Teams connector installation guide

Installation and Configuration Guide for Microsoft Teams Phone Connector for Creatio

Installation

The application is installed using the standard Creatio tools. You need to install the application package on your system version.

Configuration

Azure Configuration

To use the connector with telephony features in Microsoft Teams, the user must independently purchase a Teams Phone license along with a Microsoft Calling Plan if they need to make external phone calls. This plan is necessary for connecting the Teams Phone System to the Public Switched Telephone Network (PSTN), allowing for external calls with Microsoft acting as the PSTN carrier. Users need to buy this license themselves through the Microsoft 365 admin center (Microsoft Cloud) (MS Learn).

Integration with Teams uses the Azure Communication Services API. Attention - this service may charge an additional fee for its use.

To configure the operation, you need to perform the following actions in portal.azure.com:

- Create a Communication Services if not already existing.
- Create a new application in App registrations.
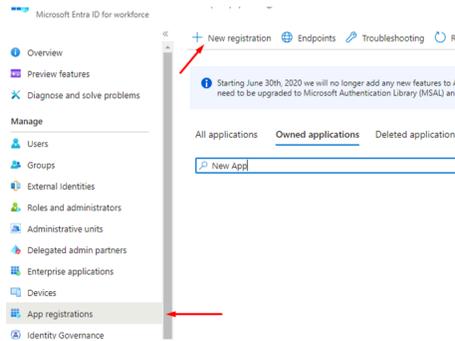
- Add an authentication method
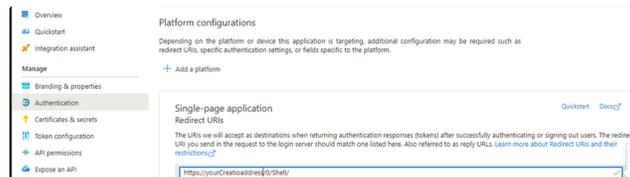
- Allow public client applications to use this application
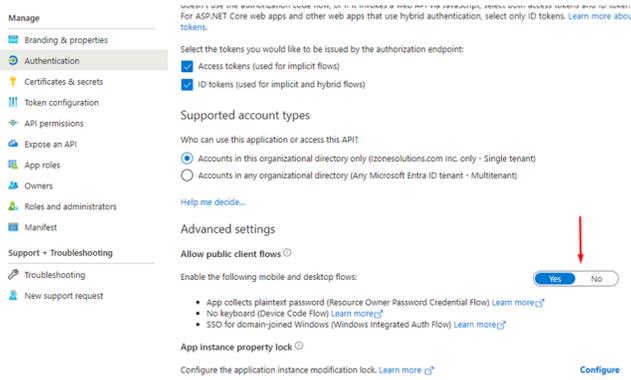
- Add the following permissions for the application.

Changing System Settings

You need to set the following system settings:

Name	Code	Description
SMTeams phone application Id	SMTeamsPhoneAppClientId	The Azure application identifier that was registered above.
Azure Communication Services Connection string	SMTeamsPhoneCommunicationServicesConnectionString	Connection string to Azure Communication Services
SMTeams phone app tenantId	SMTeamsPhoneAppTenantId	Your Tenant ID in Azure.
Default messages exchange library	SysMsgLib	Set the value to "MS Teams Phone".

For your convenience, the settings related to the connector are grouped in the "SM Teams phone connector" folder.

First Launch

After successfully configuring the application, you need to go to the user profile page and select the Call Center settings item.

The quickest way to do this is through the CTI panel.
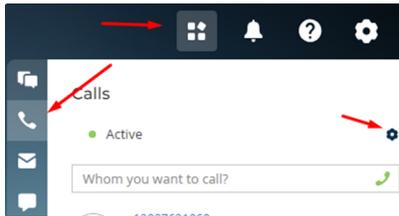
After that, the connector settings window will open.

In it, you need to enter the phone number that was assigned to your Teams account and log in to Teams by clicking the "Login MS Teams" button.

After successful login, the Teams User Name field should be automatically filled in. Refresh the page, and your connector should be ready.

User interface

This connector uses a standard Creatio user interface that described on the academy page ▣ Manage calls | Creatio Academy .