# MSTeams Connector

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
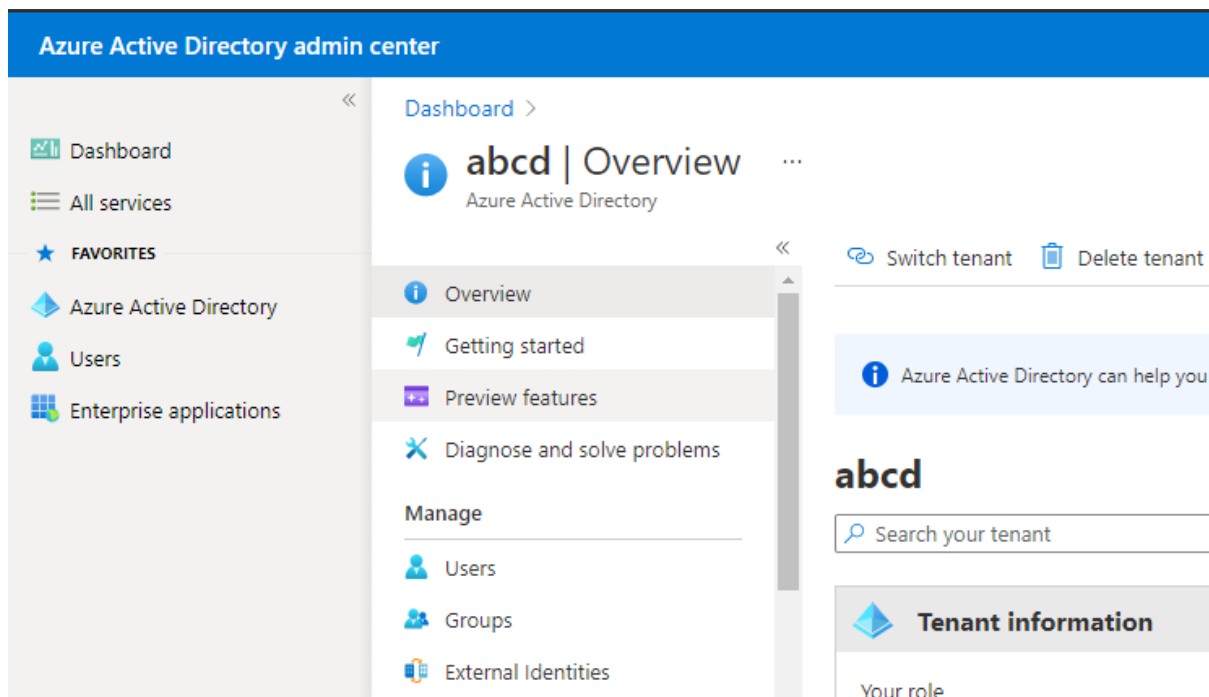
3. Select App Registration
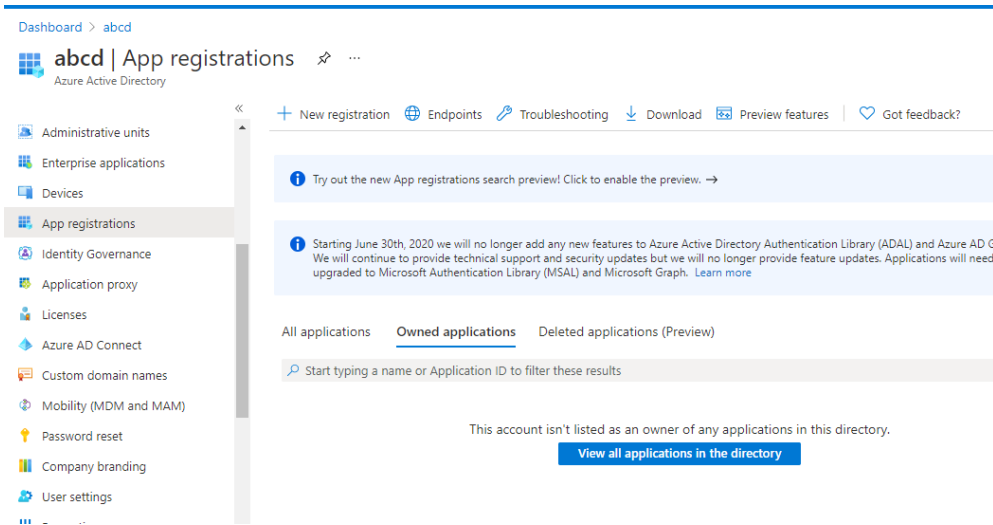
4. Select New Registration

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

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

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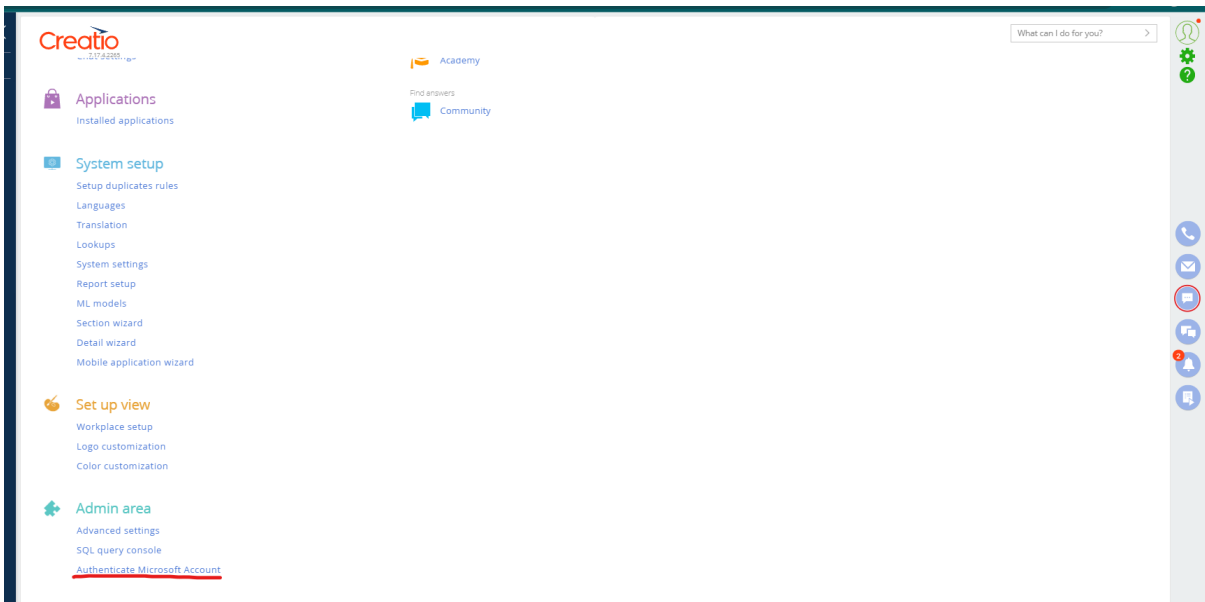
User Authentication

Note: This authentication process is mandatory for all the users before start using the connector
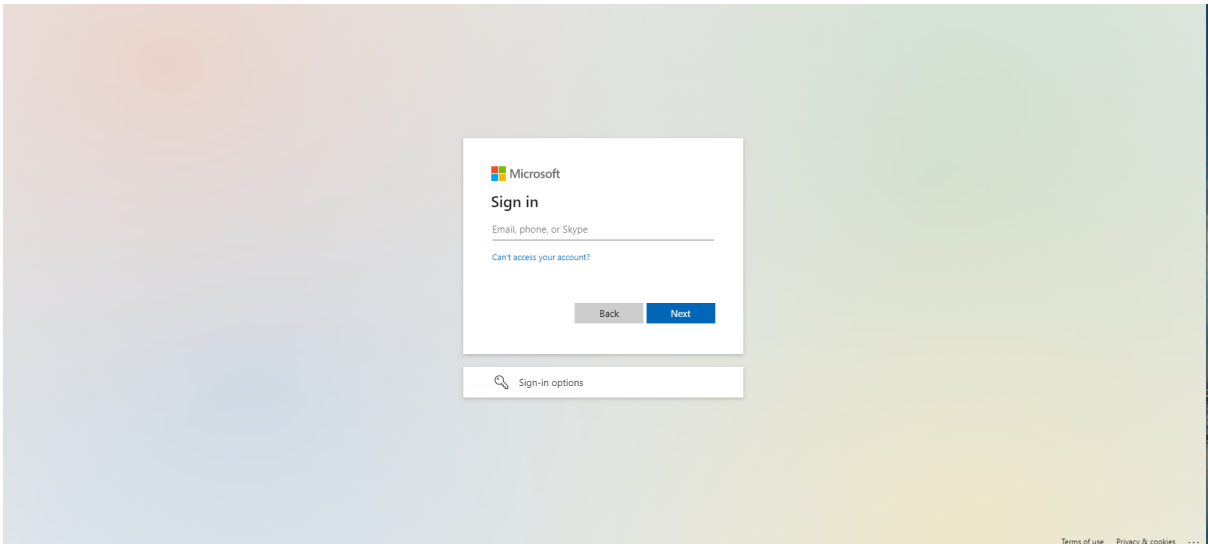
Navigate to the system designer by clicking on the settings icon in the right top corner.
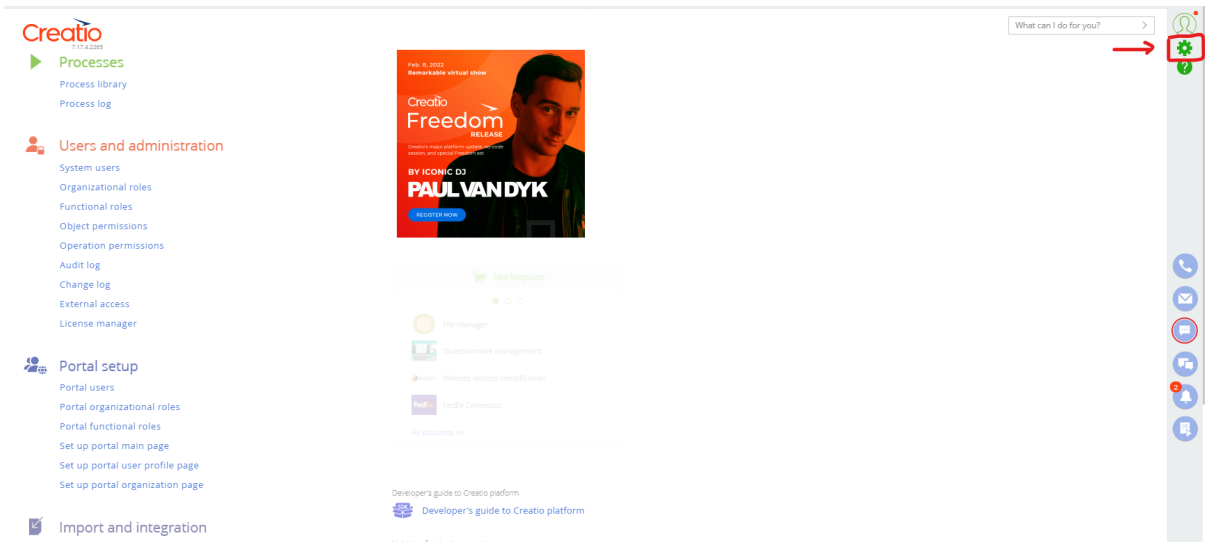
Then scroll down to the bottom and click on the "Authendicate Microsoft Account"
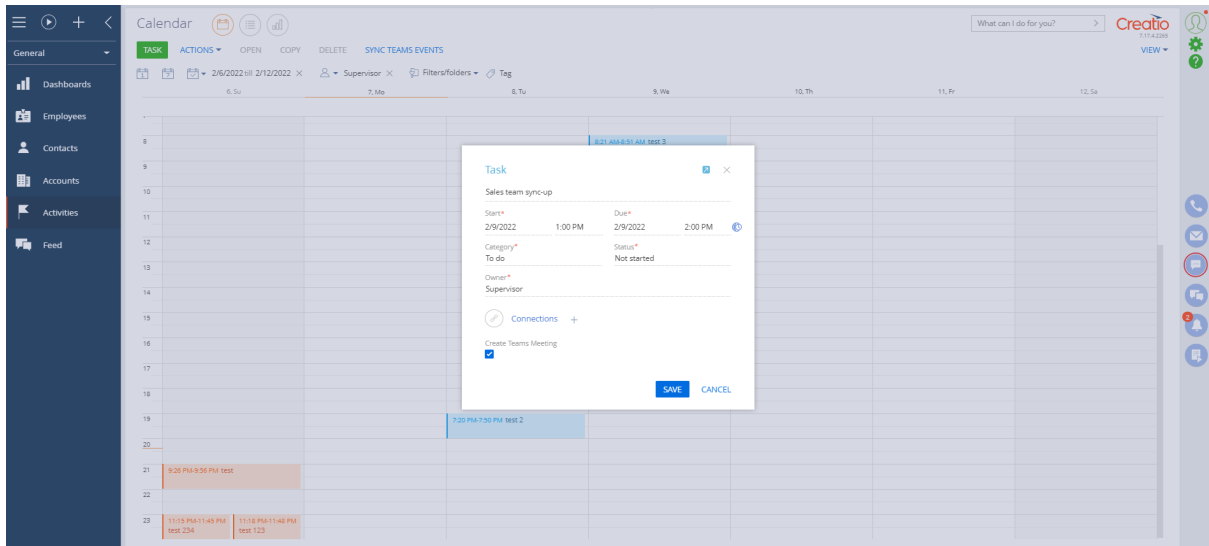

You will be redirected to the Microsoft login page.

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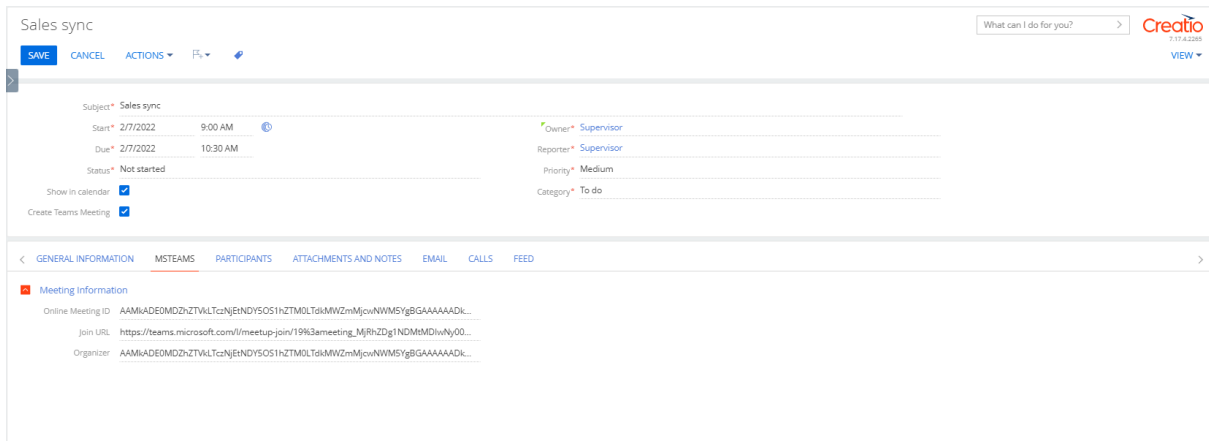
How to use

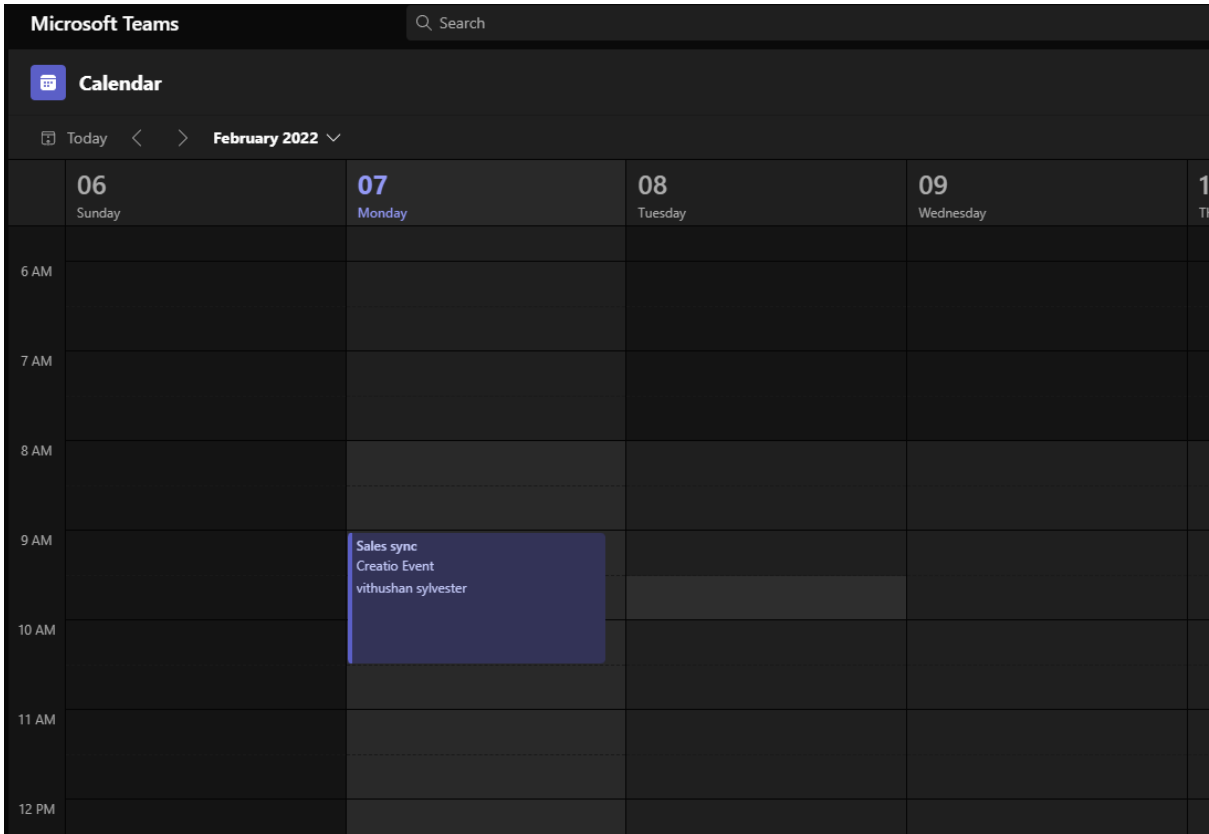## Create Event

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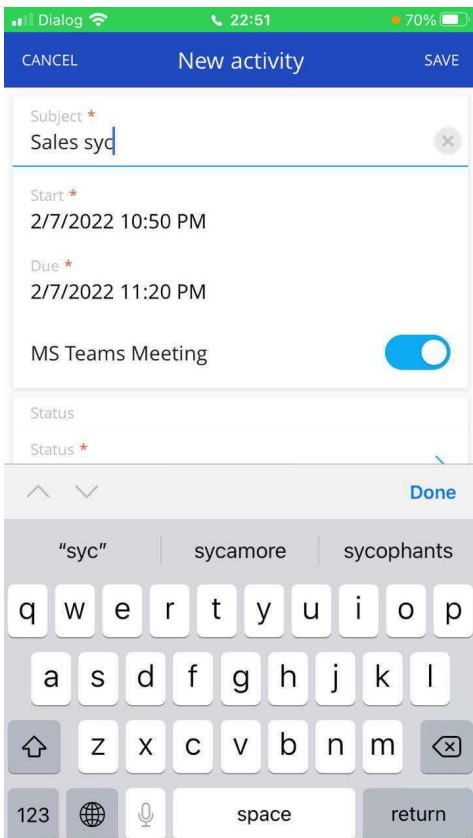

Once it's created, the teams join URL, and meeting informations will be visible under the created event.

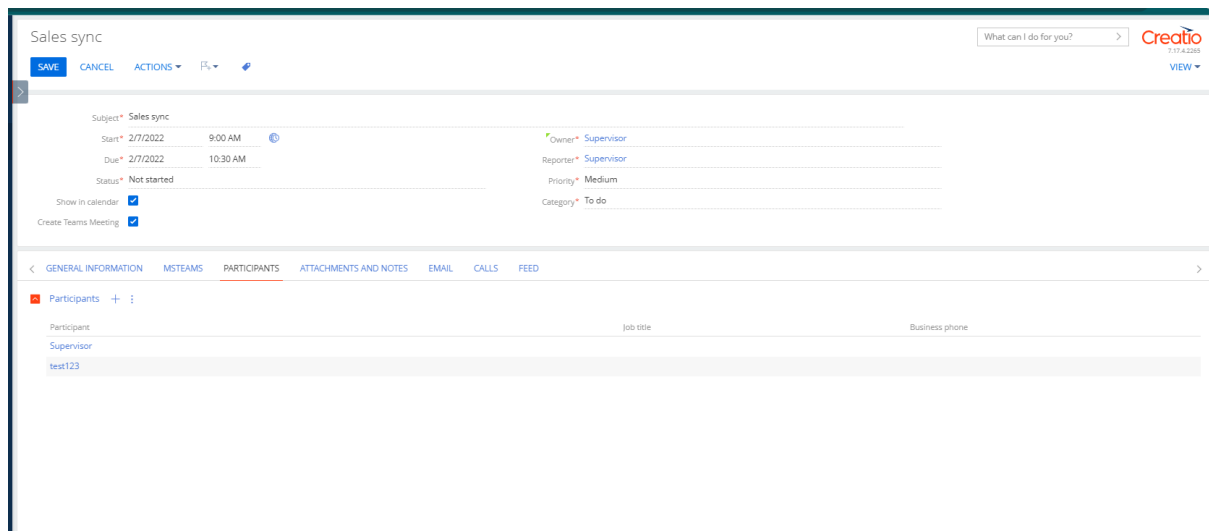It will be reflected in your Teams calendar as well.

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.