

# Google mail, contacts, and calendar

Version 7.18



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# Register Creatio application in G Suite

PRODUCTS: [ALL CREATIO PRODUCTS](#)

G Suite registration procedure can be divided into two steps:

- Register a Google account and set it up, enable access to the API, and generate the keys required for integration (“Client ID” and “Client Secret”).
- Use the values of the “Client ID” and “Client Secret” keys to populate the [Google Service Access Key] and [Google Secret Access Key] Creatio system settings respectively.

For security reasons, we recommend enabling two-factor authentication for Gmail accounts and using app passwords to access your mail. Read more in the [Google Help Center](#).

To test this functionality, you can turn on “less secure app access” in your Gmail account as a temporary solution. Read more in the Google Help Center.

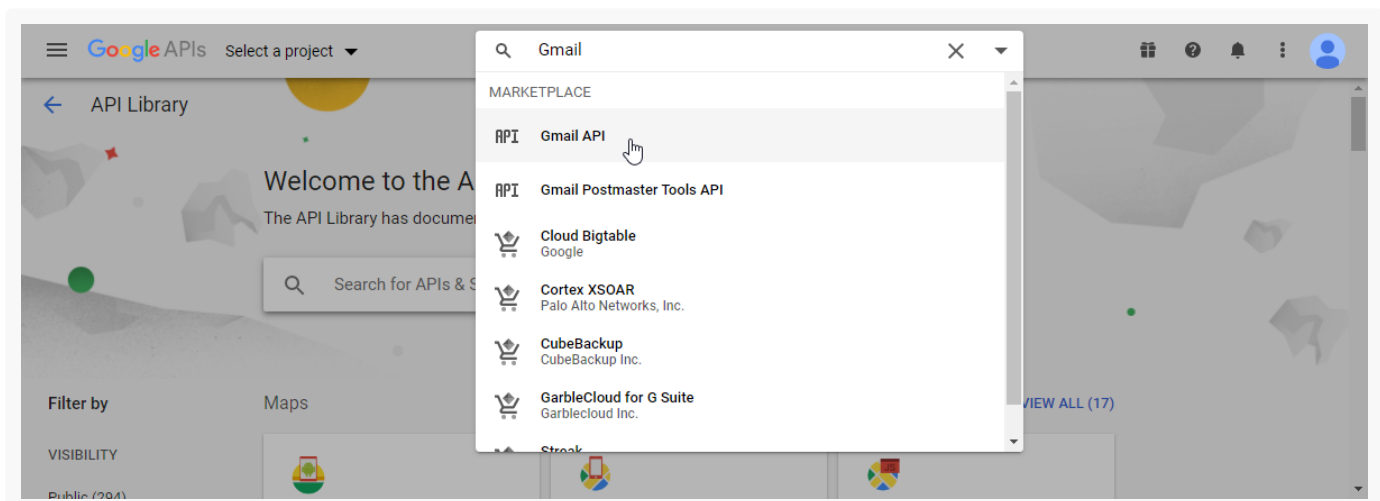
## Set up an account and receive Google keys

**Note.** When you transfer to version 7.17.1, create an OAuth 2.0 client ID with a new redirection address.

To configure your Google account:

1. Follow the <https://code.google.com/apis/console/> link.
2. Log in as a G Suite administrator.
3. Open the API library and use the search bar to find Gmail API.

Accessing Gmail API




4. Go to the Gmail API page and click [ *Enable* ].

Enabling Gmail API

Google APIs Creatio Shared

←

 **Gmail API**  
Google  
Flexible, RESTful access to the user's inbox

**ENABLE** **TRY THIS API** [↗](#)

Click to enable this API

**OVERVIEW** DOCUMENTATION SUPPORT

**Overview**

The Gmail API lets you view and manage Gmail mailbox data like threads, messages, and labels.

**About Google**

Google's mission is to organize the world's information and make it

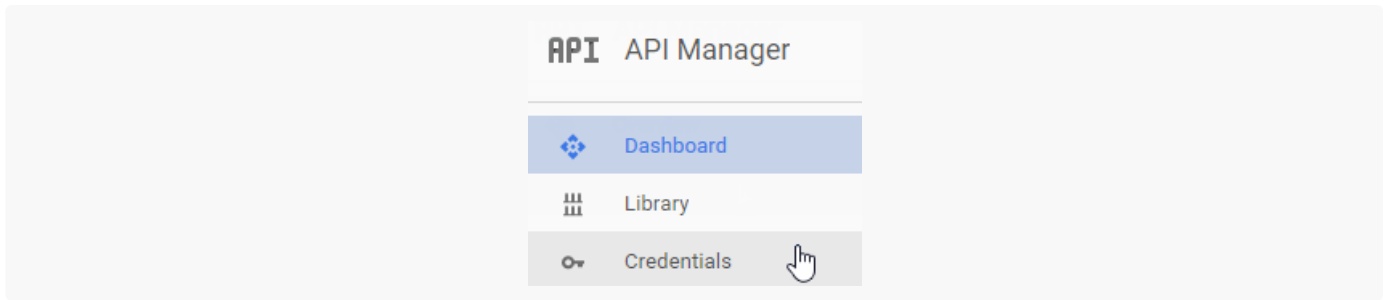
5. Repeat steps 3 and 4 to enable [ *Contacts API* ] and [ *Calendar API* ].  
As a result, both APIs are added to the list of available APIs ([Fig. 3](#)).

Fig. 3 The list of available project API

Filter				
Name	↓ Requests	Errors (%)	Latency, median (ms)	Latency, 95% (ms)
Contacts API	21,371	0	30	448
Google Calendar API	3,936	0	60	128
Gmail API				

6. Specify the information about the product to create the client ID. In the [API Manager] menu, click [ *Credentials* ] ([Fig. 4](#)).

Fig. 4 Opening the [ *Credentials* ] setup page



7. Specify API parameters:

- a. Select [ *Gmail API* ] in the [ *[Which API are you using?]* ] drop-down menu.
- b. Select [ *Web-browser (Javascript)* ] in the [ *[Where will you be calling the API from?]* ] drop-down menu.
- c. Select [ *User data* ] in the [ *[What data will you be accessing?]* ] field.

Click [ *What credentials do I need?* ] ([Fig. 5](#)).

Fig. 5 Adding credentials to your project

# Add credentials to your project

## 1 Find out what kind of credentials you need

We'll help you set up the correct credentials

If you wish you can skip this step and create an [API key](#), [client ID](#), or [service account](#)

### Which API are you using?

Different APIs use different auth platforms and some credentials can be restricted to only call certain APIs.

Gmail API ▼

### Where will you be calling the API from?

Credentials can be restricted using details of the context from which they're called. Some credentials are unsafe to use in certain contexts.

Web browser (Javascript) ▼

### What data will you be accessing?

Different credentials are required to authorize access depending on the type of data that you request.

- User data**  
Access data belonging to a Google user, with their permission
- Application data**  
Access data belonging to your own application

[What credentials do I need?](#)

## 8. Create an OAuth client ID

- Specify the name of the product in the [ *Name* ] field to show to the Creatio users during authorization for using Google accounts.
- Enter your Creatio website address in the [ *Authorized JavaScript origins* ] field.
- Populate the [ *Authorized redirect URLs* ] field with links formatted as follows:

For Creatio version 7.17.0 or lower::

`https://your_website_address/0/ViewPage.aspx?Id=3b22f0ff-034a-48da-8758-a0660e5a26ff`

`https://your_website_address/0/rest/GoogleOAuthAuthenticator/ProcessAuthenticationCode`

For Creatio **version 7.17.1 and up**:

`https://your_website_address/0/LegacySocialAccountAuthPage.aspx?Id=3b22f0ff-034a-48da-8758-a0660e5a26ff`

`https://your_website_address/0/rest/GoogleOAuthAuthenticator/ProcessAuthenticationCode`

Click [ *Create an OAuth client ID* ] ([Fig. 6](#)).

Fig. 6 Creating OAuth client ID

## Add credentials to your project

- ✓ Find out what kind of credentials you need  
Calling Gmail API from a web browser

### 2 Create an OAuth 2.0 client ID

Name ?

#### Restrictions

Enter JavaScript origins, redirect URIs, or both [Learn More](#)

Origins and redirect domains must be added to the list of Authorized Domains in the [OAuth consent settings](#).

##### Authorized JavaScript origins

For use with requests from a browser. This is the origin URI of the client application. It can't contain a wildcard ([https://\\*.example.com](https://*.example.com)) or a path (<https://example.com/subdir>). If you're using a nonstandard port, you must include it in the origin URI.




Type in the domain and press Enter to add it


##### Authorized redirect URIs

For use with requests from a web server. This is the path in your application that users are redirected to after they have authenticated with Google. The path will be appended with the authorization code for access. Must have a protocol. Cannot contain URL fragments or relative paths. Cannot be a public IP address.






Type in the domain and press Enter to add it

Create OAuth client ID 

As a result, Google will suggest to set up an OAuth consent screen. Click [Set up consent screen] to proceed.

9. Specify the required parameters in the OAuth consent screen:



- a. The name of the application that requires access
- b. Support service email address
- c. Authorized domains
- d. Link to the main page of the application
- e. Link to the privacy policy of the application.

Click [ Save ].

10. Go back to the credentials page. Refresh the page. As a result, the [ *Create OAuth client ID* ] button will become available. Click the button to create your “Client ID” and “Client Secret”.

11. Enter your Google keys ([Fig. 7](#)) in the corresponding system settings in Creatio.

Fig. 7 Google keys

Client ID for Web application    [DOWNLOAD JSON](#)    [RESET SECRET](#)    [DELETE](#)

Name \*  
Creatio

The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.

Client ID    16451305...b2goja.apps.goo

Client secret    r9F...db

Creation date    August 18, 2020 at 9:00:41 AM GMT+3

**i** The domains of the URIs you add below will be automatically added to your [OAuth consent screen](#) as [authorized domains](#).

## Enter a Google key in Creatio

### Enter Google keys to synchronize with contacts and calendar

Enter the received “Client ID” and “Client Secret” keys into Creatio for the values of the [Google Service Access Key] and [Google Secret Access Key] system settings. To do this:



1. Open the Creatio application.
2. Open the System Designer by clicking  in the top right corner of the application window.
3. Click [ *System settings* ] in the [ *System setup* ] block ([Fig. 8](#)).

Fig. 8 The [ *System settings* ] section

 System setup

Lookups

Setup duplicates rules

System settings


4. Select the “Google services access key” system setting in the list and click [ *Open* ].
5. Populate the [ *Default value* ] field of the system setting page with your client ID that you retrieved during the Creatio registration in Google (available in the [ *Here is your client ID* ] field in the Google API message).
6. Select the “Google secret access key” system setting in the list and click [ *Open* ].

7. Populate the [ *Default value* ] field of the system setting page with your client secret key that you retrieved during the Creatio registration in Google (available in the [ *Here is your client secret* ] field in the Google API message).

As a result, users will be able to synchronize their mail, tasks, and contacts with their Google calendar and Google contacts.

## Enter Google keys to synchronize with email

Enter the received “Client ID” and “Client Secret” codes in Creatio when setting up the secure OAuth 2.0 connection for the Gmail provider. To do this:

1. Open the Creatio application.
2. Open the System Designer by clicking  in the top right corner of the application window.
3. Go to the [ *System setup* ] block -> click [ *Lookups* ].
4. Select the [ *List of email providers* ] lookup.
5. Open Gmail provider settings.
6. In the [ *Additional settings area* ], specify the OAuth 2.0 authentication method. This enables limited access of the email service to the user protected resources and does not require login and password.
7. Specify the “Client ID” and “Client Secret” codes that you received earlier in the [ *Application client ID* ] and [ *Client secret* ] required fields.

Setting up OAuth 2.0 for Gmail

## GMail

APPLY

CANCEL

imap.gmail.com

Port

993

Security

SSL/TLS

 Outgoing mail server (SMTP)

Email service settings for sending emails. Specify mail server address, port and security settings

Server address \*

smtp.gmail.com

Port

465

Security

SSL/TLS

## Additional settings

Login format

Use mailbox name

Service name \*

GMail

Authentication type

OAuth 2.0

Application (client) ID \*

Client ID

Client secret \*

.....

8. Save the email provider settings.

# Synchronize contacts and activities with Google

PRODUCTS: [ALL CREATIO PRODUCTS](#)

To enable synchronization setup of Google contacts and calendar with Creatio contacts and activities, the synchronization must be set up beforehand.

An example of synchronization setup in the [ *Contacts* ] section is described below.

1. Open the [ *Contacts* ] section.
2. Create a [private tag](#) to be used for synchronization, for example, “Google synchronization”.

**Note.** Only records with private tags are synchronized. Records with public or corporate tags never synchronize.

3. Click [ *Actions* ] -> [ *Synchronize contacts* ] -> [ *Set up...* ]. Take the following steps in the settings page:
  - a. For activities to synchronize automatically, select the [ *Synchronize activities automatically* ] checkbox and specify the synchronization interval. To start synchronization from a specified date, select the required date in the [ *Synchronize from* ] field.
  - b. To automatically synchronize contacts, select the [ *Synchronize contacts automatically* ] checkbox and specify the synchronization interval.
  - c. To synchronize contacts with a specific tag, in the [ *Send all contacts with a tag from Creatio to Google* ] field select the required tag.
4. Click [ *Save* ].

**Note.** Date and time of the latest synchronization session is displayed on the setup page.

As a result, both your Google account and the Creatio contact tag for synchronization will be saved in the system, and the synchronization will be started at the specified time intervals automatically.

**Note.** In the [ *Activities* ] section, setting up synchronization with Google is done in the same manner. Note that you don't need to specify the tag for synchronizing tasks in the synchronization settings of the [ *Activities* ] section.

## Synchronize Creatio contacts with Google contacts

You can use the synchronization option to add your Google contacts into Creatio. The action is only performed for records that are specially tagged as per the synchronization settings.

To run the synchronization for the first time:

1. Open the [ *Contacts* ] section
2. Click [ *Actions* ] -> [ *Synchronize contacts* ] -> [ *Start synchronization* ].

As a result of synchronization, a new group of contacts titled “Creatio” will be added to your Gmail contacts.

**Note.** If you set up automatic synchronization, the process starts automatically.

3. Move the Gmail contacts to the “Creatio” group.
4. Click [ *Synchronize contacts* ] -> [ *Start synchronization* ] again to synchronize.

As a result, the Gmail contacts from the “Creatio” group will be imported into Creatio with the private tag

specified during the synchronization setup.

**Note.** If you set up automatic synchronization, the process starts automatically.

From this point on, the synchronization of Google and Creatio contacts is performed in both directions. Synchronization is run only for those records that have been changed or added since the last synchronization session.

If a record has been modified in both Gmail and Creatio, the most recent changes will be used for the synchronization.

If records were deleted in Gmail or Creatio, the next synchronization will not delete them from Creatio or Gmail. In the first case, the tags will be removed from such records. In the second case, the records will be excluded from the “Creatio” group.

## Synchronize Creatio activities with Google calendar

If you use the Google calendar to plan your activities, you can synchronize it with your Creatio calendar.

You must register Creatio in G Suite to synchronize your Creatio schedule with Google calendar. Read more: [Register Creatio application in G Suite.](#)

Go to the [ *Activities* ] section and click [ *Actions* ] -> [ *Synchronize activities* ] -> [ *Start synchronization* ].

When you run this action, the Creatio activities are synchronized with the primary calendar of the Google account specified in the synchronization settings. All activities with the [ *Display in calendar* ] mark synchronize from Creatio. Synchronization runs by the [ *Organizer* ] field. Thus, if an event organizer has not set up synchronization, the [ *Organizer* ] field is filled by the participant of the activity who has run the synchronization. If the current author creates an event in Google, synchronization with Creatio adds it into the system and adds the participants to the [ *Participants* ] detail. Only users who have the same email listed on the [ *Communication options* ] detail and in the Google event will be added to the list of participants. This collective task is displayed for other participants only after they synchronize their calendar with Google.

If a collective task that was created in Creatio by synchronizing with Google has been modified by one of its participants, all changes will be displayed in Google.

**Note.** Synchronization can also be run automatically, within the time intervals specified in the synchronization settings.

## Delete your Google account from Creatio

PRODUCTS: [ALL CREATIO PRODUCTS](#)

To delete a Google account, do the following:

1. Open the user profile page. Click the [ *Profile* ] button on the home page.
2. Click the [ *Accounts in external resources* ] button.
3. Select the Google account and click [ *Actions* ] -> [ *Delete* ]. Click [ *Yes* ].

