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RentalPoint Google Drive Integration

How does RentalPoint Interface with Google Docs?

Why Integrate with Google Docs?

A Little History

Over the years we have used many methods to send client facing documents such as quotes, proposals, estimates, confirmations, delivery sheets, invoices and receipts to clients and prospects. Those of us that are old enough to remember; in the 80's we used snail mail or couriers, in the 90's we started to print and then fax, then around the turn of the century we started printing to PDF and then attaching this PDF to email and sending.

A More Modern Approach

Now with arrival of Google drive, RentalPoint can upload the client facing document and then you can share it with the recipient.

The Pros and Cons

As for Pros / Pluses, there are many:

- Because Google drive has a light end office Suite built into it, these client facing documents can be opened for editing so that last minute finishing touches can be made for example to formatting. Then send to the recipient by sharing the document. When sharing you select "view" only, as you do not want the recipient to be able to make changes to the document.
- A major pro/plus is that Google docs is free, therefore <u>saving you from having to purchase Office licenses</u> in the future.
- Another plus is that large files such as images, videos and other media can be shared with the recipient without having to attach them to email (as only the link is sent).
- Client facing documents will be available anywhere there is an Internet connection, no need to use remote desktop connection to the server.

Cons:

- Since Google docs is a light end Office suite it does not currently support many of the advanced formatting features that we are used to using in Office, in particular the

use of tables is simple. For this reason all existing Office templates must be simplified / reformatted before they can be used with Google docs.

- If you have a slow Internet upload speed then this option may be too slow for general widespread use.

- RentalPoint generates a new client facing document every time a new version of document is generated, this leads to thousands of documents over time and requires many GIGABYTES of storage. Since this storage would now be on Google drive then this must be paid for. At the moment this cost is not significant (per GIGABYTE), and the costs for storage are generally going down at the moment.

How does RentalPoint Interface with Google Docs?

The actual interface is accomplished using Google Drive API.

Once RentalPoint has been configured, all client facing documents that use a template to be generated, will automatically be uploaded to Google drive, the document can be opened for editing or viewing. Then the document can be shared with the recipient.
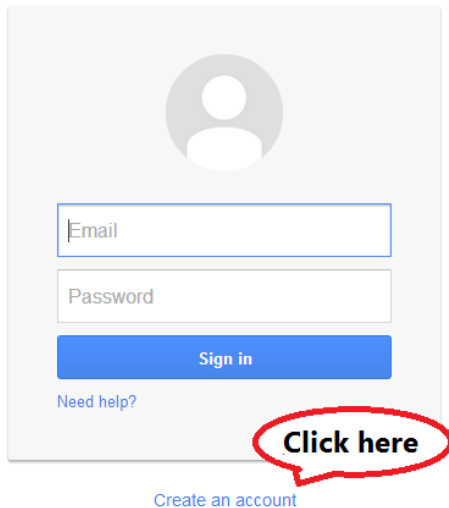
Another option available in RentalPoint is the ability to carbon copy the documents to Google drive, this means the document will still be saved and opened locally (on your server or desktop), but a carbon copy will also be uploaded to the shared Google docs folder.

Setting Up Your Main Google Account

- Create a new corporate Google account, you can do this in Google by clicking on the link to create a new account as below –

- This new corporate account will only be used to setup the Google drive integration, no emails will be sent or received using this account.
- From Google Developers Console, set up your Google Account for Google Drive usage
    1. Go to https://console.developers.google.com/project
    2. Create your project (should be created within CORPORATE Google Account) :
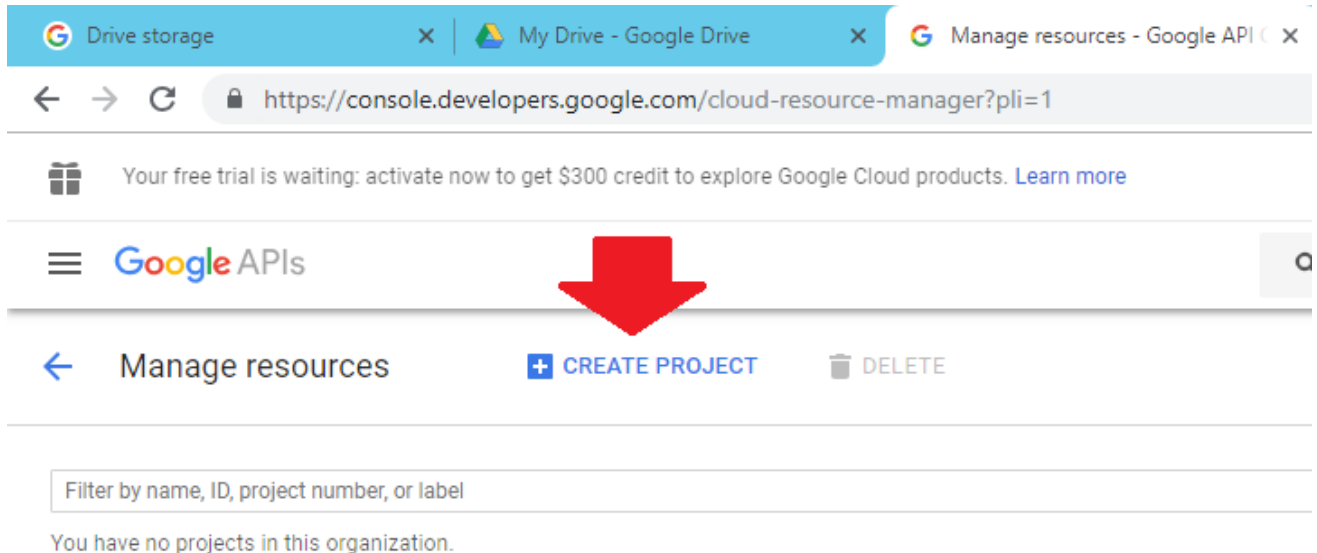
3. Enter project name*/id**:
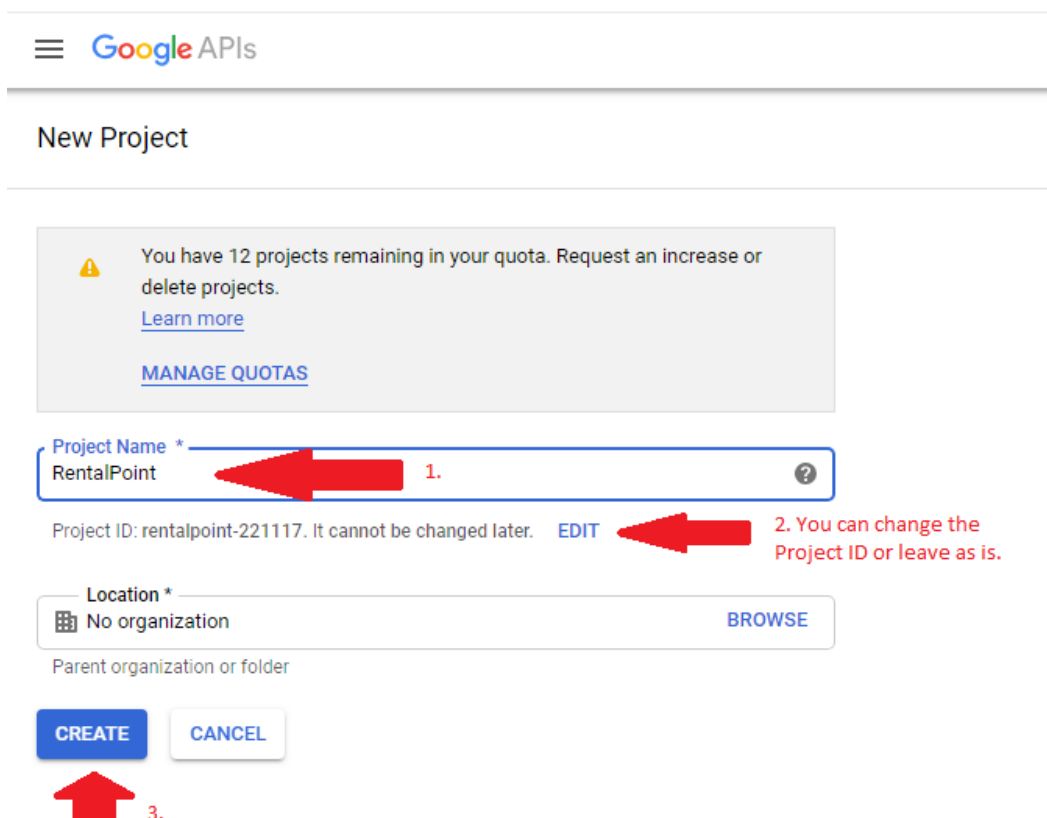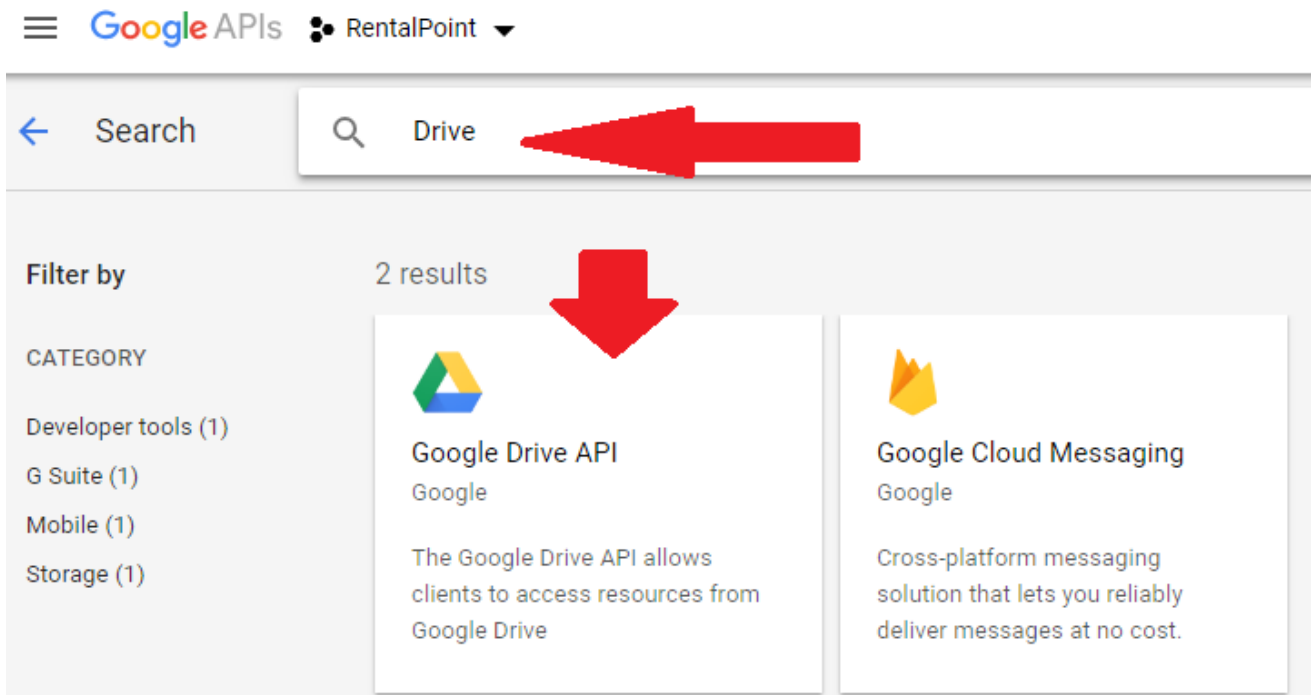
ⓘ * The project name is only used in the Console.

** The project ID is used to uniquely identify your project. Once selected, this identifier cannot be changed.
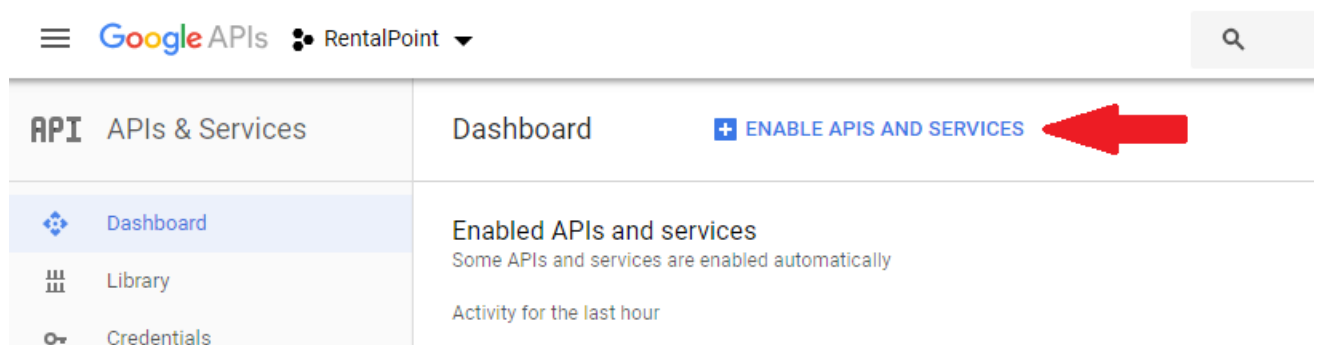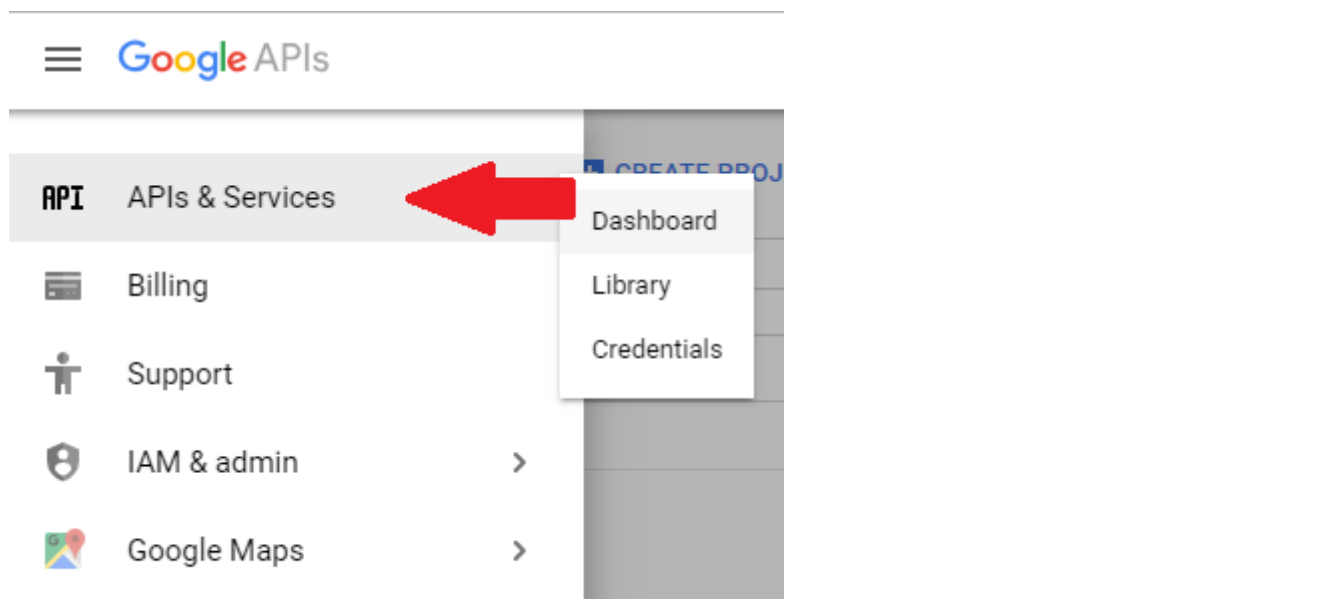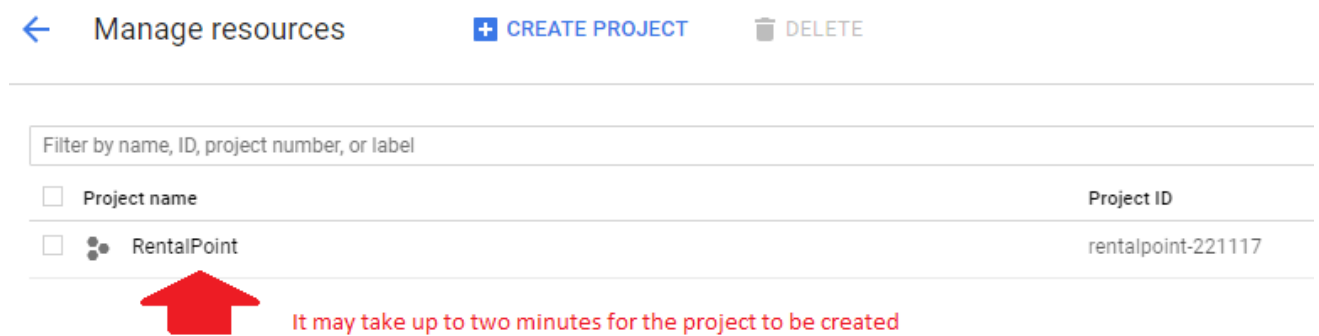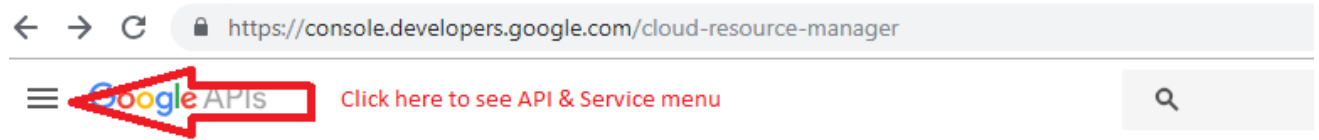
APIs & auth will display, Enable the API's marked below
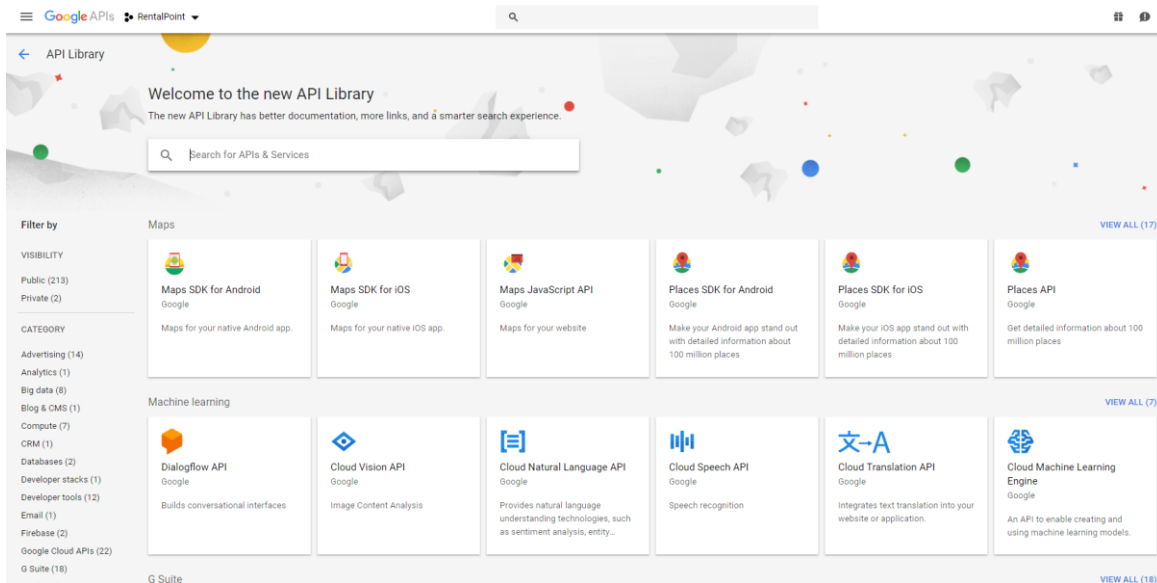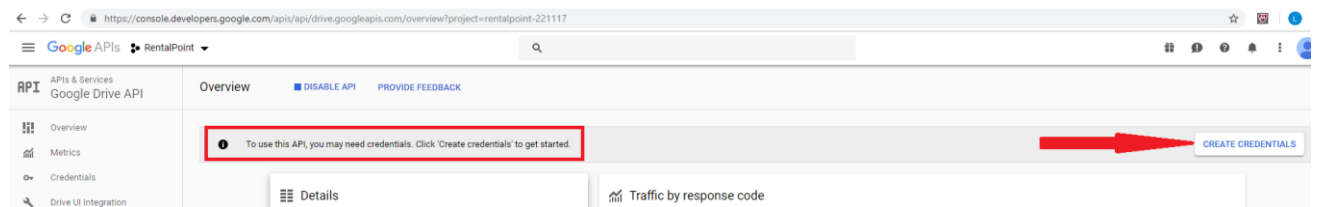

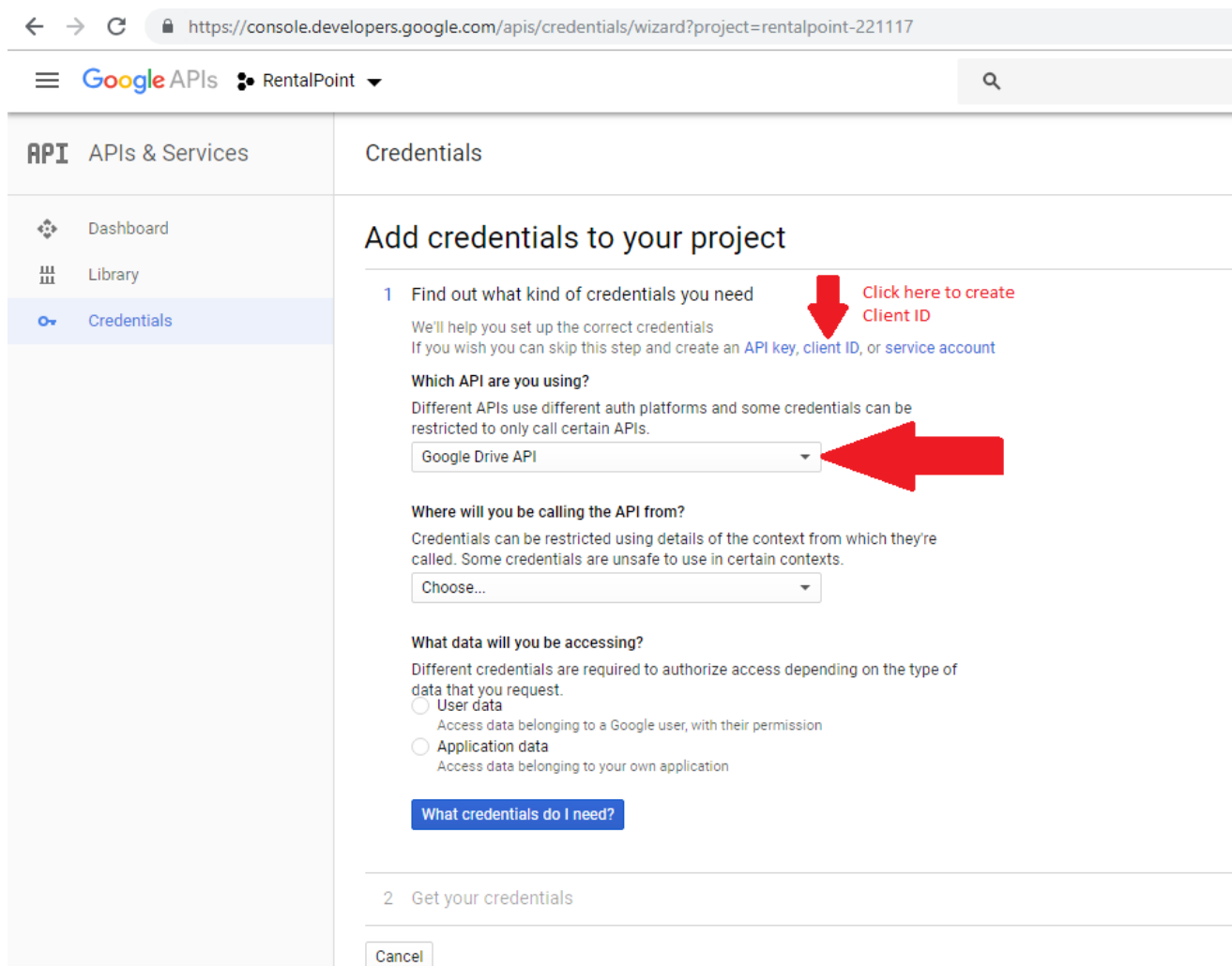Click the "Drive API" option as shown below -

The next window should look like the below, click on "Enable".
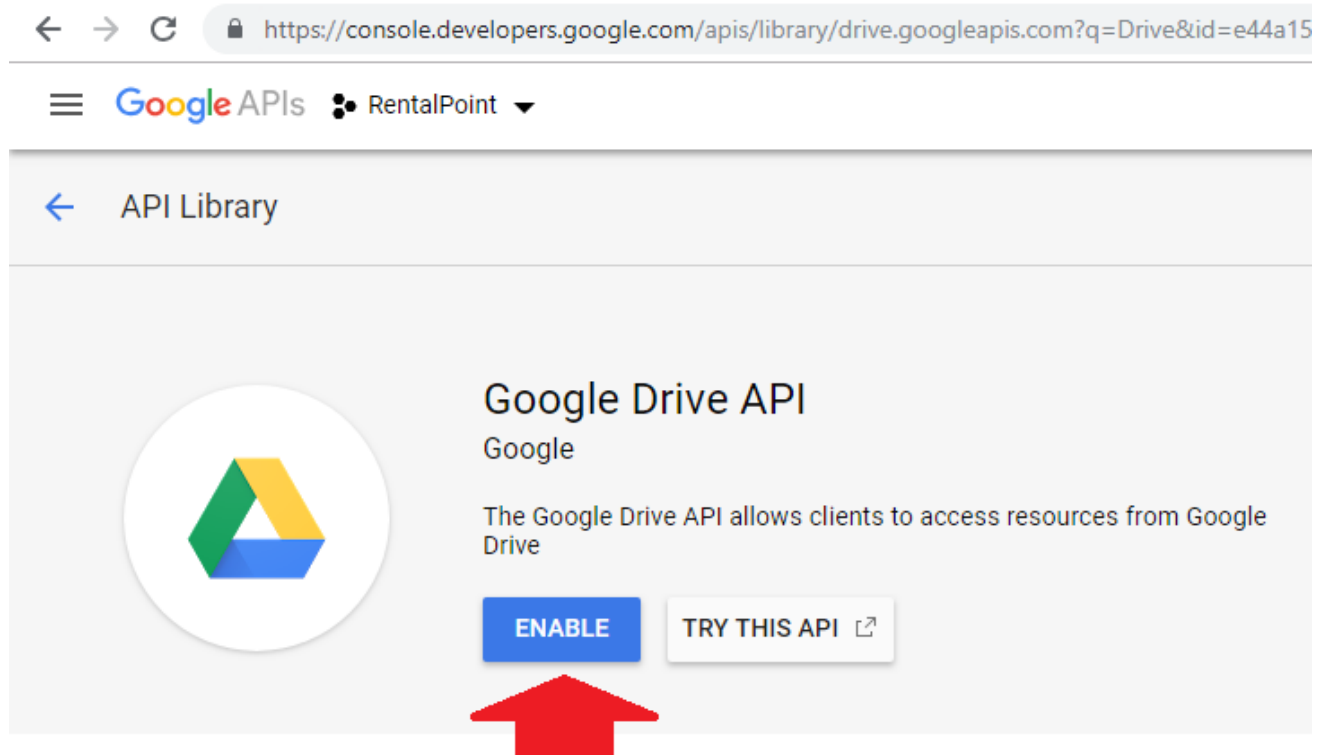
Then create credentials by clicking the button shown below –

Client ID creation:

RentalPoint Google Drive Integration

Before your users authenticate, this consent screen will allow them to choose whether they want to grant access to their private data, as well as give them a link to your terms of service and privacy policy. This page configures the consent screen for all applications in this project.

Verification status
Not published

Application name ❓
The name of the app asking for consent

RentalPoint ← Enter Product name and click SAVE

About the consent screen

The consent screen tells your users who is requesting access to their data and what kind of data you're asking to access.

OAuth Developer Verification

To protect you and your users, your consent screen may need to be verified by Google. Without verification, your users will see an additional page indicating that your app is not verified by Google.

Create OAuth client ID

For applications that use the OAuth 2.0 protocol to call Google APIs, you can use an OAuth 2.0 client ID to generate an access token. The token contains a unique identifier. See Setting up OAuth 2.0 for more information.

Application type
○ Web application
○ Android Learn more
○ Chrome App Learn more
○ iOS Learn more
● Other

Name ❓

RentalPoint Docs ← Leave as is or change name

[Create] [Cancel]

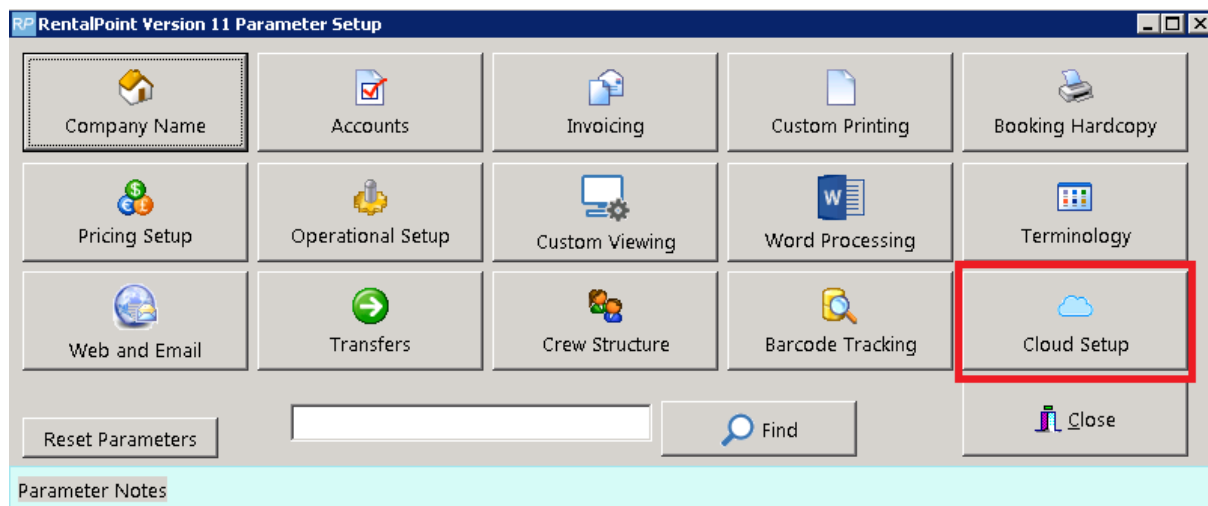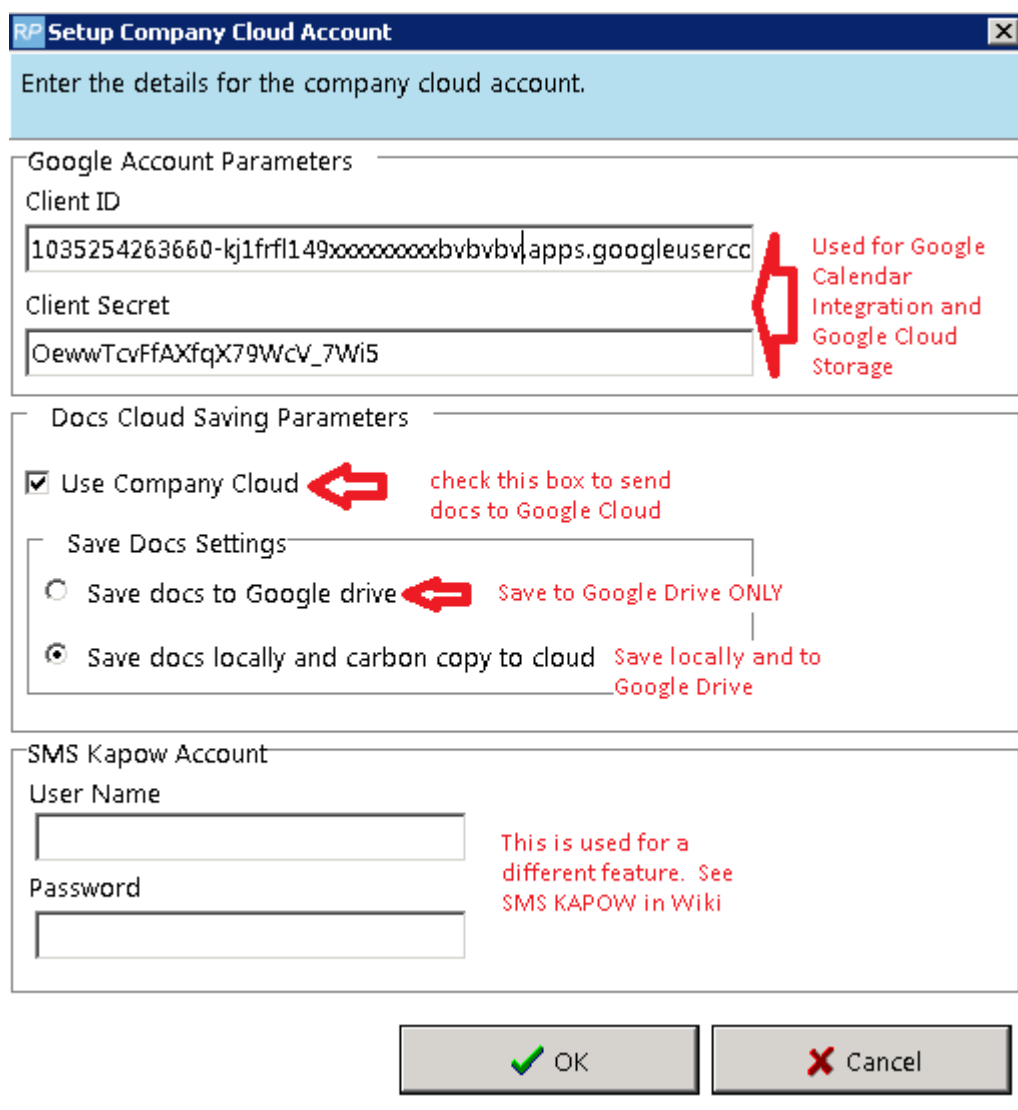ℹ️ You will need your Client ID and Client Secret for RentalPoint Setup so click edit to copy paste these values

You will now need to set up Rentalpoint to interface with Google Docs; Once complete, you can share the folder with other users

Setting Up RentalPoint To Interface With Google Docs
From the Main Menu, Go To Setup –> Parameters –> Cloud Setup

Authorization window will be opened once you hit ok above. Enter your CORPORATE email address and password. This only needs to be setup once unless the password is changed.
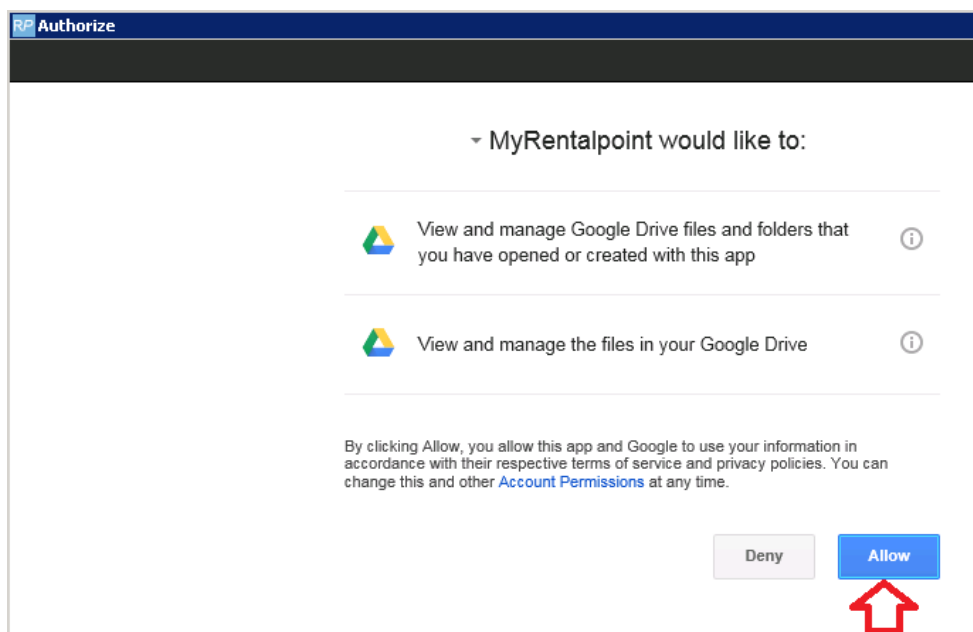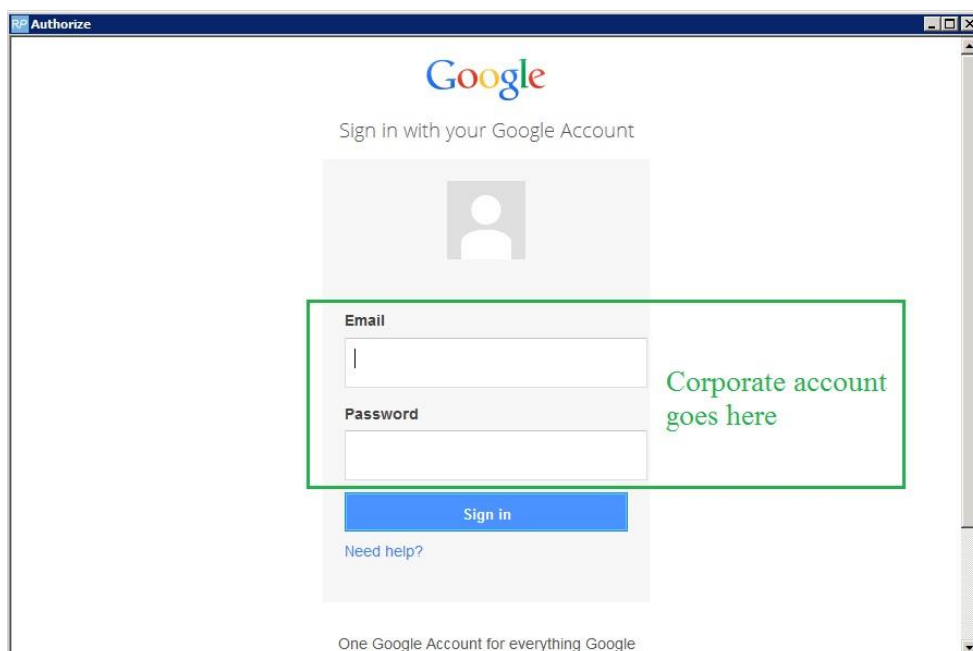
Accessing your documents online

Once all your parameters are set up, log out of Rentalpoint and back in again to avail of the changes. Then produce a quote for a booking; The quote should be saved in your Google Cloud Storage account https://drive.google.com/drive/my-drive
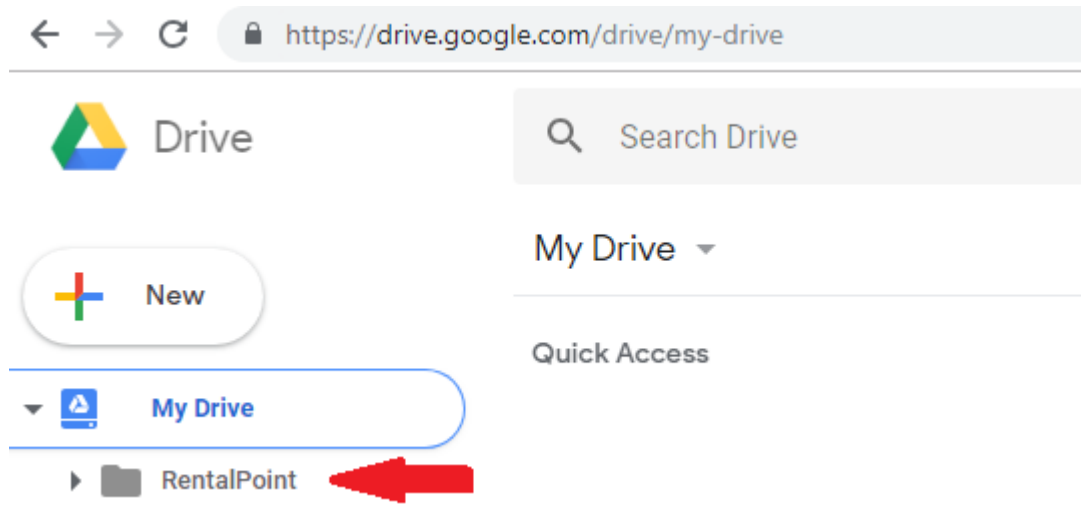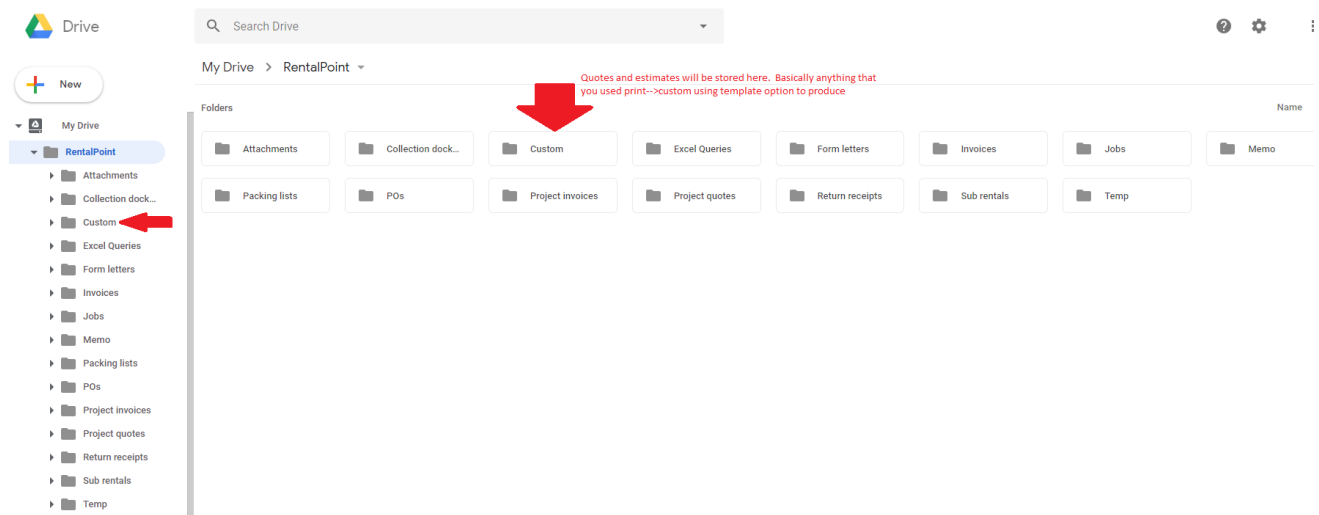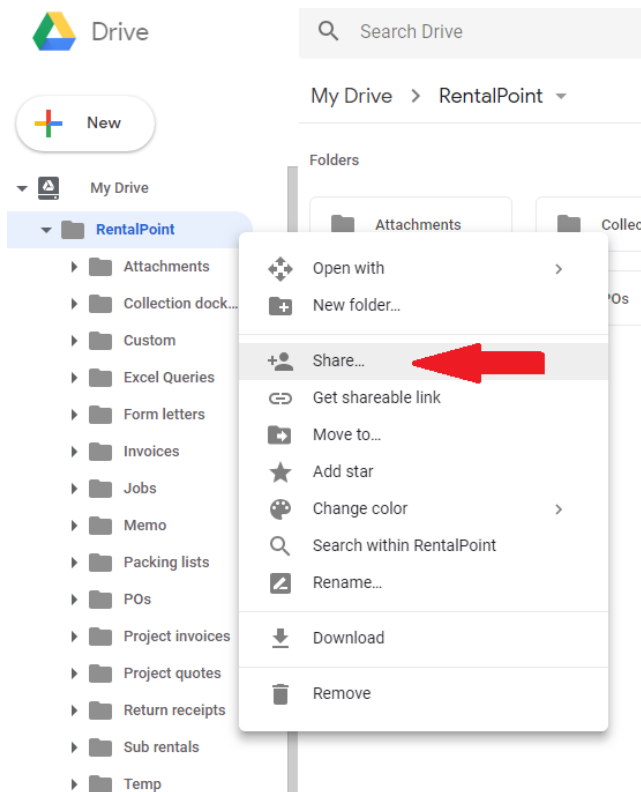
Then expand the Rental*Point* folder.

There will be folders for each type of document, estimates and quotes are kept in a folder called "Custom".

Sharing Your Rentalpoint Google Docs Folder

1. You should SHARE the "RentalPoint" folder with other users who need to have access to your CORPORATE folder on Google Drive, this should be every RentalPoint user in your company.

2.

1. Google drive share settings: Right click on a folder – Share (see screenshot above)

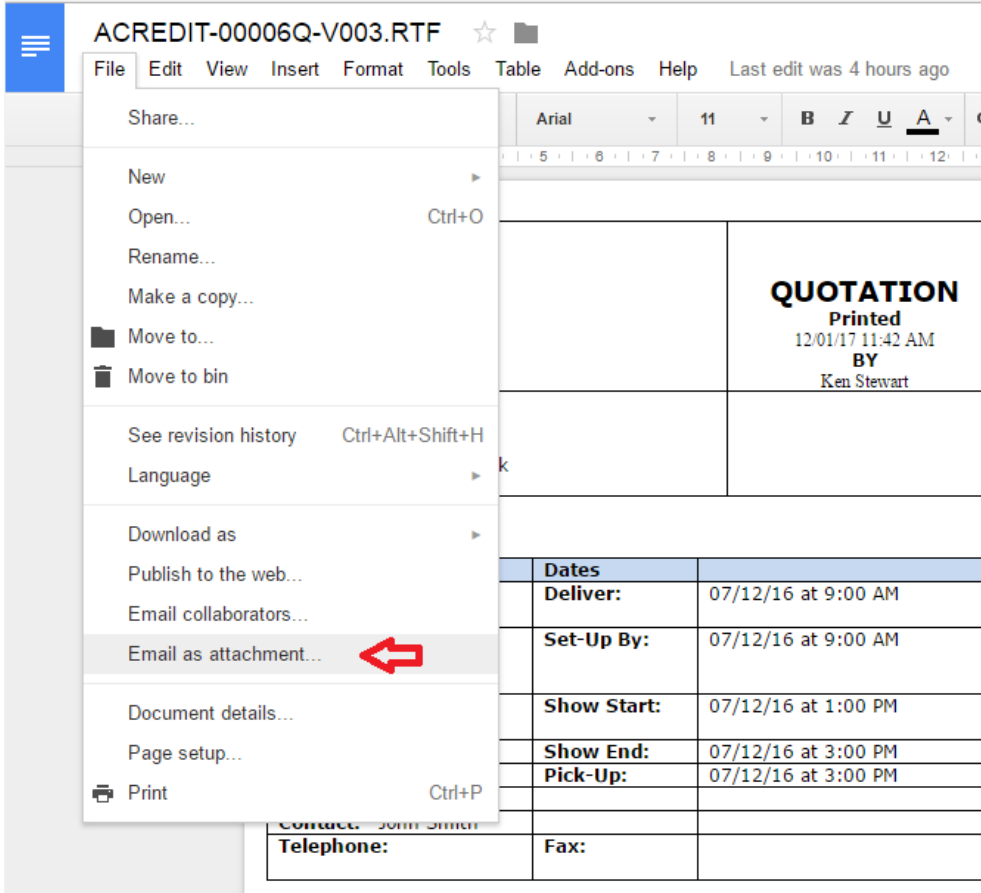2. All authorized users may upload documents to your CORPORATE Google Drive. All files will show 'last edited by %username%' for traceability.

Emailing Google documents as attachments

You can also send documents as PDF attachments, instead of using the share option, click the file menu and select "Email as attachment", then enter/paste in the email address and send -
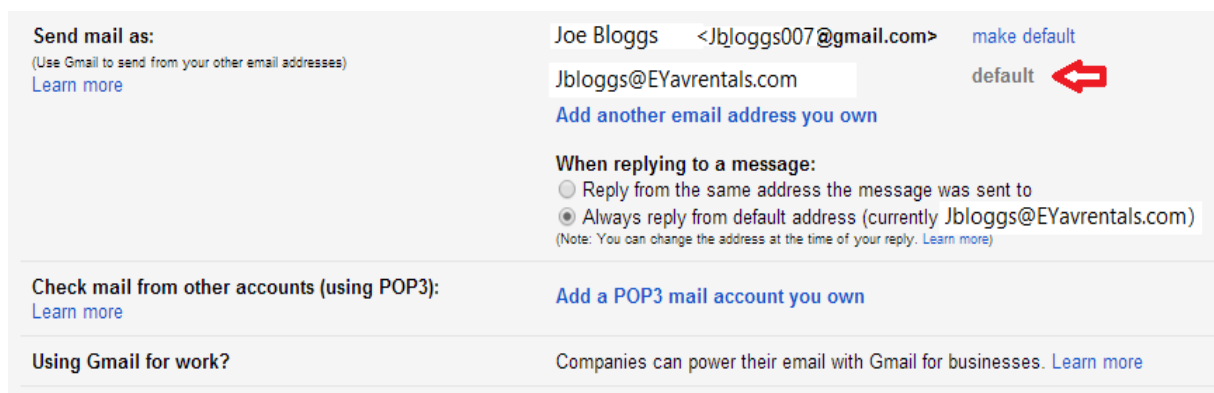
Working with Google Docs Integration

Every Rental*Point* user in your company should have or create their own Google account, they will use their own accounts to share documents with recipients, send and receive emails.

Please be aware that Google email allows you to send emails using your corporate email address as the send address, please see the snippet below from the Google mail setup window. It is advisable to set all Gmail accounts to use the corporate email return address if users are going to send emails using Gmail. In the settings below it is also possible to set Gmail to work with a pop3 account.


Modifying Documents

- Option 1:

    a. Set your parameters to 'Save Docs to Google Drive' only

    b. All documents will be produced to Google Drive and opened there

    c. All modifications will be made on Google Drive.

- Option 2

    a. Set your parameters to 'Save docs locally and carbon copy to cloud'

    b. All documents will be produced locally and a copy will be saved to Google Drive

    c. When modifying, you would modify the document locally, then save and attach it to the booking. Once attached to the booking, it will be sync'd to the same folder on Google Drive
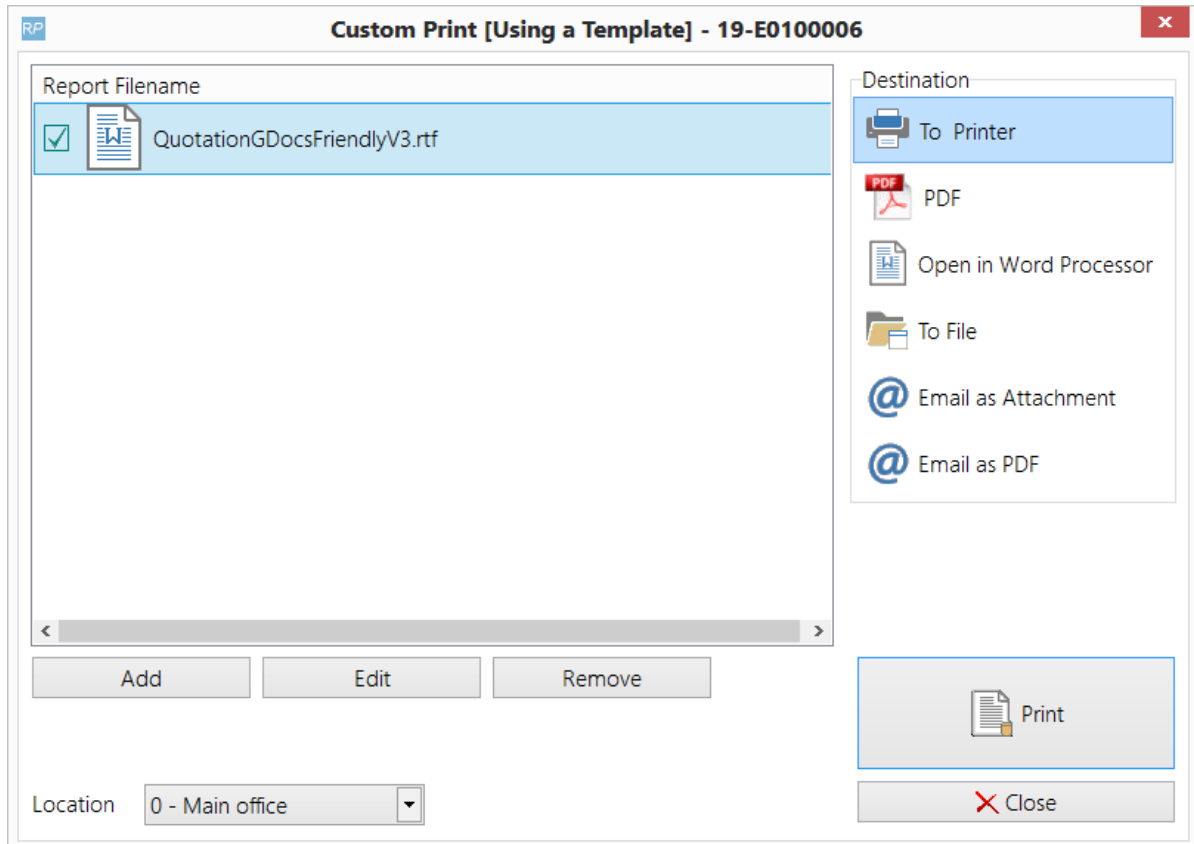
Attachments

Documents stored exclusively on Google Drive can still be opened from attachments tab in RentalPoint.
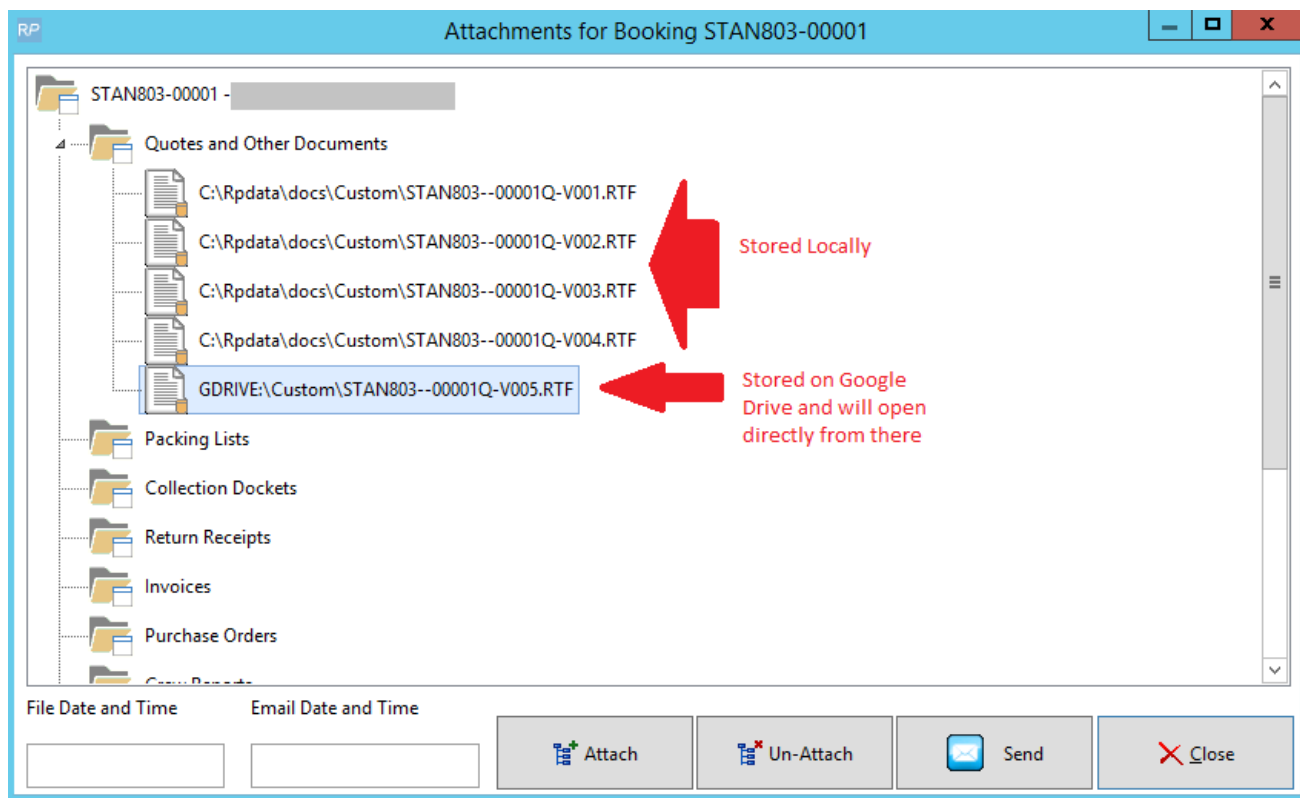
- Using Attach Option – any document can be attached to the Booking and after opening will automatically be synchronized with the relevant folder on Google Drive.

- Un-attach – any document can be un-attached from booking. All files are still on Google Drive and in local storage. They must be deleted manually.

- If you are working only with MS Office (i.e. Cloud settings from section 2 above are NOT set up) then your document will be stored locally only with a local link to the file.

  o Eg. C:\RentalPointV11\docs\Invoices\ALPH47-00002I-V001.PDF

- If you are working only with Google Drive (using 'Save all docs to Google Drive' setting in Cloud Parameters) then all Word files will be stored ONLY on Google Drive, PDF files will still have local copy). You will see a global link in the attachments window:

  o Eg. GDRIVE:\Invoices\ALPH47-00002I-V001

- If you are working with Google Drive and MS Office (using 'Save locally and Carbon copy to cloud' setting in Cloud Parameters then all documents will be opened locally). You will see a local link to the file in the attachments folder

  o Eg. C:\RentalPointV11\docs\Invoices\ALPH47-00002I-V001.PDF

Print Using Custom Template

Button description:

- Printer – Send to printer

- PDF – Create file. Store local, store local and on Google Drive. It depends on *selected settings*

- Open in Word Processor – File will be opened from Word or from Google Drive. Depends on *selected settings.*

- To File – Create local copy, create local and on Google Drive or create on Google drive only. Depends on *selected settings.*

- Email as attachment – Send copy via Email

- Email as PDF – Send copy via Email in PDF format

Selected setting:
- PDF files are always stored locally despite our cloud settings but they still could be opened via google drive.
- Cloud is not in use – Create file. Store it local. Open it local with MS Office
- Save all docs to google drive – Create file. Store it only on Google Drive. Open it from Google Drive
- Save locally and Carbon copy to cloud – Create file. Store it local and CC to cloud. Open it local with MS Office

Sample PDF View on Google Drive

Invoice or delivery sheet

Button description:

- Printer – Send to printer
- PDF – Create file. Store local, store local and on Google Drive. It depends on selected settings.
- Email as PDF – Send copy via Email in PDF format .

Templates for client facing documents

Before starting to use Google Docs instead of MS Office. Your old MS Word RTF templates need to be simplified to make them Google docs friendly, this mostly concerns the use of tables in MS Word RTF docs MS Word supports some features which Google Docs does not, for example; MS Word tables can have columns that "Span" more than one column.

We have adjusted our sample templates to make them Google Drive friendly, we have also given them a face lift to make them look nicer.

You can either -

1. Simplify and adjust your current templates to make them work with Google Docs or

2. Download our sample templates and paste your logo and contact details into these templates and use them.

Download the sample templates from here

Adjusting the templates is quite time consuming and requires above average MS Word experience, the average template takes anywhere from 30 minutes to 3 hours to adjust and test, depending on how complex they are.

If you would like us to adjust the templates for you to make them Google docs friendly, please email us (at support@rentp.com), the templates (via Google drive preferably), we will then look at them and estimate a fixed price quotation for the conversion. Get in early, first come first served. If you are on one of our cloud servers then there is no need to email us the templates.