

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.

Concerned profiles:

ALL

Step By Step

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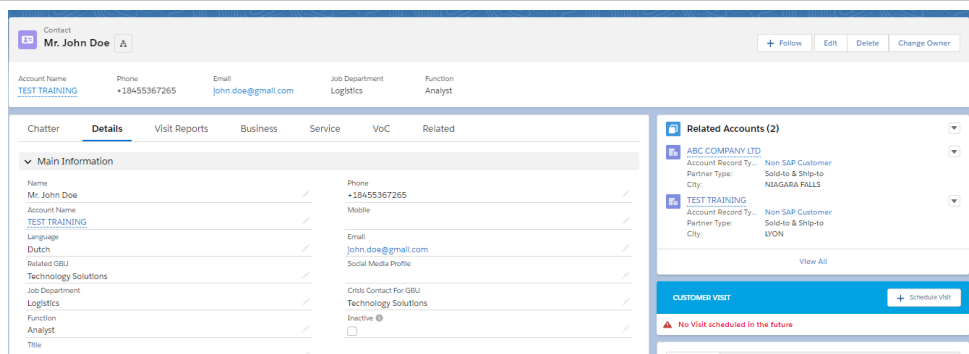
Create a customer visit in Salesforce

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 shows the Salesforce interface for a contact named Mr. John Doe. The 'Details' tab is selected, displaying the 'Main Information' section. The contact's account is 'TEST TRAINING'. The contact's phone number is '+18455367265' and the email is 'john.doe@gmail.com'. The contact's job department is 'Logistics' and the function is 'Analyst'. The contact's language is 'Dutch'. The contact's related GBU is 'Technology Solutions'. The contact's job department is 'Logistics'. The contact's function is 'Analyst'. The contact's title is 'Analyst'. The contact's status is 'Inactive'. The contact's related accounts are listed on the right, including 'ABC COMPANY LTD' and 'TEST TRAINING'. The 'CUSTOMER VISIT' section at the bottom shows a red warning message: '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

* Subject

* Start

Date

15/10/2018

Time

16:00

* End

Date

15/10/2018

Time

17:00

All-Day Event

☐

Location

Account

Search Accounts...

* Contact Name

John Doe

Attendees

Search...

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

* Subject

Business Review

* Start

Date

15/10/2018

Time

16:00

* End

Date

15/10/2018

Time

17:00

All-Day Event

☐

Location

Account

Search Accounts...

* Contact Name

John Doe

Attendees

Search...

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 commitment annual volume is not reached.

Event Business Review

Edit Delete

Account
[TEST TRAINING](#)

Start
15/10/2018 16:00

End
15/10/2018 17:00

Contact Name
[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](#)

* Subject

Business Review

* Start

Date

15/10/2018

Time

16:00

* End

Date

15/10/2018

Time

17:00

All-Day Event

☐

Location

|

Account

[TEST TRAINING](#)

* Contact Name

[John Doe](#)

Attendees

Search...

[Lella RADJAH](#)

[John SMITH](#)

Type

Meeting

Related To

[Search Account Plans...](#)

* 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

***Subject**

Business Review

***Start**

Date
15/10/2018
Time
16:00

***End**

Date
15/10/2018
Time
17:00

All-Day Event
☐

Location

Account

TEST TRAINING

***Contact Name**

John Doe

Attendees

Search...

Lella RADJAH
John SMITH

Type

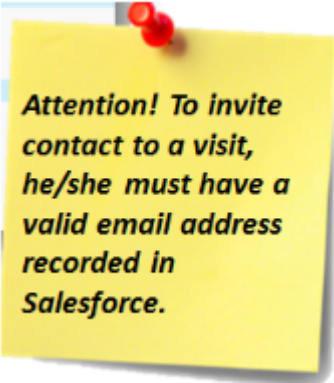
Meeting

Related To

Search Account Plans...

***Status**

Draft

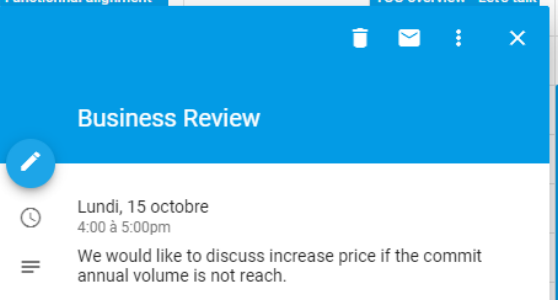


Attention! To invite contact to a visit, he/she must have a valid email address recorded in Salesforce.

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.

Business Review

ENREGISTRER

Autres actions

15 oct. 2018

4:00pm

à

5:00pm

15 oct. 2018

FUSEAU HORAIRE

☐

Toute la journée

Une seule fois

ÉTAIls DE L'ÉVÉNEMENT

RECHERCHER UN HORAIRE

Leila RADJAH

Occupé

Public

Si vous activez le mode public pour cet événement, toutes les personnes qui ont accès à cet agenda peuvent voir tous les détails de cet événement, même si les détails des autres événements ne leur sont pas visibles.

En savoir plus sur la visibilité des événements

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

INVITÉS

SALLES

Ajouter des invités

1 invité

1 en attente

dummyemail53_dummy.com@in...

* Impossible d'afficher l'agenda

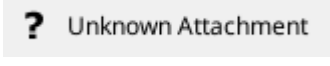
Les invités peuvent :

☐

Modifier l'événement

☐

Inviter d'autres personnes

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

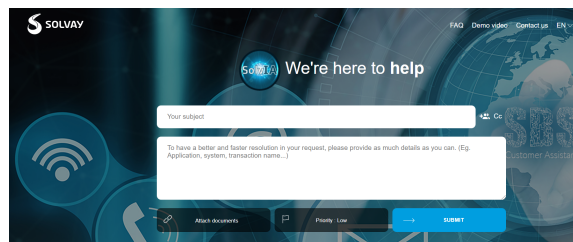
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Related articles

- [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.solvia.com/>



The image shows the Solvia Freshdesk interface for creating a new ticket. At the top, there's a Solvia logo and navigation links like 'FAQ', 'Demo video', 'Contact us', and 'EN'. Below this is a header 'We're here to help'. A form is visible with a 'Your subject' field and a larger text area for the ticket description. A note below the text area says: 'To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)' At the bottom of the form, there are buttons for 'Attach documents', 'Priority Low', and 'SUBMIT'.

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