

# MSTeams Connector

## Features

- Create online events using Creatio calendar through the Microsoft Graph API.
- Create online meetings and access the join url and meeting id in the Creatio calendar event.

## Features in the development roadmap

- Invite participants through the Creatio calendar
- Delete/cancel/Update event from the Creatio Calendar

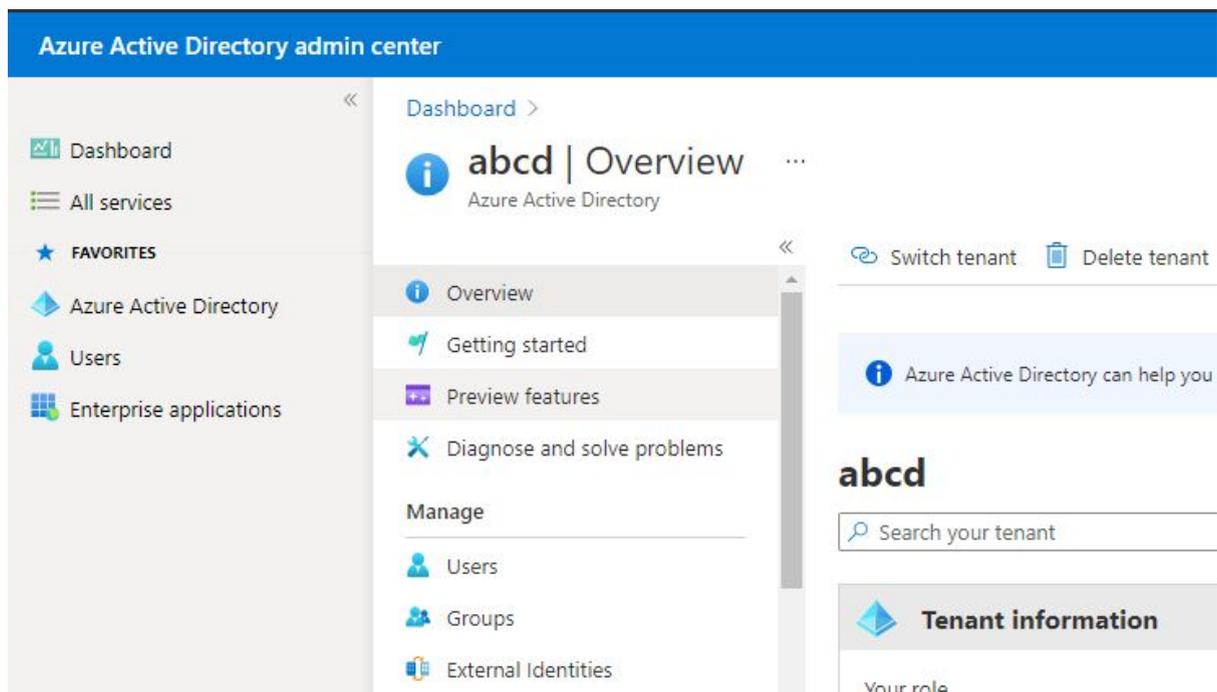
## User Guide

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

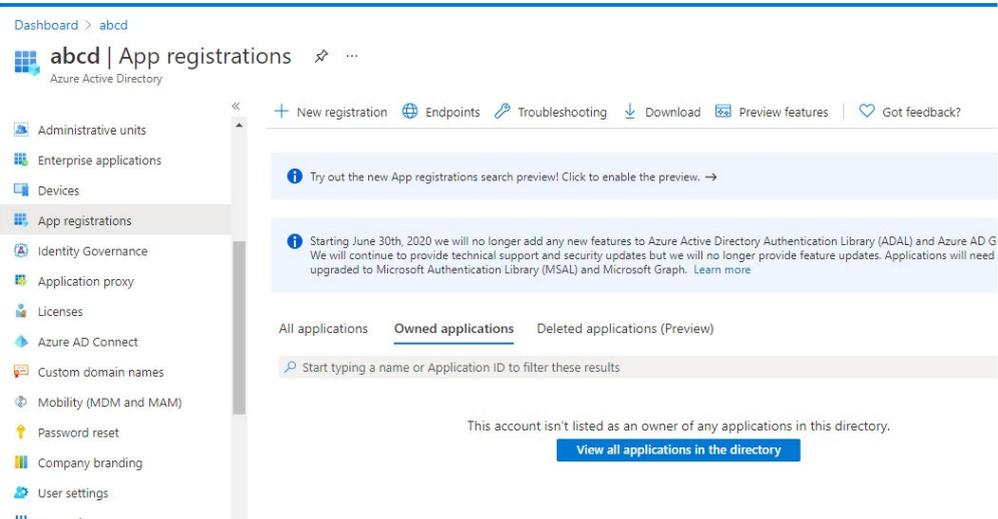
To set up a user account on Microsoft Business Basic/ Business Standard account for creatio MSTeams connector. If it's a demo purpose you can take a MS 365 trial account on the following link

<https://docs.microsoft.com/en-us/microsoft-365/commerce/sign-up-for-office-365-trial?view=o365-worldwide> . If you have a business basic/standard account you can proceed with that.

1. First of all log in to your Microsoft 365 admin panel  
<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.

### 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                                 | 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 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 msxcode |
| Calendars.Read           | Application | Read calendars in all mailboxes           | Yes                  | Granted for msxcode |
| Calendars.ReadWrite      | Delegated   | Have full access to user calendars        | No                   | Granted for msxcode |
| Calendars.ReadWrite      | Application | Read and write calendars in all mailboxes | Yes                  | Granted for msxcode |
| OnlineMeetings.ReadWrite | Delegated   | Read and create user's online meetings    | No                   | Granted for msxcode |
| User.Read                | Delegated   | Sign in and read user profile             | No                   | Granted for msxcode |

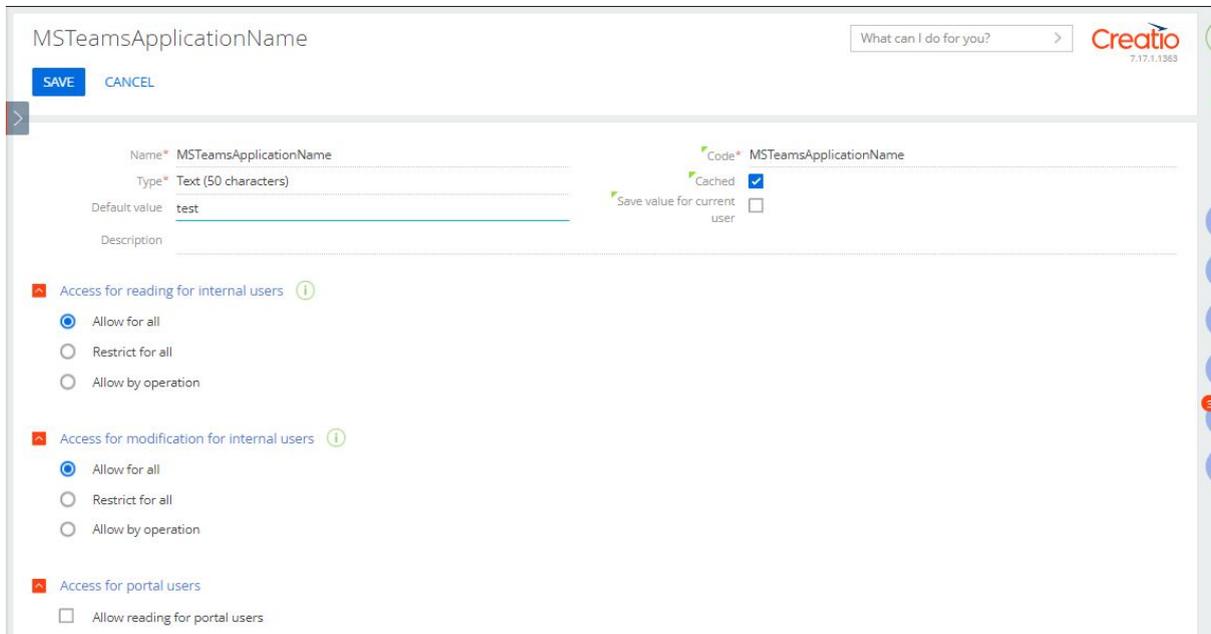
10. Once you've done that. Grant the permission

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”



The screenshot shows the configuration page for the system setting 'MSTeamsApplicationName'. The page includes a search bar at the top right with the text 'What can I do for you?' and the Creatio logo. Below the search bar are 'SAVE' and 'CANCEL' buttons. The main configuration area contains the following fields:

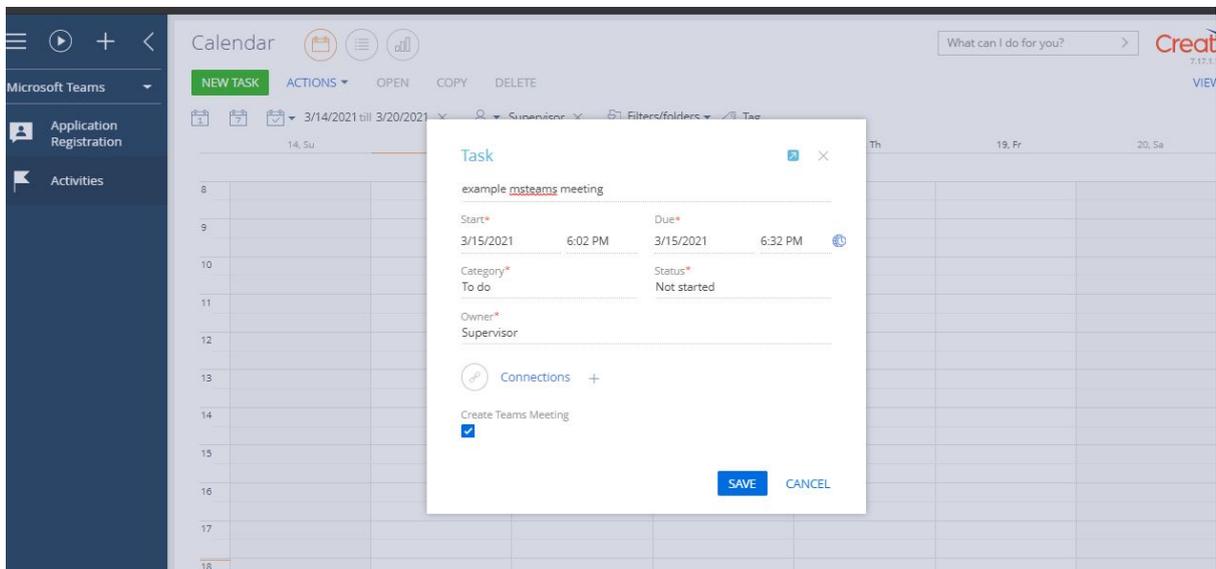
- Name: MSTeamsApplicationName
- Type: Text (50 characters)
- Default value: test
- Description: (empty field)
- Code: MSTeamsApplicationName
- Cached:
- Save value for current user:

Below the fields are three sections for access control:

- Access for reading for internal users** (with an information icon):
  - Allow for all
  - Restrict for all
  - Allow by operation
- Access for modification for internal users** (with an information icon):
  - Allow for all
  - Restrict for all
  - Allow by operation
- Access for portal users**:
  - Allow reading for portal users

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

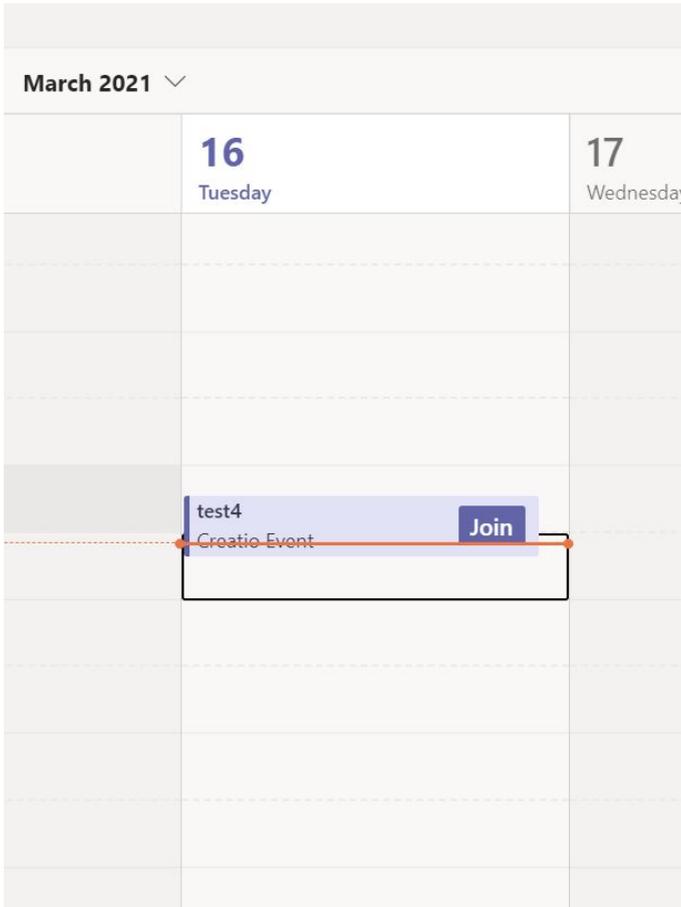
You can tick the “create teams meeting” checkbox whenever you want while creating an event in the Creatio Calendar.



The screenshot shows the Creatio Calendar interface. A 'Task' dialog box is open, allowing the user to create a new task. The dialog box contains the following information:

- Title: example msteams meeting
- Start: 3/15/2021 6:02 PM
- Due: 3/15/2021 6:32 PM
- Category: To do
- Status: Not started
- Owner: Supervisor
- Connections: (empty list)
- Create Teams Meeting:

At the bottom of the dialog box are 'SAVE' and 'CANCEL' buttons. The background shows the calendar grid with dates from 14, Su to 20, Sa.



CLOSE ACTIONS

>

Subject\* test4

Start\* 3/18/2021 9:42 PM

Due\* 3/18/2021 10:12 PM

Status\* Not started

Owner\* Supervisor

Reporter\* Supervisor

Priority\* Medium

Category\* To do

Show in calendar

Create Teams Meeting

< GENERAL INFORMATION **MSTEAMS** PARTICIPANTS ATTACHMENTS AND NOTES EMAIL CALLS FEED

Meeting Information

Online Meeting ID AAMkADE0MDZhZTVkLTczNjEtNDY5OS1hZTM0LTdkMWZmMjc...

Join URL [https://teams.microsoft.com/join/19%3ameeting\\_NW...](https://teams.microsoft.com/join/19%3ameeting_NW...)

Organizer AAMkADE0MDZhZTVkLTczNjEtNDY5OS1hZTM0LTdkMWZmMjc...