

G Suite

Setup of a service account for PisaSales link

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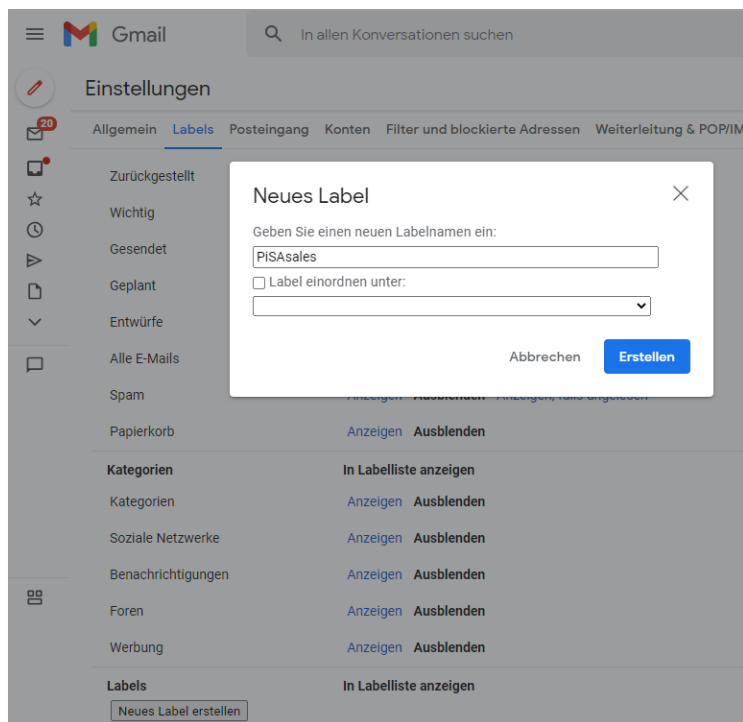
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General

From PiSA sales version 7.3 the server-driven synchronisation of e-mails and appointments in Google is supported. This is done using Google G Suite.

Since these are web-based services, e-mails and appointments can also be synchronised with PiSA sales on other platforms (e.g. Mac).

Basically, e-mails that are to be synchronised are labelled as "PiSAsales". The label must first be created in the settings on GMail (note exact spelling).



If another mailbox is to be used for synchronization (e.g. "Support"), it must be created in Google as a mailbox (or user, e.g. support@yourwebsite.com) and in PiSA sales as a corresponding groupware user.

Synchronization is only performed via Job. In Google, manual synchronization is not possible because Google has blocked access to the interface and thus the installation of application-specific functions (buttons).

Via environment variable **PSA_EMA_IMP_GGL**, values: *MOD:=LBL/ALL* (import labelled or all e-mails)
TIM:=Number of days in the past (-1 or empty stands for no restriction in the past, i.e. the date of receipt of the e-mail) the GMail import setting can be adjusted.

Prerequisites

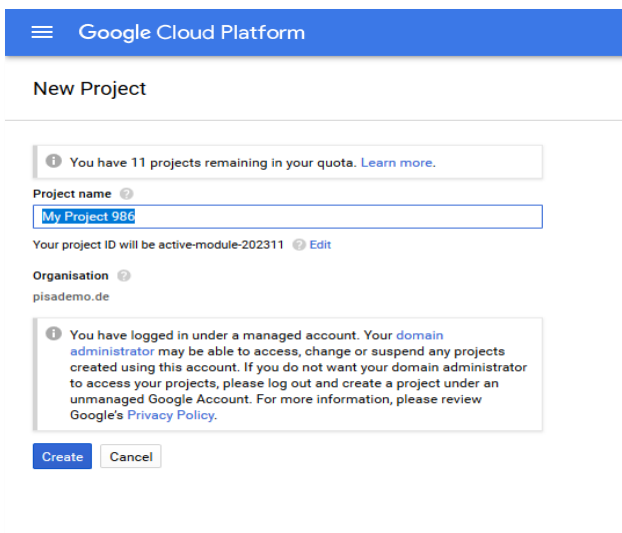
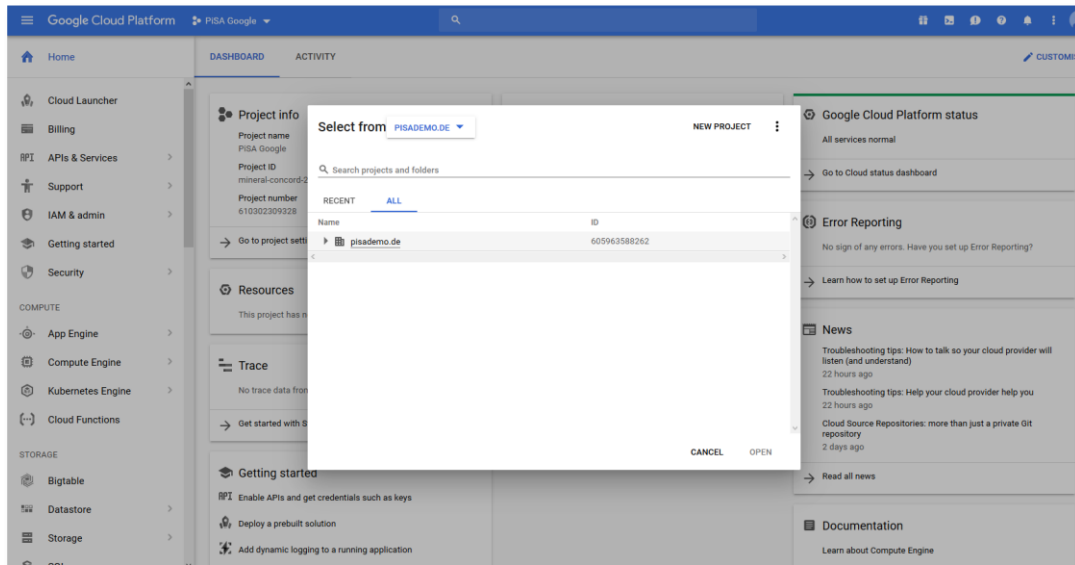
The prerequisites for setting up a Google service account, as required for the PiSA sales Google link, are

- + a G Suite account for companies with a domain containing all users who are to use the PiSA sales link,
- + access to the Google Cloud platform and the Google Administrator Console.

Note: Google again has changed the administration interface in the meantime, which happens again and again. The screenshots shown here do not correspond to the actual appearance and can appear "irritating" in the procedure. We will include current screenshots shortly.

Einrichtung eines neuen Projekts Setting up a new project

Log on to the Google Cloud platform with your user (a normal user is sufficient for this).
Create a new project ("+") for your domain (here "pisademo.de" as an example):



Enter a name for your project, e.g. "PiSA Google".
Click *Create*.

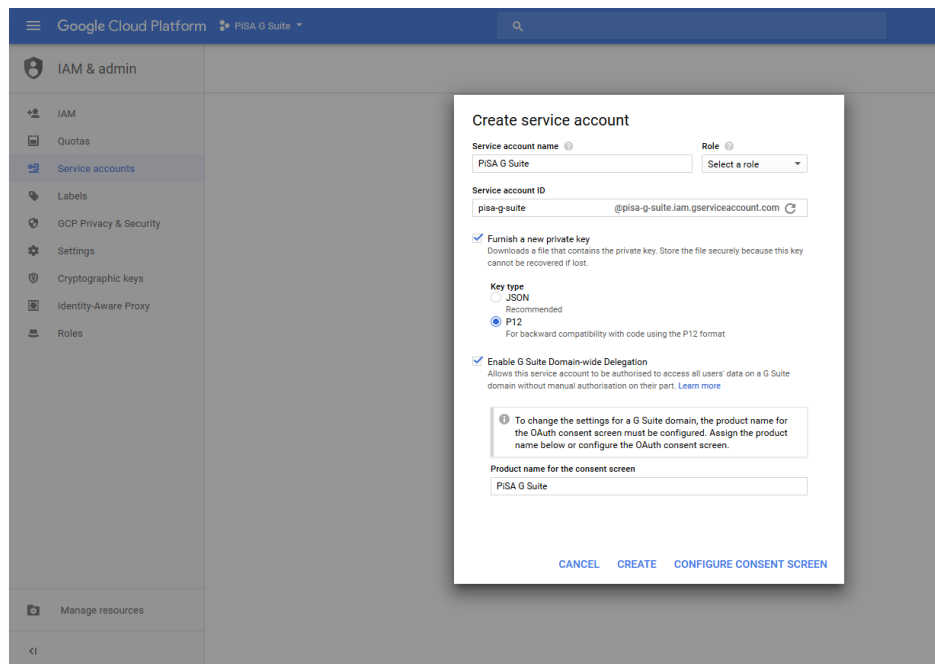
Create a service account

Now select your new project under *Select project* above.

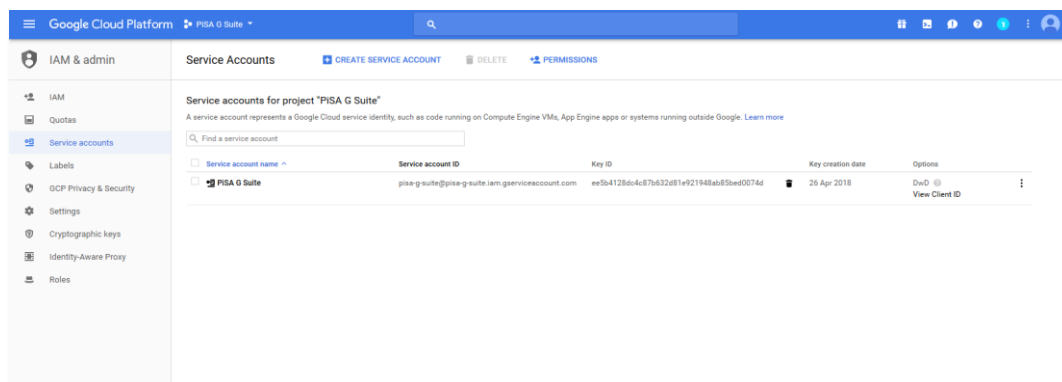
Note: The domain must be selected for this.

In the menu item *IAM & Administration* -> *Service accounts* you now create a new service account.

Note: It is imperative that the domain-wide G Suite delegation is activated:



Click *Create*. This newly created service account now appears in the overview. If the key file (*.p12) was not downloaded automatically, download it on the right via the three dots -> *Create key*. This file is required for subsequent authentication by the PiSA sales application server and must be provided to PiSA sales.

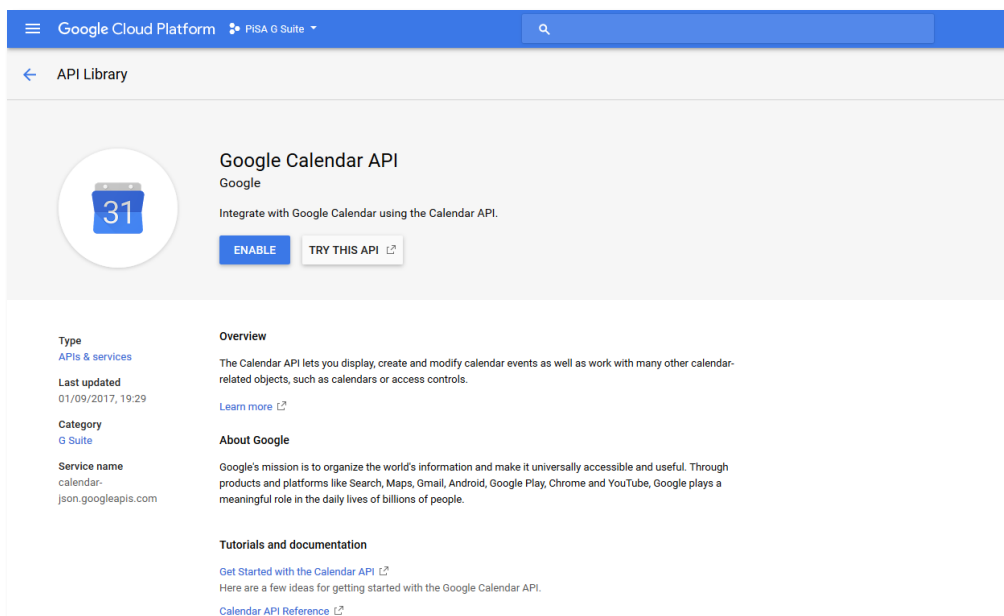
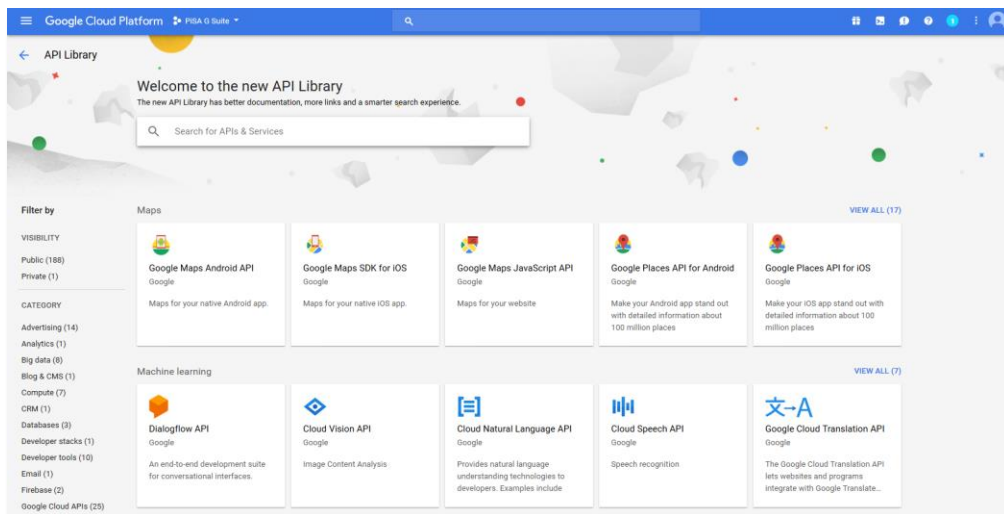


Use the *Call Client ID* link to get the client ID required for the fourth step.

Activation of the APIs

In the *APIs and Services* -> *Library* menu item, search for the APIs "Gmail API", "Google Calendar API", "Google Drive API" and "Admin SDK" (for resource management) one after the other and activate them.

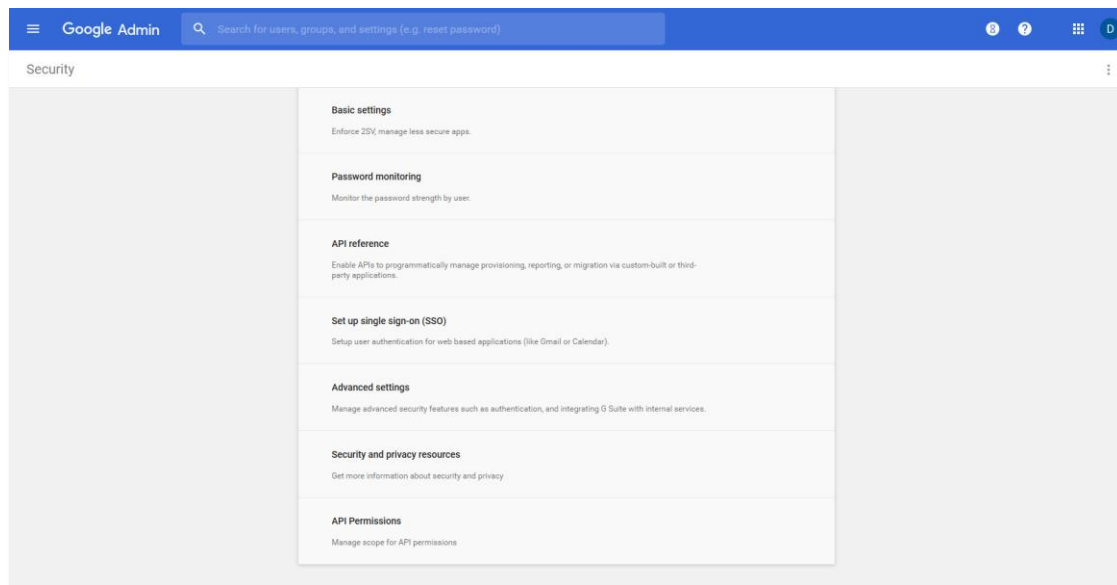
Note: The correct project must be selected at the top!



Granting the Scopes

In order for the service account to access the enabled APIs, the Google Scopes (the areas that can be accessed) must be assigned. This is performed in the Google admin console (admin.google.com) and must be carried out by an admin user.

In the admin console under the *Security* -> *Settings* menu item you will find the *Advanced settings* item. Click *Manage API client access*.



A new mask opens. In the *Client name* field, enter the client ID that you previously received. In the *One or more API areas* field, enter the required scopes separated by commas:

At least required (for Gmail):

<https://www.googleapis.com/auth/gmail.labels>

<https://www.googleapis.com/auth/gmail.modify>

If you also want to use Google Calendar synchronisation, you will also need:

<https://www.googleapis.com/auth/calendar>

<https://www.googleapis.com/auth/drive> (Google Drive for appointment attachments)

<https://www.googleapis.com/auth/admin.directory.resource.calendar.readonly> (Resource management)

Note: If the setting that appointments are synchronised is activated for at least one PiSA groupware user, the last three scopes of the list are absolutely necessary, as the PiSA Google-Connector will request them during the authentication! If these scopes were not issued via the Google admin console, the GMail synchronisation will also fail!

Then click *Authorise*.

Data required by PiSA sales

PiSA sales requires the following data to configure the link:

- + the service account ID (e.g. pisa-google@mineral-concord-200008.iam.gserviceaccount.com)
- + the generated, downloaded P12 key file

Access to *www.googleapis.com*

It must be ensured that the PiSA sales application server can reach the URL www.googleapis.com, because the Google API is accessing it. Please adjust the firewall settings accordingly!