

## 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

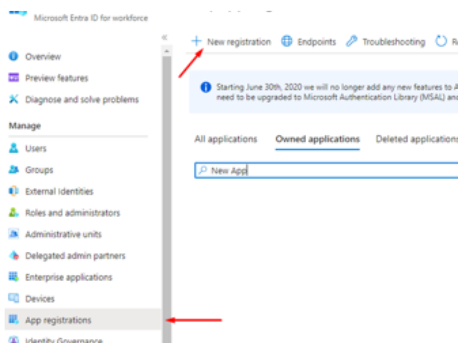
##### Azure Configuration

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](#)).

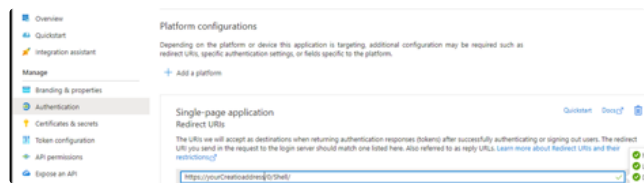
Integration with Teams uses the Azure Communication Services API. Attention - this service may charge an additional fee for its use.

To configure the operation, you need to perform the following actions in [portal.azure.com](https://portal.azure.com):

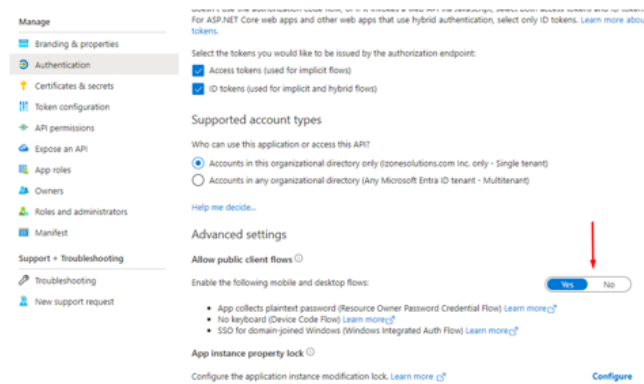
- Create a Communication Services if not already existing.
- Create a new application in App registrations.



- Add an authentication method



- Allow public client applications to use this application



- Add the following permissions for the application.

API / Permissions name	Type	Description	Admin consent requ...	Status
Azure Communication Services (2)				
Teams.ManageCalls	Delegated	Manage calls in Teams	No	Granted for Ionesolutio_...
Teams.ManageChats	Delegated	Manage chats in Teams	No	Granted for Ionesolutio_...
Microsoft Graph (1)				
User.Read	Delegated	Sign in and read user profile	No	Granted for Ionesolutio_...

## Changing System Settings

You need to set the following system settings:

Name	Code	Description
SMTeams phone application Id	SMTeamsPhoneAppCli entId	The Azure application identifier that was registered above.

<b>PhoneApp client secret</b>	SMTeamsPhoneAppClientSecret	The secret that was generated for your phone application on the Azure side
<b>Azure Communication Services Connection string</b>	SMTeamsPhoneCommunicationServicesConnectionString	Connection string to Azure Communication Services
<b>SMTeams phone app tenantId</b>	SMTeamsPhoneAppTenantId	Your Tenant ID in Azure.
<b>Default messages exchange library</b>	SysMsgLib	Set the value to "MS Teams Phone".
<b>SM Teams Phone AppClient Secret</b>	SMTeamsPhoneAppClientSecret	A Client Secret is a password-like credential used for Azure AD App Registration authentication. In this code, it's used with the ClientSecretCredential class to authenticate your application to Microsoft Graph API using the Client Credentials Flow (OAuth 2.0).

How to Get Client Secret in Azure Portal

### Step 1: Register an Application or use existing application

1. Go to Azure Portal
2. Navigate to Azure Active Directory → App registrations
3. Click + New registration
4. Fill in:
  - Name: e.g., "Teams Phone Integration"

- Supported account types: Choose "Single tenant" (most common)
- Redirect URI: Leave blank for backend apps


5. Click Register

## **Step 2: Copy Application (Client) ID and Tenant ID**

After registration:

- Copy Application (client) ID → This is your ClientId
- Copy Directory (tenant) ID → This is your tenantId

## **Step 3: Create a Client Secret**

1. In your app registration, go to Certificates & secrets
2. Click + New client secret
3. Add a description: e.g., "Production Secret"
4. Choose expiration: 6 months, 12 months, or 24 months
5. Click Add
6.  **IMPORTANT:** Copy the Value immediately - it will be hidden after you navigate away
  - This value is your clientSecret

## **Step 4: Grant API Permissions**

1. Go to API permissions in your app registration
2. Click + Add a permission → Microsoft Graph → Application permissions
3. Add required permissions (based on your code):
  - User.Read.All - to read user profiles
  - CallRecords.Read.All - to read Teams call records
4. Click Grant admin consent (requires admin rights)

## **Step 5: Configure System Settings in Your Application**

Store these values in your Creatio system settings:

- SMTeamsPhoneAppClientId → Application (client) ID
- SMTeamsPhoneAppClientSecret → Client Secret value
- SMTeamsPhoneAppTenantId → Directory (tenant) ID
- SMTeamsAzureAuthority → (Optional) Default is <https://login.microsoftonline.com/>

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

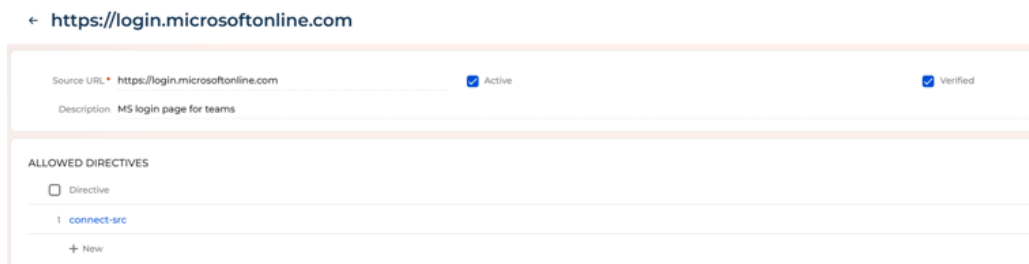
## Content Security Policy

You have to add MS login page to CORS settings. To do this, go to the Content Security Police on the Settings page.



Click "Add Source".

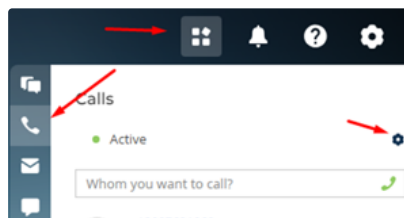
Fill field values as it is shown in the picture.



## 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 [M](#)

[anage calls | Creatio Academy](#).