

- [1 - Authenticating in Gmail](#)
- [2 - Working with your emails](#)
 - [Email table view](#)
 - [Email detailed view](#)
 - [Saved emails](#)

1 - Authenticating in Gmail

Depending how EmailLiveConnect for Gmail is configured in your system, you will be invited to log into your Gmail account when you use it for the first time. On this occasion, please follow the instructions shown.

The screenshot shows a web interface for configuring external system authentication. At the top, a red banner contains a link: "To configure access to Gmail please click here and enter the configuration settings as shown in the screenshot below. After clicking 'Save' you will be redirected to the Gmail Login..". Below this, the page title is "Authentication Settings for External Systems" with a subtitle "Set up user authentication for third-party systems or other Salesforce orgs.". There are "Save" and "Cancel" buttons at the top right. A section titled "Authentication" is expanded, showing a form with the following fields: "External System Definition" (set to "Named Credential"), "Named Credential" (set to "Gmail"), and "Authentication Protocol" (set to "OAuth 2.0"). Below these, "Authentication Provider" is "Gmail", "Scope" is "openid email profile https://mail.google.com/", and "Authentication Status" is "Pending". At the bottom of the form, there is a checkbox labeled "Start Authentication Flow on Save" which is checked, and a red exclamation mark icon. "Save" and "Cancel" buttons are at the bottom right.

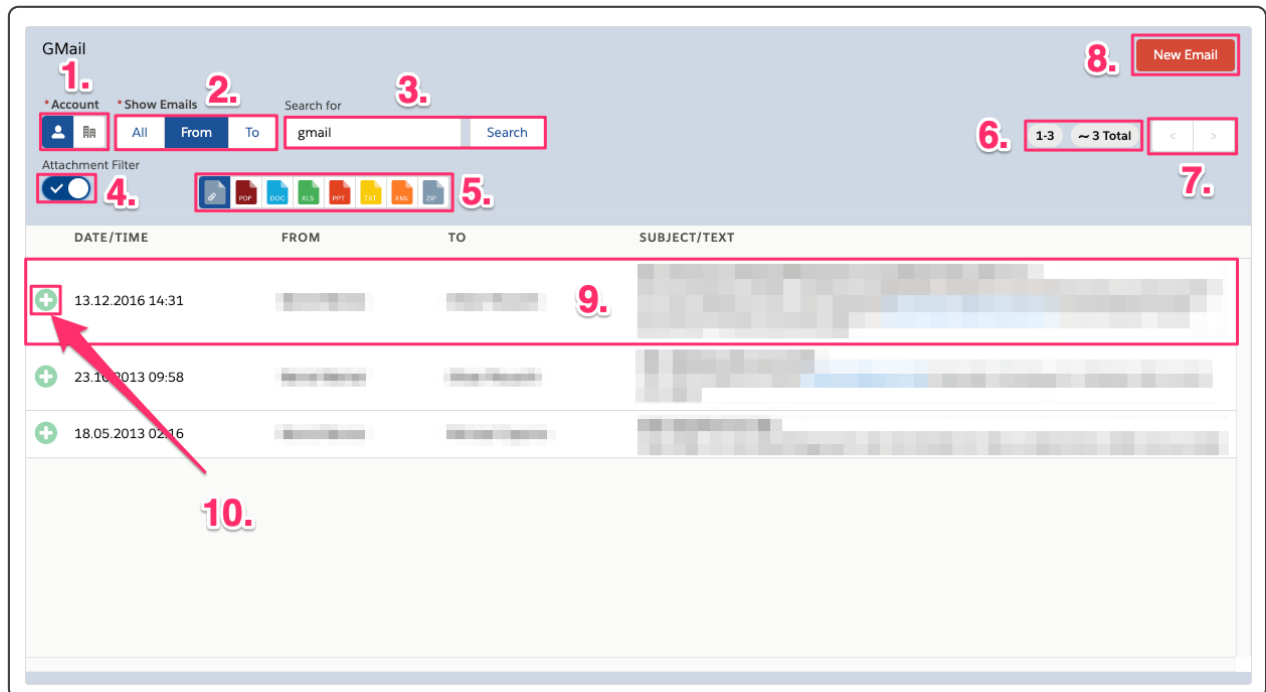
- Click the link.
- Activate the **Start authentication flow on Save** checkbox.
- Click Save and authenticate yourself in your Gmail account.

2 - Working with your emails

Email table view

Depending how EmailLiveConnect for Gmail is configured in your system, you

will see the email table view in the datasets of various objects. This view displays all relevant emails that are connected to the current dataset. The diagram below gives you an overview of this view.

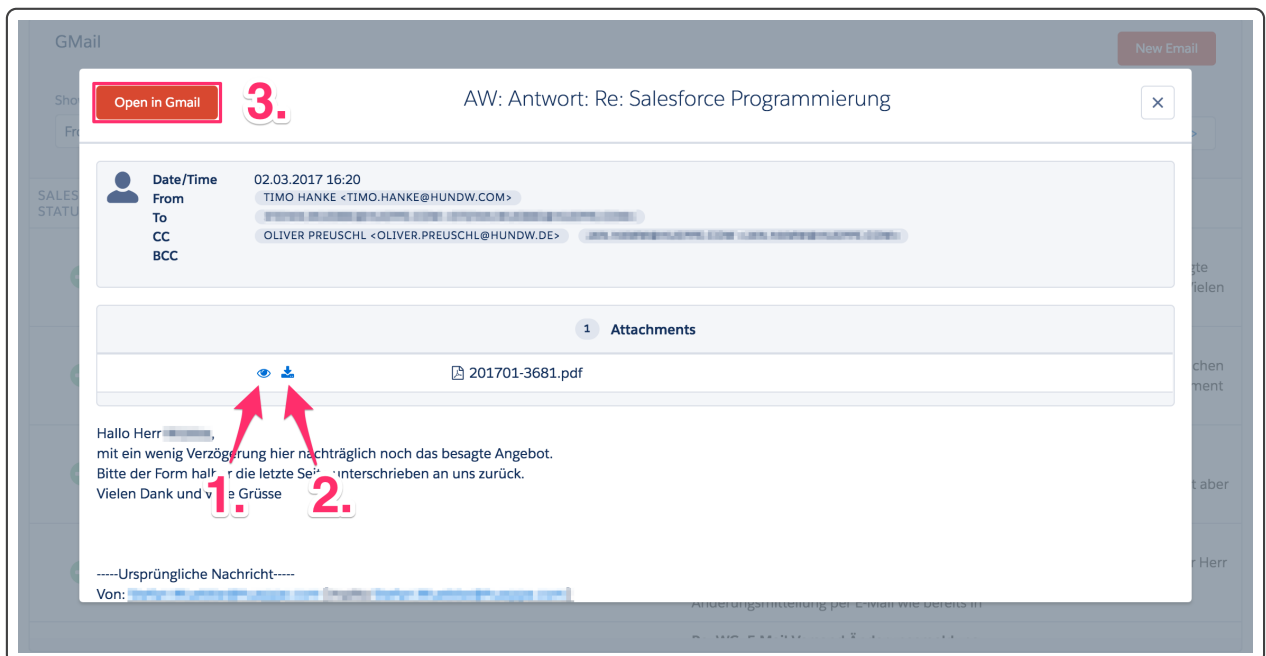


1. Switch between your private emails and your company's org-wide emails. (You may see this button or not based on your company's configuration)
2. Select whether you only want to see emails that you have received from email addresses from this dataset (From), those that have been sent to these addresses (To) or both (From & To).
3. Search for specific emails. The search term can consist of one or more simple words or of complex Gmail-specific search operators (for more information on Gmail search operators see [here](#)).
4. Enable the attachment filter to just show emails which have a file attached. The filter functionality works with the following file types: PDF, Office documents, TXT, XML, ZIP.
5. Choose a specific file type to filter for (PDF, DOC, PPT, XLS, TXT, XML, ZIP) or filter for any of these attachments.
6. This shows both the number of emails currently displayed and the estimated total of all emails.

7. The **forward** and **back** buttons let you scroll through different pages of emails in order to move to older or newer emails.
8. Clicking on **New Email** takes you straight to Gmail where you can create a new email. **Please note, that you need to be logged into the same Gmail account in your browser as in Salesforce itself.**
9. In the table view itself, you see a listing of your emails. Click on an email to open it in the detailed view.
10. Click the + sign to store this email in the activity history of the current dataset. This makes the text of this email accessible to all users with access to this dataset. Depending on the configuration, attachments are also transferred. Attachments are transferred asynchronously and may not be accessible until a few seconds have passed.

Email detailed view

The illustration below gives an example detailed view of an email from which you can obtain the following information.



- Subject
- Date sent

- Sender
- Recipients (+ Cc and Bcc recipients)
- Attachments
- The message itself

The following actions can be performed in this view.

1. Show attachment in browser.
2. Download attachment.
3. Open email in Gmail, e.g. so that you can reply to it. **Note, that for this you need to be logged into the same Gmail account in your browser as you are in Salesforce itself.**

Caution: Note, that attachments may be downloaded from Gmail only up to a maximum size of 6 MB. If your attachment is larger than this, you will automatically be offered the opportunity of accessing the file directly in Gmail. This is only possible, however, if you are logged in with your browser into the same Gmail account as in Salesforce itself.

Saved emails

If an email has been saved manually in Salesforce from the table view, this can be used in various places (depending on the configuration and Salesforce user interface). Additionally, the email will either be saved as a task (unformatted text) or, additionally, as an email message (formatted text). The transfer of any attachments also varies by configuration, such that these are either with the task or email message or are not saved at all.

- In Salesforce Classic you can determine directly from the activity history whether the activity consists of a stored Gmail message using the **Gmail** field, (1.). Click the subject of the task (2.) to open the detailed task or email message view (This depends on your configuration).

Activity History								Activity History Help ?	
Log a Call		Mail Merge		Send an Email		View All			
Action	Subject	Related To	Task	Gmail	Due Date	Assigned To	Last Modified Date/Time		
Edit Del	Email Test		✓	✓	15.06.2016	Test Admin	25.07.2019 15:10		

- In Lightning Experience the activity history is replaced by the activity timeline which gives you an overview of your saved emails.

Activity

Chatter

New Task

New Event

Log a Call

Create a task...

Add

Filters: All time • All activities • All types



[Refresh](#) [Expand All](#)

Next Steps

[More Steps](#)

No next steps. To get things moving, add a task or set up a meeting.

Past Activities



Test

10:26 | 15.06.2016



[oliver.preuschl@hundw.com](#) sent an email to  and 2 others

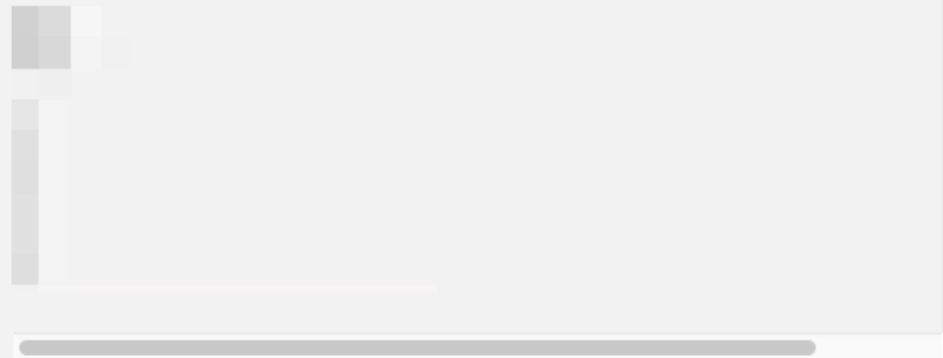
From Address

[oliver.preuschl@hundw.com](#)

To Address

 + 1 More

Text Body



[Load More Past Activities](#)

