

(Lightning) Activity: Create a customer visit in Salesforce and from Google Calendar (Lightning For Gmail)

Overview

In this section, you will find information about how to create an event or a customer visit in Salesforce, and how to invite a colleague or customer contact to the event. You will also find information about how to synchronize events / customer visits from your Google Calendar to Salesforce AND from Salesforce to Google Calendar using Lightning For Gmail. This functionality will help you ensure alignment between your calendars and simplify the management of customer visits.

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ALL

Step By Step

Create a customer visit in Salesforce

1 Start the creation of your activity by opening the **contact** page in Salesforce



You can create customer visit from different places in Salesforce:

- From an Opportunity
- From a Visit Report
- From an Account

-> In all the cases, the account and/or the contact already recorded at opportunity, visit report and account level will be pre-filled in the new customer visit

The screenshot displays the Salesforce interface for a contact named Mr. John Doe. The contact is associated with the account 'TEST TRAINING'. The page includes tabs for Chatter, Details, Visit Reports, Business, Service, VoC, and Related. The 'Details' tab is active, showing fields for Name, Account Name, Language, Related GBU, Technology Solutions, Job Department, Logistics, Function, Analyst, and Title. A 'CUSTOMER VISIT' button is visible at the bottom right, with a '+ Schedule VMS' option. A warning message states 'No Visit scheduled in the future'.

2

From the contact page, *schedule the next visit* by clicking on

[+ Schedule Visit](#)

that will **create an event on the calendar**

•As the event was created from the contact, the **Account** field and **Name** field for contact are automatically pre-populated. Isn't this useful?

CUSTOMER VISIT [+ Schedule Visit](#)

⚠ No Visit scheduled in the future

New Event: Customer Visit

Calendar Details

*Assigned To: Lella RADJAH

Account: Search Accounts...

*Subject: [Empty]

*Contact Name: John Doe

*Start: Date: 15/10/2018, Time: 16:00

*End: Date: 15/10/2018, Time: 17:00

All-Day Event:

Location: [Empty]

Attendees: Lella RADJAH

Type: Meeting

Related To: Search Account Plans...

*Status: Draft

3

Enter a **Subject**

•Enter the **Start date** and the **End date** for his event.

New Event: Customer Visit

Calendar Details

*Assigned To: Lella RADJAH

Account: Search Accounts...

*Subject: Business Review

*Contact Name: John Doe

*Start: Date: 15/10/2018, Time: 16:00

*End: Date: 15/10/2018, Time: 17:00

All-Day Event:

Location: [Empty]

Attendees: Lella RADJAH

Type: Meeting

Related To: Search Account Plans...

*Status: Draft

4

Fill in the **Visit Preparation** (Internal) with the items allowing you to prepare the visit (Topics to discuss, to prepare, etc)

- The Description can be used if the invitation is sent from SFDC
- It will be filled in automatically if you synchronize your event from Google
- The visit is now created in Salesforce and available in your calendar.

Additional Information

Event Record Type
Customer Visit

Meeting Type

In Person

Visit Preparation (Shared Internally)

Objectives

Discuss to Increase the price

Visit Description (Shared with customer)

Description

We would like to discuss increase price if the commit annual volume is not reach.

Event Business Review

Edit Delete

Account	Start	End	Contact Name
TEST TRAINING	15/10/2018 16:00	15/10/2018 17:00	John Doe

Details Related

Calendar Details

Assigned To

[Lella RADJAH](#)

Subject

Business Review

Start

15/10/2018 16:00

End

15/10/2018 17:00

All-Day Event

Location

Account

[TEST TRAINING](#)

Contact Name

[John Doe](#)

Attendees

Accepted or Maybe: 1, Declined: 0, No Response: 0

[Lella RADJAH](#) (Organizer)

Type

Meeting

Related To

Status

Draft

Invite a colleague or contact to the visit

1

To invite your customer John to the meeting, *click* on **Edit** to update the visit details in the field attendees. The visit owner is added automatically in the field attendees

Calendar Details

* Assigned To

[Lella RADJAH](#)

Account

[TEST TRAINING](#)

* Subject

Business Review

* Contact Name

[John Doe](#)

* Start

Date

15/10/2018

Time

16:00

Attendees

Search...

[Lella RADJAH](#)

[John SMITH](#)

* End

Date

15/10/2018

Time

17:00

Type

Meeting

All-Day Event

Related To

[Search Account Plans...](#)

Location

* Status

Draft

2

Click on **Add to Invitees** to include John in the invitees who will receive an invitation by email

Edit Business Review

Calendar Details

*Assigned To: Lella RADJAH

Account: TEST TRAINING

*Subject: Business Review

Contact Name: John Doe

*Start Date: 15/10/2018 Time: 16:00

*End Date: 15/10/2018 Time: 17:00

All-Day Event:

Attendees: Lella RADJAH, John SMITH

Type: Meeting

Related To: Search Account Plans...

*Status: Draft

Location: |

Attention! To invite contact to a visit, he/she must have a valid email address recorded in Salesforce.

3

Your SFDC calendar is automatically syncornize with your google calendar

Dim.	Lun.	Mar.	Mer.	Jeu.
14	15	16	17	18
		Call Leila / Sylvie, 9am		
	Point hebdomad, 10am			
	Review workf, 11:30am	Functionnal alignment		YOU overview - Let's talk
	salesforce support 2:30 à 3:30pm			
	Business Review 4 à 5pm			

Business Review

Lundi, 15 octobre
4:00 à 5:00pm

We would like to discuss increase price if the commit annual volume is not reach.

4 Only the part Visit Description (shared with Customer) will appear in the google calendar and received per the external invitees.

The screenshot shows the Salesforce event creation page for 'Business Review'. The event is scheduled for 15 oct. 2018 from 4:00pm to 5:00pm. The event is currently set to 'Occupé' and 'Public'. The description field contains the text: 'We would like to discuss increase price if the commit annual volume is not reach.' The invitees list shows one invitee: 'dummyemail53_dummy.com@in...'. There are buttons for 'ENREGISTRER' and 'Autres actions'.

Create and Sync Google Calendar with Salesforce

<p>Go to your Google Calendar</p> <p>Create an Event by selecting a particular time range on the calendar and click on "Edit Event"</p> <p>Enter the Event Details and select the "Event Color" designated by your admin</p> <p>Add the invitees to the event and click "Save"</p>	
<p>Wait for 15 minutes</p> <p>Go to Salesforce</p> <p>Click on the home tab. There you would see the event which was synced from Google to Salesforce</p>	
<p>Google Calendar Sync</p>	<p>The event synced from SFDC to Google Calendar will appear in the "Red" color as well.</p>

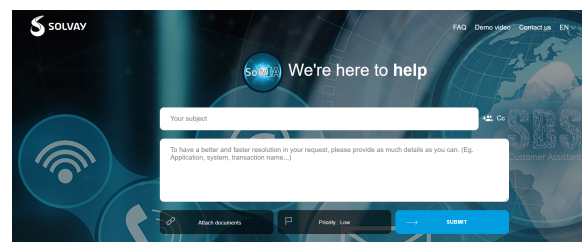
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Related articles

- [\(Lightning\) Activity: Create my business calendar](#)
- [Activity: Mass email contacts](#)
- [Activity: Synchronize events with Google Calendar \(Lightning For Gmail\)](#)
- [Visit Report Creation & Update](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example