

Google services

Version 8.0



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Register Creatio application in Google Workspace

PRODUCTS: **ALL CREATIO PRODUCTS**

Google Workspace is a set of cloud services that lets Creatio administrators integrate the domain name of your application with Gmail and enable users to synchronize Google corporate email and calendars with Creatio.

Creatio registration in Workspace involves several steps:

1. Register and set up a Google Cloud Platform project, grant access to the API, and generate the keys (“Client ID” and “Client Secret”) for Creatio.
2. Enter the retrieved “Client ID” and “Client Secret” keys in Creatio calendar synchronization and email service settings.

Step 1. Set up a Google Cloud Platform project

To set up a Google project:

1. Open the <https://console.cloud.google.com/cloud-resource-manager> page.
2. Log in as a Workspace administrator.
3. Use a Google Cloud Platform project to register Creatio in Google Workspace. If you want to create a new project, proceed to step 4. If you want to use an existing project, skip steps 4-5 and proceed to step 6.
4. Take the following steps to create a new project:

a. Click [*Create Project*].

b. Fill out the following fields:

Enter an arbitrary project name in the [*Project name*] field. For example, “Creatio OAuth.”

Specify the name of your business in the [*Organization*] field to connect the project in Google Cloud to your company as opposed to an employee who created the account. Otherwise, select “No organization.” After you save the project, the field becomes non-editable.

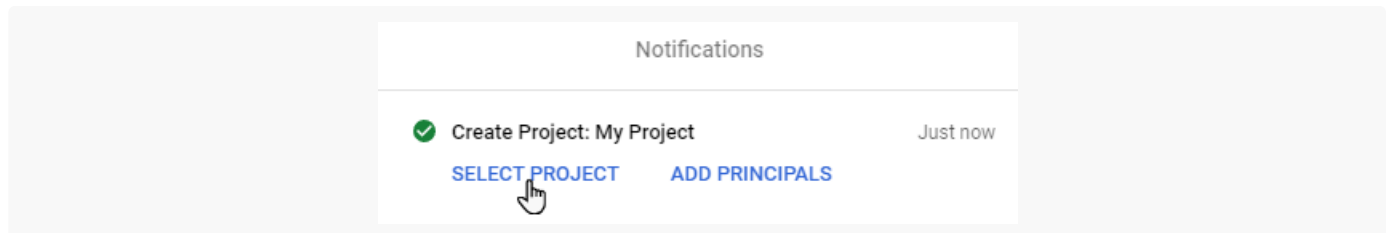
Specify the folder to place the project in the [*Location*] field. If you specify an organization in the previous field, Google populates the value automatically. If you select “No organization” in the previous field, select the folder to place the project in your account.

c. Click [*Create*] (Fig. 1).

Fig. 1 Create a project

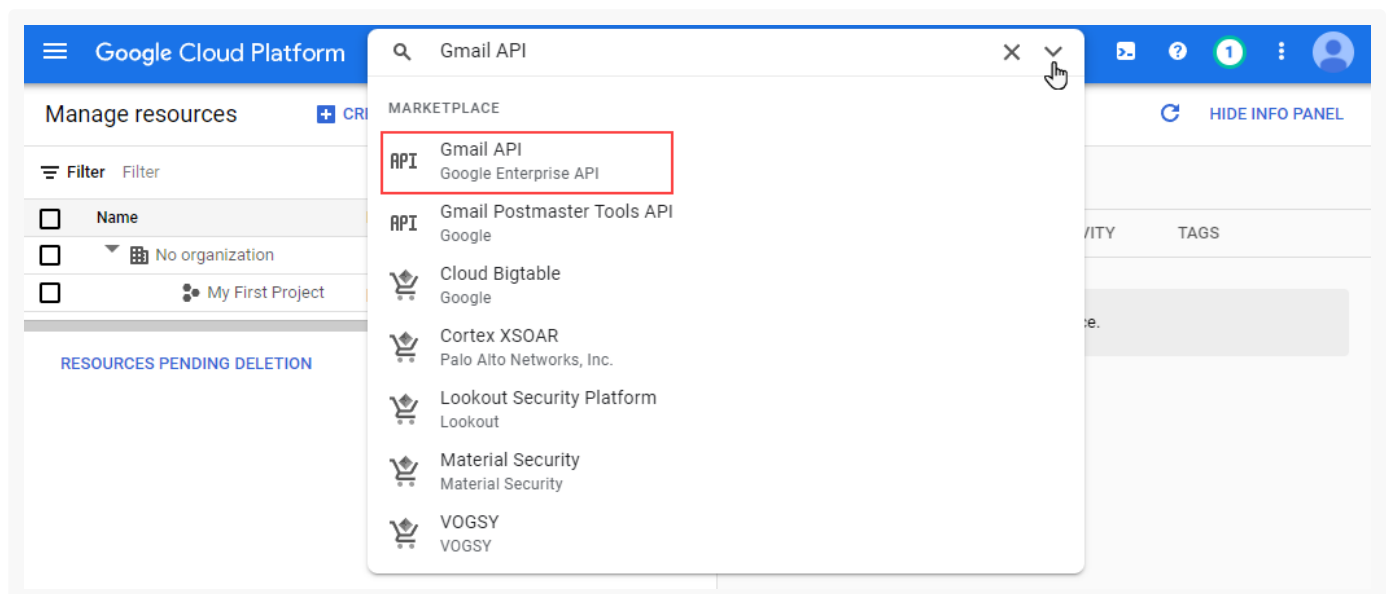
- Click [*Select project*] (Fig. 2) and select a project in the window that opens to proceed to the project setup.

Fig. 2 Select a project



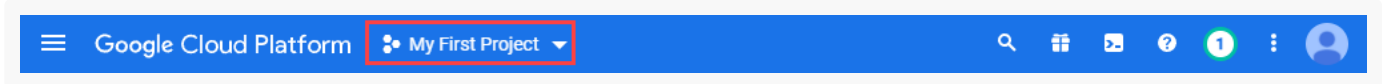
- Grant permissions to use the project APIs Creatio requires. Find the Gmail API using the search bar (Fig. 3).

Fig. 3 The Gmail API



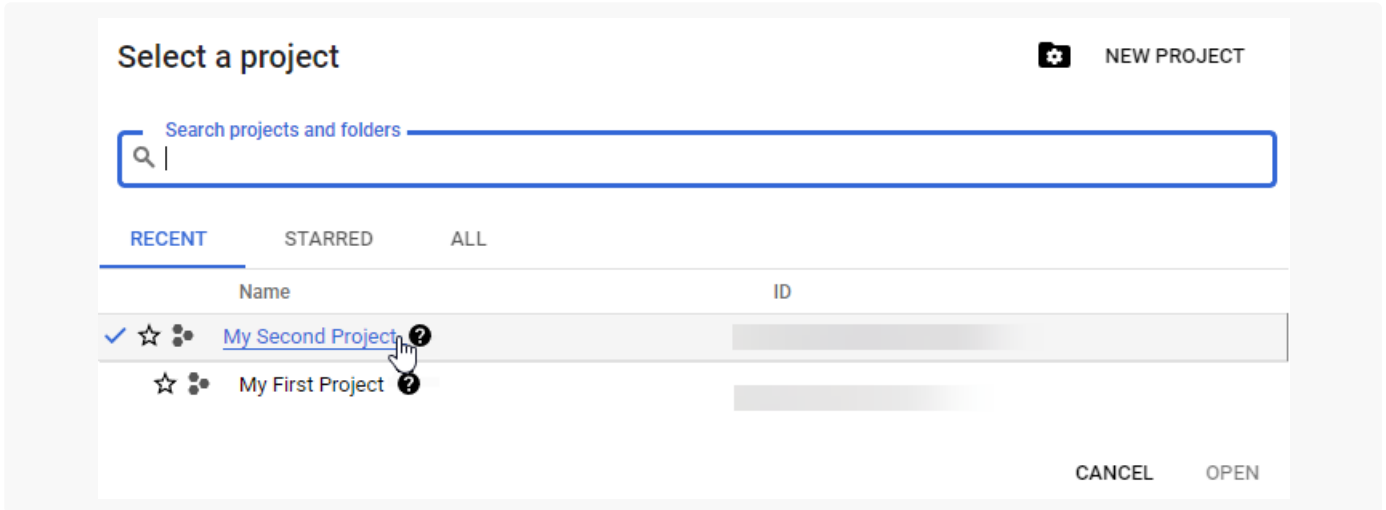
- Open the Gmail API page. Make sure you selected the relevant project. Google displays the name of the active project in the header of the page that opens (Fig. 4).

Fig. 4 The name of the active project



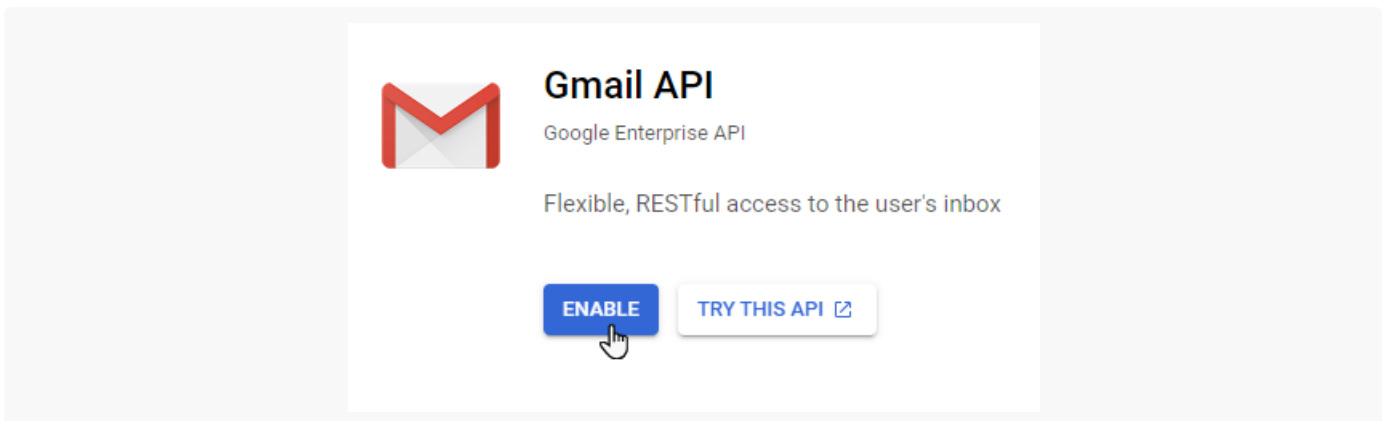
To change the active project, click the name in the top bar and select the needed project in the window that opens (Fig. 5).

Fig. 5 Select the active project



8. Click [*Enable*] to enable the Gmail API (Fig. 6).

Fig. 6 Enable the Gmail API



As a result, the API will appear in the index of available APIs on the control panel (Fig. 7).

Fig. 7 The index of available project APIs

Name	↓ Requests	Errors (%)	Latency, median (ms)	Latency, 95% (ms)
Gmail API				

9. Repeat steps 5-7 to activate the Calendar API.


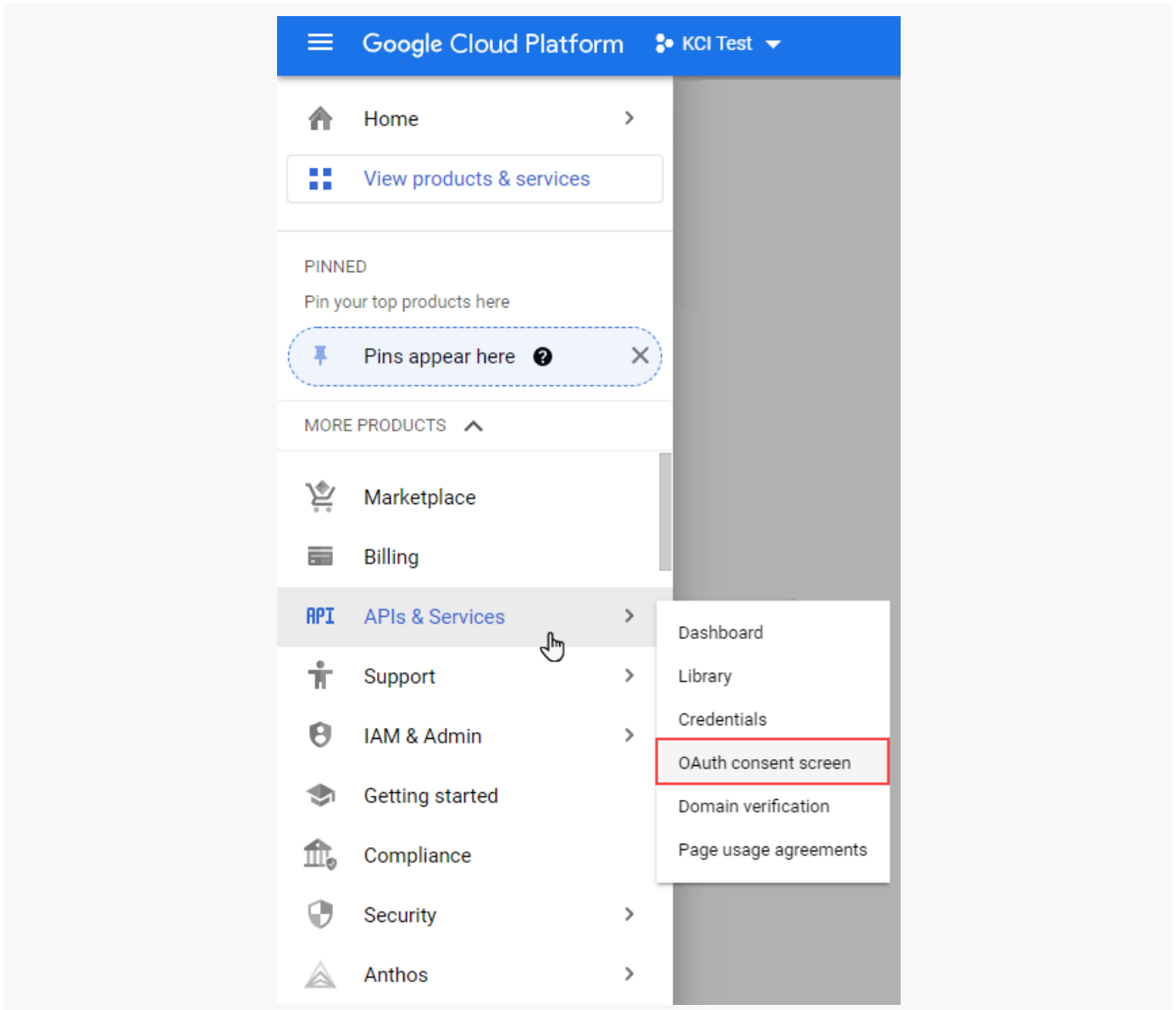
10. Click  in the top left of the settings page → [*APIs & Services*] → [*OAuth consent screen*] to specify the user type, app name, and app parameters (Fig. 8).

Fig. 8 Open the OAuth consent screen




11. Specify the [*Internal*] user type to restrict access to Google services to users from your company (Fig. 9).

Fig. 9 Select the user type


OAuth consent screen

Choose how you want to configure and register your app, including your target users. You can only associate one app with your project.

User Type

Internal 

Only available to users within your organization. You will not need to submit your app for verification. [Learn more about user type](#)

External 

Available to any test user with a Google Account. Your app will start in testing mode and will only be available to users you add to the list of test users. Once your app is ready to push to production, you may need to verify your app. [Learn more about user type](#)

[CREATE](#)

[Let us know what you think](#) about our OAuth experience

12. Fill out the domain parameters:

- Enter the product name to display to users when they permit Creatio to use the Google account in the [*App name*] field. For example, "Creatio."
- Enter the email of the Workspace administrator or your support service in the [*User support email*] field.
- Enter the domain of your Creatio application in the [*Authorized domains*] field. Specify "creatio.com" for **Creatio cloud**. Specify your individual domain for **Creatio on-site**.
- Enter the email of the Workspace administrator in the [*Developer contact information*] field.

13. Click [*Add or remove scopes*] to proceed to scope setup (Fig. 10).

Fig. 10 Open the scope setup page

Edit app registration

OAuth consent screen — **2** **Scopes** — **3** Summary

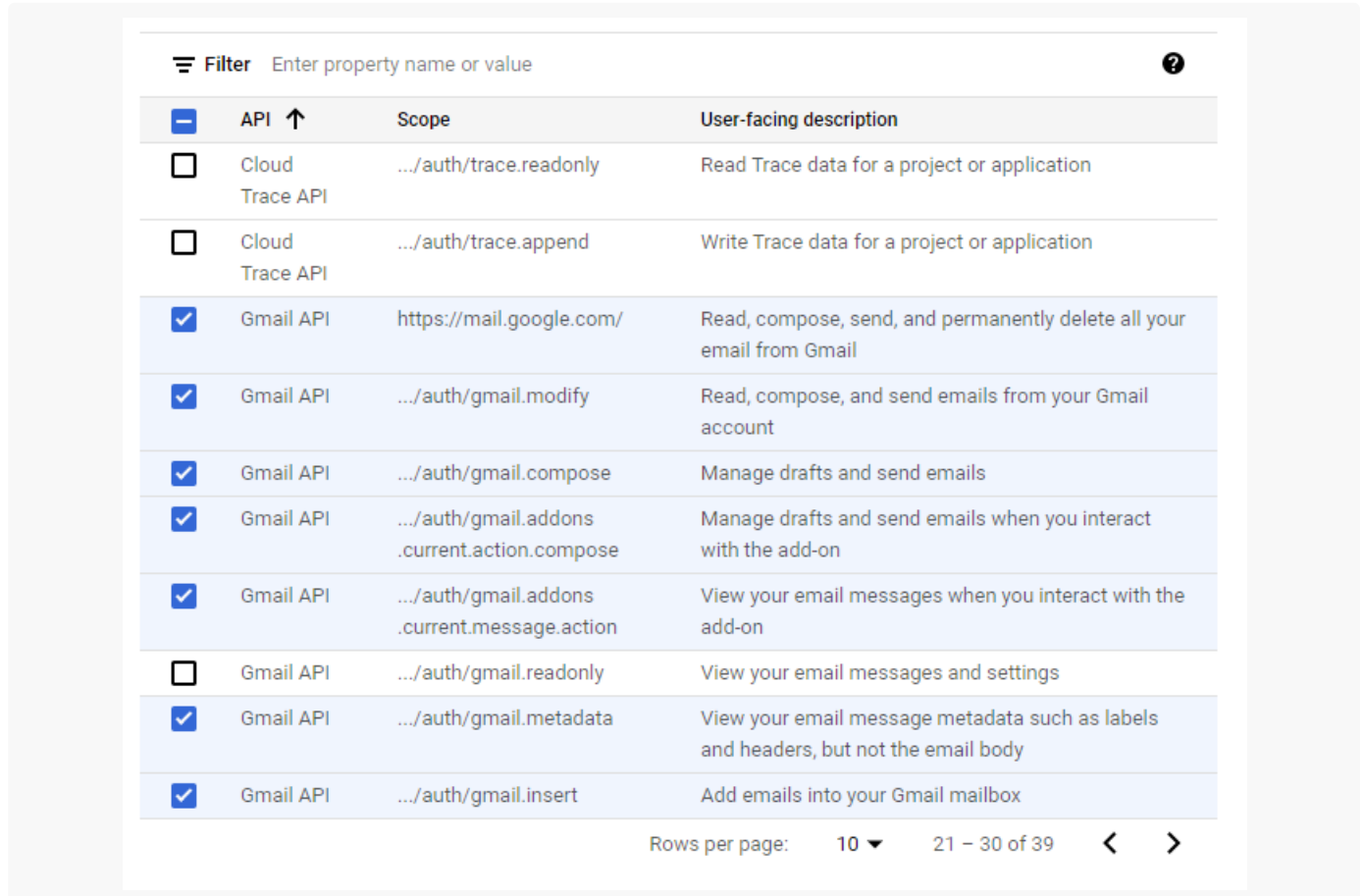
Scopes express the permissions you request users to authorize for your app and allow your project to access specific types of private user data from their Google Account. [Learn more](#)

[ADD OR REMOVE SCOPES](#)

14. Set up the scopes of your domain users. To do this, select the rows whose [*API*] column value is “Gmail API” except for rows that have read-only scope, i. e., whose [*Scope*] column value matches the `.../*.*.readonly` pattern (Fig. 11).

Repeat the step for rows whose [*API*] column value is “Calendar API.”

Fig. 11 Set up the scopes

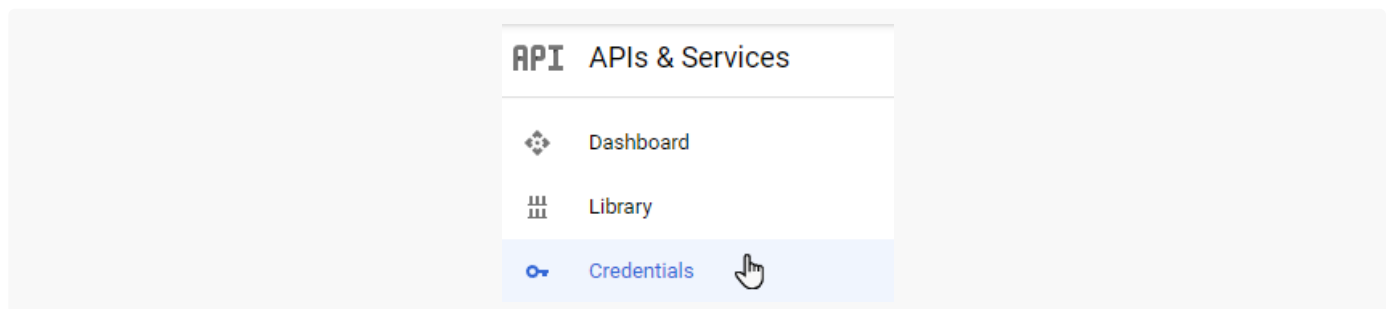


15. Click [*Save and continue*].

Step 2. Retrieve the keys that integrate Google with external apps

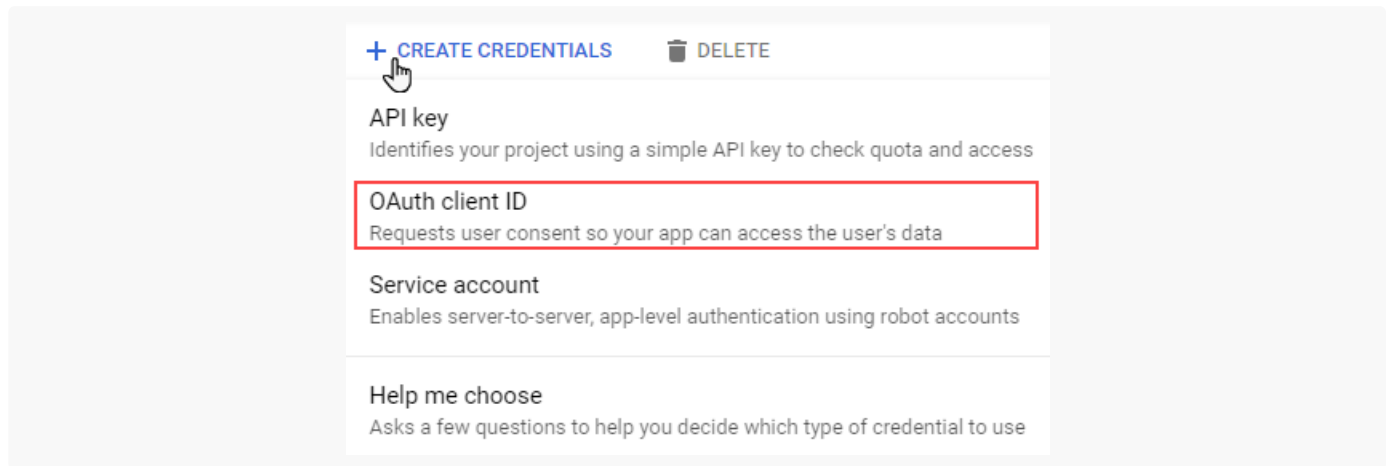
1. Open the credentials page. To do this, select [*Credentials*] in the side menu (Fig. 12).

Fig. 12 Open the [*Credentials*] page



2. Click [*Create Credentials*] → [*OAuth client ID*] (Fig. 13) to create an OAuth 2.0 client ID.

Fig. 13 Select OAuth client ID



3. Fill out the required parameters to create an OAuth 2.0 client ID (Fig. 10):
 - a. Select “Web application” in the [*Application type*] parameter
 - b. Enter an arbitrary name of the OAuth 2.0 client in the [*Name*] parameter.
 - c. Enter the full Creatio URL in the [*Authorized JavaScript origins*] parameter. Specify the URL with the “creatio.com” domain for **Creatio cloud**. For example, “https://050651-studio.creatio.com.” Specify the URL with your individual domain for **Creatio on-site**.
 - d. Enter the links to Creatio in the following formats in the [*Authorized redirect URLs*] field:

For Creatio **7.17.0 and earlier**:

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

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

For Creatio **7.17.1 and later**:

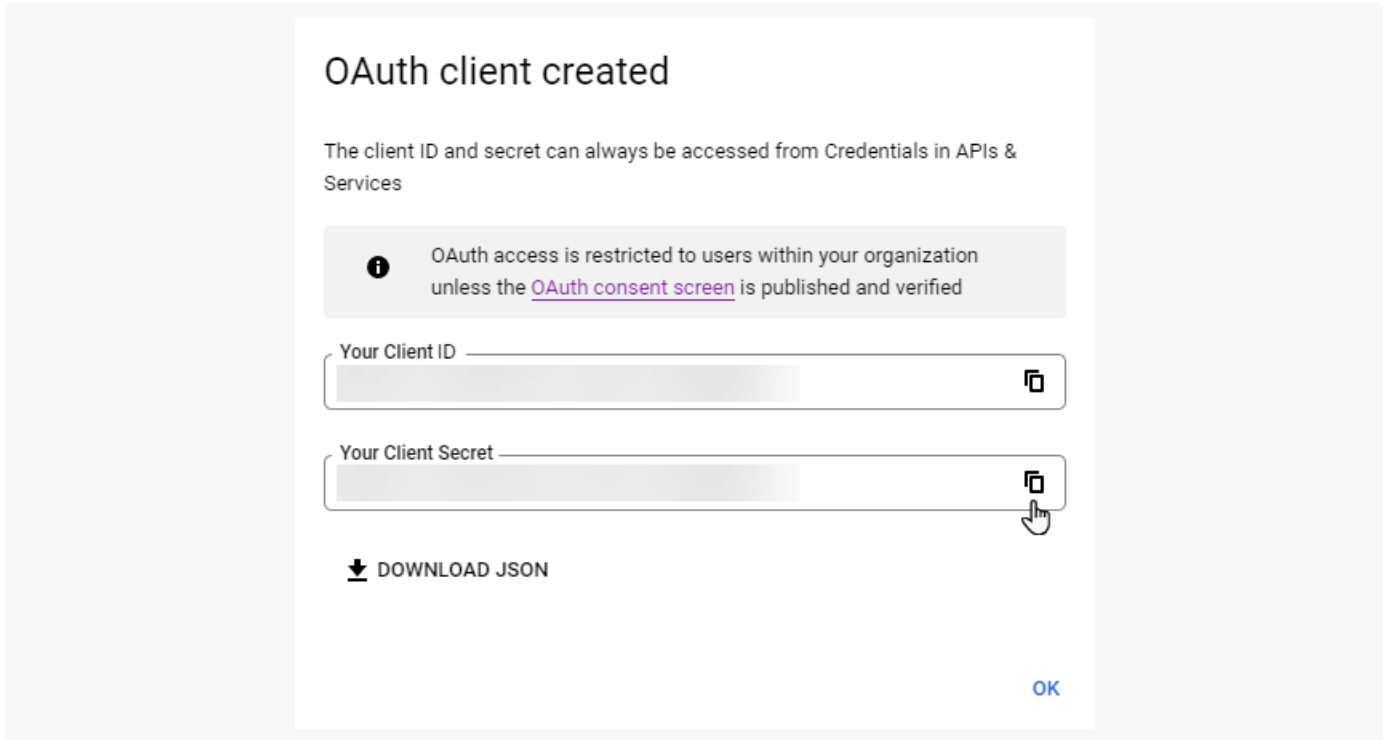
```
https://your_website_url/0/LegacySocialAccountAuthPage.aspx?Id=3b22f0ff-034a-48da-8758-a0660e5a26ff
```

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

Note. Specify new authorized redirect URIs in the existing OAuth 2.0 client ID as part of an update to Creatio 7.17.1 and later. Alternatively, create a new client ID that has new URIs and use its client and secret keys for Creatio account integration.

4. Copy the retrieved Client ID and Client Secret and save them to your device (Fig. 14).

Fig. 14 The Google keys



Step 3. Enter the Google keys in Creatio

Enter the Google keys that synchronize the calendar

Enter the retrieved "Client ID" and "Client Secret" keys in Creatio as the values of the "Google services access key" ("GoogleConsumerKey" code) and "Google secret access key" ("GoogleConsumerSecret" code) system settings, respectively. To do this:


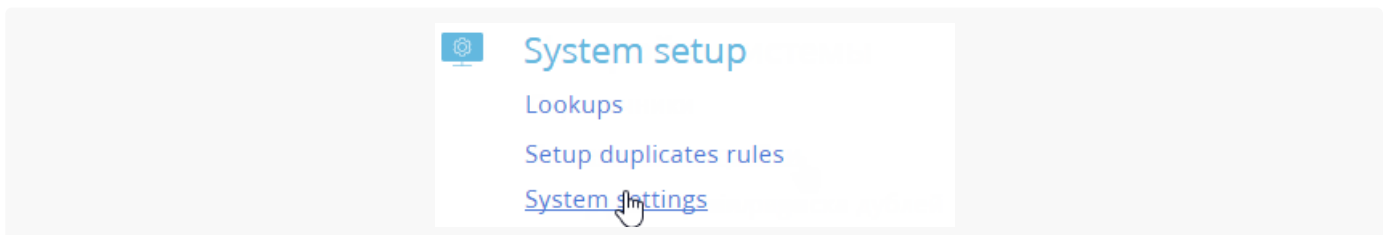
1. Open Creatio.
2. Open the System Designer. For example, click the  button.
3. Go to the [*System setup*] block → [*System settings*] (Fig. 15).

Fig. 15 The [*System settings*] section



4. Select the "Google services access key" ("GoogleConsumerKey" code) system setting in the list and click [*Open*].
5. Enter the "Client ID" code retrieved when you registered Creatio in Google (available in the [*Your client ID*] field of the Google API message) in the [*Default value*] field of the system setting and save the changes.
6. Select the "Google secret access key" ("GoogleConsumerSecret" code) system setting in the list and click [*Open*].

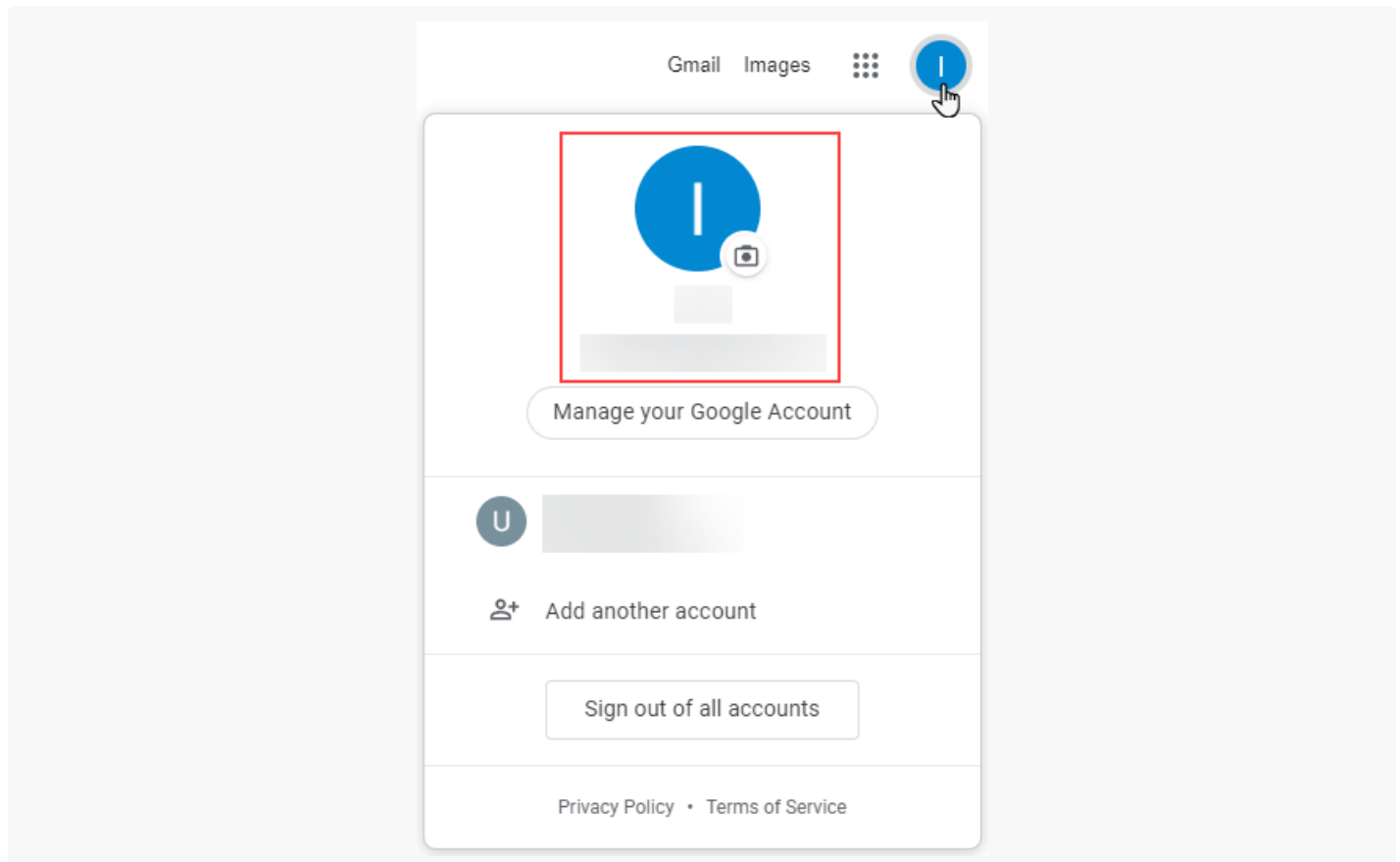
7. Enter the “Client Secret” code retrieved as part of Creatio registration in Google (available in the [*Your client secret*] field of the Google API message) in the [*Default value*] field of the system setting and save the changes.
8. Select the “Use shared Google application” (“UseGoogleSharedApplication” code) system setting, click [*Open*], and make sure that the [*Default value*] checkbox is **cleared**.

As a result, you will be able to set up the [synchronization of Creatio tasks with Google](#).


Enter the Google keys for email synchronization

Since the project in Google Workspace has internal user type, make sure you are logged in the Google account as an **authorized domain user** when you add a new mailbox or set up email synchronization in Creatio. The account must also have the priority. To check the priority, go to <https://www.google.com/> and make sure the account with the authorized domain in the email has the priority (Fig. 16)

Fig. 16 Account priority in Google



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

1. Open Creatio.
2. Open the System Designer. For example, click the  button.
3. Go to the [*System setup*] block → [*Lookups*].
4. Open the content of the [*List of email providers*] lookup.

5. Open the Gmail provider settings.
6. Specify the OAuth 2.0 authentication method in the [*Additional settings*] area. This grants the email service limited access to the protected user resources without the need to pass the user credentials.
7. Enter the “Client ID” and “Client Secret” codes retrieved earlier in the [*Application (client) ID*] and [*Client secret*] required fields, respectively.

Fig. 17 Set up OAuth 2.0 for Gmail

GMail

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.

As a result, users will be able to set up the synchronization of Google mailboxes and calendars with their Creatio accounts.

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*].