

MSTeams Connector

| | |
|---------------------------------|----------|
| Setting Up the connector | 2 |
| Active Directory App Setup | 2 |
| User Authentication | 7 |
| How to use | 9 |
| Create Event | 9 |
| Adding a participant | 11 |
| Update Event | 11 |
| Delete Event | 11 |

Setting Up the connector

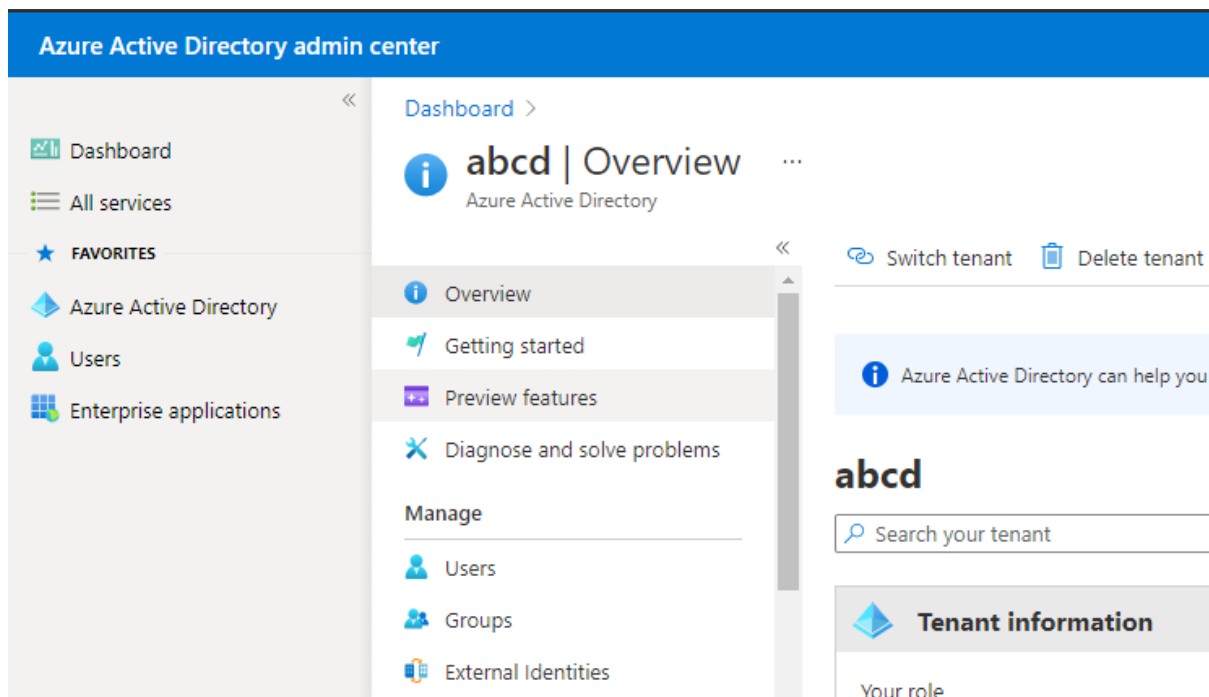
Active Directory App Setup

Note: This authentication process is mandatory for all the users before start using the connector

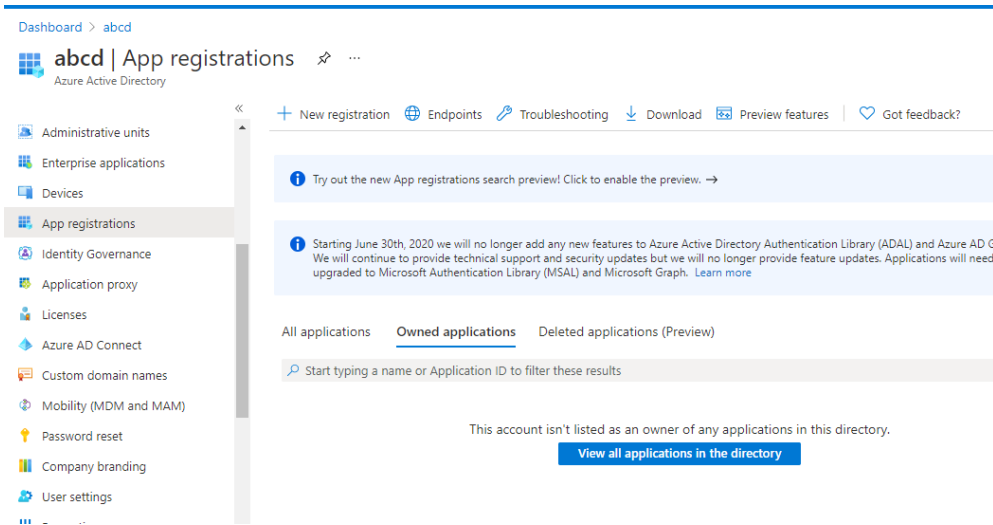
In order to use this connector you need an o365 account.

To set up a user account on Microsoft Business Basic/ Business Standard account for creatio MSTEams connector.

1. First of all log in to your Microsoft 365 admin panel via Azure active directory <https://www.microsoft.com/en-us/microsoft-365/business/office-365-administration>
2. Open the Azure Active Directory



3. Select App Registration



4. Select New Registration

5. Give the Name, select Web Redirect URL. The redirect URL will be {creation link}/0/rest/MSTeamsAuthCallbackService/OauthCallback (For Example <https://146505-crm-bundle-demo.creatio.com/0/rest/MSTeamsAuthCallbackService/OauthCallback>) and say register.

Register an application

* Name

The user-facing display name for this application (this can be changed later).

test ✓

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (abcd only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web

By proceeding, you agree to the [Microsoft Platform Policies](#)

[Register](#)

6. You will be getting your Client ID & Tenant ID

| ^ Essentials | |
|--|--|
| Display name : test | Supported account types : My organization only |
| Application (client) ID : a6ef56aa-be82-4adc-bc2f-6b00eb36c7b1 | Redirect URIs : 1 web, 0 spa, 0 public client |
| Directory (tenant) ID : a685c819-f754-4f39-94e5-b7bc8d209a37 | Application ID URI : Add an Application ID URI |
| Object ID : 12028fca-8636-4e13-9d8e-bc9b33b51dc0 | Managed application in L... : test |

7. Go to Certificate & Secrets and add a new client secret

Note : Add the time you add the secret you will be getting your secret ID under the Value column. You have to take a copy of it at the time you create it. Otherwise it will be hidden if you refresh the page

8. Then go to API permissions → Add permission → choose Microsoft Graph API

9. Make sure the following permission are given.

| API / Permissions name | Type | Description | Admin consent req... | Status |
|--------------------------|-------------|---|----------------------|-----------------------|
| ▼ Microsoft Graph (6) | | | | |
| Calendars.Read | Delegated | Read user calendars | No | ✔ Granted for msvcode |
| Calendars.Read | Application | Read calendars in all mailboxes | Yes | ✔ Granted for msvcode |
| Calendars.ReadWrite | Delegated | Have full access to user calendars | No | ✔ Granted for msvcode |
| Calendars.ReadWrite | Application | Read and write calendars in all mailboxes | Yes | ✔ Granted for msvcode |
| OnlineMeetings.ReadWrite | Delegated | Read and create user's online meetings | No | ✔ Granted for msvcode |
| User.Read | Delegated | Sign in and read user profile | No | ✔ Granted for msvcode |

Refresh | Got feedback?

| API / Permissions name | Type | Description | Admin consent req... | Status |
|------------------------------|-------------|---|----------------------|-----------------------|
| ▼ Microsoft Graph (11) | | | | |
| Calendars.Read | Delegated | Read user calendars | No | ✔ Granted for msvcode |
| Calendars.Read | Application | Read calendars in all mailboxes | Yes | ✔ Granted for msvcode |
| Calendars.Read.Shared | Delegated | Read user and shared calendars | No | ✔ Granted for msvcode |
| Calendars.ReadWrite | Delegated | Have full access to user calendars | No | ✔ Granted for msvcode |
| Calendars.ReadWrite | Application | Read and write calendars in all mailboxes | Yes | ✔ Granted for msvcode |
| Calendars.ReadWrite.Shared | Delegated | Read and write user and shared calendars | No | ✔ Granted for msvcode |
| OnlineMeetings.Read | Delegated | Read user's online meetings | No | ✔ Granted for msvcode |
| OnlineMeetings.Read.All | Application | Read online meeting details | Yes | ✔ Granted for msvcode |
| OnlineMeetings.ReadWrite | Delegated | Read and create user's online meetings | No | ✔ Granted for msvcode |
| OnlineMeetings.ReadWrite.All | Application | Read and create online meetings | Yes | ✔ Granted for msvcode |
| User.Read | Delegated | Sign in and read user profile | No | ✔ Granted for msvcode |

Go to the authentication tab -> enable the checkbox below

Manage

Branding & properties

Authentication

Select the tokens you would like to be issued by the authorization endpoint:

- Access tokens (used for implicit flows)
- ID tokens (used for implicit and hybrid flows)

10. Once you've done that. Grant the permission

11. Now Log in to the Creatio Instance that has MSTEams connector installed

Microsoft Teams → Application Registration → New

12. Give your credentials and Save

The screenshot shows the 'New' application registration form for Microsoft Teams. The form is titled 'test' and has a 'SAVE' button in green, a 'CANCEL' button in blue, and an 'ACTIONS' dropdown menu. The form fields are:

- MSTEamsName*: test
- MSTEamsClientID*: a6ef56aa-be82-4adc-bc2f-6b00eb36c7...
- MSTEamsClientSecret*: n3f9-C-7~z62Zmlq4G.4A8MifL1Im5S0C
- MSTEamsRedirectURI*: http://localhost:800/0/rest/MSTEamsA...
- MSTEamsTenantID*: a685c819-f754-4f39-94e5-b7bc8d209...

13. Then finally you need to set the same value of MSTEamsName to the system setting named "MSTEamsApplicationName"

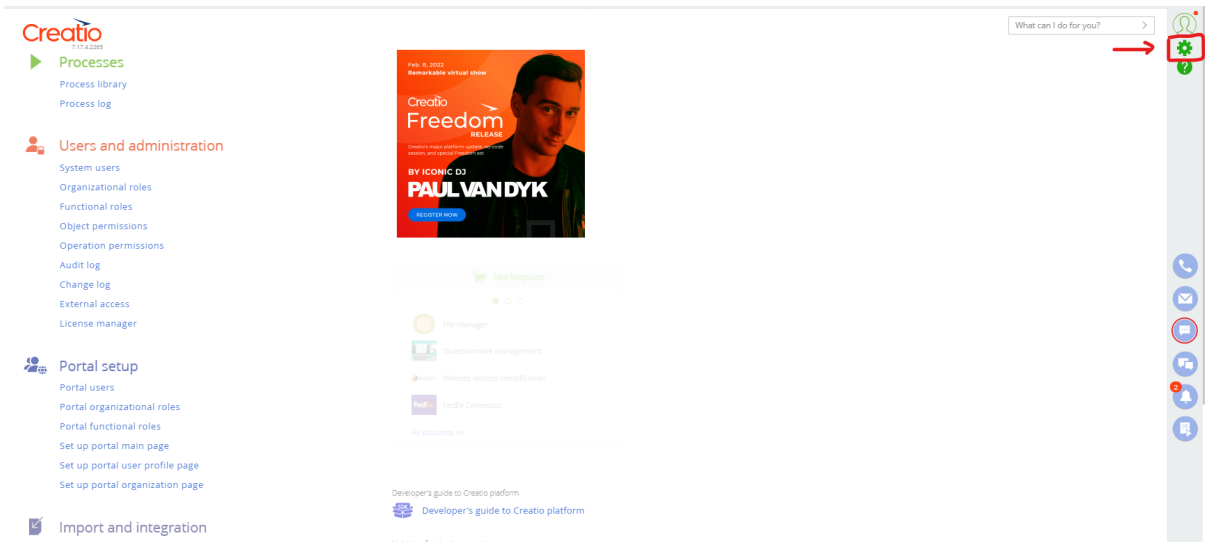
The screenshot shows a configuration form for 'MSTeamsApplicationName' in the Creatio system designer. The form includes a search bar at the top right with the text 'What can I do for you?' and the Creatio logo with version '7.17.1.1363'. Below the search bar are 'SAVE' and 'CANCEL' buttons. The form fields are: 'Name' (MSTeamsApplicationName), 'Type' (Text (50 characters)), 'Default value' (test), and 'Description'. To the right, there are fields for 'Code' (MSTeamsApplicationName), 'Cached' (checked), and 'Save value for current user' (unchecked). Below the fields are three sections for access control: 'Access for reading for internal users' (radio buttons for 'Allow for all', 'Restrict for all', 'Allow by operation'), 'Access for modification for internal users' (radio buttons for 'Allow for all', 'Restrict for all', 'Allow by operation'), and 'Access for portal users' (checkbox for 'Allow reading for portal users').

Now you're done with the set up. You can go to an appointment and create MSTeams meeting

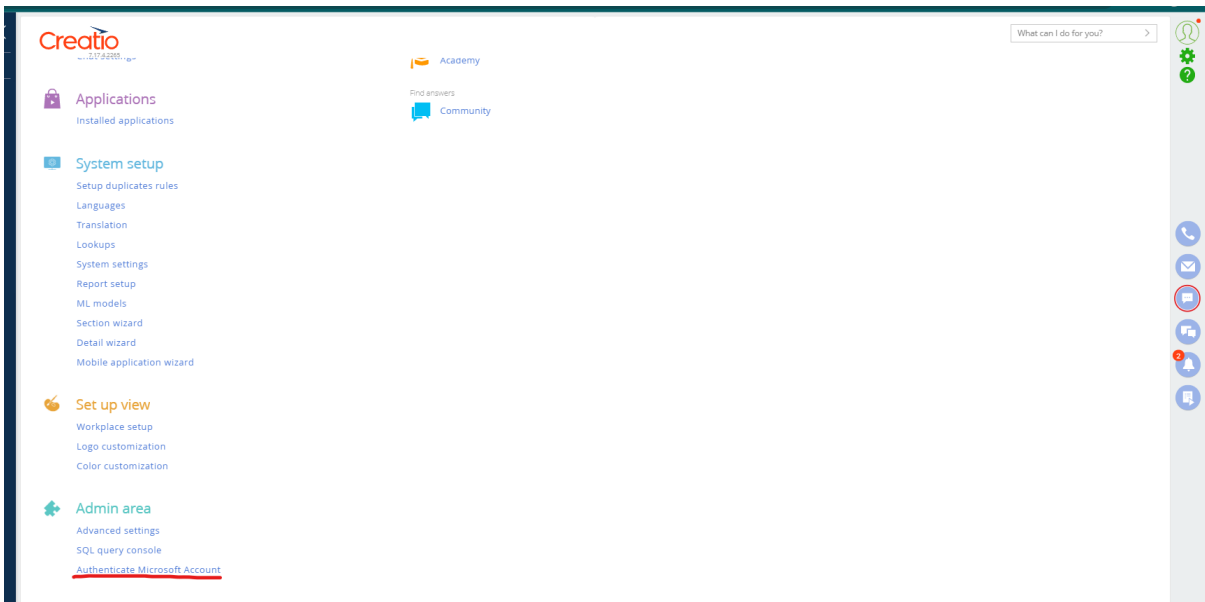
User Authentication

Note: This authentication process is mandatory for all the users before start using the connector

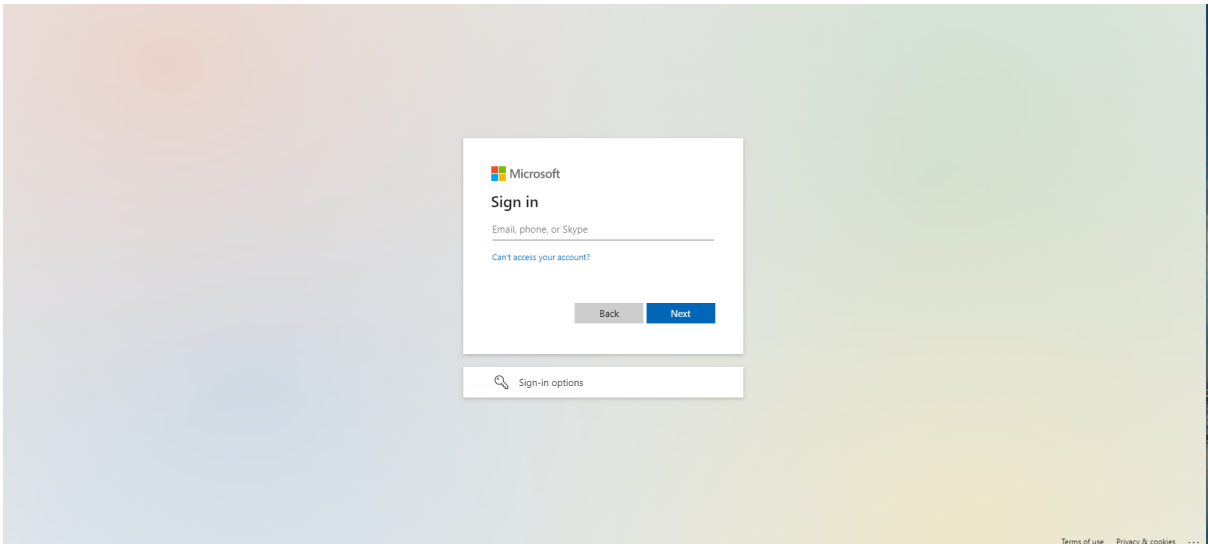
Navigate to the system designer by clicking on the settings icon in the right top corner.



Then scroll down to the bottom and click on the “Authendicate Microsoft Account”



You will be redirected to the Microsoft login page.



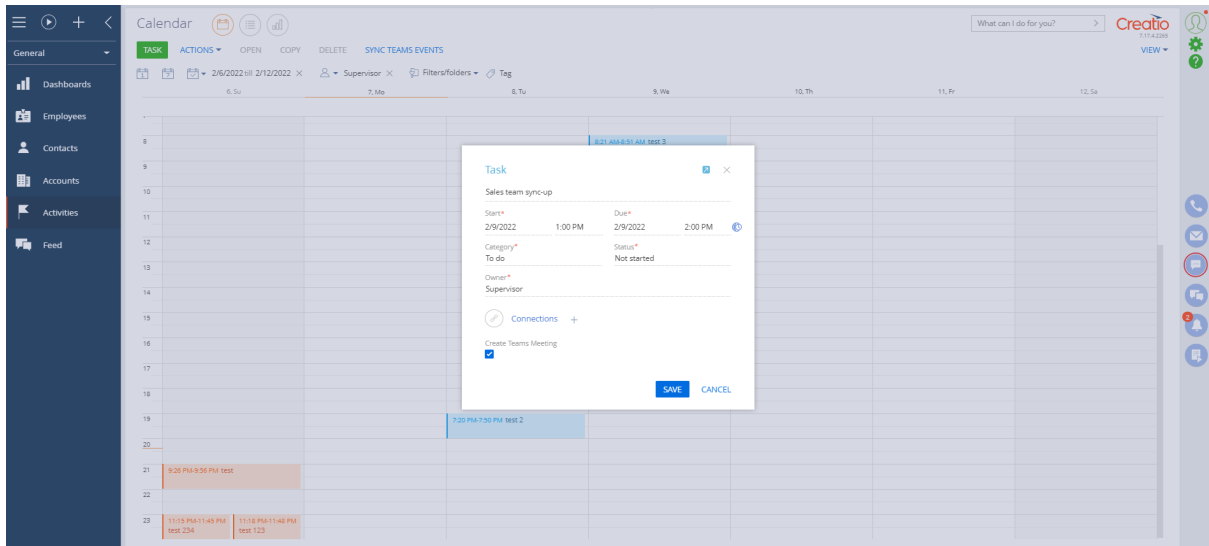
Right after the successful login, you will be redirected back to the Creatio screen

How to use

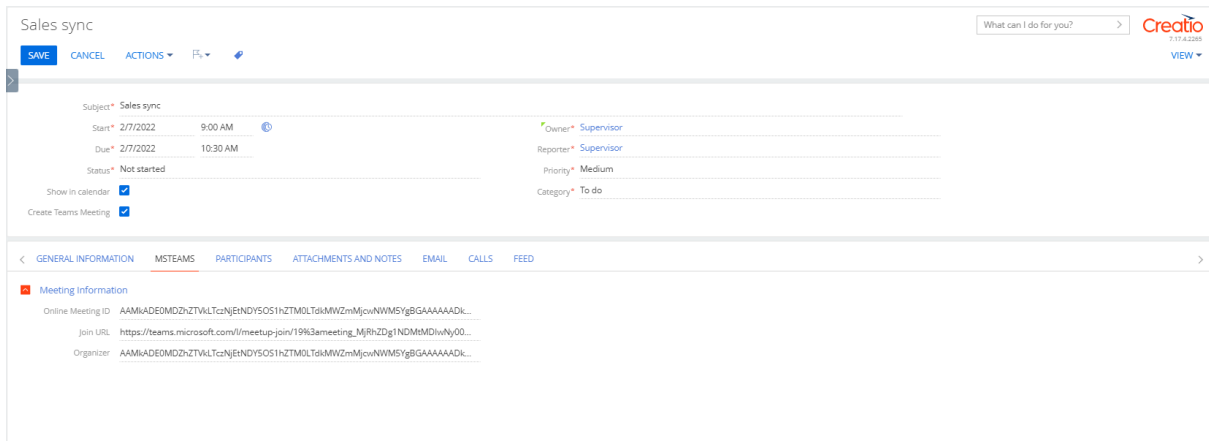
Create Event

Go to the activity section

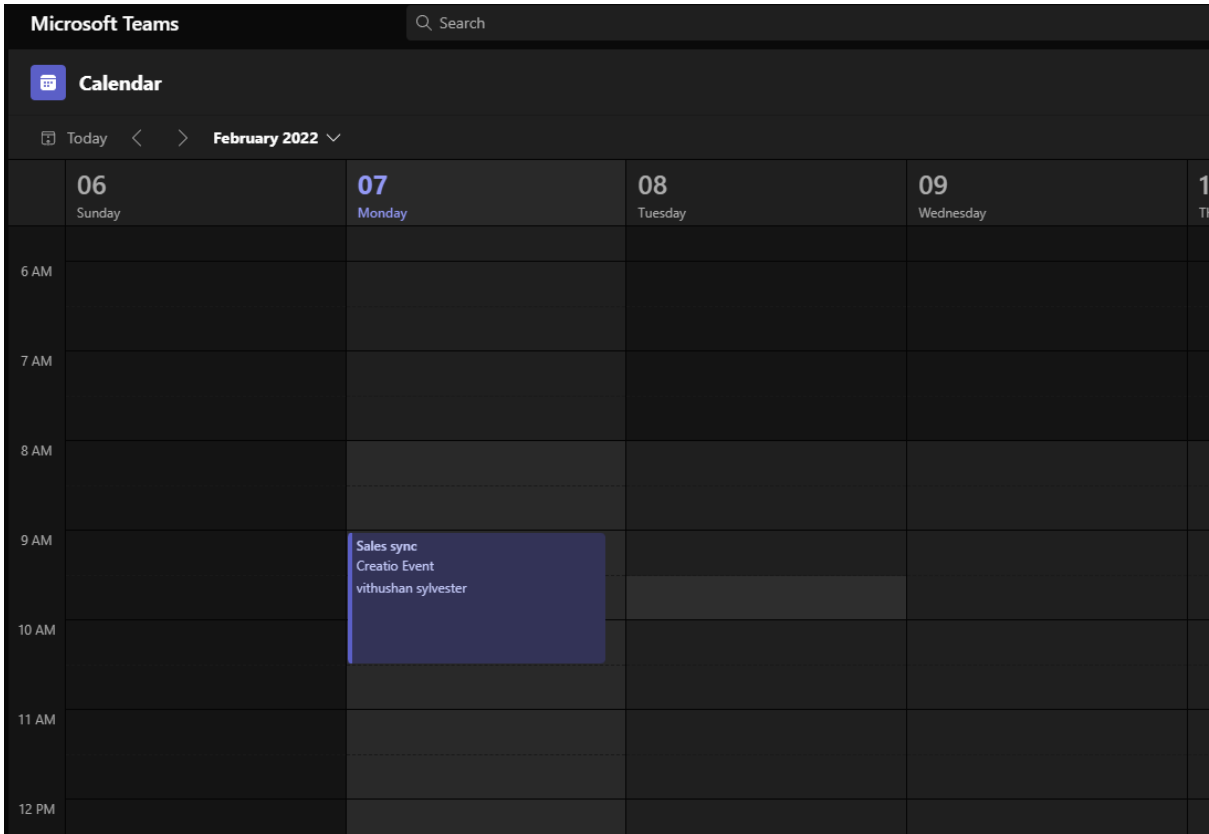
Click on create a new activity. And the tick the "Create Teams Meeting" check box while creating it.



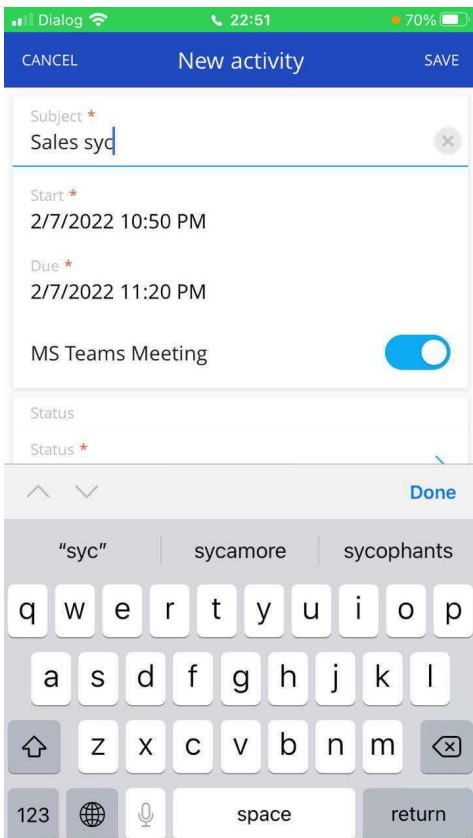
Once it's created, the teams join URL, and meeting informations will be visible under the created event.



It will be reflected in your Teams calendar as well.

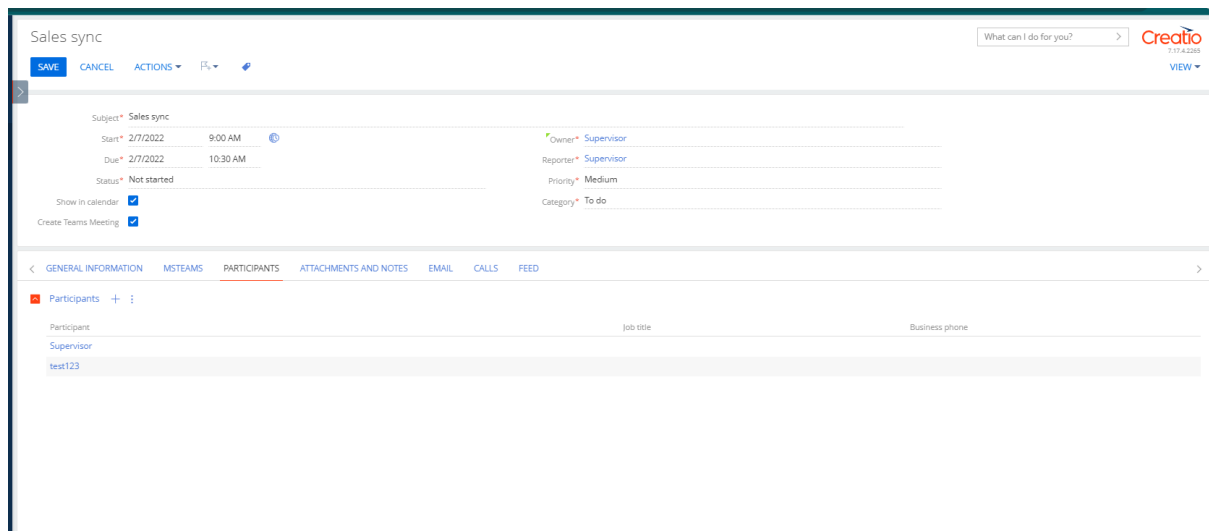


In order to work with the mobile app enable the MS Teams Meeting checkbox while creating/updating an activity



Adding a participant

Once the activity is created, navigate to the participant's tab of the created event.



Here you will be able to add/remove the participants from your creatio contact list.

Based on the email address in the participant contact. They will be invited and they will get Teams to invite to their email inbox as well.

Update Event

You can open an existing event from the calendar and modify the date/time or participants similar to a normal Creatio event. Based on the update it will sync that to the scheduled event in Teams.

Delete Event

Once the event is deleted from the calendar, it will be automatically removed from the teams calendar as well.