



Global Cloud
Communications

8x8 Meet integration with Salesforce

Salesforce Administrator Guide

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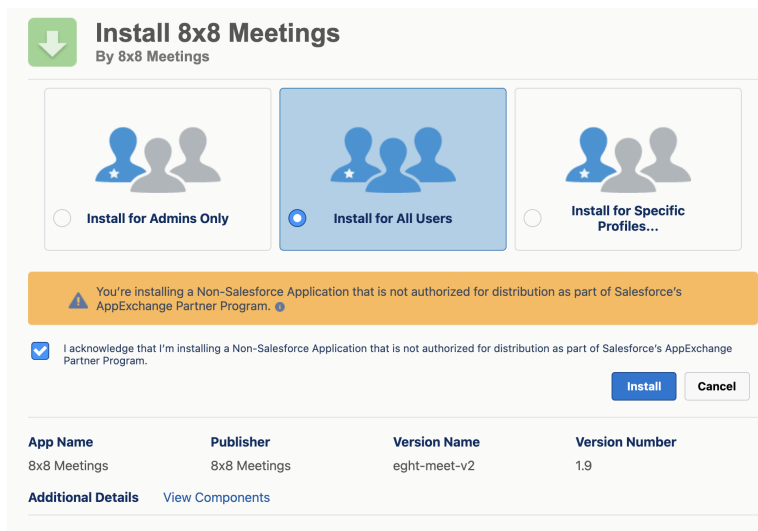
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Installing the “8x8 Meetings” Application in Salesforce

As a System Administrator, please follow the steps:

1. Open one of the following installation links:
 - a. For Production organizations:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5f000000Ak2r>
 - b. For Sandbox organizations:
<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5f000000Ak2r>
2. Login using the administrator’s username and password for the instance where you want the package to be installed
3. Select “Install for all Users” and click on the acknowledgement option then click “Install”

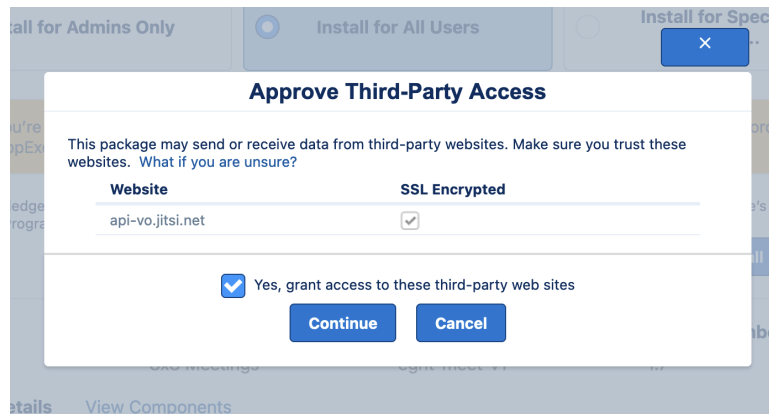


The screenshot shows the Salesforce AppExchange installation interface for the "8x8 Meetings" application. At the top, there is a green download icon and the text "Install 8x8 Meetings By 8x8 Meetings". Below this, there are three radio button options for installation scope: "Install for Admins Only", "Install for All Users" (which is selected), and "Install for Specific Profiles...". A yellow warning banner states: "You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program." Below the banner, there is a checkbox with a checkmark and the text: "I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program." To the right of this checkbox are "Install" and "Cancel" buttons. At the bottom, there is a table with the following information:

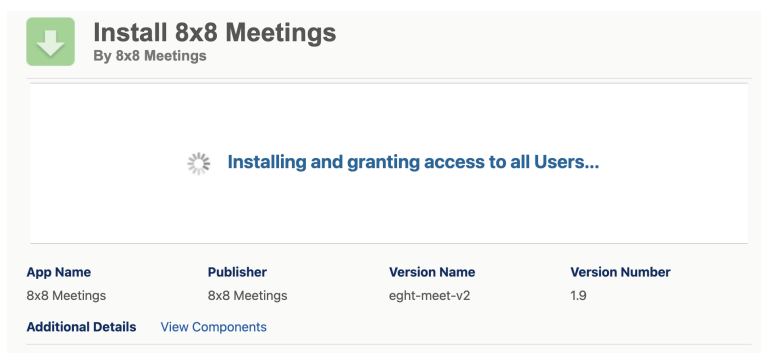
App Name	Publisher	Version Name	Version Number
8x8 Meetings	8x8 Meetings	eght-meet-v2	1.9

Below the table, there is a link "Additional Details" and a link "View Components".

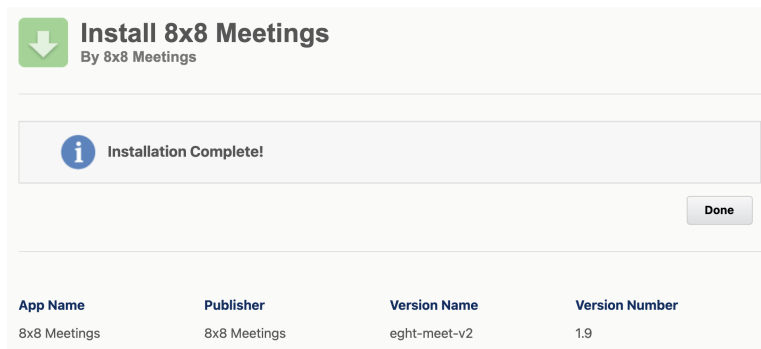
4. Approve Third-Party Access and click “Continue”



5. Wait for the installation to finish



6. When the installation is complete, click on “Done”



7. You should now see the “8x8 Meetings” package installed

Configuring the “8x8 Meetings” Application in Salesforce

As a System Administrator, please follow the steps:

Assign the “8x8 User” permission set to the users who will be using the application

1. Go to Setup > Permission Sets
2. Open the “8x8 Meetings User” permission
3. Click on “Manage Assignments”, then click on “Add Assignments”

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION, and Users. The main content area is titled 'Permission Sets' and shows the '8x8 Meetings User' permission set. The 'Permission Set Overview' section displays details: Description (Salesforce), License (Salesforce), Session Activation Required (checkbox), Last Modified By (Raluca Toth, 11/25/2021, 11:23 AM), API Name (X_8x8_Meetings_User), Namespace Prefix (eght_meet), and Created By (Raluca Toth, 11/25/2021, 11:23 AM). Below this, the 'Apps' section shows 'Assigned Apps' and 'Assigned Connected Apps' with their respective descriptions.

4. Select all the users which should be able to see the 8x8 meeting details and then click on “Assign”

The screenshot shows the 'Assign Users' section for the '8x8 Meetings User' permission set. The 'View' dropdown is set to 'All Users'. Below the view controls, there is a table of users with columns: Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. The table lists three users: Avram Tudor, Bhalekar Priyanka, and Bumbu Alex, all with the role of 'Standard User' and active status. The 'Assign' button is visible at the top of the table.

5. Click “Done”

Update the Event layout to include the “8x8 Meeting Details” section

1. Click on Setup > Object Manager and select the Event option

The screenshot shows the Salesforce Setup interface with the 'Object Manager' section selected. The left sidebar shows the navigation menu. The main content area is titled 'Object Manager' and shows a list of objects: Entitlement, Event, and Image. The 'Event' object is highlighted, and its details are shown below the list.

2. Go to “Page Layouts”
3. Select one by one each of the Event page layout where you want the “8x8 Meetings” information to be displayed
4. For each layout, create a new “8x8 Meeting Details” section, by dragging the “Section” object from the “Fields” panel. In the Section Name, write “8x8 Meeting Details” and select the 1-Column layout. Then click “Ok”

The screenshot shows the Salesforce Lightning Design Studio interface. The 'Section Properties' dialog box is open, displaying the following details:

- Section Name:** 8x8 Meeting Details
- Display Section Header On:**
 - ☒ Detail Page
 - ☒ Edit Page
- Layout:**
 - ☒ 1-Column
 - ☐ 2-Column

The background shows a page layout with various sections like 'Calendar Details', 'Other Information', 'Description Information', and 'Additional Information'.

5. Add the “EghtMeetingSessionEventDetails” visualforce page to the “8x8 Meeting Details” section: in the Event layout page, go to the Visualforce Pages section and drag and drop the “EghtMeetingSessionEventDetails” to the “8x8 Meeting Details” section

The screenshot shows the Salesforce Lightning Design Studio interface. The '8x8 Meeting Details' section is highlighted, and the 'EghtMeetingSessionEventDetails' visualforce page is visible within it. The 'Visualforce Pages' section in the left sidebar is active.

6. Double click the visualforce page on the “8x8 Meeting Details” section and set “Height” to 650, click on “Show scrollbars” then click “Ok”

The screenshot shows the Salesforce Lightning Design Studio interface. The 'Visualforce Page Properties' dialog box is open, displaying the following details:

- Width (in pixels or %):** 100%
- Height (in pixels):** 650
- Show scrollbars:** ☒
- Show label:** ☐

The background shows the same page layout as the previous screenshot, with the '8x8 Meeting Details' section highlighted.

7. Click on “Save” to save the new layout

Uninstalling the “8x8 Meetings” Application from Salesforce

As a System Administrator, please follow the steps:

1. Remove the “8x8 Meetings User” Permission Set assignment from all the users
 - a. Go to Setup > Permission Sets
 - b. Open the “8x8 Meetings User” Permission
 - c. Click on “Manage Assignments”
 - d. Select all the users from the list and click on “Remove Assignments”
2. Remove the “8x8 Meeting Details” section from the Event Page Layout
 - a. Go to Setup > Object Manager and open the Event option
 - b. Click on “Page Layouts”
 - c. Open the layout(s) where you added the “8x8 Meeting Details” section
 - d. For each layout, remove the “8x8 Meeting Details” section from the layout and click “Save”
3. Uninstall the “8x8 Meetings” package
 - a. Go to Setup > Installed Packages
 - b. Open the “8x8 Meetings” package and then click “Uninstall”
 - c. Confirm you want to uninstall the package and click again “Uninstall”
 - d. The package will be uninstalled in a couple of minutes