



www.code-k.com.br

Code-K Calendar Sync – Configuration and Installation Guide

(Release July, 2015)

Summary

| | |
|---|----|
| 1. About the Code-K Calendar Sync | 3 |
| 2. Installation | 4 |
| 3. Enabling the synchronization per user | 5 |
| 4. Disabling the synchronization per user | 8 |
| 5. Synchronization Error Logs | 9 |
| 6. Workflows | 10 |
| 6.1. Sync Appointment – Create/Update | 10 |
| 6.2. Sync Appointment – Delete | 11 |
| 6.3. Reprocess Appointment | 12 |
| 6.4. Send Alert Calendar Sync | 13 |
| 7. Synchronization Example | 17 |

1. About the Code-K Calendar Sync

Code-K Calendar Sync is a product that allows a bidirectional synchronization of the appointments between Microsoft Dynamics CRM and Google Calendar. This integration is performed through CRM's native Web Services and Google's native API, which ensure the proper functioning of the tool.

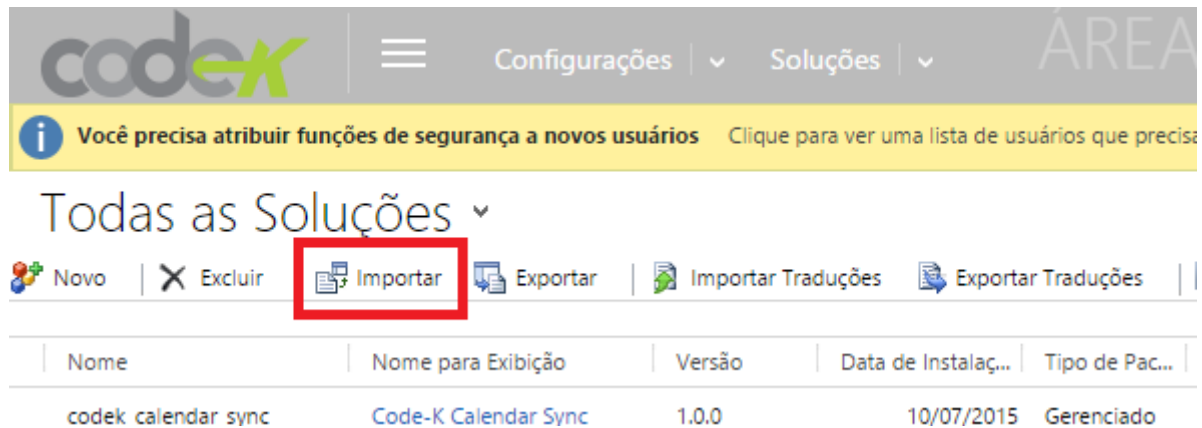
2. Installation

To install Code-K Calendar Sync is necessary to have the System Administrator security role within Microsoft Dynamics CRM.

Navigate in main menu to solutions area:

Settings → Solutions.

After navigating to Solutions the user must import ("Importar") the Code-K Calendar Sync solution.



The screenshot shows the 'Todas as Soluções' (All Solutions) page in the Microsoft Dynamics CRM interface. The 'Importar' button is highlighted with a red box. The table below lists the installed solutions.

| Nome | Nome para Exibição | Versão | Data de Instalaç... | Tipo de Pac... |
|---------------------|----------------------|--------|---------------------|----------------|
| codek calendar sync | Code-K Calendar Sync | 1.0.0 | 10/07/2015 | Gerenciado |

After the solution's import, it will be possible to configure which users that must have their appointments synchronized.

3. Enabling the synchronization per user

To enable the calendar synchronization per user it is necessary to access Microsoft Dynamics, then go to Settings → Security → Users.


Fill the Primary Email field with the Google account and click on button “Enable Sync”.

The screenshot shows the Microsoft Dynamics CRM user administration interface. At the top, there is a navigation bar with 'code-k' logo, 'Settings', 'Security', and 'code-k Usuário para Testes'. A yellow banner at the top states: 'You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics CRM Security Roles. Assign Roles'. Below this, there is a menu with 'CONNECT', 'ENABLE SYNC' (highlighted with a red box), 'DISABLE SYNC', 'APPROVE EMAIL', 'REJECT EMAIL', 'REASSIGN RECORDS', and 'MANAGE ROLES'. The user profile for 'code-k Usuário para Testes' is displayed. A yellow warning banner states: 'The information provided in this form is viewable by the entire organization. This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.' The 'Summary' section is divided into three columns: 'Account Information' (User Name: code-k@code-k.com.br), 'User Information' (Full Name: code-k Usuário para Testes, Title: --, Primary Email: codek2015@gmail.com - highlighted with a red box, Mobile Phone: --, Main Phone: --), and 'Calendar Sync' (Status: Enabled). The 'POSTS' section shows two posts: 'JC Soluções' (Opportunity: Created by code-k Usuário para Testes for Contact Code-K Admin. On JC Soluções's wall 07/07/2015 10:51) and 'Gabriela Klava' (Contact: Created By code-k Usuário para Testes. On Gabriela Klava's wall 29/06/2015 11:27). The 'TEAMS' section shows 'codek'.

Log in using your Google account



Fazer login usando sua Conta do Google



Code-K 2015
codek2015@gmail.com

Fazer login

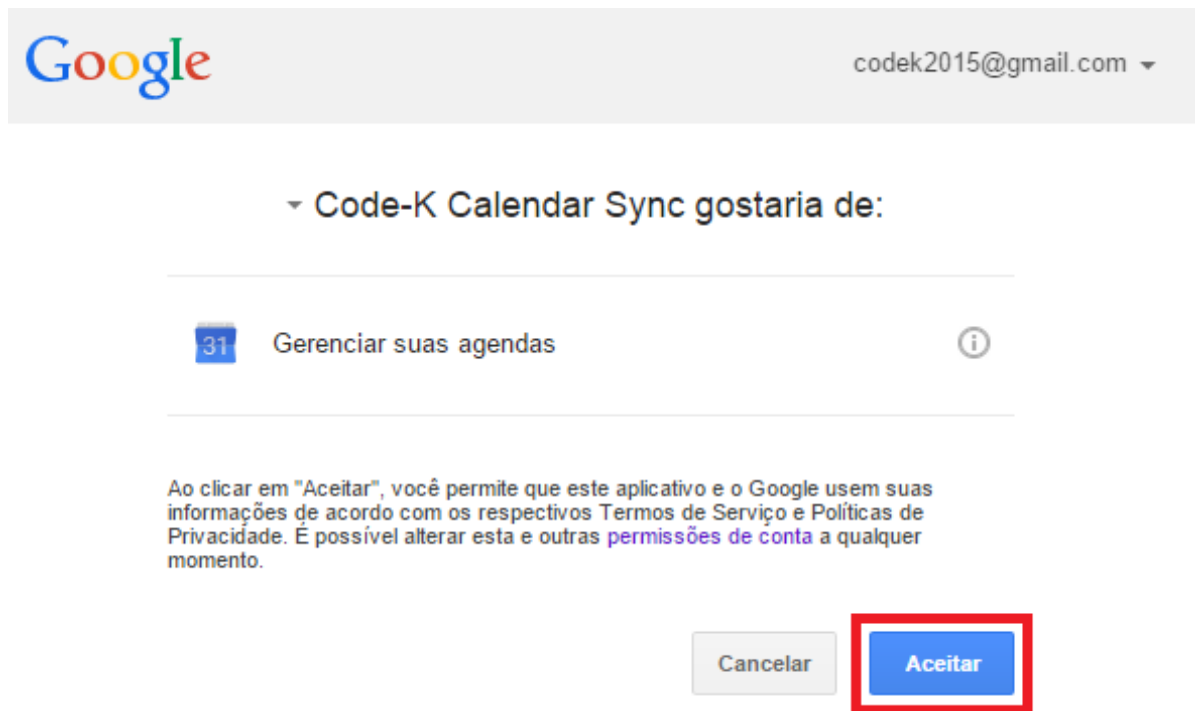
[Precisa de ajuda?](#)

[Acesse com uma conta diferente](#)

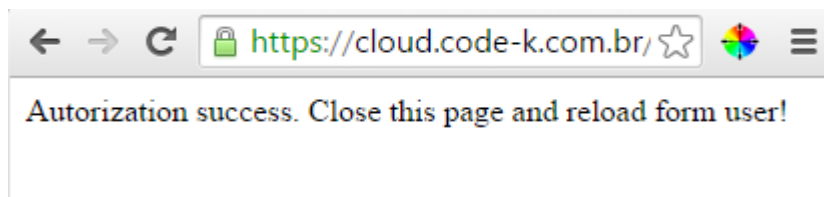
Uma Conta do Google para tudo o que o Google oferece



Accept the terms of service and privacy policy.



After the synchronization enabling, the below message will be displayed.



Following all these steps, the synchronization is enabled to this account.

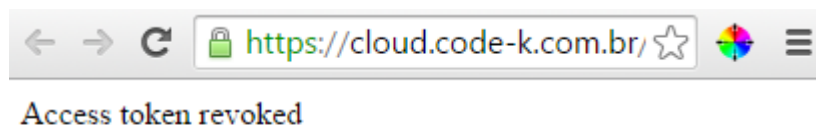
4. Disabling the synchronization per user

To disable the calendar synchronization per user it is necessary to access Microsoft Dynamics CRM, then go to Settings → Security → Users.

Click on button “Disable Sync”.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Settings', 'Security', and 'code-k Usuário para Testes'. A yellow banner at the top says 'You need to assign security roles to new users'. Below that, a row of action buttons includes 'CONNECT', 'ENABLE SYNC', 'DISABLE SYNC' (highlighted with a red box), 'APPROVE EMAIL', 'REJECT EMAIL', 'REASSIGN RECORDS', and 'MANAGE ROLES'. The user profile for 'code-k Usuário para Testes' is shown, with a 'Summary' section containing 'Account Information', 'User Information', and 'Calendar Sync'. The 'Calendar Sync' status is currently 'Enabled'.

After disabling, the below message will be displayed:



5. Synchronization Error Logs

The entity "Code-K Calendar Sync Log" is responsible for storing the synchronization error logs, in other words, in case an error occurs during any appointment synchronization, it can be seen in this entity. Subsequently, if necessary, the appointment can be synchronized again using the process "Reprocess Appointment", which will be detailed on section 6.3.

6. Workflows

6.1. Sync Appointment – Create/Update

The process “Sync Appointment – Create/Update” is responsible for performing the integration in the way Microsoft Dynamics CRM -> Google Calendar. After the creation or update of an appointment, the process allows to insert business rules before sending to Google Calendar.

Process: Sync Appointment - Create/Update

Working on solution: Solução Padrão

File Close Deactivate Show Dependencies Actions Help

Information

Process Sessions

General Administration Notes

Hide Process Properties

Process Name * Sync Appointment - Create/Update

Activate As Process

Entity Appointment

Category Workflow

Options for Automatic Processes

Scope Organization

Start when: Record is created Record status changes Record is assigned Record fields change View Record is deleted

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Workflow Job Retention

Automatically delete completed workflow jobs (to save disk space)

Execute

Code-K Calendar Sync\Execute Sync View properties

Create log if exists error (Only create and update events, if delete, workflow generate an exception)

If Execute:Success equals [False], then:

Create: Calendar Sync Event Log View properties

* The actions can only be added to existing steps, once done it can not be changed.

6.2. Sync Appointment – Delete

The process “Sync Appointment – Delete” is responsible for performing the integration in the way Microsoft Dynamics CRM -> Google Calendar after the appointment deletion.

The screenshot shows the configuration interface for the process "Sync Appointment - Delete". The interface includes a top menu bar with options like "File", "Close", "Deactivate", "Show Dependencies", and "Actions". Below the menu, the process name and tabs for "General", "Administration", and "Notes" are visible. The "General" tab is active, showing various configuration options:

- Process Name:** Sync Appointment - Delete
- Entity:** Appointment
- Activate As:** Process
- Category:** Workflow
- Available to Run:**
 - Run this workflow in the background (recommended)
 - As an on-demand process
 - As a child process
- Workflow Log Retention:**
 - Keep logs for workflow jobs that encountered errors
- Options for Automatic Processes:**
 - Scope:** Organization
 - Start when:**
 - Record is created:** After
 - Record status changes:** After
 - Record is assigned:** After
 - Record fields change:** After
 - Record is deleted:** Before
- Execute as:**
 - The owner of the workflow
 - The user who made changes to the record

At the bottom of the configuration pane, there is a link: "Code-K Calendar Sync\Execute Sync. View properties".

6.3. Reprocess Appointment

The process “Reprocess Appointment” is responsible for performing the appointment reprocessing.

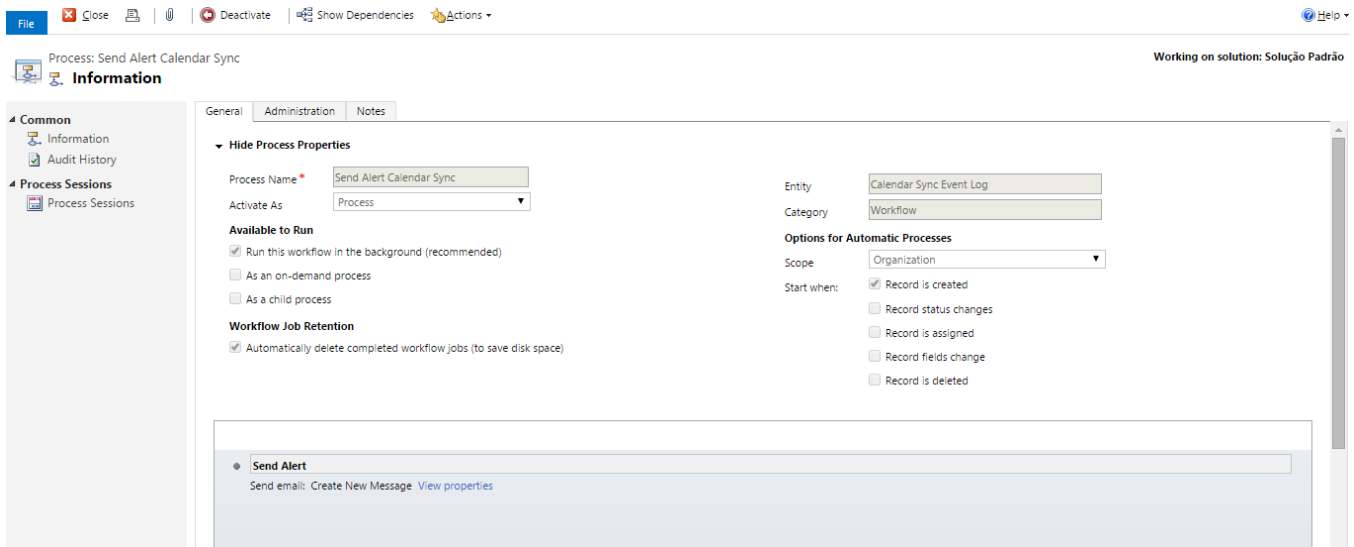
The screenshot shows the configuration for the 'Reprocess Appointment' process in Salesforce. The process is set to 'Reprocess Appointment' and is activated as a 'Process'. It is configured to run in the background, as an on-demand process, and as a child process. The process is set to automatically delete completed workflow jobs. The process is associated with the 'Calendar Sync Event Log' entity and the 'Workflow' category. The scope is set to 'Organization'. The process is triggered when a record is created, and it performs the following actions:

- Change record status to: Calendar Sync Event Log Synchronized
- Code-K Calendar SyncForce Sync [View properties](#)
- Step description: None provided.
 - If Force SyncSuccess equals [False], then:
 - Create: Calendar Sync Event Log [View properties](#)

*This process is not automatic, if necessary, it needs to be done manually.

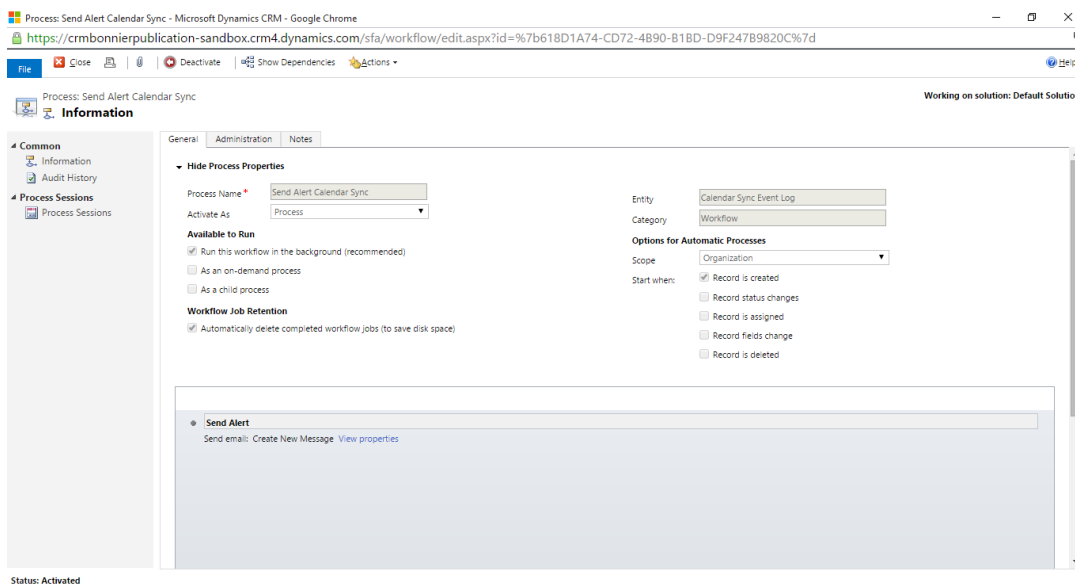
6.4. Send Alert Calendar Sync

The process “Send Alert Calendar Sync” is responsible for sending an email alert in case occurs any appointment's synchronization error.

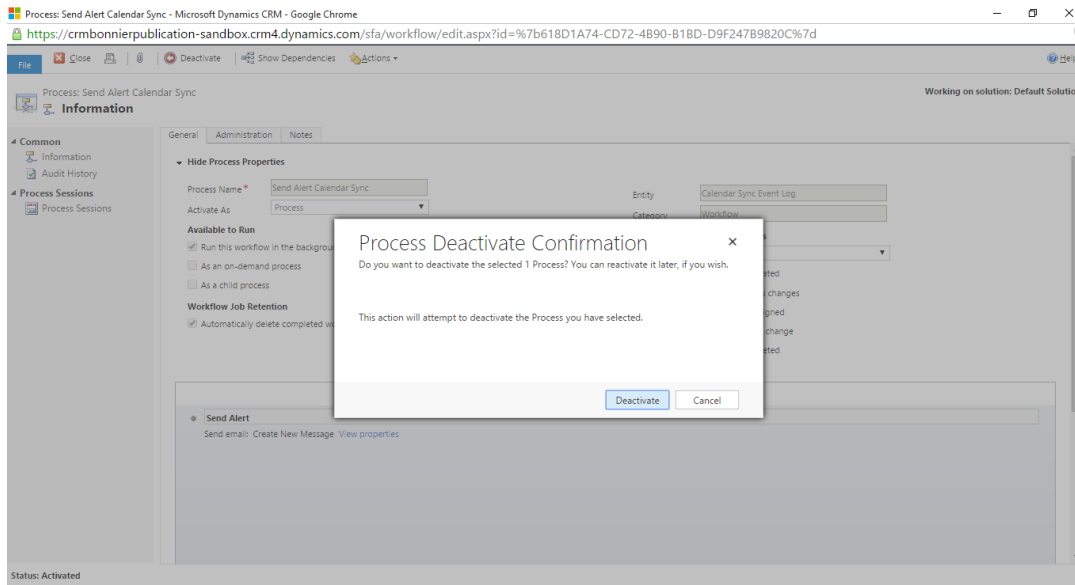


By default the email alert is send to the appointment Organizer, it is allowed to set the recipient for the email alert and also the email model. For you set the new recipient for the email alert, follow the steps bellow:

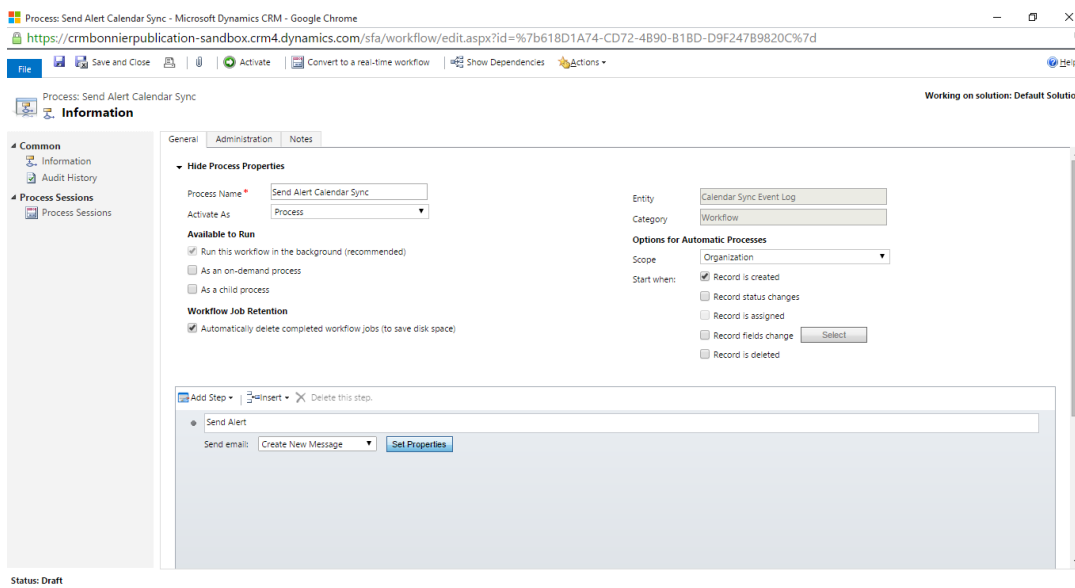
1. Open the Microsoft Dynamics CRM and go to the list Process and open the process with name “Send Alert Calendar Sync”



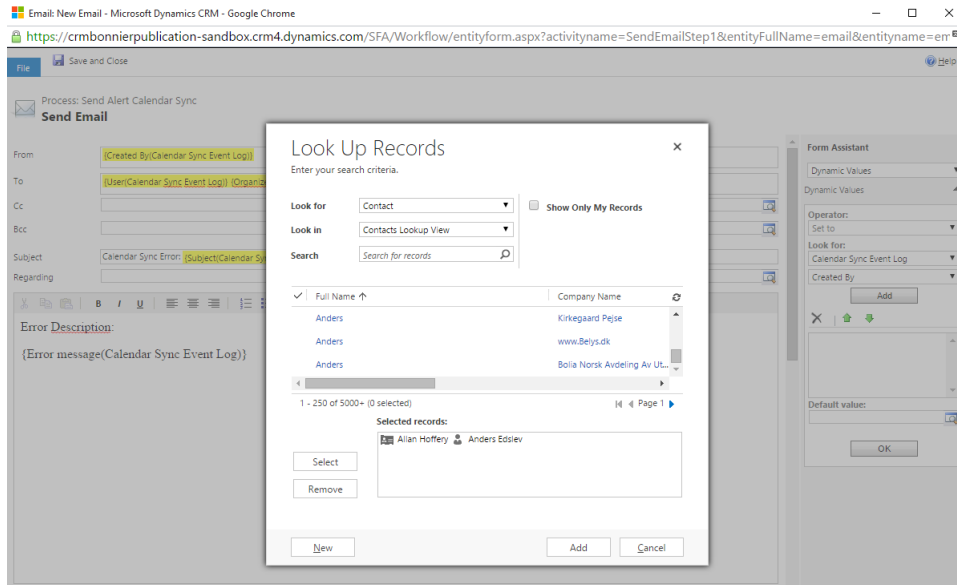
2. Deactivate process



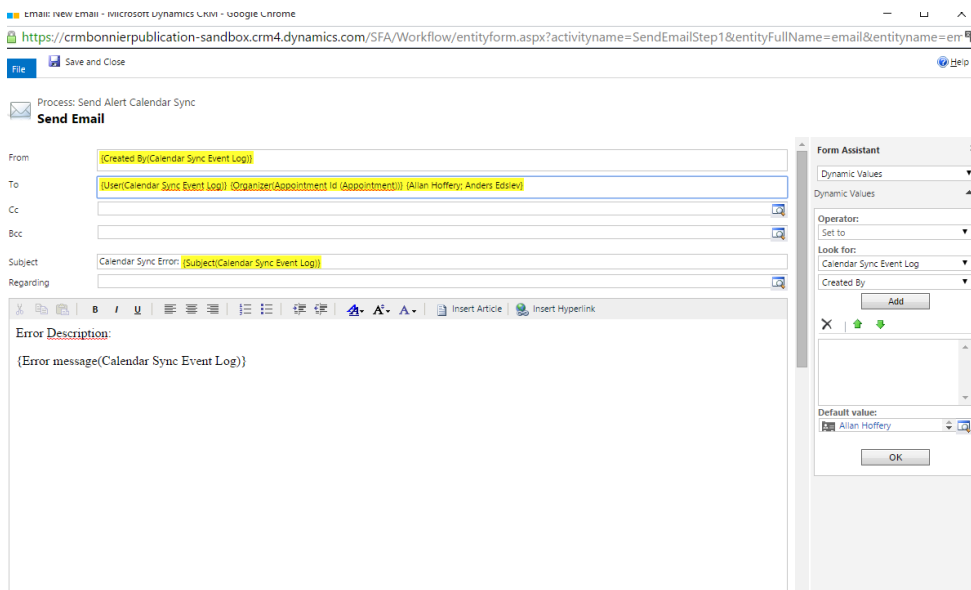
3. Click Button "Set Properties" in the send email step



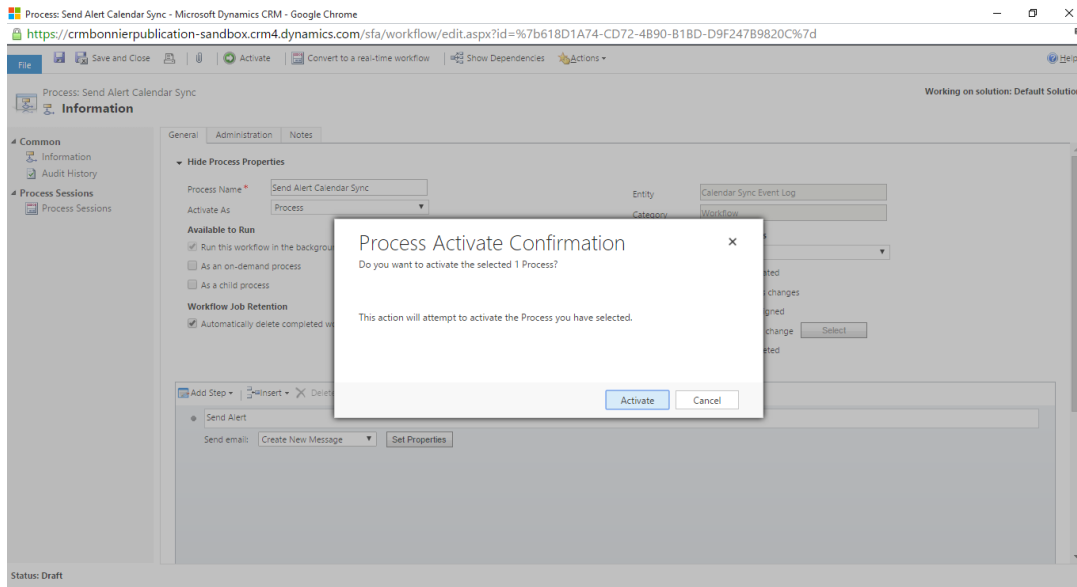
4. Click “to” field and set default value. You can use account, contact or user entity



5. Click OK and Save and Close



6. Activate Process



7. Synchronization Example

1) Creating an appointment in Microsoft Dynamics CRM.

codex | New Appointment | SANDBOX

SAVE MARK COMPLETE SAVE & CLOSE RECURRENCE

APPOINTMENT

New Appointment | Priority: Normal | Status: Open | Owner: code-k Usua...

! Some of the recipients are outside of your organization. These recipients will also receive this appointment when you save it.

| | |
|---------------|--------------------------|
| Required | Danilo Castro |
| Optional | -- |
| Subject * | Teste Evento |
| Location | Allianz Parque |
| Regarding | -- |
| Visibility | Public |
| Start Time * | 14/07/2015 09:30 |
| End Time * | 14/07/2015 10:00 |
| All Day Event | <input type="checkbox"/> |
| Duration | 30 minutes |

Attachments

| File Name ↑ | File Size (Bytes) |
|-------------|-------------------|
| Open | |

2) Event synchronized with Google Calendar.

←
SALVAR
Cancelar alterações
Excluir

Mais ações ▾

Teste Evento

7/14/2015
9:30am
até
10:00am
7/14/2015
Fuso horário

dia inteiro
 Repetir...

Detalhes do evento
Encontrar um horário

Onde
[mapa](#)

Video chamada [Adicionar vídeo chamada](#)

Agenda

Descrição

Adicionar convidados

Digite os endereços de e-mail

Adicionar

Clique nos ícones abaixo para marcar como opcional.

Convidados [✉ Enviar e-mail para os convidados](#)

Sim: 0, Talvez: 0, Não: 0, Aguardando: 1

daraujo@code-k.com.br * ✕

* A agenda não pode ser exibida. [Por quê?](#)

Cor do evento

Notificações

minutos
✕

[Adicionar uma notificação](#)

Mostrar-me como

Disponível
 Ocupado

Visibilidade

Padrão da agenda
 Público
 Privado

Se você tornar esse evento público, todos os detalhes do evento serão expostos a qualquer pessoa que tiver acesso a essa agenda, mesmo que ela não possa ver detalhes de outros eventos. [Saiba mais](#)

[Publicar evento](#)

www.code-k.com.br

comercial@code-k.com.br

Avenida Paulista, 2006, 4º Andar - São Paulo/SP - Brazil

Telephone +55 11-3171-3540

Code-K Calendar Sync