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1 - Overview

EmailLiveConnect for Gmail offers the option of displaying relevant emails of the current user live in Salesforce. The selection of emails takes place depending on the context. If the user is looking at one contact, for example, the emails that he or she has exchanged with this person are displayed directly in the contact record. It is, however, also possible to display the emails for several complete domains of a customer or only those which refer to the reference number of an offer. In principle, a custom configuration can be created for almost every default or user-defined object to display the relevant emails.

To keep the configuration time and associated costs as low as possible, we supply ready-made default configurations for the following objects.

- Lead
- Contact
- Account
- Opportunity

- Case

2 - Gmail views

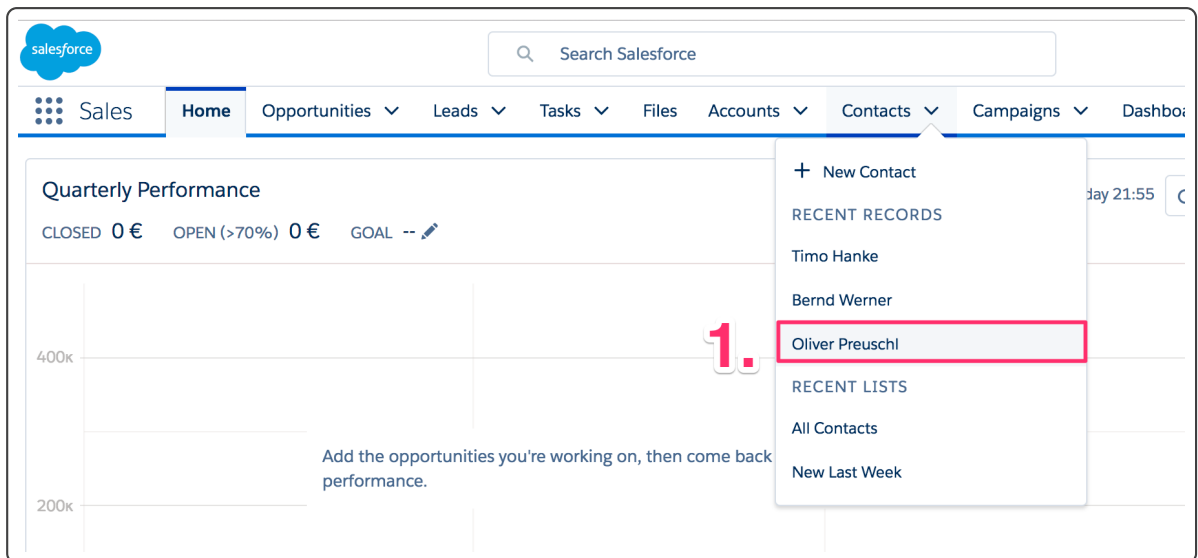
In principle, Gmail messages can be displayed in almost every Salesforce object. For this purpose, different configurations must be made depending on the Salesforce interface used.

Interface	Configuration
Classic	1. Possible creation of a new Visualforce page (This step is only necessary for objects for which no configuration is provided) 2. Embedding the Visualforce page in the appropriate page layout
Lightning	1. Embedding the Lightning components in the appropriate Lightning page

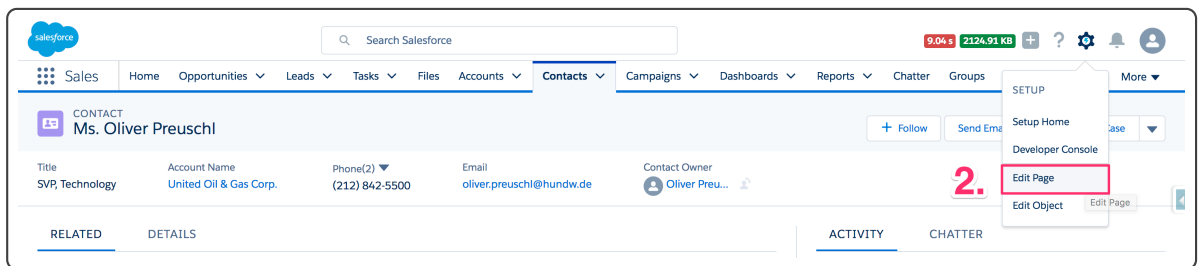
2.1 - Lightning Experience

To add the Gmail view to a record page for Salesforce Lightning, please proceed as follows.

1. Open a record of the object (1)

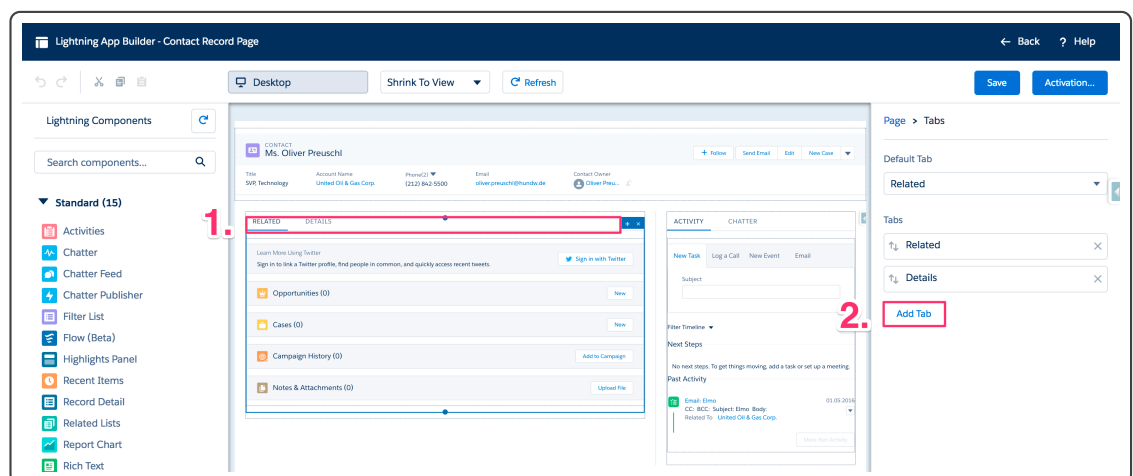


2. Click on **Setup->Edit Page (2)**



3. Create a new **Gmail** tab

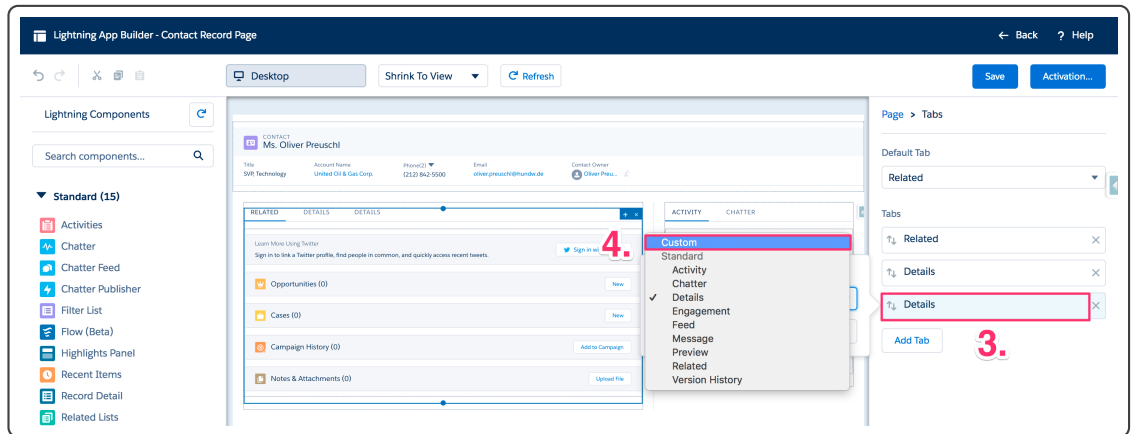
1. Select the tab view (1)



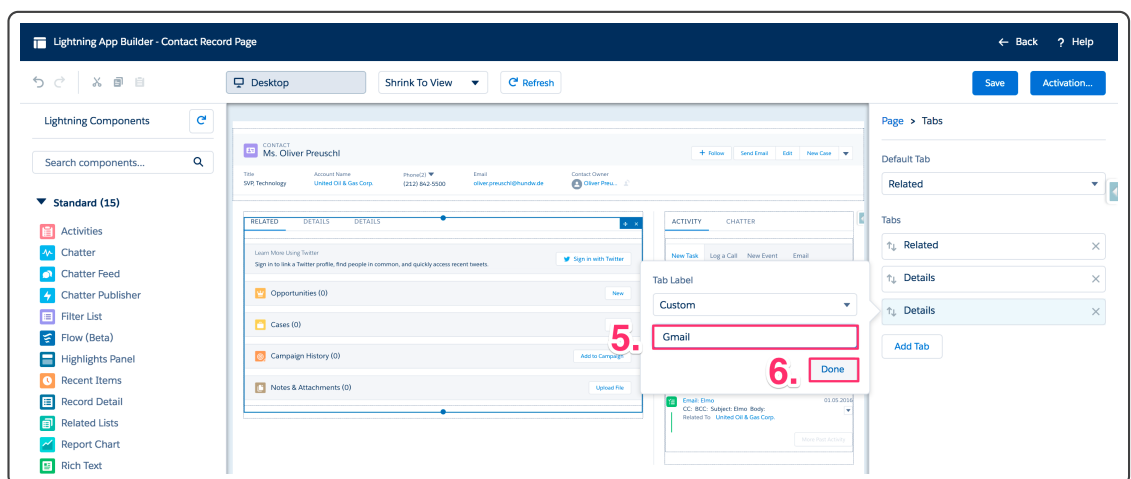
2. Click on **Add Tab (2)**

3. Click on the new tab (3)

4. Choose **Custom** from the tab title selection list (4)



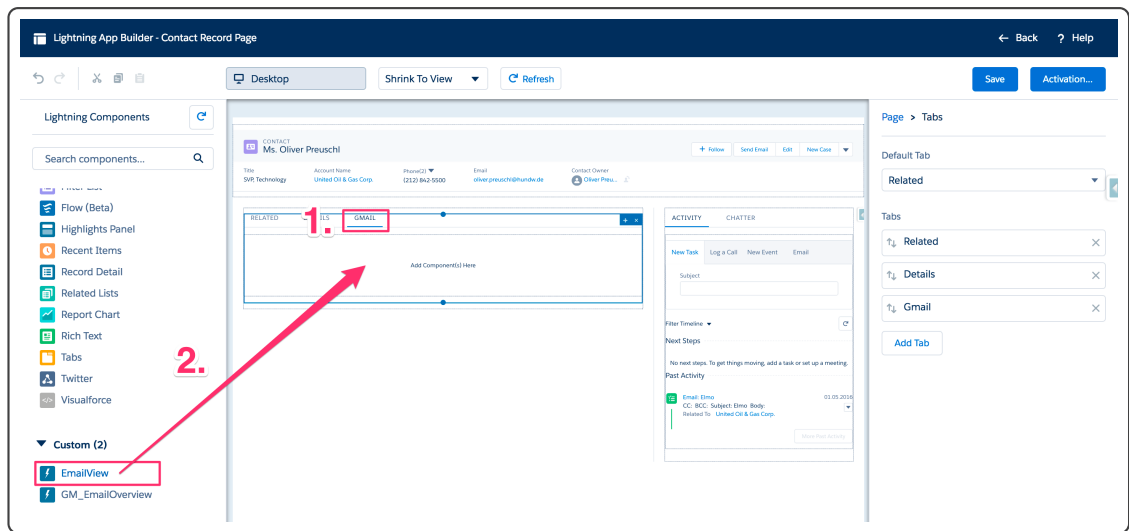
5. Enter a name for the tab (e.g. *Gmail*) (5)



6. Click on **Done** (6)

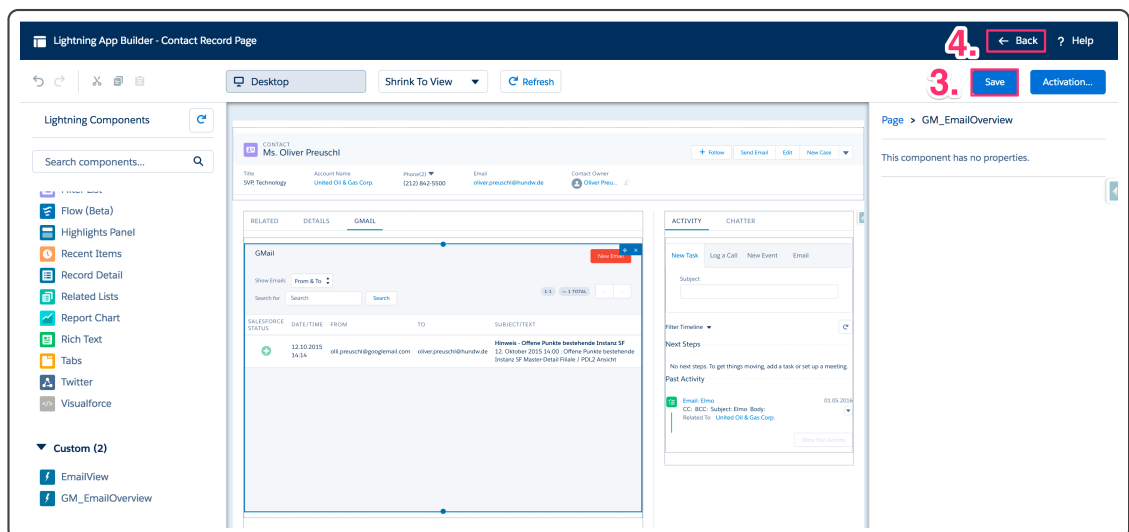
4. Add the Gmail view to the new tab

1. Click on the newly created tab (1)



2. Drag and drop the **EmailView** component into the newly created tab (2)

3. Click on **Save** (3)



4. Click on **Back** (4)

2.2 - Salesforce Classic

To add the Gmail view to a page layout for Salesforce Classic, please proceed as follows. Please note that the required Visualforce page is only provided for some objects. Please refer to the following table for the appropriate Visualforce

pages.

Name	Visualforce-Page
Lead	LeadEmailList_Lightning
Contact	ContactEmailList_Lightning
Account	AccountEmailList_Lightning
Opportunity	OpportunityEmailList_Lightning
Case	CaseEmailList_Lightning

If you would like to configure EmailLiveConnect for Gmail for a different object, first create a new Visualforce page as described [here](#), and then continue with the following steps.

1. Open the desired page layout.
 1. For default objects: **Setup->Customise->Object name->Page Layouts->Edit**
 2. For user-defined objects: **Setup->Create->Object name->Page Layouts->Edit**
2. Now create a new section in your page layout
 1. Drag and drop a new section into your page layout (1)

The screenshot shows a Salesforce page editor interface. On the left, a sidebar titled 'Fields' contains a list of components: Buttons, Quick Actions, Salesforce1 & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A red arrow labeled '1' points to the 'Section' button in this sidebar. The main area of the page shows a form with various fields and sections. A red arrow points to the 'Section' button in the sidebar, indicating the first step in adding a new section.

2. Assign a name to the new section (e.g. _Gmail:) (2)

The screenshot shows the 'Section Properties' dialog box. It contains the following configuration options:

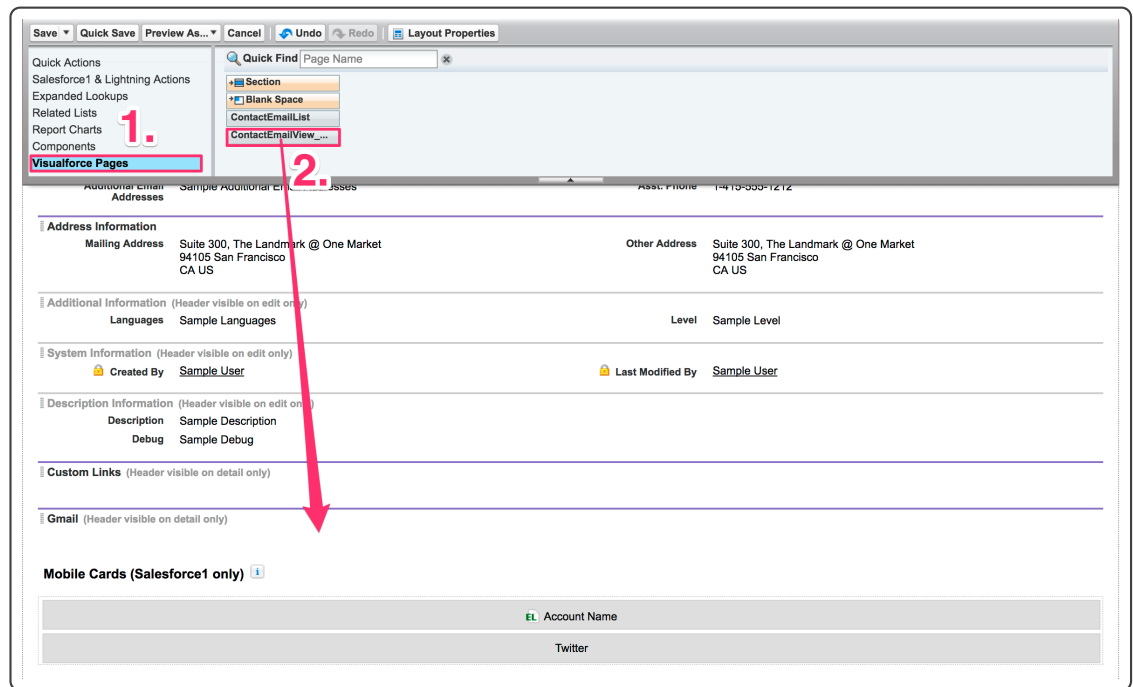
- Section Name:** A text field containing 'Gmail', highlighted with a red box and labeled '2.'.
- Display Section Header On:** Two checkboxes are present: 'Detail Page' (checked) and 'Edit Page' (unchecked). The 'Edit Page' checkbox is highlighted with a red box and labeled '3.'.
- Layout:** A section containing two layout options: '1-Column' (selected with a radio button) and '2-Column' (unselected). The '1-Column' option is highlighted with a red box and labeled '4.'.
- Buttons:** At the bottom, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box and labeled '5.'.

3. Uncheck the **Edit Page** check box (3)

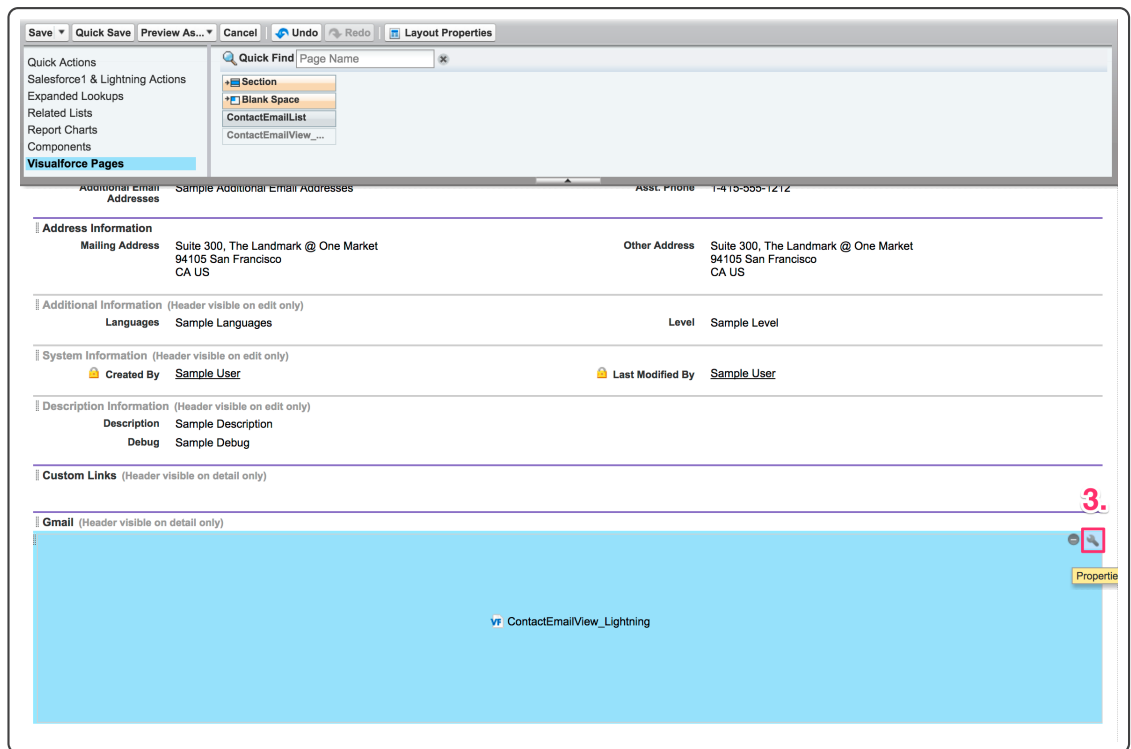
4. Specify a 1-column layout (4)

5. Click on **OK** (5)
3. Now add the Gmail view to the newly created section

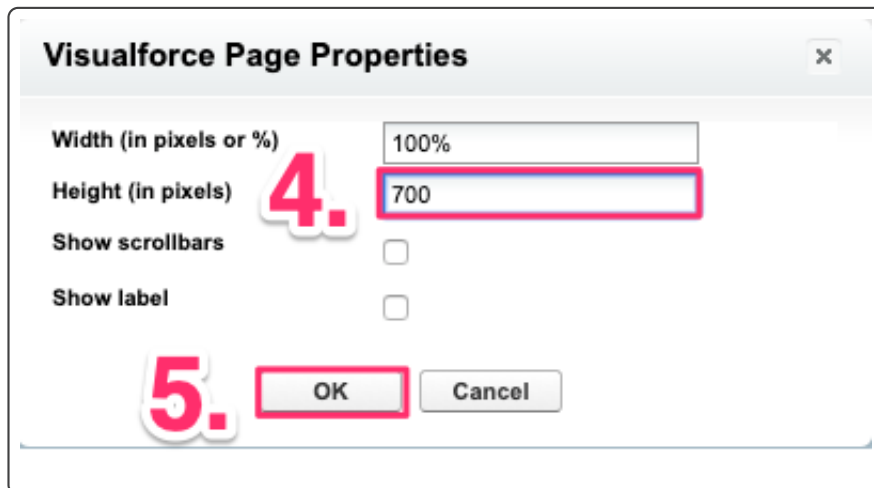
1. Select the **Visualforce Pages** section (1)



2. Drag and drop the appropriate Visualforce page (e.g. **ContactEmailList_Lightning**) into the new section (2)
3. Click on the spanner symbol (3)

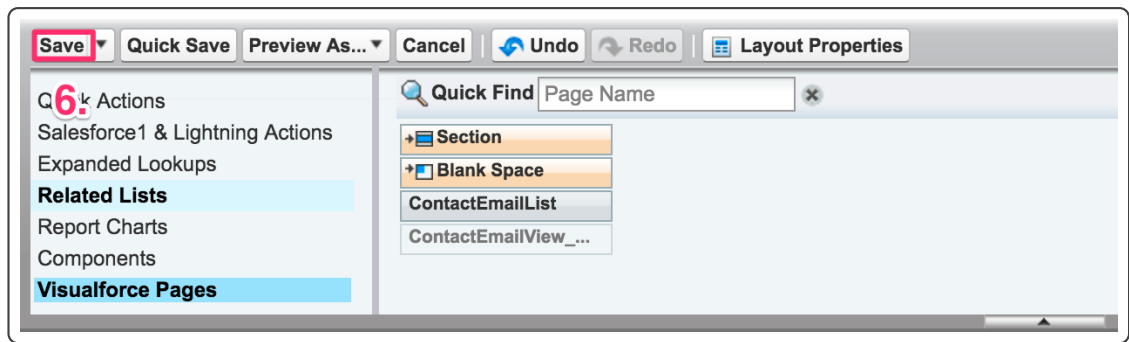


4. Specify a height of 700 (4)



5. Click on **OK** (5)

6. Click on **Save** (6)



2.3 - Configuration of additional object views (only required for Salesforce Classic)

If you would like to configure the Gmail view for Salesforce Classic for an object that does not have a default configuration, you must first create a Visualforce page. The structure of the code is always the same; you just have to replace the placeholder with the API name of the object (you will find the API name on the object's setup page).

```
<apex:page standardController="<ObjectAPIName>">
    <GMLC:EmailView_Lightning PV_RecordId="{!
<ObjectAPIName>.Id}" />
</apex:page>
```

The code for the Salesforce default object Quote would, for example, appear as follows.

```
<apex:page standardController="Quote">
    <GMLC:EmailView_Lightning PV_RecordId="{!Quote.Id}" />
</apex:page>
```

To create the new Visualforce page, perform the following steps.

1. Navigate to **Setup->Develop->Visualforce Pages** (1)

Salesforce1 Quick Start

Force.com Home

Administer

Manage Users
Manage Apps
Manage Territories
Company Profile
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Lightning for Outlook
Lightning Sync
Email Administration
Google Apps
Data.com Administration

Build

Customize
Create
Develop

Apex Classes
Apex Triggers
Apex Test Execution
API
Visualforce Components
Custom Permissions
Custom Metadata Types
Custom Settings
Email Services
Lightning Components
Visualforce Pages
Platform Cache

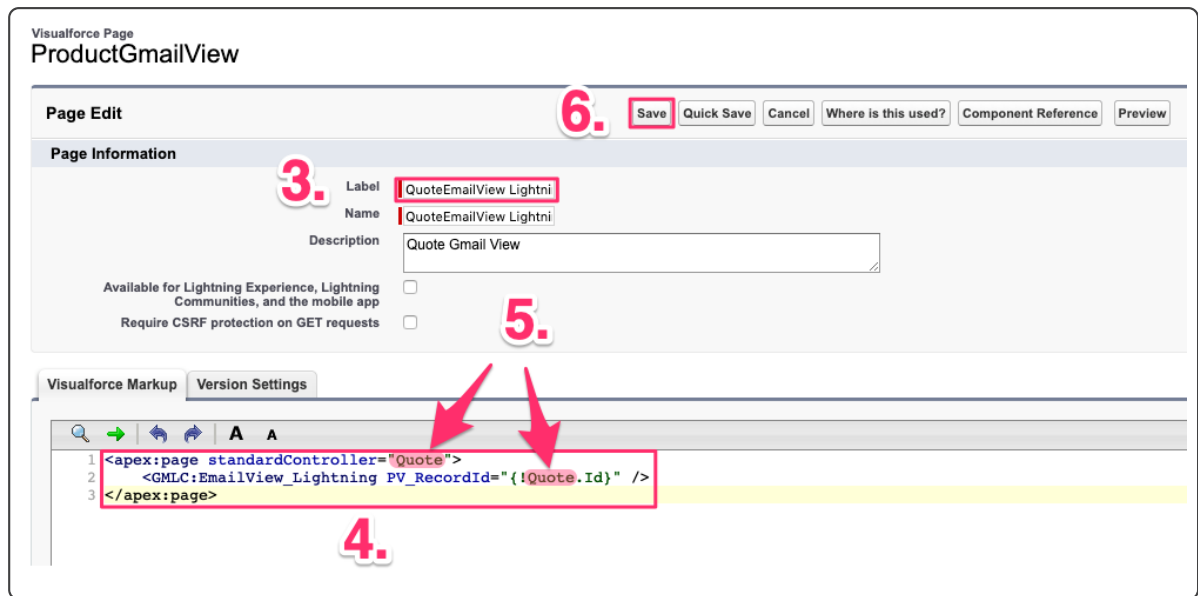
Developer Console

New

Action	Label	Name	Namespace Prefix	Api Version	De
Edit Del Security Lightning	ContactEmailView_Lightning	ContactEmailView_Lightning	GMLC	38,0	
Edit Del Security Lightning	CaseEmailView_Lightning	CaseEmailView_Lightning	GMLC	38,0	
Edit Del Security Lightning	OpportunityEmailView_Lightning	OpportunityEmailView_Lightning	GMLC	38,0	
Edit Del Security Lightning	LeadEmailView_Lightning	LeadEmailView_Lightning	GMLC	38,0	
Edit Del Security Lightning	AccountEmailView_Lightning	AccountEmailView_Lightning	GMLC	38,0	
Edit Del Security Lightning	EmailMessageView	EmailMessageView	GMLC	37,0	

2. Click on **New** (2)

3. Then assign a name to the new page (3)



4. Copy the above template into the content area (4)
5. Change the object name (5)
6. Click on **Save** (6)
7. The newly created Visualforce page can now be embedded in the system as described [here](#)

2.4 - Configuration of the activity history

Individual emails can be manually saved by users in Salesforce. Depending on the configuration, different records are generated (see [Gmail-configuration](#)). In principle, tasks save the email only as reformatted text, whereas email messages can contain additional formatted text (including any pictures that may be present).

Name	Beschreibung
Task (without Attachments)	Only saves the email as a Task in text format. Attachments are not transferred.
Task (with Attachments)	Only saves the email as a Task in text format including all attachments.

Task + EmailMessage (without Attachments)	Saves the email both as a Task in text format and as an Email Message in HTML format. Attachments are not transferred.
Task + EmailMessage (with Attachments)	Saves the email both as a Task in text format and as an Email Message in HTML format including all attachments.

Attention: Please note, that attachments are transferred asynchronously and may only be available after a few seconds or even minutes.

Attention: Please note, that email messages can only be saved if the **Extended Emails** feature is enabled in the Salesforce setup (Setup-> Customise-> Email-> Extended Email-> Activation).

To simplify the use of the emails saved in Salesforce, the additional task field **Gmail** is available that can be embedded in the task's page layouts and in the respective object's activity history (available only for Salesforce Classic). This checkbox field indicates whether the task is a saved Gmail message.

3 - Gmail Configuration

Attention: This part of the documentation is for **Salesforce Classic**. For **Lightning Experience**, the navigation might differ slightly in the setup menu. Please contact your administrator or our support team if problems arise.

The Gmail messages displayed on a record are determined in real time using information such as the email address of a contact from Gmail. In addition to the email address, however, further information may be useful for the search. Examples are:

Object	Message Search	Example

Contact	Search using one or more email addresses	oliver.preuschl@hundw.com oder oliver.preuschl@hundw.de
Account	Search using one or more email domains	@hundw.com oder @hundw.de
Opportunity	Search using an offer number for the account's domain	(@hundw.com oder @hundw.de) und hw1234567

Because the search may vary according to the object, a configuration with the following elements must be specified for each object that is used with Gmail.

Field	Description
Name	Any name
Label	Any unique name
Object	The name of the object to be configured
Email Field Name	The API name of the field in which the primary record's email address is saved. This email address is used to search for relevant messages and as a recipient for the dispatch.
Additional Email Adresses	The API name of the field in which additional email addresses can be stored which are used for the search for messages. This should be a multiline text field in which one email address is specified per line.
Email Search String Field Name	The API name of the field in which an additional Gmail search string can be stored. Form fields are generally very good for this purpose. These search queries can be dynamically generated from the data of the current record and the linked records. An overview of the search operators available in Gmail can be found here .

Email Page Size	The number of emails displayed per page. Further emails can be displayed using a pagination function.
Closed Task Status	The status in which the tasks of the emails saved in Salesforce are created.
Email Saving Behavior	Specifies how emails are saved in Salesforce. Possible values are Task (without Attachments) and Task (with Attachments) , Task + Email Message (without Attachments) and Task + Email Message (with Attachments) . Email messages can only be saved if the Extended Emails feature is enabled in the Salesforce setup (Setup-> Customise-> Email-> Advanced Email-> Activation).
Table Height in Pixels	The height of the email table. If the specified height is not sufficient for the display, a scroll bar is displayed. If no value is specified, the height of the table automatically adjusts to the number of displayed emails. In this case, it makes sense to uncheck the Prevent Table Scroll Propagation checkbox.
Prevent Table Scroll Propagation	Prevents the scrolling of the entire page if this is covered by the email table view.
Prevent Detail Scroll Propagation	Prevents the scrolling of the entire page if this is covered by the email single view.

Factory-made configurations already exist for the following standard objects.

- Lead
- Contact
- Account
- Opportunity

- Case

To customise this configuration or create a new configuration, please proceed as follows.

1. Navigate to **Setup->Develop->Custom Metadata Types** (1)

The screenshot displays the Salesforce Setup interface. On the left sidebar, under the 'Build' section, the 'Develop' option is selected, and 'Custom Metadata Types' is highlighted with a red box and a red '1.' annotation. The main content area shows a table of Custom Metadata Types. The table has columns: Action, Label, Installed Package, Namespace Prefix, and Visibility. The first row is 'GMail Setting' with 'Gmail Live Connect' as the installed package and 'Public' visibility. The 'Manage Records' link in the Action column is highlighted with a red box and a red '2.' annotation.

Action	Label	Installed Package	Namespace Prefix	Visibility
Manage Records	GMail Setting	Gmail Live Connect	GMLC	Public

2. Click on the **Manage Records** link next to the **Gmail Setting** title (2)

3. To edit an existing configuration, click on **Edit** to create a new configuration, click on New (3)

GMail Settings

View: All ⌵ [Create New View](#)

New

Action	Label ↑	GMail Setting Name	Namespace Prefix
Edit	Account	Account	GMLC
Edit	Case	Case	GMLC
Edit	3. Contact	Contact	GMLC
Edit	Lead	Lead	GMLC
Edit	Opportunity	Opportunity	GMLC

4 - Gmail Authentication

Attention: This part of the documentation is for Salesforce Classic. For Lightning Experience, the navigation might differ slightly in the setup menu. Please contact your administrator or our support team if problems arise.

Attention: After installation, it takes up to 24 hours for the connection between your Salesforce organisation and Gmail to be established and until you can authenticate yourself with Gmail. We will send you a confirmation email as soon as the setup is complete. If you try to authenticate yourself earlier, you will receive a Gmail error message.

2 options are available for Gmail authentication.

- System-wide Gmail access (shared by all users). In this case, Gmail authorisation must be performed once by an administrator. This variant could be useful, for example, if a corporate support email address is used. Another option would be to automatically forward certain employee messages to a group address to ensure that each employee can access all corporate communication. This can be achieved by using filters within the Gmail settings. You can find more information about setting up forwarded emails in Gmail [here](#).
- Private Gmail access (user specific). For this variant, each user must authenticate separately with his or her personal Gmail access. In this case,

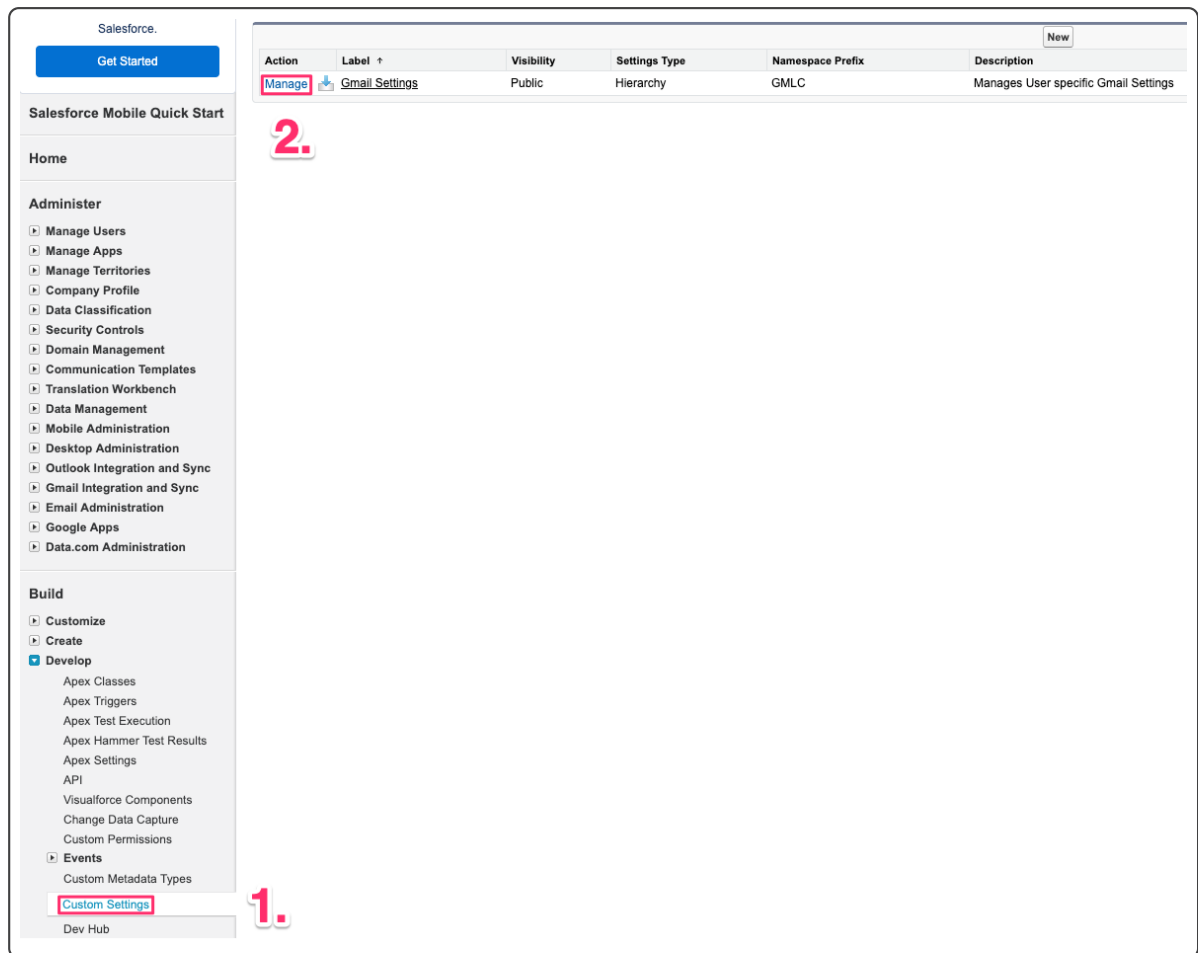
each user only sees the messages of his or her Gmail account. To also make selected private messages available to other colleagues with access to the current record, individual emails can be saved manually as email messages. Another option would be to automatically forward certain messages from each employee to a distribution address (for example, using Google Groups) to ensure that each employee can access all corporate communication. This can be achieved by using Google Groups together with forwarding filters within the Gmail settings. You can find more information about the setup of Google Groups and forwarded emails in Gmail [here](#) and [here](#).

The app can be configured to either just use one of these options or to use both. If you want to use both, your users will be able to switch between the two options whenever viewing emails. This configuration can optionally be done independently for single profiles and users.

4.1 - Gmail Authentication Configuration

By default, the app will just use the private Gmail access and, as a result, displays only the single user's own emails. If you want to change this behavior please perform the following steps.

1. Navigate to **Setup->Develop->Custom Settings (1)**



2. Click on **Manage** besides **Gmail Settings** (2)
3. Depending on your existing configuration create a new configuration (global, profile or user) or edit an existing one (global, profile or user)
 1. Global configuration:
 1. Click on **New** (3-1-1) or **Edit** (3-1-2)
 2. Enter the default Gmail account (**Gmail** or **GmailCompany**) (5)
 3. Choose if your users should be able to use both Gmail accounts (6)
 2. Profile/User configuration:
 1. Click on **New** (3-2-1) or **Edit** (3-2-2)
 2. Choose a profile or user (4)
 3. Enter the default Gmail account (**Gmail** or **GmailCompany**) (5)
 4. Choose if your users should be able to use both Gmail accounts

(6)

Custom Setting
Gmail Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is run

3-1-1. **New**

▼ Default Organization Level Value

View: **All** **Create New View**

Setup Owner	Location
No records to display.	

Custom Setting
Gmail Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the

3-1-2. **Edit** **Delete**

▼ Default Organization Level Value

Location **H+W Consult GmbH** Default Gmail Account **Gmail**

Switch Gmail Account ☒

View: **All** **Create New View**

Action	Setup Owner	Location
3-2-2. View Edit Del	Standard User	Profile

3-2-1. **New**

Gmail Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit Gmail Settings **Save** **Cancel**

Gmail Settings Information

4. Location **Profile**

5. Default Gmail Account **Gmail**

6. Switch Gmail Account ☐

4.2 - System-wide Gmail Access - Authentication

If you have configured the app to use the system-wide Gmail access, you need to perform the following steps to authenticate to the system-wide account.

1. In the setup menu under **Security Controls**, click on **Named Credentials**

The screenshot shows the Salesforce Setup interface. On the left is the navigation menu with the following items: Transition Assistant, Salesforce Mobile Quick Start, Home, Administer, Manage Users, Manage Apps, Manage Territories, Company Profile, Data Classification, Security Controls (highlighted with a red box and a red '1.'), Health Check, Sharing Settings, Field Accessibility, Password Policies, Session Settings, Login Flows, Network Access, Activations, Session Management, Login Access Policies, Certificate and Key Management, Single Sign-On Settings, Auth. Providers, Identity Provider, Identity Verification, View Setup Audit Trail, Expire All Passwords, Delegated Administration, Remote Site Settings, CSP Trusted Sites, Named Credentials (highlighted with a red box and a red '1.'), and File Upload and Download. On the right is the 'Named Credentials' page, which has a table with the following data:

Action	Label ↑	URL
Edit	Gmail	https://www.googleapis.com/
Edit	Gmail (Company)	https://www.googleapis.com/

A red '2.' is placed next to the 'Edit' link for 'Gmail (Company)'.

2. Click on **Edit** besides **Gmail (Company)**
3. Check the checkbox **Start Authentication Flow on Save**

Named Credential Edit: Gmail (Company)

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

4.

Save Cancel

Label ⓘ

Gmail (Company)

Name ⓘ

GmailCompany

URL

https://www.googleapis.com/

▼ Authentication

Certificate

Identity Type

Named Principal

Authentication Protocol

OAuth 2.0

Authentication Provider

Gmail

Scope

openid email https://ww

Authentication Status

Pending

Start Authentication Flow on Save

☒

3.

▼ Callout Options

Generate Authorization Header ⓘ

☒

Allow Merge Fields in HTTP Header ⓘ

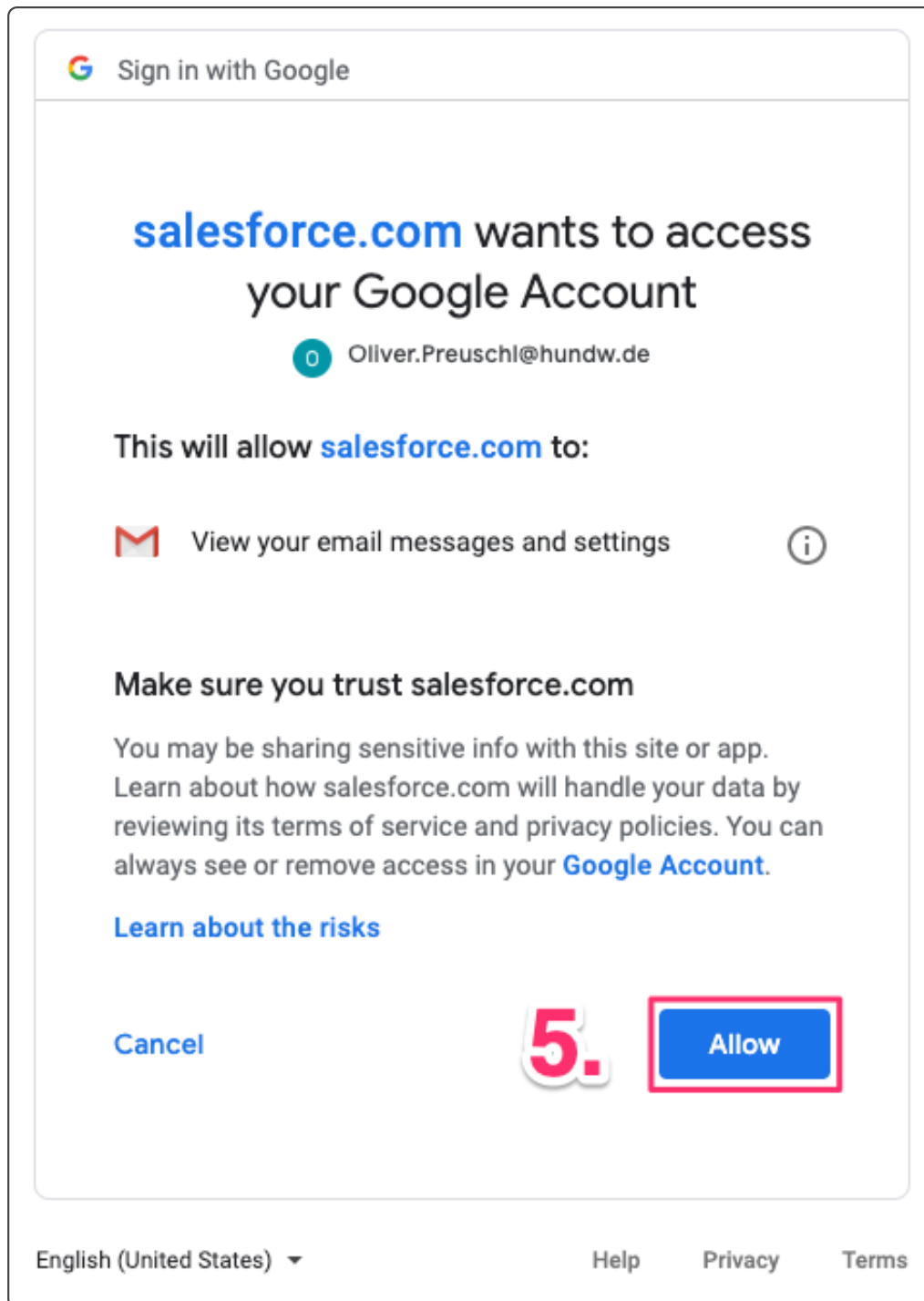
☐

Allow Merge Fields in HTTP Body ⓘ

☐

Save Cancel

4. Click on **Save**
5. Click on **Allow** to grant your Salesforce system access to the Gmail account. If you are not yet logged into Gmail with your browser, you will be prompted to log in. If you would like to grant access to another Gmail account, you must first log off from the currently logged-in account.



6. After successful authentication, the authentication status in Salesforce should have changed accordingly.

Named Credential: Gmail (Company)

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

« [Back to Named Credentials](#)

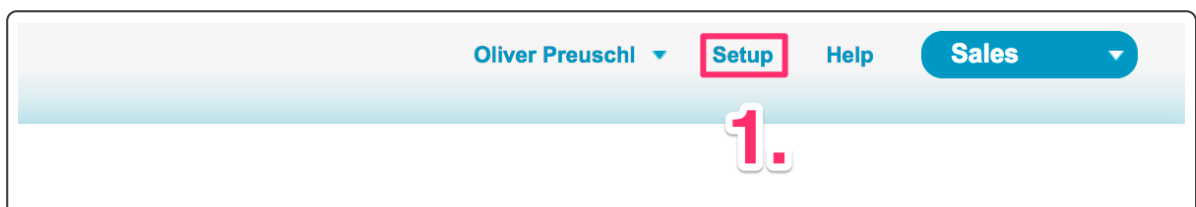
[Edit](#) [Delete](#)

Label	Gmail (Company)
Name	GmailCompany
URL	https://www.googleapis.com/
▼ Authentication	
Certificate	
Identity Type	Named Principal
Authentication Protocol	OAuth 2.0
Authentication Provider	Gmail
Scope	openid email https://www.googleapis.com/auth/gmail.readonly
Authentication Status	Authenticated as 
▼ Callout Options	
Generate Authorization Header	☒
Allow Merge Fields in HTTP Header	☐
Allow Merge Fields in HTTP Body	☐

4.3 - Private Gmail Access - Authentication

If you have configured the app to use the private Gmail access it is necessary to grant users access to the Named Credential **Gmail**. To do this, proceed as follows.

1. Click on **Setup**



2. Click on **Profiles**

The screenshot shows the Salesforce Admin console interface. On the left sidebar, under the 'Administer' section, 'Manage Users' is expanded. The 'Profiles' link is highlighted with a red rectangular box, and a large red '2.' is placed next to it. The main content area displays a table of profiles. The 'Standard User' profile is highlighted with a red rectangular box, and a large red '3.' is placed next to it. The table has columns for 'Action' and 'Profile Name'. The 'Standard User' profile is listed with 'Edit' and 'Clone' links available.

Action	Profile Name
Edit Clone	Customer Portal Manager Standard
Edit Clone	External Identity User
Edit Clone	Force.com - App Subscription User
Edit Clone	Force.com - Free User
Edit Del...	Gmail Live Connect Read Only User
Edit Del...	Gmail Live Connect Standard User
Edit Clone	Gold Partner User
Edit Clone	High Volume Customer Portal
Edit Clone	High Volume Customer Portal User
Edit Clone	Identity User
Edit Clone	Marketing User
Edit Clone	Partner App Subscription User
Edit Clone	Partner Community Login User
Edit Clone	Partner Community User
Edit Clone	Read Only
Edit Clone	Silver Partner User
Edit Clone	Solution Manager
Edit Clone	Standard Platform User
Edit Clone	Standard User
Edit Clone	System Administrator
Edit Clone	Work.com Only User

3. Click on the profile used (steps 3 through 7 must be repeated for each profile used by your users)
4. Click on **Edit** in the **Enabled Named Credential Access** topic list

Enabled Apex Class Access Edit

No Apex Classes enabled

Enabled Visualforce Page Access Edit

Visualforce Page Name	AppExchange Package Name
GMLC.ContactEmailView_Lightning	Gmail Live Connect

Enabled External Data Source Access Edit

No External Data Sources enabled

Enabled Named Credential Access Edit **4.**

No Named Credential enabled

Enabled Service Presence Status Access Edit

No Service Presence Status enabled

5. Select Email LiveConnect for Gmail.GMLC.Gmail from the list

Enable Named Credential Access

Available Named Credentials

EmailLiveConnect for Gmail.GMLC.Gmail

5.

Enabled Named Credentials

--None--

Add

Remove

6.

7.

Save Cancel

6. Click on **Add**

7. Click on **Save**

Once a user accesses a record with the Gmail view, he or she is automatically prompted to sign in with his or her Gmail account.