8x8 Global Cloud Communications
8x8 Meet integration with Salesforce
Salesforce Administrator Guide

Copyright © 2022, 8x8, Inc. All rights reserved.

This document is provided for information purposes only and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

8x8® is a registered trademark of 8x8, Inc.

All other trademarks, service marks, registered trademarks, or registered service marks are the property of their respective owner/s. All other brands and/or product names are the trademarks (or registered trademarks) and property of their respective owner/s.

[Installing the “8x8 Meetings” Application in Salesforce](#)

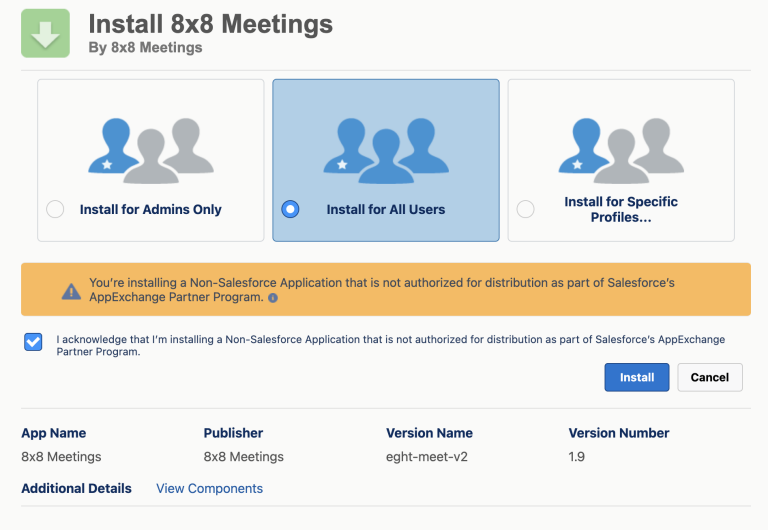
[Configuring the “8x8 Meetings” Application in Salesforce](#)
- [Assign the “8x8 User” permission set to the users who will be using the application](#)
- [Update the Event layout to include the “8x8 Meeting Details” section](#)

[Uninstalling the “8x8 Meetings” Application from Salesforce](#)

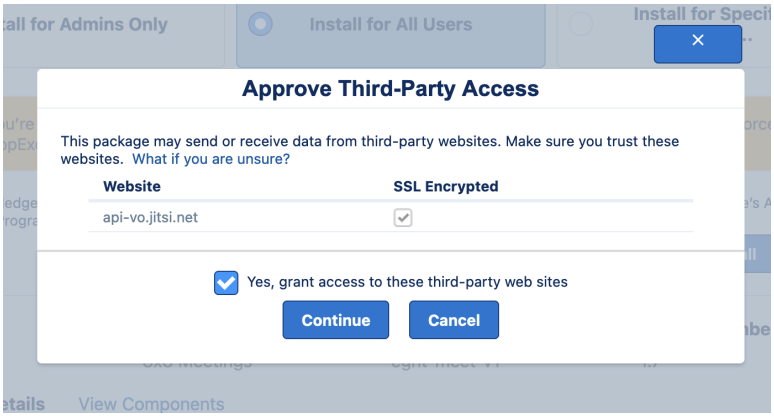
Installing the “8x8 Meetings” Application in Salesforce

As a System Administrator, please follow the steps:

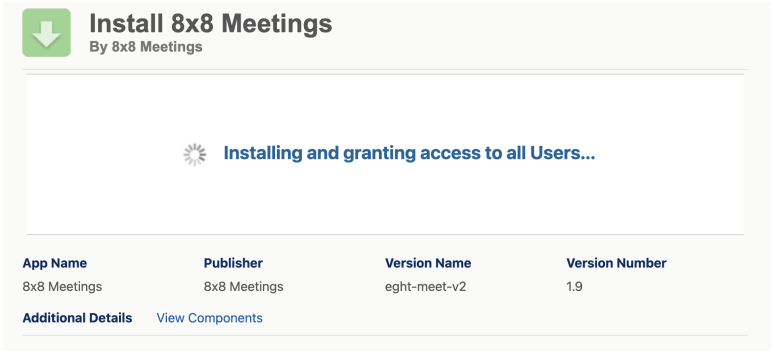
1. Open one of the following installation links:
   a. For Production organizations: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5f000000Ak2r
   b. For Sandbox organizations: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5f000000Ak2r
2. Login using the administrator’s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



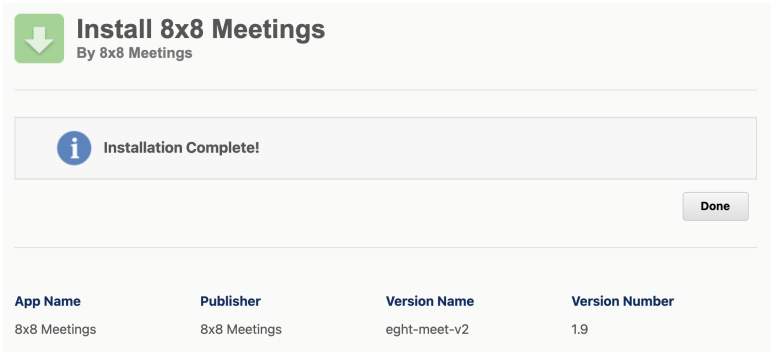
4. Approve Third-Party Access and click “Continue”



5. Wait for the installation to finish



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



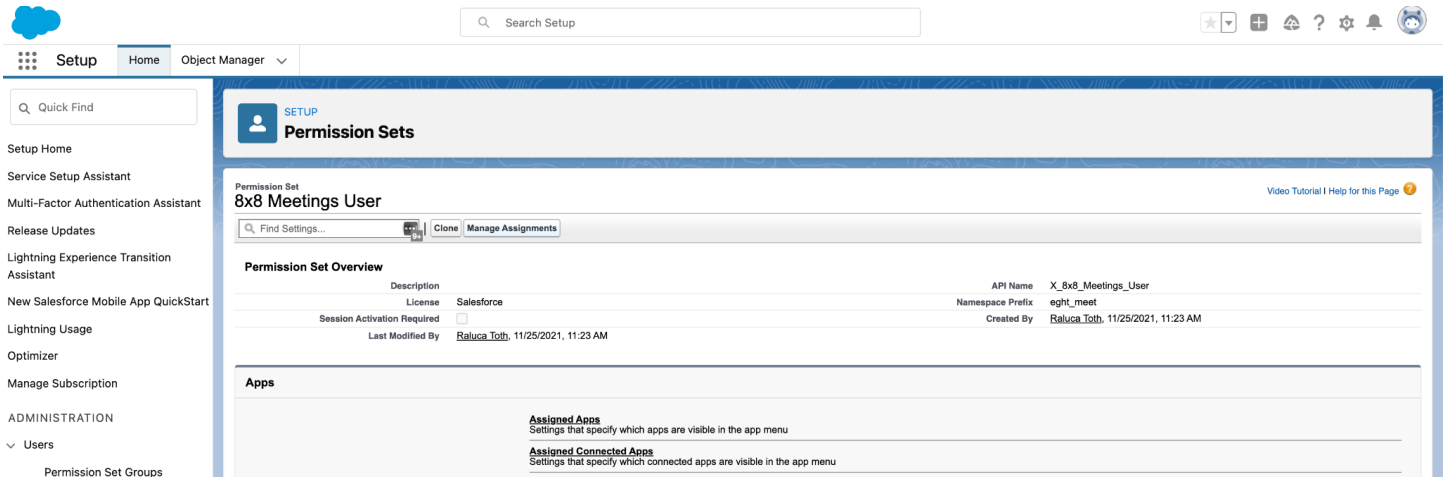
7. You should now see the “8x8 Meetings” package installed

Configuring the “8x8 Meetings” Application in Salesforce

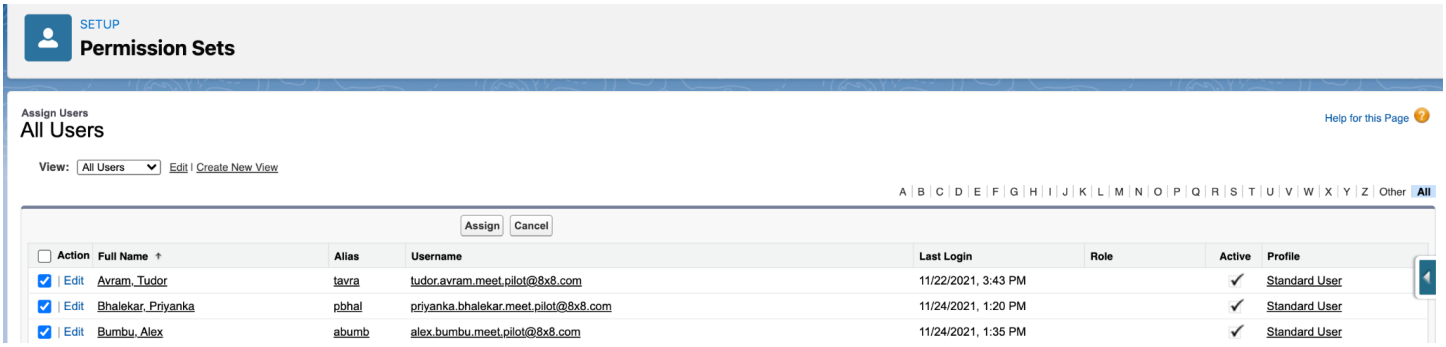
As a System Administrator, please follow the steps:

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”



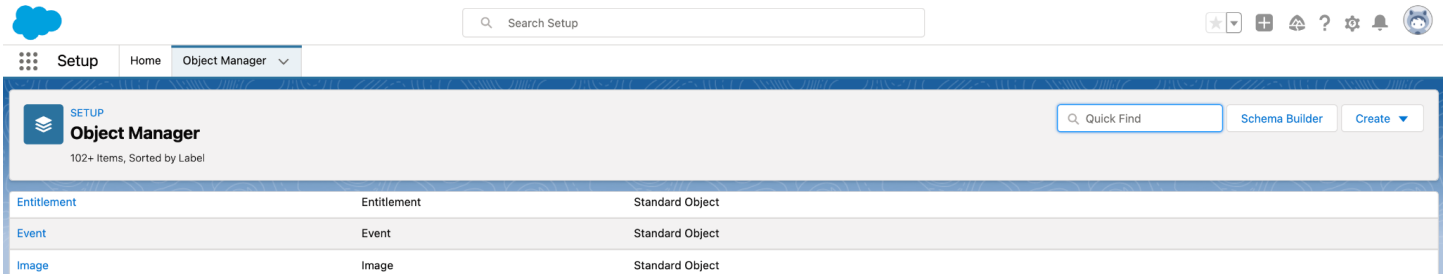
4. Select all the users which should be able to see the 8x8 meeting details and then click on “Assign”



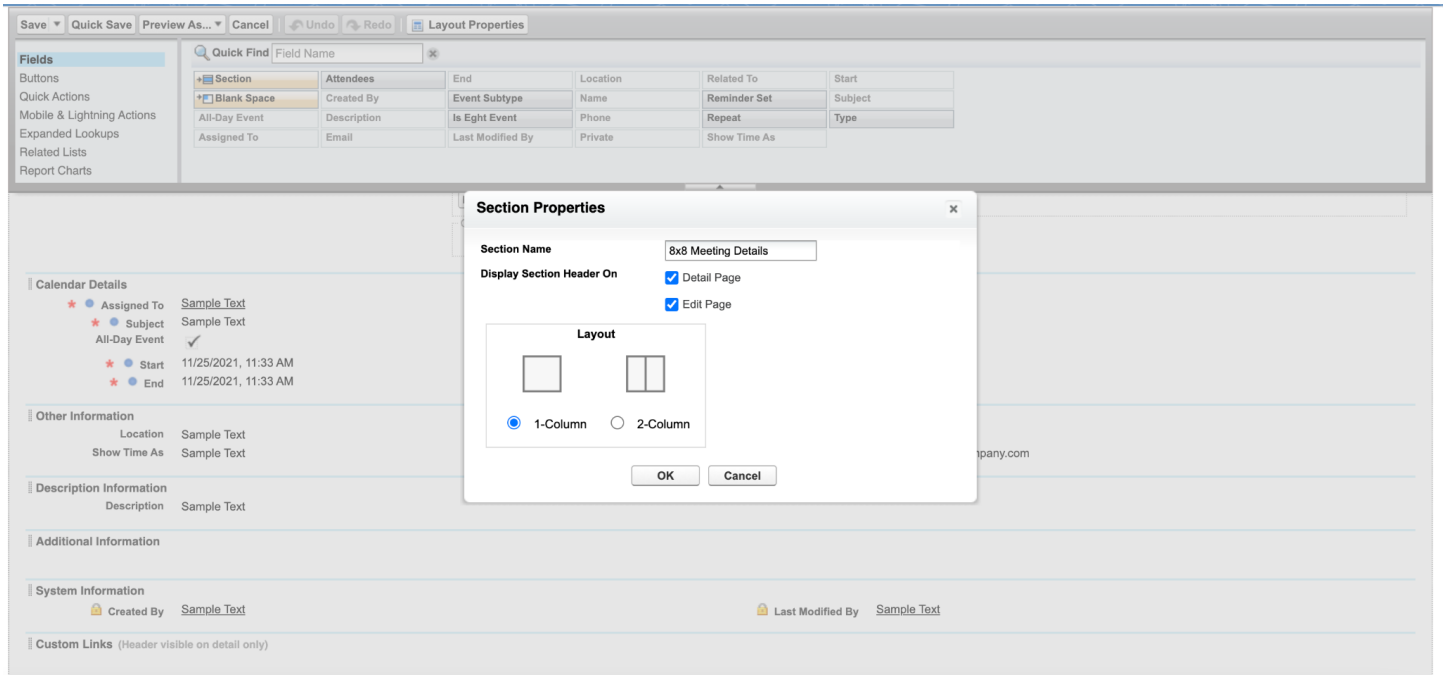
5. Click “Done”

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

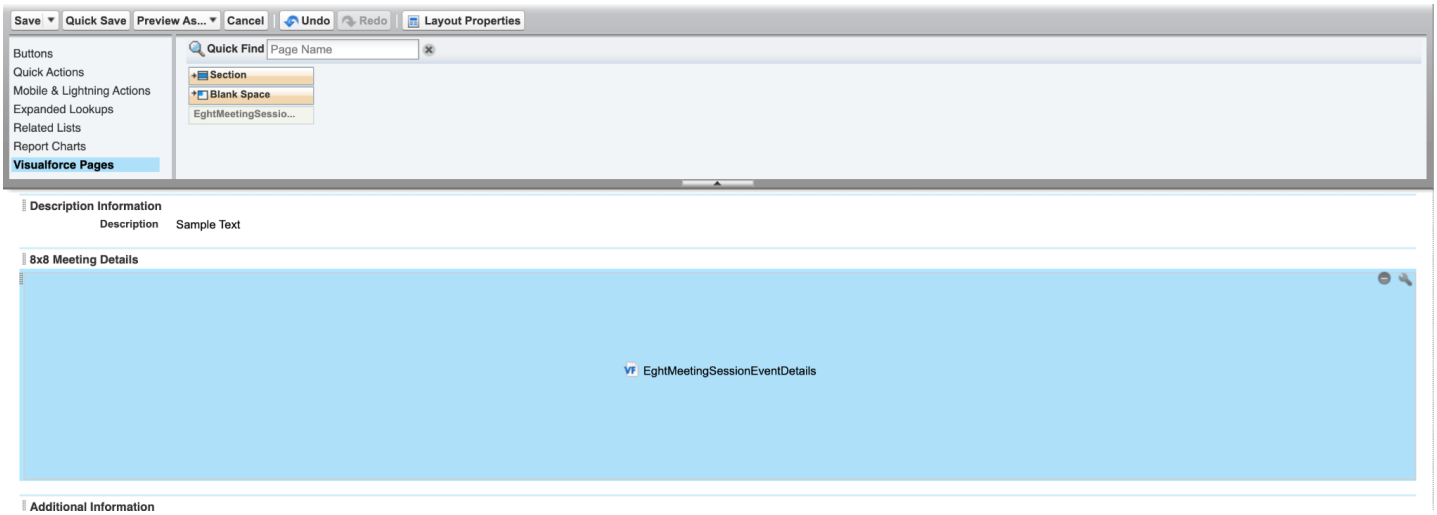
1. Click on Setup > Object Manager and select the Event option



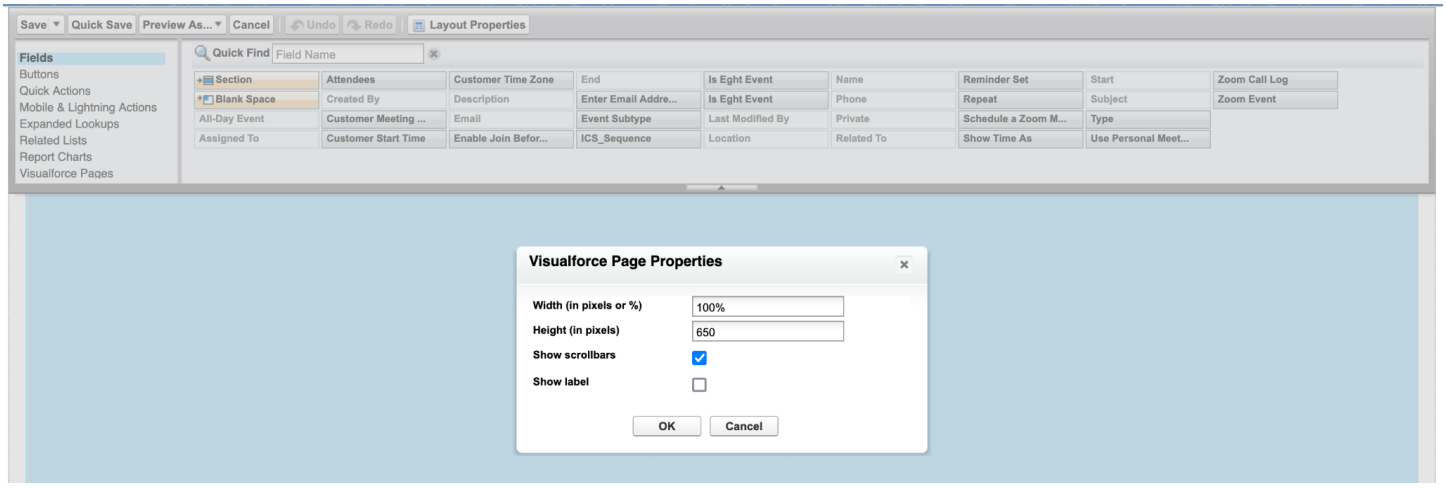
2. Go to “Page Layouts”
3. Select one by one each of the Event page layout where you want the “8x8 Meetings” information to be displayed
4. For each layout, create a new “8x8 Meeting Details” section, by dragging the “Section” object from the “Fields” panel. In the Section Name, write “8x8 Meeting Details”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



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



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



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