

Microsoft Teams Connector

User Guide

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Setting Up the connector

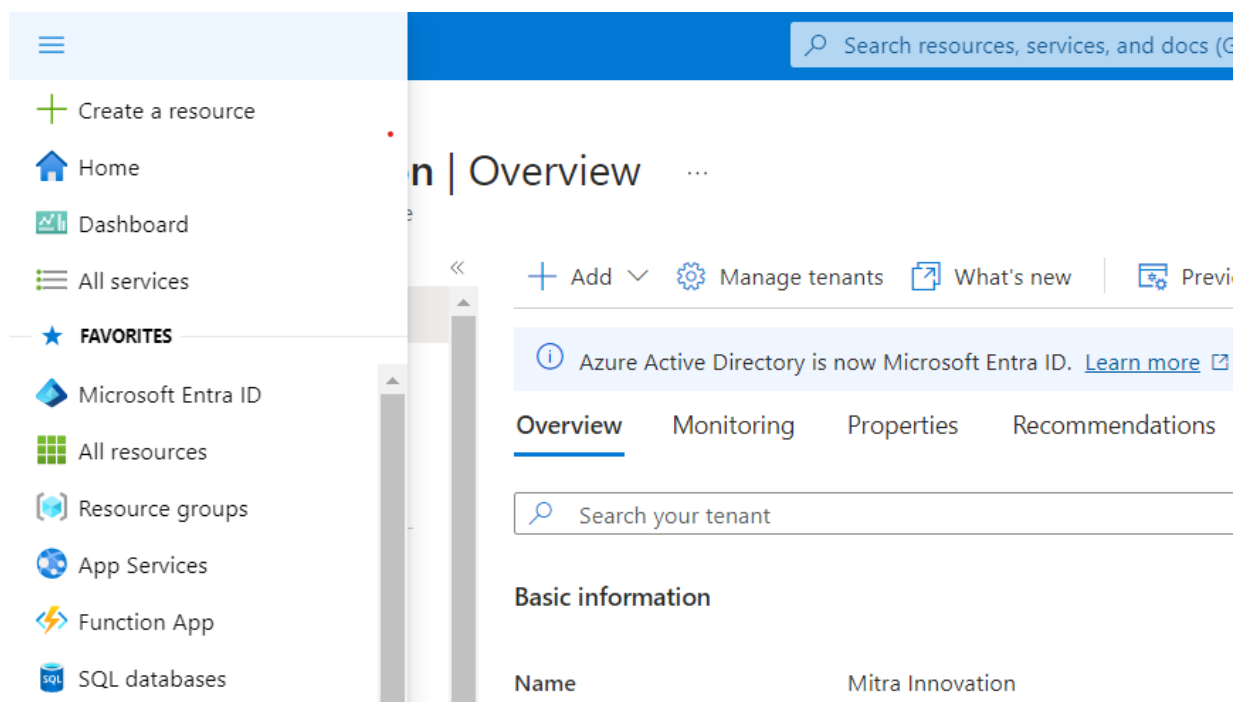
Microsoft Entra ID Setup

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.

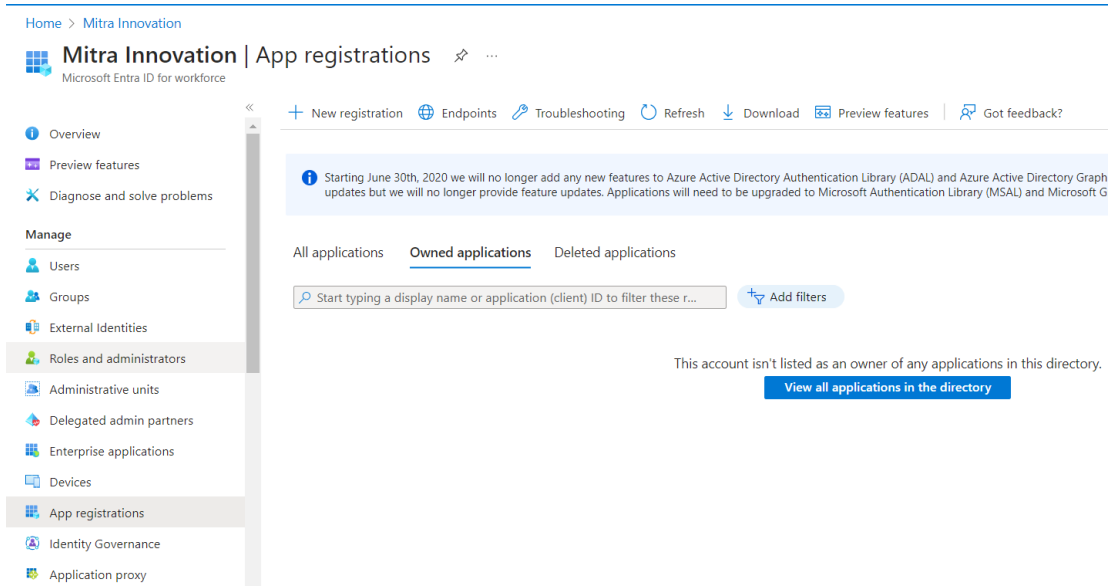
To set up a user account on Microsoft Business Basic/ Business Standard account for creating MTeams connector.

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 Microsoft Entra ID



The screenshot shows the Microsoft Entra ID Overview page in the Azure portal. The left-hand navigation pane includes options like 'Create a resource', 'Home', 'Dashboard', 'All services', and a 'FAVORITES' section with 'Microsoft Entra ID' selected. The main content area displays the 'Overview' tab for a tenant named 'Mitra Innovation'. A notification banner at the top states 'Azure Active Directory is now Microsoft Entra ID. Learn more'. Below this, there are tabs for 'Overview', 'Monitoring', 'Properties', and 'Recommendations'. A search bar for the tenant is visible. Under the 'Basic information' section, the 'Name' is listed as 'Mitra Innovation'.

3. Select App Registration



4. Select New Registration

- Give the Name, select Web Redirect URL. The redirect URL will be {creatiolink}/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).

 ✓

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	Client credentials	: Add a certificate or secret
Application (client) ID	: 1fd5b93e-9d13-4e90-ac22-c03816509d36	Redirect URIs	: 1 web, 0 spa, 0 public client
Object ID	: 26f46f5f-b819-433e-b12c-be74617d6bcb	Application ID URI	: Add an Application ID URI
Directory (tenant) ID	: 486cea9e-2541-48c0-b7d2-fe21f1952a49	Managed application in I...	: test
Supported account types	: My organization only		

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 hid 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:

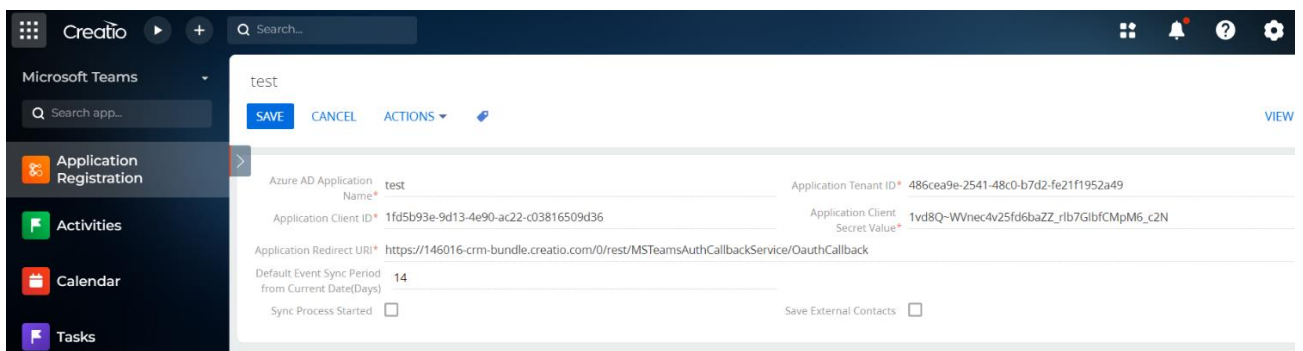
- Access tokens (used for implicit flows)
- ID tokens (used for implicit and hybrid flows)

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

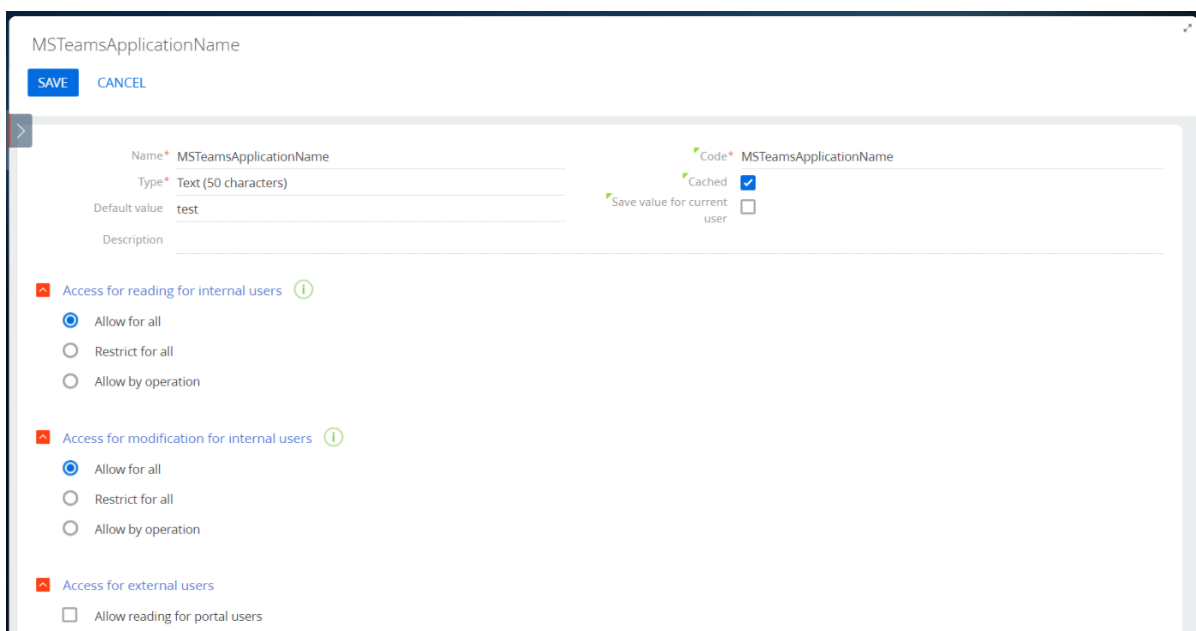
11. Now Log in to the Creatio Instance that has MSTEams connector installed

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 systemsetting named "MSTEamsApplicationName"

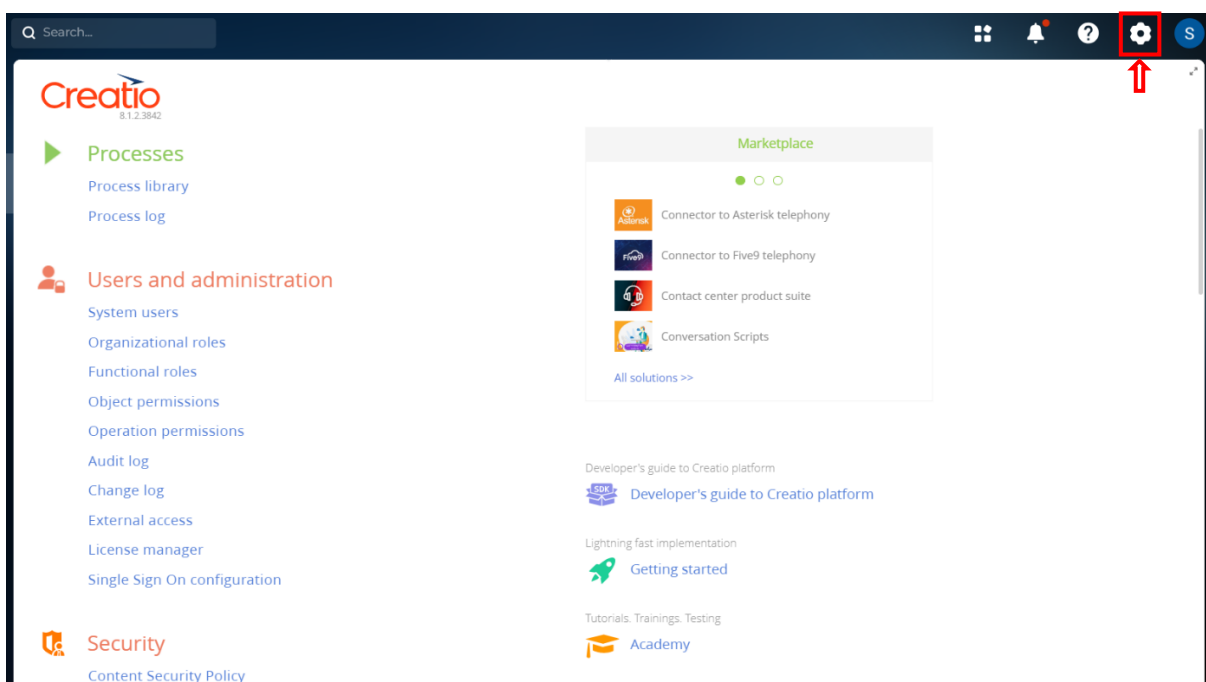


Now you're done with the set up. You can go to an appointment and create MSTeams meeting

User Authentication

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

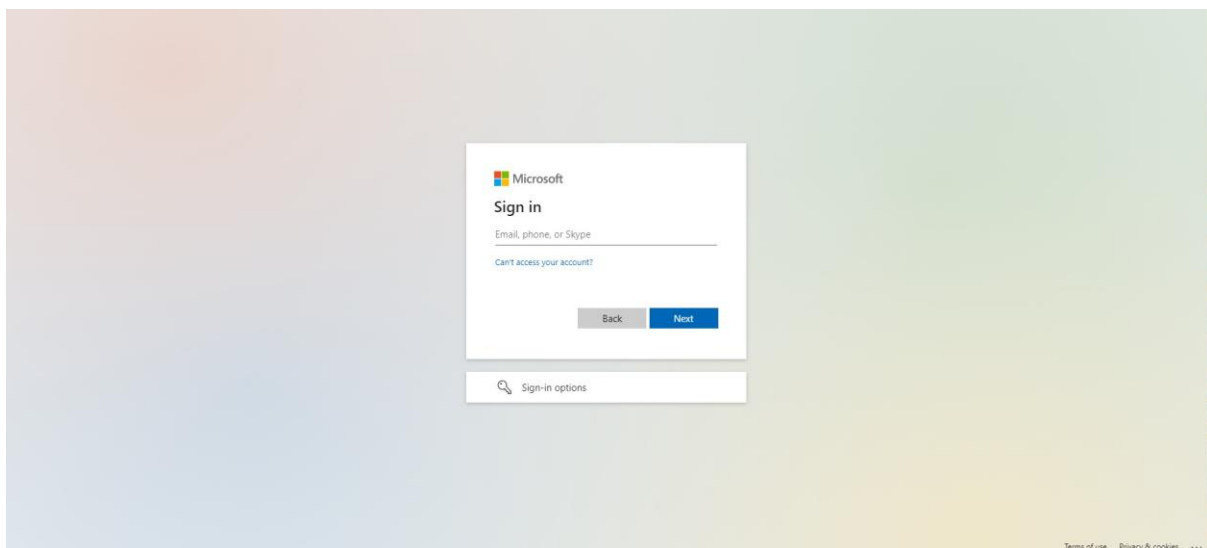
Navigate to the system designer by clicking on the settings icon in the right top corner.



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



You will be redirected to the Microsoft login page.



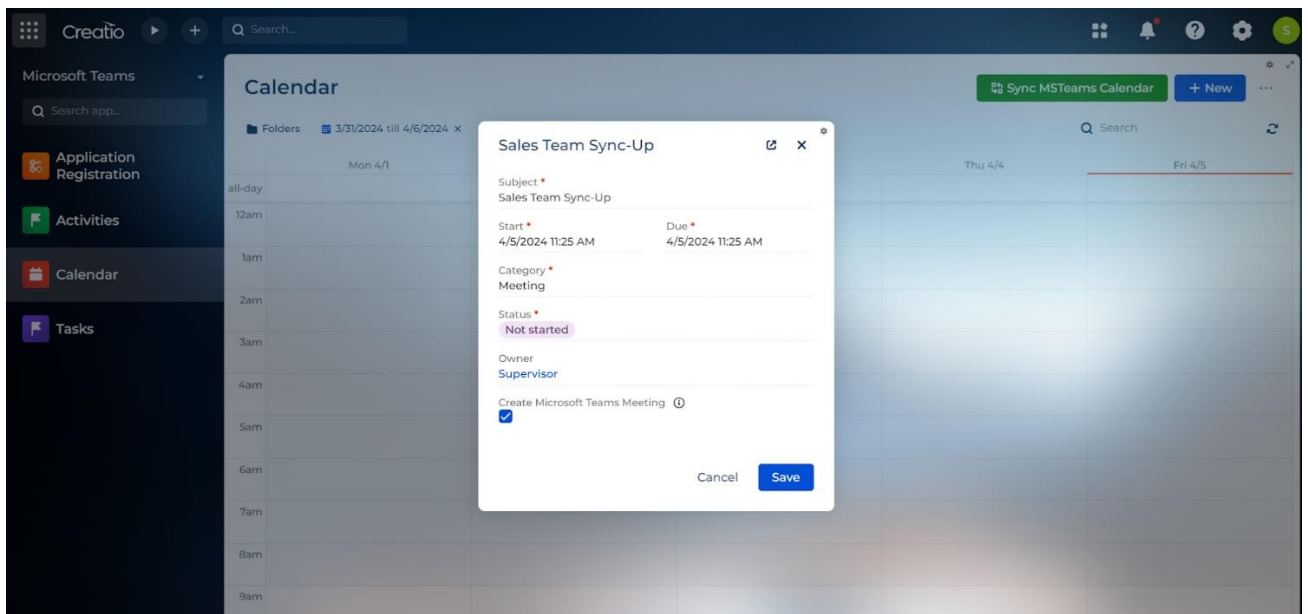
Right after the successful login, you will be redirected back to the Creatio screen

How to use

Create Event

Go to the Calendar 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.

← Sales Team Sync-Up
Refresh Close Lock

Add tag
Join
Connections
Feed
Attachments

Details

Priority • Medium

Category • Meeting

Location

Show in calendar

Executors

Owner
Sachiendran Rajendran (Sachi...)

Role

Reporter
Sachiendran Rajendran (Sachi...)

Reminders

Subject • Sales Team Sync-Up

Start • 4/5/2024 6:59 AM Due • 4/5/2024 6:59 AM

Status • Not started Result

Participants

Info

Sales Team Sync-Up
Microsoft Teams

Need help? <https://aka.ms/JoinTeamsMeeting?omkt=en-US>

Join the meeting now: https://teams.microsoft.com/l/meetup-join/19%3ameeting_NGVIzjg4N2EtyjNIOC00MGE5LWl3ZCYtTc5MGQ5MWl3ODRh%40thread.v2/0?context=%7b%22Tid%22%3a%22486cea9e-2541-48c0-b7d2-fe21f952a49%22%2c%22Oid%22%3a%22fca36ae6-07a1-4d8a-99dc-a8eca40aa8c9%22%7d

Meeting ID: 470 629 159 044
Passcode: ZJ37ku

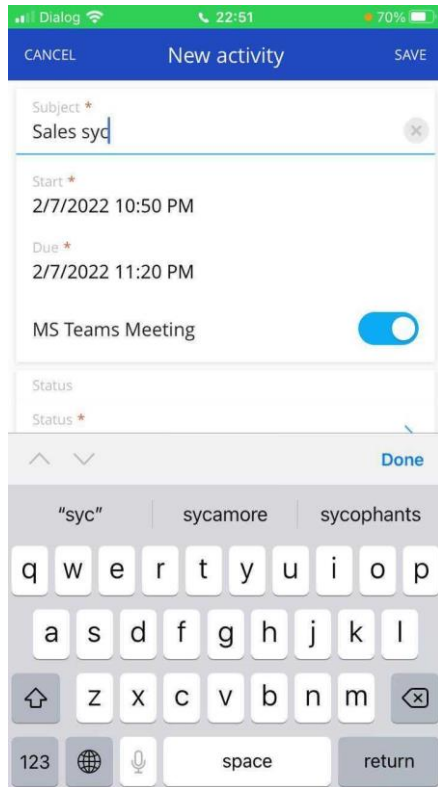
It will be reflected in your Teams calendar as well.

Activity **Calendar**
Join with an ID

Today
←
April 2024
▼

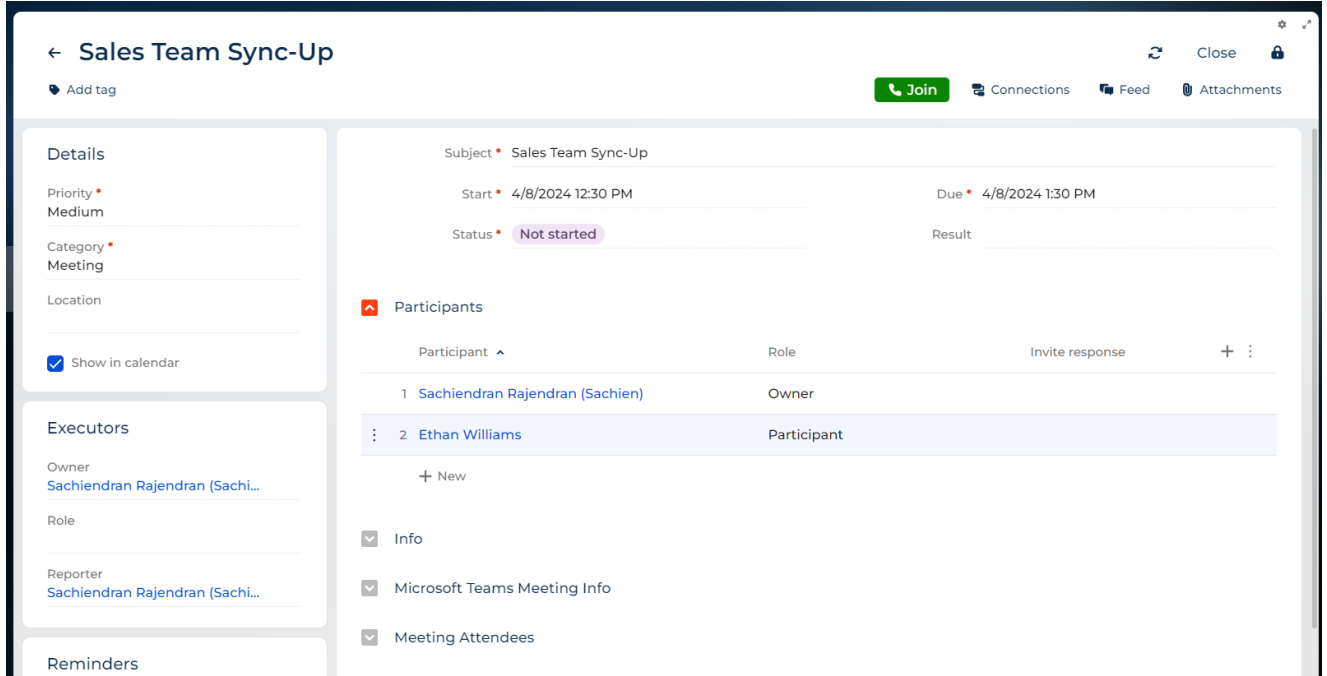
	08 Monday	09 Tuesday	10 Wednesday	11 Thursday
3 PM				
4 PM				
5 PM	Sales Team Sync-Up Creatio Event Roobeshwara Sharma			
6 PM				
7 PM				
8 PM				

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 detail of the created event.



The screenshot displays the 'Sales Team Sync-Up' event detail page. The page is divided into several sections:

- Header:** Shows the event title 'Sales Team Sync-Up', a 'Join' button, and navigation options like 'Connections', 'Feed', and 'Attachments'.
- Details Panel (Left):**
 - Priority: Medium
 - Category: Meeting
 - Location: (empty)
 - Checkbox: Show in calendar
- Executors Panel (Left):**
 - Owner: Sachiendran Rajendran (Sachi...)
 - Role: (empty)
 - Reporter: Sachiendran Rajendran (Sachi...)
- Main Content Area:**
 - Subject: Sales Team Sync-Up
 - Start: 4/8/2024 12:30 PM
 - Due: 4/8/2024 1:30 PM
 - Status: Not started
 - Result: (empty)
 - Participants Table:**

Participant	Role	Invite response
1 Sachiendran Rajendran (Sachien)	Owner	
2 Ethan Williams	Participant	
 - Info Panel (Bottom Left):**
 - Info
 - Microsoft Teams Meeting Info
 - Meeting Attendees

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.