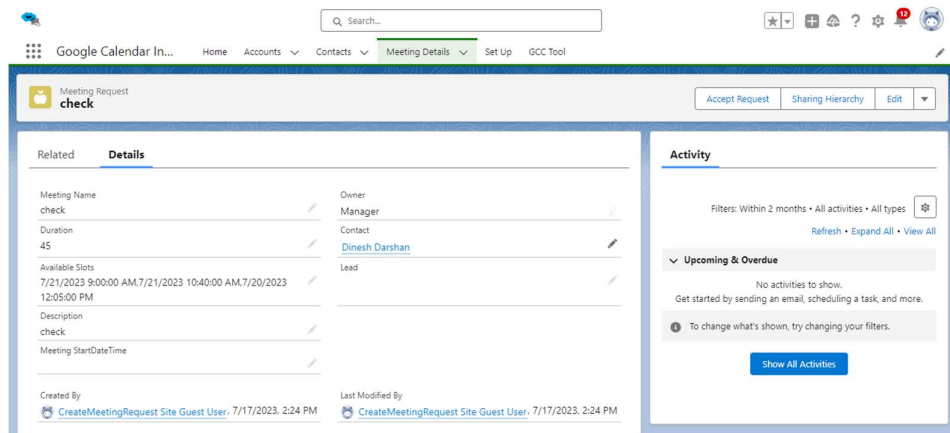
✓ Meeting Request Created

Meeting details	
Meeting Name	check
Meeting Description	check
Meeting Duration	45
Available Slots	7/21/2023 9:00:00 AM,7/21/2023 10:40:00 AM,7/20/2023 12:05:00 PM

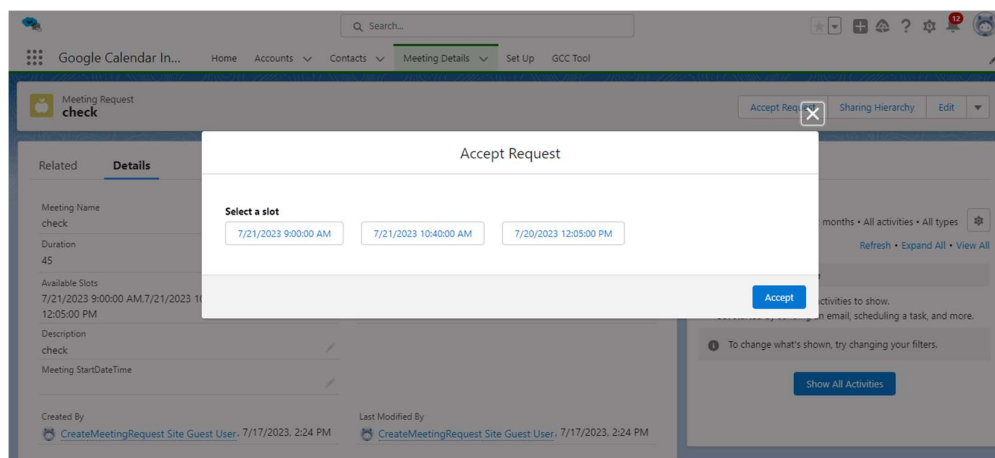
Steps to accept meeting request:

Scenario 1: Accept meeting request by internal user. Request sent by External User:

1. Go to meeting request record page.

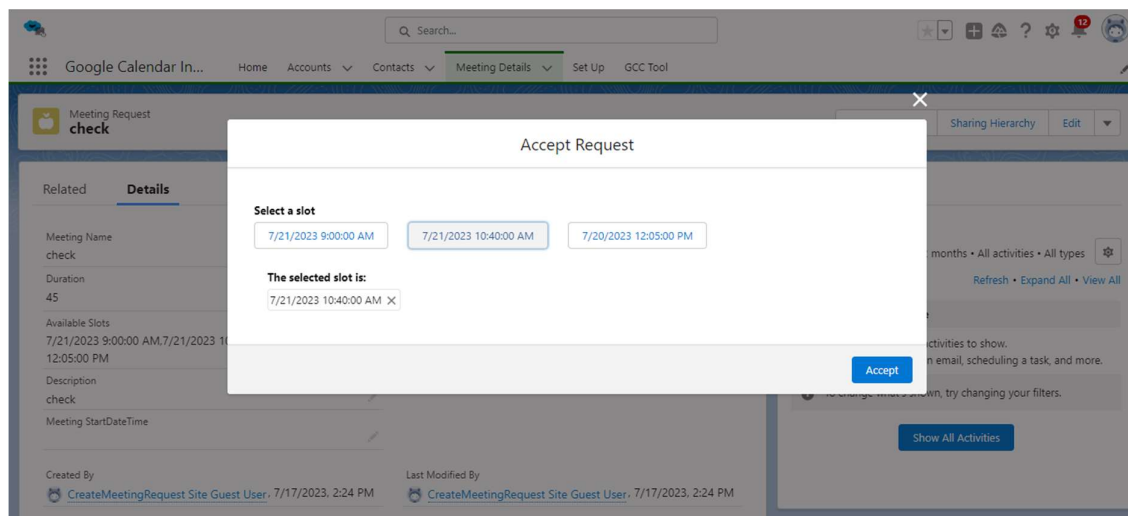


2. Click the accept request action button.



3. This will pop up a custom component which will ask to select one slot from the available slots provided by the sender.

4. Select one slot and click accept.



5. The event will be created, and Google calendar will be blocked of both users (Sender and Receiver).

Internal to External Flow

Scenario 1: Steps to Create Meeting Requests: Create meeting request to existing client (Internal to Client flow):

1. Go to GCC Tool tab.

The screenshot shows the 'Schedule a Meeting' form in the GCC Tool tab. The form is divided into two columns. The left column contains fields for 'Host' (Pankaj Chittora), 'Duration (in minutes)' (a dropdown menu with 'Select a Duration' selected), 'Account Name' (a search bar with 'Search Accounts...' placeholder), and an 'Add Users' toggle switch. The right column contains fields for 'Description' (a text input with 'Enter Description...' placeholder), 'Meeting Name' (a text input with 'Enter Meeting Name...' placeholder), and 'Add Contacts' (a search bar with a magnifying glass icon). A 'Create' button is located at the bottom center of the form.

2. Enter all details.
 - a. Description.
 - b. Duration.
 - c. Meeting Name.

The screenshot shows the 'Schedule a Meeting' form with details entered. The 'Duration (in minutes)' dropdown menu is open, showing options: 15, 45 (selected), 60, and 90. The 'Description' field contains 'Meeting check', and the 'Meeting Name' field also contains 'Meeting check'. The 'Add Contacts' search bar is empty. Below the form, there is a section titled 'Select the slots' with a calendar view for July 2023.

- d. Company Name (Account).

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Schedule a Meeting

Host
Pankaj Chittora

*Duration(in minutes)
45

Account Name
All

*Description
Meeting check

*Meeting Name
Meeting check

Add Contacts
Q

Select the slots

Jul 2023

e. Add contact(s) of the account.

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Schedule a Meeting

Host
Pankaj Chittora

*Duration(in minutes)
45

Account Name
All Stars

Add Users ☐

*Description
Meeting check

*Meeting Name
Meeting check

Add Contacts
Q dinesh

Dinesh Darshan

Select the slots

Jul 2023

3. Select some suitable slots.

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Jul 2023

17 mon	18 tue	19 wed	20 thurs	21 fri	22 sat	23 sun
15:10	09:00	09:25	09:00	09:00		
16:05	09:55	10:20	11:10	10:40		
17:00	10:50	11:15	12:05	11:35		
	11:45	12:10	12:00	12:10		

The selected slots are:

- 2023-07-19 10:20
- 2023-07-20 12:05
- 2023-07-21 09:00

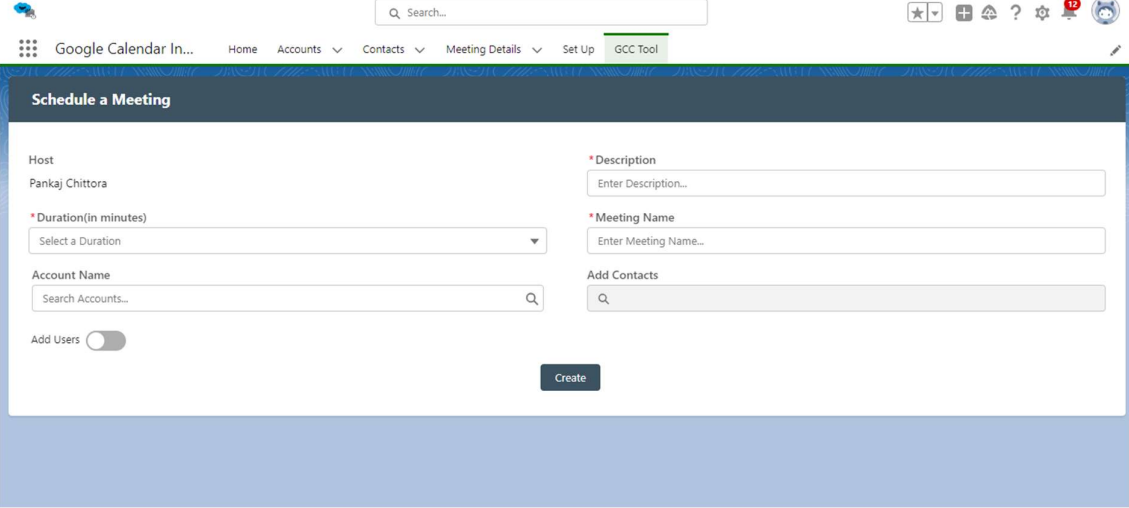
4. Click create.
5. You will be redirected to the newly created record page.

Accept Meeting Request by external client: If external user is an existing client of the organisation and the internal user has requested a meeting request.

1. Click on the meeting request link sent by the internal user via email.
2. The URL will redirect to a site or community page.
3. The meeting details would have been auto populated.
4. Select the appropriate slot suitable.
5. Click save.
6. You will receive an email of the meeting details and the google calendar will be blocked at the chosen time slot.

Scenario 2: Create meeting request to existing clients and users of the organisation (Group Meeting):

1. Go to the GCC Tool tab.



The screenshot shows a web application interface for scheduling a meeting. At the top, there is a navigation bar with a search bar and several icons. Below the navigation bar, the 'GCC Tool' tab is selected. The main content area is titled 'Schedule a Meeting' and contains a form with the following fields:

- Host:** Pankaj Chittora
- *Duration(in minutes):** A dropdown menu with the option 'Select a Duration'.
- Account Name:** A search bar with the placeholder 'Search Accounts...' and a magnifying glass icon.
- *Description:** A text input field with the placeholder 'Enter Description...'.
- *Meeting Name:** A text input field with the placeholder 'Enter Meeting Name...'.
- Add Contacts:** A search bar with a magnifying glass icon.
- Add Users:** A toggle switch.
- Create:** A button at the bottom right of the form.

2. Enter all details.
 - a. Description.
 - b. Duration.
 - c. Meeting Name.

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Schedule a Meeting

Host
Pankaj Chittora

*Duration(in minutes)
45

*Description
Meeting check

*Meeting Name
Meeting check

Add Contacts
Q

Select the slots
Jul 2023

d. Company Name (Account).

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Schedule a Meeting

Host
Pankaj Chittora

*Duration(in minutes)
45

Account Name
All

*Description
Meeting check

*Meeting Name
Meeting check

Add Contacts
Q

Select the slots
Jul 2023

e. Add contact(s) of the account.

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Schedule a Meeting

Host
Pankaj Chittora

*Duration(in minutes)
45

Account Name
All Stars

Add Users ☐

*Description
Meeting check

*Meeting Name
Meeting check

Add Contacts
Q dinesh
Dinesh Darshan

Select the slots
Jul 2023

- f. Toggle the Add user button.
- g. Search user(s) from the search bar and select.

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Meeting Name: Meeting check

Duration: 45

Account Name: All Stars

Add Users: ☒

Add Contacts: Dinesh Darshan

Search for users: Test User1 test user2

Calendar view: Jul 2023

17 mon	18 tue	19 wed	20 thurs	21 fri	22 sat	23 sun

3. Select some suitable slots.

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Calendar view: Jul 2023

17 mon	18 tue	19 wed	20 thurs	21 fri	22 sat	23 sun
15:10	09:00	09:25	09:00	09:00		
16:05	09:55	10:20	11:10	10:40		
17:00	10:50	11:15	12:05	11:35		
	11:45	12:10	12:00	12:10		

The selected slots are:

- 2023-07-19 10:20
- 2023-07-20 12:05
- 2023-07-21 09:00

4. Click Create.
5. You will be redirected to the newly created record page.

Google Calendar In... Home Accounts Contacts Meeting Details Set Up GCC Tool

Meeting Request: Meeting check

Accept Request Sharing Hierarchy Edit

Details

Meeting Name: Meeting check

Duration: 45

Available Slots: 7/19/2023 10:20:00 AM, 7/20/2023 12:05:00 PM, 7/21/2023 9:00:00 AM

Description: Meeting check

Meeting Start Date Time

Created By: Pankaj Chittora, 7/17/2023, 2:12 PM

Last Modified By: Pankaj Chittora, 7/17/2023, 2:12 PM

Activity

Filters: Within 2 months • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.

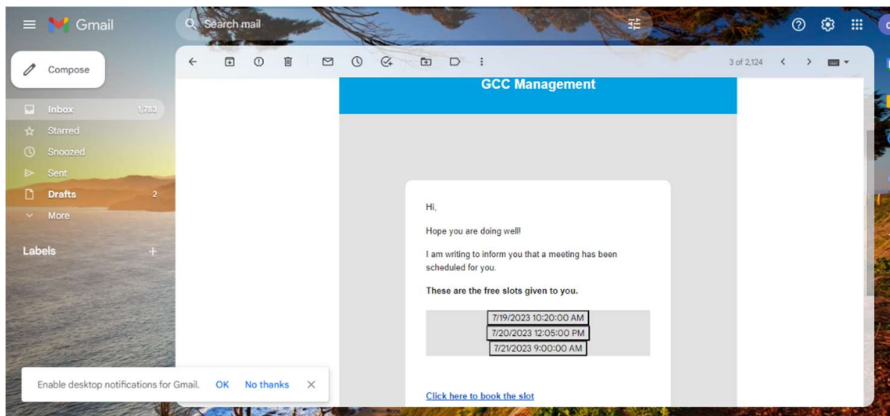
Get started by sending an email, scheduling a task, and more.

To change what's shown, try changing your filters.

Show All Activities

Accept meeting request if the internal user has requested the meeting for multiple users (Group Meeting):

1. The receivers will get an URL via email.



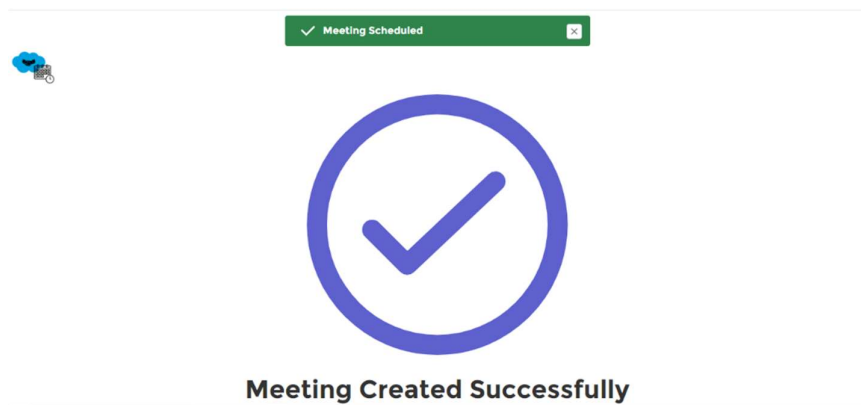
2. Click on the URL to visit the site or community site.

A screenshot of a web form titled 'Meeting Details'. It has several sections: 'Meeting Name' with a dropdown menu showing 'Meeting check'; 'Description' with a dropdown menu showing 'Meeting check'; 'Select a slot' with three buttons: '7/19/2023 10:20:00 AM', '7/20/2023 12:05:00 PM', and '7/21/2023 9:00:00 AM'. The 'Organiser' is 'Pankaj Chittora'. The 'PARTICIPANTS' section has two sub-sections: 'Clients' with 'Name: Dinesh Darshan' and 'EmailID: darshandinesh009@gmail.com', and 'Users' with 'Name: Test User1' and 'EmailID: h959767@gmail.com'. A blue 'Schedule' button is at the bottom right.

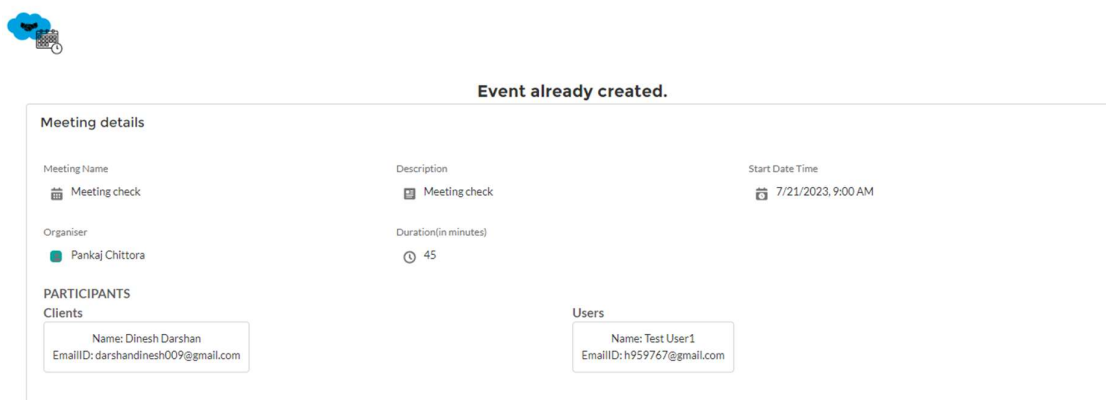
3. Choose one slot from the available slots.

A screenshot of the same 'Meeting Details' web form as above. In this version, the '7/21/2023 9:00:00 AM' slot button is highlighted in blue, indicating it has been selected. All other elements remain the same.

4. Click save.
5. The event will be created, and Google calendar will be blocked for all the users (Sender and Receivers).



6. The first one who accepts the request and schedules, it will affect all the participants. Everyone's calendar will be blocked. Later if other users try to open the link, it will show as below-



Internal to Internal Flow:

Scenario 2: Create meeting request to internal user.

1. Go to the GCC Tool tab.
2. Enter all details.
 - a. Description.
 - b. Duration.
 - c. Meeting Name.
 - d. Toggle the Add user button.
 - e. Search user from the search bar and select.

3. Select some suitable slots.
4. Click Create.
5. You will be redirected to the newly created record page.

Accept meeting request for internal user sent by internal user:

1. The receivers will get an URL via email.
2. Click on the URL to visit the site or community site.
3. Choose one slot from the available slots.
4. Click save.
5. The event will be created, and Google calendar will be blocked for all the users (Sender and Receivers).