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Belgium



COLLABORATION BUTLER

-

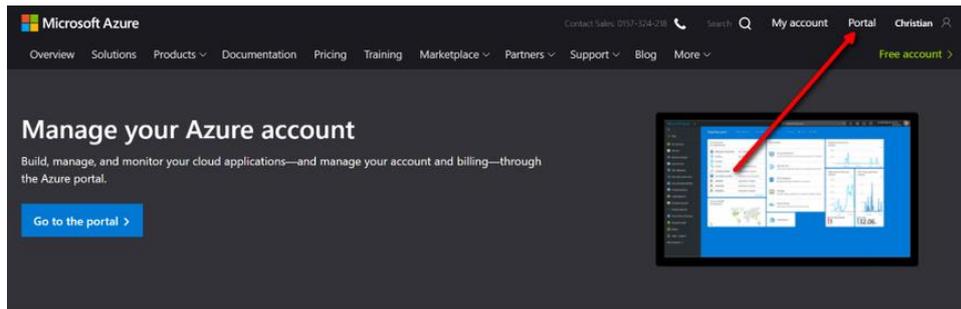
Microsoft Connected App

O365 configuration

The integration for Salesforce to SharePoint (OneDrive/Teams) is in the security context of the user. To allow integration, the setup of a Connected App is required. This is to be done via the Azure setup (not in 1 single overview as in Salesforce Setup menu 😊)

Go to url: <https://azure.microsoft.com/en-us/account/>

- 1) Click the Portal menu and login with your O365 account:



Stay up to date with your account



Manage my subscriptions and see usage and billing.
[Go to cost management and billing >](#)



Review my support requests.
[Go to help and support >](#)



Create service health alerts and view service issues.
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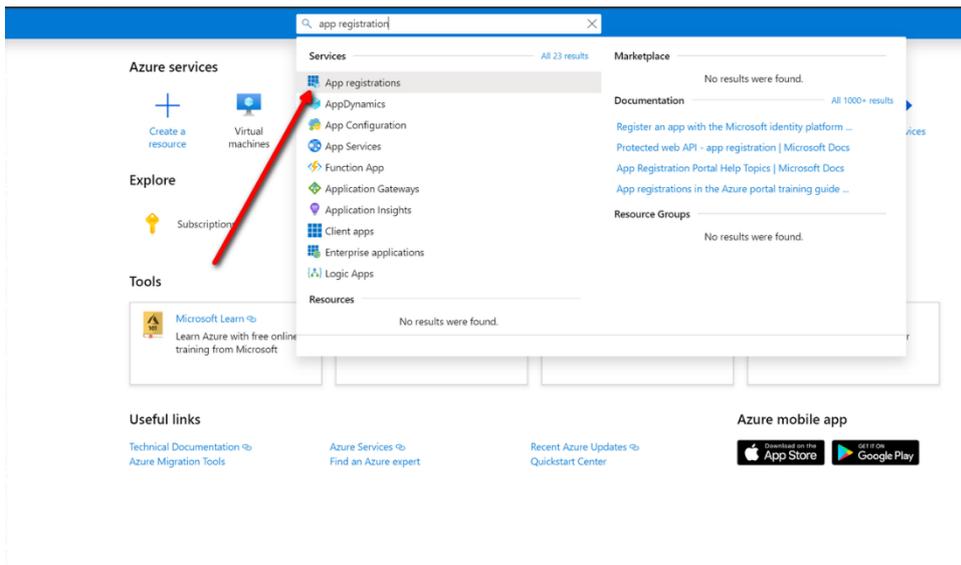


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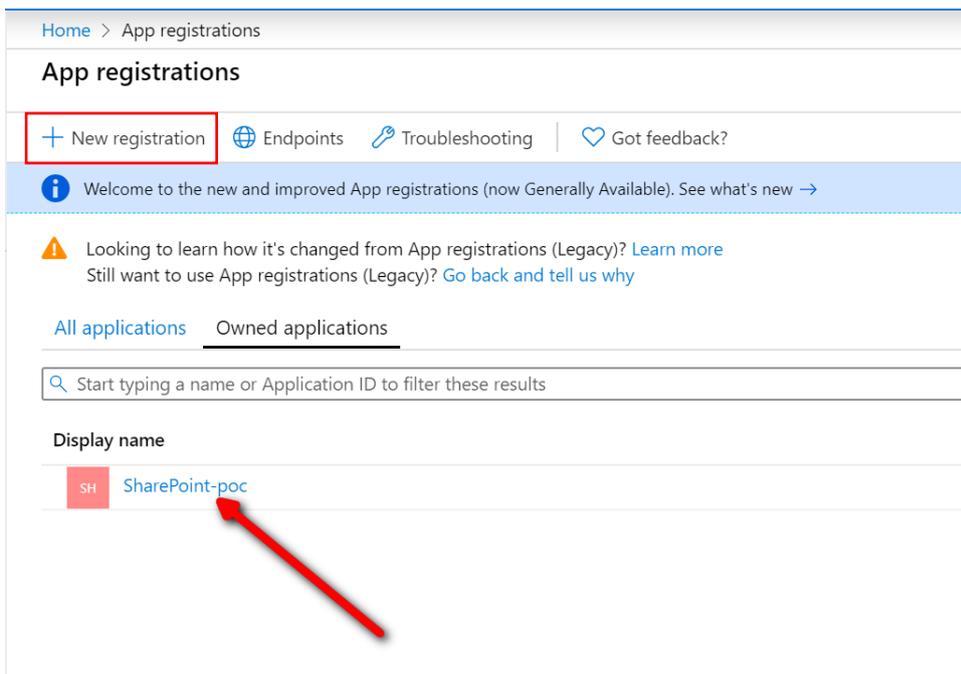


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- 2) In the Setup, search for “App Registrations”:

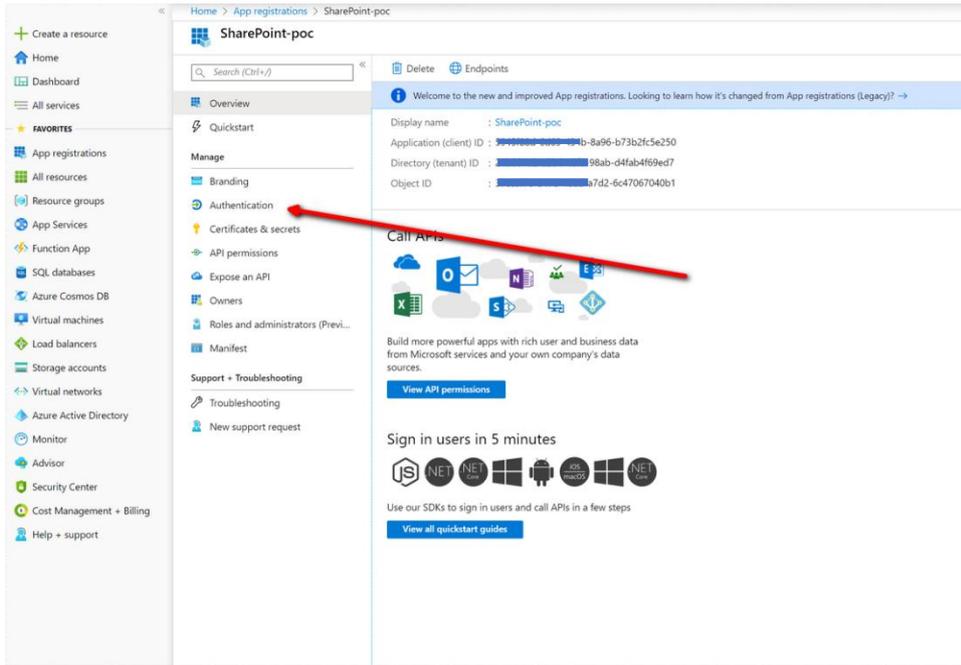


3) Create a new App Registration or select an existing one to re-use or edit:

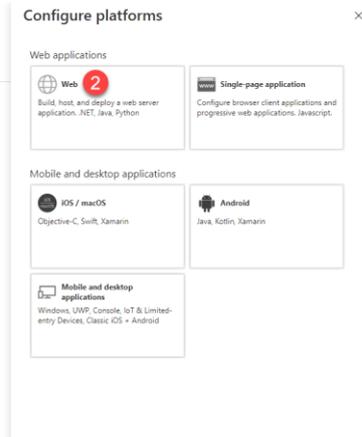
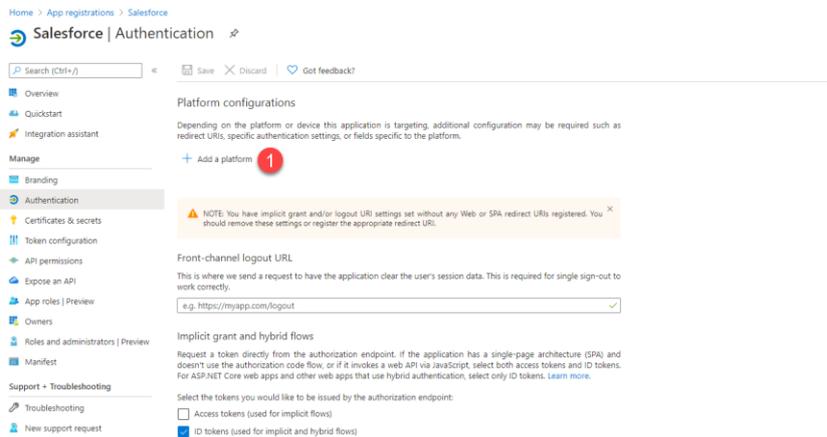


a. After the creation, make sure to copy the "Application (client) ID", this will be required in the later setup.

4) Go to Authentication to setup the URL('s) from which the Connected App can connect:

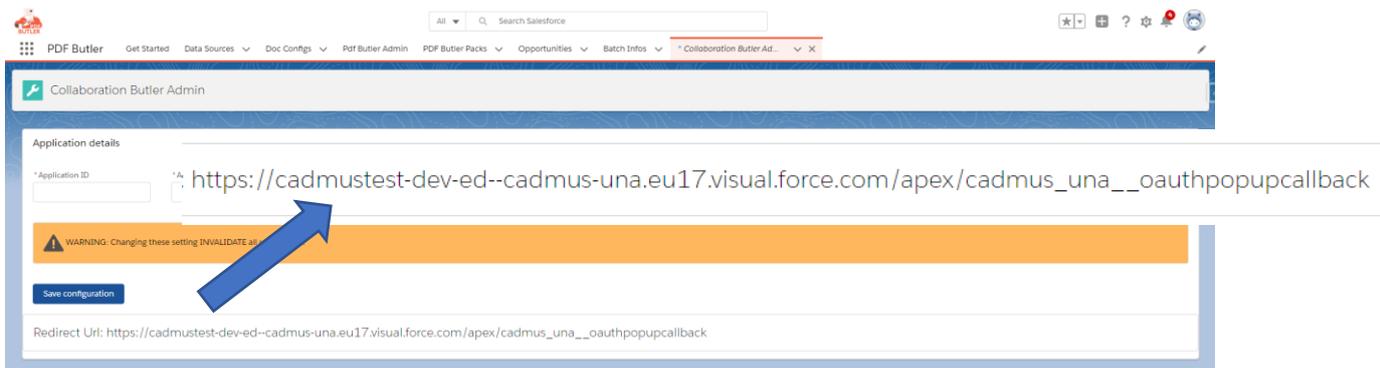


- a. Add a platform (if the platform “Web” does not exist yet)
 - 1) Click the link “Add a platform”
 - 2) Click the button “Web”

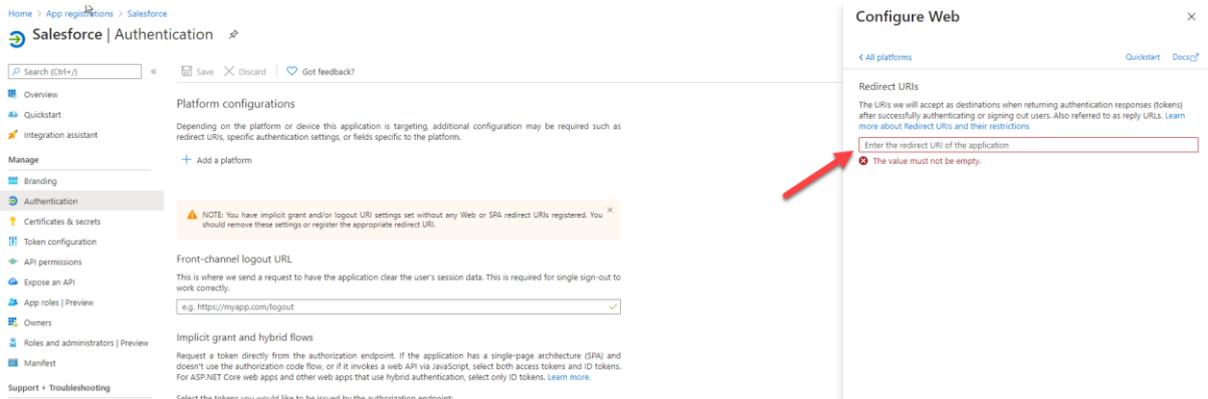


- b. Add a Redirect URI.

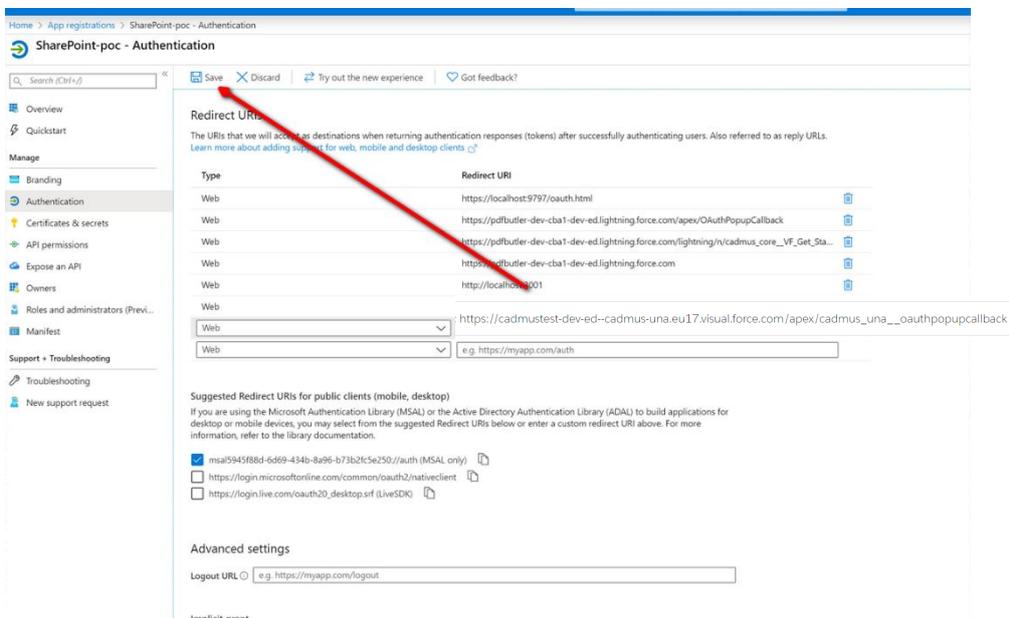
For every Sandbox and PROD environment you want to allow access for, create a new Redirect URL of type “Web” and use the following URL you will find in your SFDC under the tab “Collaboration Butler Admin”:



- c. For a new Platform, add the Redirect URI immediately after clicking the “Web” button



Or when the Platform web already exists:



- 5) Choose Single or Multi-tenant, this is on the same Authentication page
As described in the options, if you want only users in your organisation, choose Single Tenant. Otherwise choose Multitenant:

Supported account types

Who can use this application or access this API?

- Accounts in this organizational directory only (CloudCrossing only - Single tenant)
- Accounts in any organizational directory (Any Azure AD directory - Multitenant)

- 6) Next, create a new secret has to be created. Best to set the Expiry to your company’s best practices, easiest is to set it to “Never” then you cannot have that this expires.

Salesforce | Certificates & secrets

Search (Ctrl+F) << Got feedback?

- Overview
- Quickstart
- Integration assistant

Manage

- Branding
- Authentication
- Certificates & secrets** 1
- Token configuration
- API permissions
- Expose an API
- App roles | Preview
- Owners
- Roles and administrators | Preview
- Manifest

Support + Troubleshooting

- Troubleshooting
- New support request

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Certificates

Certificates can be used as secrets to prove the application's identity when requesting a token. Also can be referred to as public keys.

Upload certificate

Thumbprint	Start date	Expires	ID
------------	------------	---------	----

No certificates have been added for this application.

Client secrets

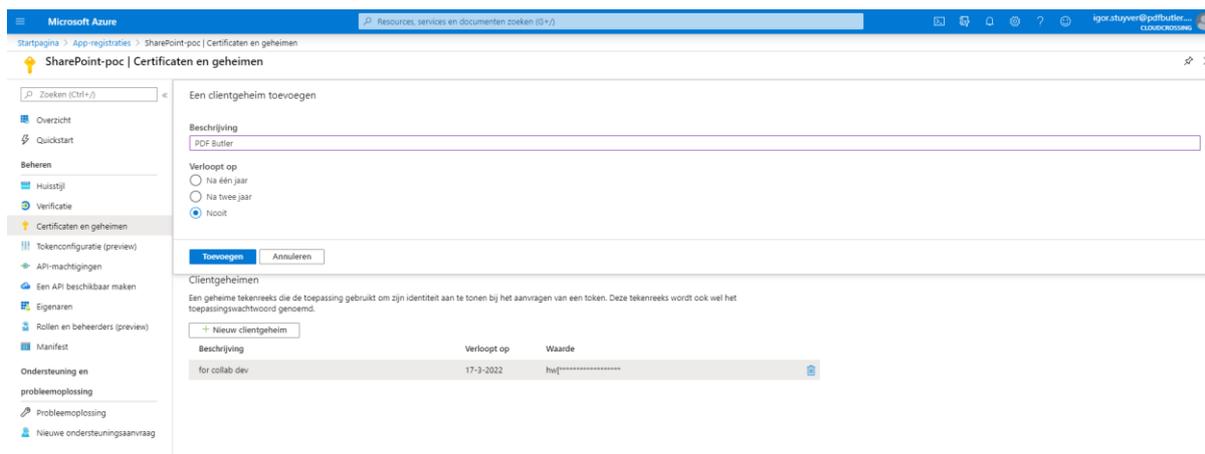
A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret 2

Description	Expires	Value	ID
-------------	---------	-------	----

No client secrets have been created for this application.

Make sure you copy the secret immediately or do not move away from this page. You cannot copy the secret anymore afterwards. That would mean you will have to create a new secret.



Make sure to copy the Secret value, not the ID:

Client secrets

A secret string that the application uses to prove its identity when referred to as application password.

+ New client secret

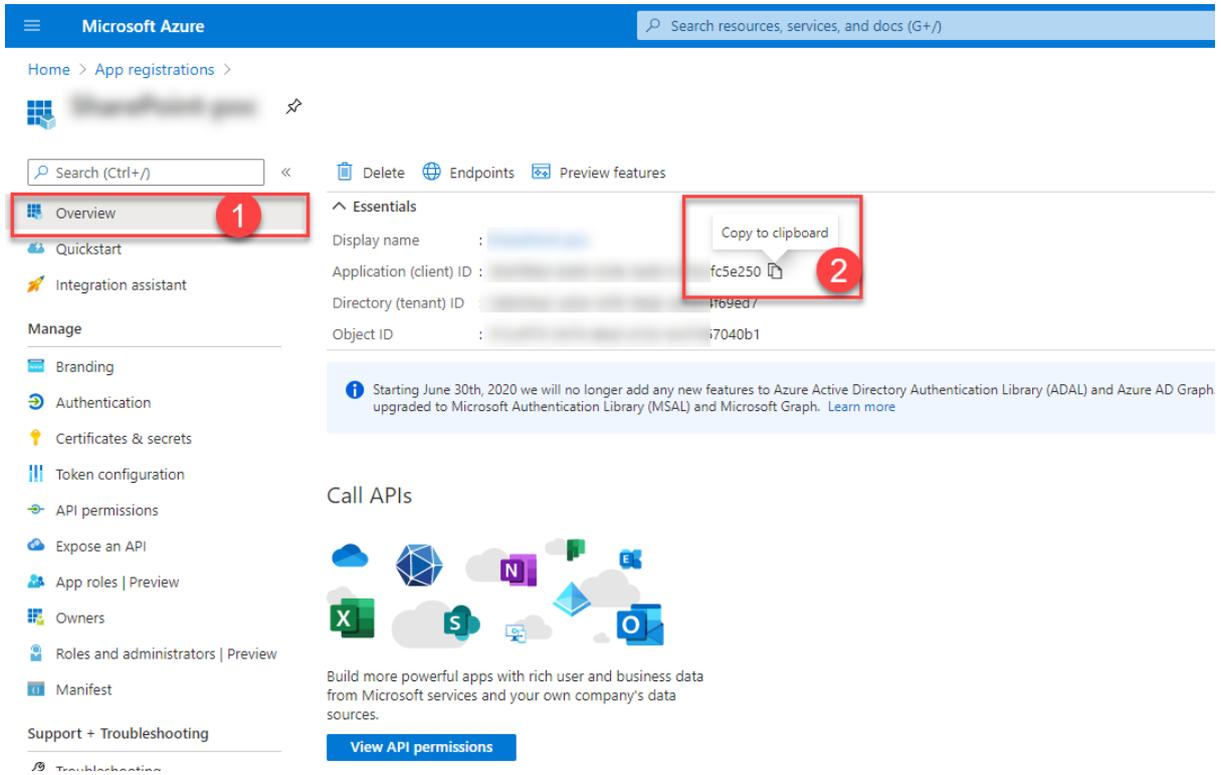
Description	Expires	Value	Secret ID
	6/14/2023	~B1*****	b22e87...
	12/31/2299	4Lg*****	445111...

Good

Wrong

7) Locate your Application ID

- 1) Go to "Overview" on the App Registration
- 2) Copy the Application (Client) ID



Microsoft Azure

Home > App registrations >

Search (Ctrl+/)

Overview **1**

Quickstart

Integration assistant

Manage

Branding

Authentication

Certificates & secrets

Token configuration

API permissions

Expose an API

App roles | Preview

Owners

Roles and administrators | Preview

Manifest

Support + Troubleshooting

Troubleshooting

Delete Endpoints Preview features

Essentials

Display name : [redacted]

Application (client) ID : fc5e250 [redacted] **2** Copy to clipboard

Directory (tenant) ID : 1f69ed7

Object ID : [redacted] 7040b1

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

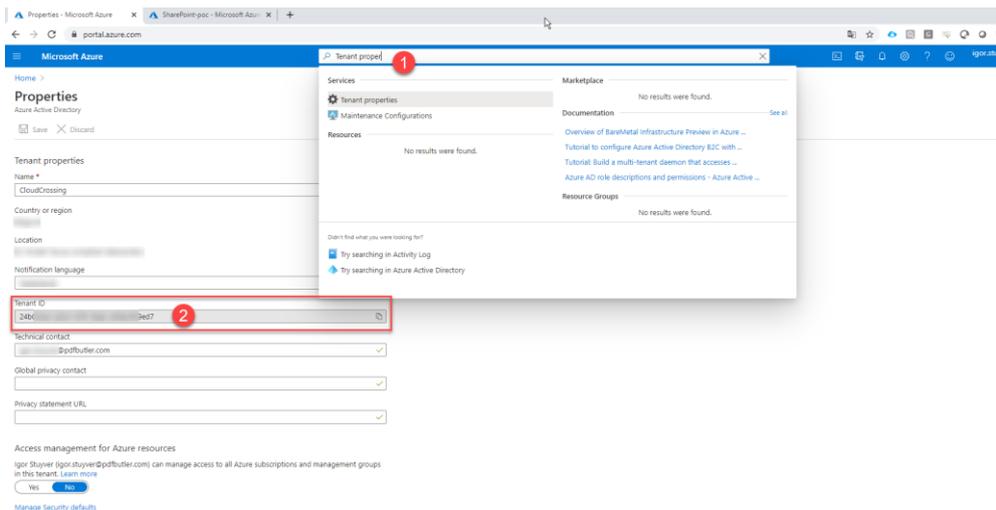
Call APIs

Build more powerful apps with rich user and business data from Microsoft services and your own company's data sources.

[View API permissions](#)

8) Locate your Tenant ID, In Azure Portal

- 1) Search for "Tenant properties"
- 2) Find you Tenant ID, you will need it in the Salesforce



Properties - Microsoft Azure

Home >

Properties

Azure Active Directory

Save Discard

Tenant properties

Name *

Country or region

Location

Notification language

Tenant ID

Technical contact

Global privacy contact

Privacy statement URL

Access management for Azure resources

Igor Skuyev (igor.skuyev@pdpbuffer.com) can manage access to all Azure subscriptions and management groups in this tenant. [Learn more](#)

Yes No

Manage Security defaults

Search: Tenant prop[redacted] **1**

Services

- Tenant properties
- Maintenance Configurations

Resources

No results were found.

Marketplace

No results were found.

Documentation

Overview of BareMetal Infrastructure Preview in Azure ...

Tutorial to configure Azure Active Directory B2C with ...

Tutorial: Build a multi-tenant daemon that accesses ...

Azure AD role descriptions and permissions - Azure Active ...

Resource Groups

No results were found.

Don't find what you were looking for?

- Try searching in Activity Log
- Try searching in Azure Active Directory

9) Set API permissions:

The below shows the recommended settings for COLLABORATION Butler:

Microsoft Azure Search resources, services, and docs (G+)

Home > App registrations > SharePoint-poc

SharePoint-poc | API permissions

Search Refresh Got feedback?

Successfully granted admin consent for the requested permissions.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for CloudCrossing

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (11)				
Channel.Create	Delegated	Create channels	Yes	Granted
ChannelMember.ReadWrite.All	Delegated	Add and remove members from channels	Yes	Granted
ChannelSettings.Read.All	Delegated	Read the names, descriptions, and settings of channels	Yes	Granted
Chat.ReadWrite	Delegated	Read and write user chat messages	No	Granted
Files.ReadWrite.All	Delegated	Have full access to all files user can access	No	Granted
Mail.Send	Delegated	Send mail as a user	No	Granted
Sites.ReadWrite.All	Delegated	Edit or delete items in all site collections	No	Granted
Team.Create	Delegated	Create teams	No	Granted
TeamMember.ReadWrite.All	Delegated	Add and remove members from teams	Yes	Granted
User.Invite.All	Delegated	Invite guest users to the organization	Yes	Granted
User.Read	Delegated	Sign in and read user profile	No	Granted

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

- User.Read: Mandatory to use all functionalities of the COLLABORATION Butler component
- Files.ReadWrite.All: Mandatory to use all functionalities of the COLLABORATION Butler component
- Sites.ReadWrite.All: Mandatory to use all functionalities of the COLLABORATION Butler component
- Chat.ReadWrite: Optional, only required if you will use the MS Teams chat integration
- Mail.Send: Optional, only required if you will use the O365 mail integration
- User.Invite.All: Optional, only required if you want to invite O365 Guest users
- MS Teams (Team/Channel) Integration: Optional, only required if you use Team/Channel
 - b. Channel.Create:
 - c. ChannelMember.ReadWrite.All:
 - d. ChannelSettings.Read.All:
 - e. Team.Create:
 - f. TeamMember.ReadWrite.All:

SFDC

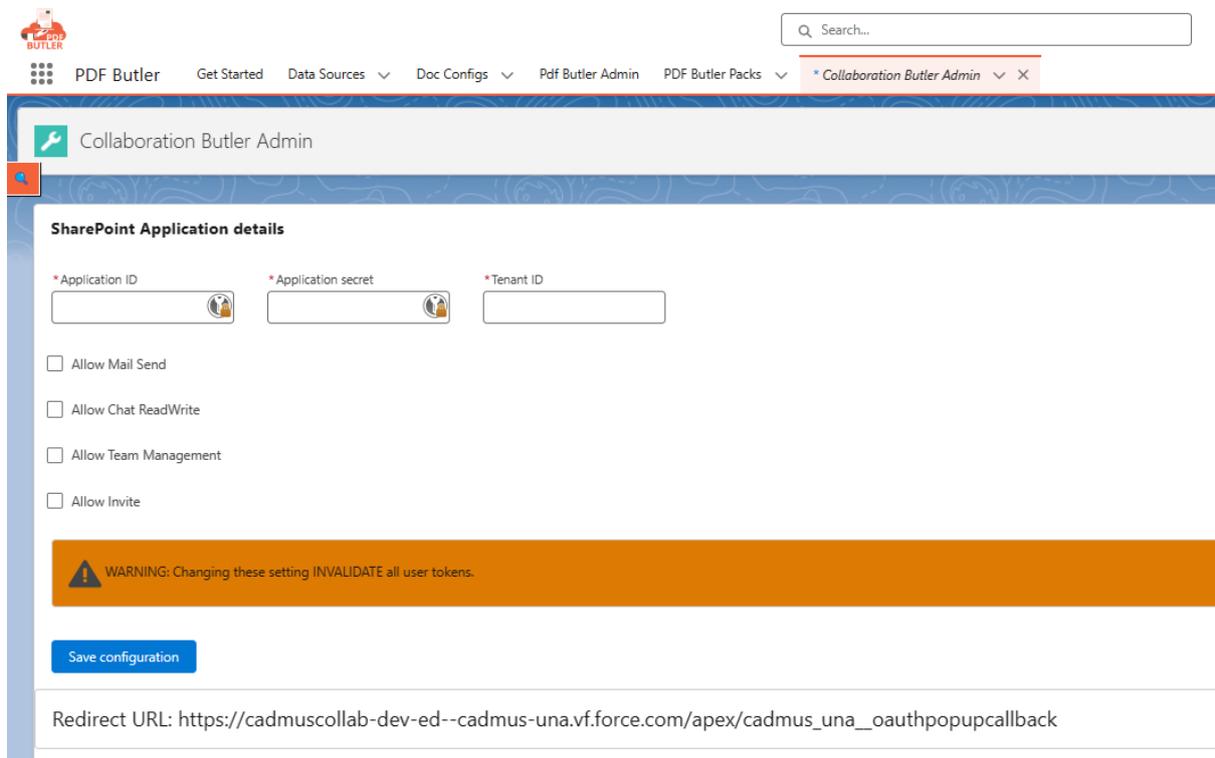
The COLLABORATION Butler managed package is dependent on the PDF Butler managed package for installation. After install, COLLABORATION Butler can exist independently if PDF Butler is not required. Of course, combining PDF Butler and COLLABORATION Butler makes your Salesforce even more powerful!

Permission sets

- Assign the “Collaboration Butler Admin” to all who requires Admin rights
- Assign the “Collaboration Butler User” to all who requires User rights

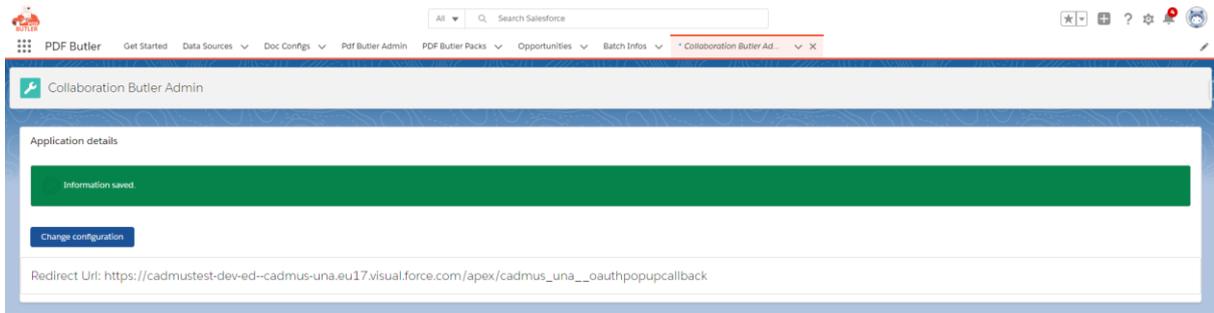
Register settings

- Open the tab “Collaboration Butler Admin”
- Enter the Application ID, the Application Secret and the Tenant ID from the O365 setup
- Options in Configuration:
 - o Allow Mail Send: Optional, only if you want to sent O365 emails via SFDC
 - o Allow Chat ReadWrite: Optional, only if you want to sent Teams Chat messages via SFDC
 - o Allow Team Management: Optional, only if you want to manage Teams, Channels and Members via SFDC
 - o Allow Invite: Optional, only if you want to invite O365 users via SFDC



The screenshot shows the Salesforce interface for the Collaboration Butler Admin configuration. The top navigation bar includes the PDF Butler logo, a search bar, and several tabs: PDF Butler, Get Started, Data Sources, Doc Configs, Pdf Butler Admin, PDF Butler Packs, and Collaboration Butler Admin (which is active). The main content area is titled "Collaboration Butler Admin" and contains a "SharePoint Application details" section. This section has three input fields for Application ID, Application secret, and Tenant ID, each with a lock icon. Below these are four checkboxes: Allow Mail Send, Allow Chat ReadWrite, Allow Team Management, and Allow Invite, all of which are currently unchecked. A prominent orange warning banner states: "WARNING: Changing these setting INVALIDATE all user tokens." At the bottom of the configuration area is a blue "Save configuration" button. Below the configuration area, the Redirect URL is displayed as: `https://cadmuscollab-dev-ed--cadmus-una.vf.force.com/apex/cadmus_una__oauthpopupcallback`.

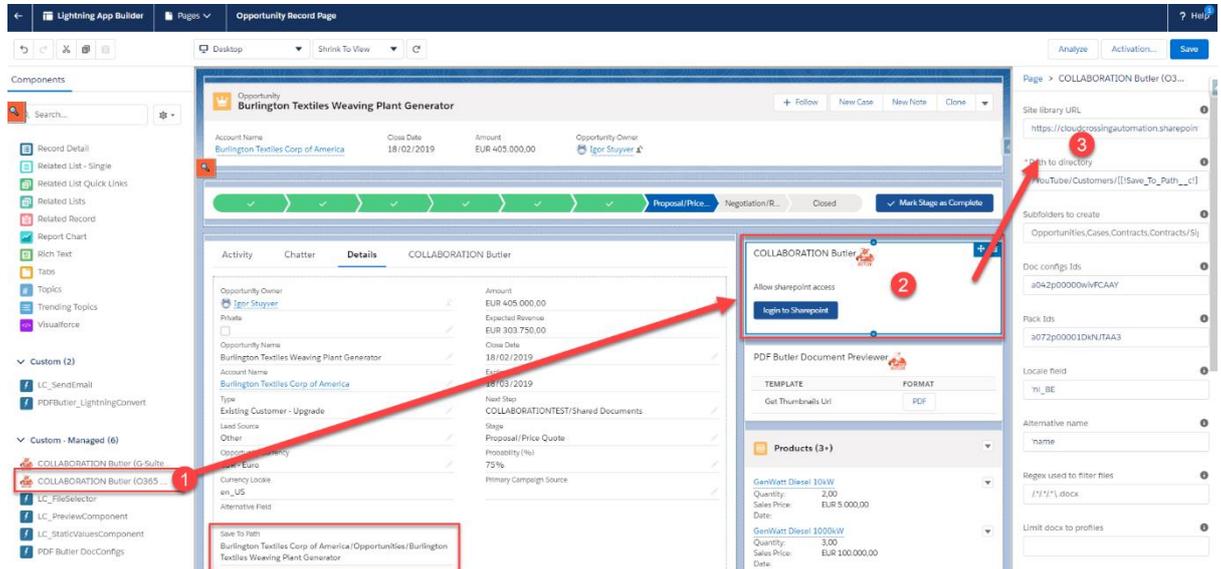
- After setting up, click “Save configuration”



- Remember, the first time, the user still has to do the login! So the security sits an multiple levels and all runs in the context of the user's 0365 permissions.

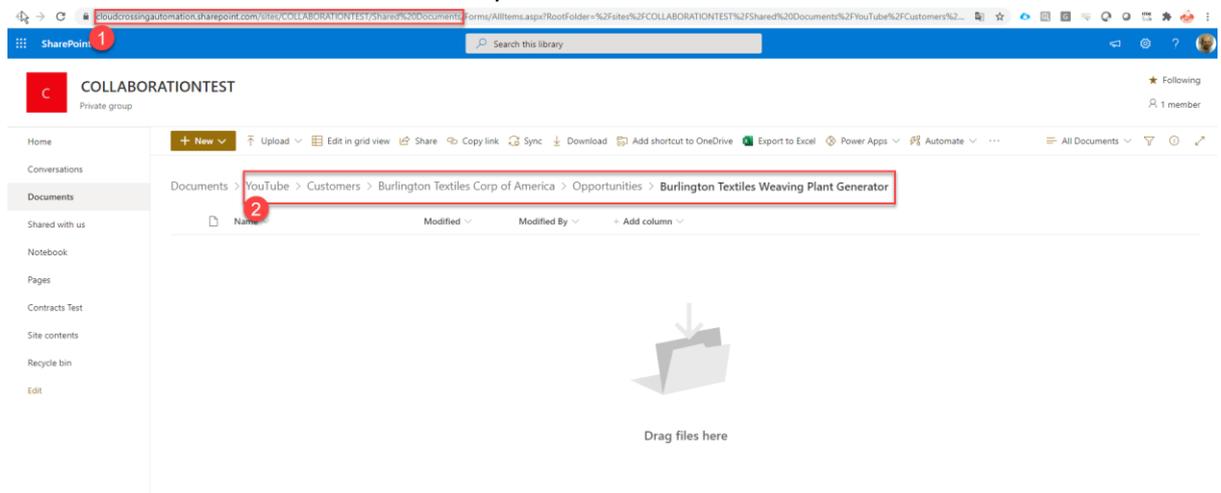
Salesforce.com configuration

- 1) Drag the COLLABORATION Butler component onto the page layout
 - 1) Choose the correct component for O365
 - 2) Position it where required, it can be anywhere on your Page Layout
 - 3) Configure it as described below



2) Configuration

We will configure the URL to our Document Library in SharePoint. You can just copy/paste the URL to the Site and Document Library from the browser.



COLLABORATION Butler Lightning Component



If you will use mergefields in the component as explained below, the Salesforce fields used must be on the Page Layout! This is a Salesforce limitation, if the fields are not on the page layout, the component cannot use them!

If you do not use a Page Layout in Lightning but use Field Sections and Fields in the Lightning App Builder, we cannot use these fields unfortunately. You will still have to add a small Page Layout with the fields used in the mergefields. This is a Salesforce limitation and Salesforce will update the functionality in the coming releases so that from the COLLABORATION Butler component we can use the fields from the Field Sections.

- a. Site Library URL:
- i. Use the URL from the Site and document library in SharePoint. Make sure only to copy the part as shown above. In our example:
`https://cloudcrossingautomation.sharepoint.com/sites/COLLABORATIONTEST/Shared Documents`
!!!Make sure to replace any "%20" that might be in the URL by a space
 - ii. This link can be made completely dynamic with mergefields for the Site and the Document Library
- b. Path to directory: dynamic path to the directory. This can also consist of a static and a dynamic part. In the example above, we control the path to the folder via a static part and a formula field. The full config is
`/YouTube/Customers/[[!Save_To_Path__c!]]`
- i. `"/YouTube/Customers/"` => a static part of the folder structure within the Document Library. This part is not required if you have the full path in the dynamic part.
 - ii. `[[!Save_To_Path__c!]]` => a dynamic part identified by the mergefield this has to start with "[[!" and end with "!]]". In between is this the API name of the field that controls the path. "Save_To_Path__c" is the API name of the field that is on the page layout shown above (see label "Save To Path"). This part is not required if you have the full path in the static part.
!!!The field must be on the Page Layout
- c. Both the "Site Library URL" and "Path to directory" can have multiple mergefields