CloudCrossing BVBA Dahlialaan 1 2950 Kapellen 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:



2) In the Setup, search for "App Registrations":

Azure	services	Services	All 23 results	warketplace	
		Rep registrations		No resu	Its were found.
-	- 📮 🖌	AppDynamics		Documentation	All 1000+ resul
Crea	te a Virtual	🛛 霧 App Configuration		Register an app with the Mi	crosoft identity platform
resc	urce machines	App Services		Protected web API - app reg	jistration   Microsoft Docs
Evolo		interest Section App		App Registration Portal Help	Topics   Microsoft Docs
LAPIO		Application Gateways		App registrations in the Azu	re portal training guide
<u> </u>	Subscription	Application Insights		Resource Groups	
	Subscription	Client apps		No resu	Its were found.
		Enterprise applications			
Tools		A Logic Apps			
		Resources			
101	Microsoft Learn 👁	No results were found.			
	Learn Azure with free online training from Microsoft				
	, ,				
Usefu	links				Azure mobile app
Technica	Documentation ®	Azure Services ®	Recent Azure U	pdates 📀	Coord App Store
	aration Tools	Find an Azure expert	Ouickstart Cent	er	

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

Home > App registra	Home > App registrations					
App registrations						
+ New registration	Endpoints <i>P</i> Troubleshooting  Got feedback?					
i Welcome to the ne	ew and improved App registrations (now Generally Available). See what's new $ ightarrow$					
Looking to learn Still want to use	<ul> <li>Looking to learn how it's changed from App registrations (Legacy)? Learn more Still want to use App registrations (Legacy)? Go back and tell us why</li> <li>All applications Owned applications</li> </ul>					
Q Start typing a name or Application ID to filter these results						
Display name SH SharePoint-poc						

- 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"

App registrations > Salesford Iesforce   Authen	tication 🖉	Configure platforms
(Ctrl+/) « ew tart ation assistant	Sine X Discard C feedback?  Platform configurations Depending on the platform of evice this application is targeting, additional configuration may be required such as redired URIs, specific authentication settings, or fields specific to the platform.	Web applications Web 2 Built, host, and deploy a web server application. NET, Java, Python
	+ Add a platform 1	Mobile and desktop applications
cation les & secrets	▲ NOTE: Nov have implicit grant and/or logat URI settings set without any Web or SRA redirect URIs registered. You <sup>32</sup> should remove these settings or register the appropriate redirect URI.	Objective-C, Swift, Xamarin
configuration missions	Front-channel logout URL	
in API is   Preview	Initial server a request to any time approximation over the uses a second data. This is required to anyte suproval to notice context, the second data and the second	Mobile and desktop applications Windows, UWP, Console, IoT & Limited-
nd administrators   Preview	Implicit grant and hybrid flows Request a token directly from the subtroitation endpoint. If the application has a single-page architecture (SPA) and descrit use the subtroations code Boby, or if it movies as sub-API via JavaScript, select both access tokens and ID tokens.	entry Devices, Classic /OS + Android
noubleshooting	For ASPAIT Core web apps and other web apps that use hybrid authentication, select only ID tokens. Learn more. Select the tokens you would like to be issued by the authentization endpoint: Access tokens (used for implicit forms)	

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":

	All 💌 Q. Search Salesforce	** 🖬 ? 🌣 🤗 🐻
PDF Butler Get Started Data Sources 🗸 Doc Configs 🗸 Pdf Butler Admin	PDF Butler Packs V Opportunities V Batch Infos V Collaboration Butler Ad V X	/
Collaboration Butler Admin		
*Application ID *A https://cadmustest-d	lev-edcadmus-una.eu17.visual.force.c	com/apex/cadmus_unaoauthpopupcallback
WARNING - Changing these setting INVALIDATE as		
Save configuration		
Redirect Url: https://cadmustest-dev-edcadmus-una.eu17.visual.for	:e.com/apex/cadmus_unaoauthpopupcallback	

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



#### Or when the Platform web already exists:

Q_ Search (Ctrl+/) 《	Save X Discard 27 Try out the new expe	erience 🛛 🛇 Got feedback?	
Overview			
3 Quickstart	Redirect URB	f B a daria da a da a da a da a da a da a d	
	Learn more about adding support for web, mobile an	uning authentication responses (toxens) after successfully authenticating users. Also referred to as reply UKLs, id desktop clients 👌	
anage	Iune	Parliment I IPI	
Branding		https://localhoct/0707/outik.html	0
Authentication	web	https://ocamoscariascaria	
Certificates & secrets	Web	https://parbutier-dev-cba1-dev-ed.lightning.torce.com/apex/OAutnPopupCaliback	
API permissions	Web	https://pdfbutler-dev-cba1-dev-ed.lightning.force.com/lightning/n/cadmus_core_VP_Get_Sta	
Expose an API	Web	https://adfbutler-dev-cba1-dev-ed.lightning.force.com	
Owners	Web	http://localhose3001	í
Roles and administrators (Previ	Web	s https://cadmustert.dov.edcadmus.upa.ou/17.visual.force.com/apov/ca	dmus una cauthnonuns
Manifest	Web	<ul> <li>Inteps://caumustescueveu-caumus-una.eui1/visualiorce.com/apex/ca</li> </ul>	unus_unaoaumpopupe
mut - Tracklasheating	Web	e.g. https://myapp.com/auth	
<ul> <li>Toubleshooting</li> <li>New support request</li> </ul>	Suggested Redirect URIs for public clients (mob If you are using the Microsoft Authentication Library desktop or mobile devices, you may select from the information, refer to the library documentation. msal3943188d 6d69434b 4846-b171b2(Cke250/, https://login.nicrosoften/ine.com/commor/our https://login.live.com/cauth20_desktop.sf (Libed	Ile, desktop) MSALJ or the Active Directory Authentication Library (ADAL) to build applications for uggested Redirect URIs below or enter a custom redirect URI above. For more Auth (MSAL only)	
	Advanced settings		

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.

Home > App registrations > Salesforce					
Salesforce   Certifica	ites & secrets 🛷				
	♡ Got feedback?				
Overview	Credentials enable confidential applications to ide	entify themselves to t	he authentication service	when receiving tokens at a	a web addressable location (using an HTTPS
🐸 Quickstart	scheme). For a higher level of assurance, we reco	mmend using a certifi	icate (instead of a client se	cret) as a credential.	
🚀 Integration assistant	Certificates				
Manage	Certificates can be used as secrets to prove the ap	oplication's identity w	hen requesting a token. A	lso can be referred to as p	ublic keys.
🧮 Branding					
Authentication	↑ Upload certificate				
📍 Certificates & secrets 🚺	Thumbprint		Start date	Expires	ID
Token configuration	No certificates have been added for this applicati	on.			
API permissions					
🙆 Expose an API					
🐣 App roles   Preview	Client secrets				
Owners	A secret string that the application uses to prove	its identity when requ	uesting a token. Also can b	e referred to as applicatio	in password.
Roles and administrators   Preview					
0 Manifest					
Support + Troubleshooting	Description	Expires	Value		ID
Troubleshooting	No client secrets have been created for this applie	cation.			
New support request					

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.

=	Microsoft Azure		$\mathcal P$ Resources, services en documenten zoeken	(G+/)		2			igor.stuyver@pdfbutler
Startp	oagina > App-registraties > SharePoi	nt-poc   Certificaten en geheimen							
÷ 🛉	SharePoint-poc   Certifica	ten en geheimen							\$ X
P	Zoeken (Ctrl+/)	Een clientgeheim toevoegen							
	Overzicht	Beschrijving							
4	QuickStart	PDF Butler							
Behe	eren	Verloopt op							
-	Huisstijl	🔘 Na één jaar							
Э	Verificatie	Na twee jaar     Nooit							
<b>†</b>	Certificaten en geheimen								
Hł.	Tokenconfiguratie (preview)								
	API-machtigingen	Toevoegen Annuleren							
4	Een API beschikbaar maken	Clientgeheimen							
8	Eigenaren	Een geheime tekenreeks die de toepassing gel toepassingswachtwoord genoemd.	bruikt om zijn identiteit aan te tonen bij het aanvr	ragen van een token. Deze tekenreeks word	t ook wel het				
2	Rollen en beheerders (preview)	+ Nieuw clientgeheim							
	Manifest	Beschrijving	Verloopt op	Waarde					
Ond	ersteuning en	for collab dev	17-3-2022	hw[*****	<b></b>				
prob	leemoplossing								
P	Probleemoplossing								
2	Nieuwe ondersteuningsaanvraag								

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

Client secrets				
A secret string that the application uses to pro	ve its identity when	Good	referred to as application password.	
+ New client secret				Wrong
Description	Expires	Value	Secret ID	
	6/14/2023	~B1*********************	b22e87	1b58e09cb5 🗈
	12/31/2299	4Lg****************	445111(	28e61e6bd8 🗈 🣋

# 7) Locate your Application ID

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

■ Microsoft Azure	∠ Search resources, services, and docs (G+/)
Home > App registrations >	
\$	
	🔳 Delete 🌐 Endpoints 💀 Preview features
R Overview	▲ Essentials
4 Quickstart	Display name : Copy to clipboard
💉 Integration assistant	Application (client) ID : fc5e250 🗅 🙎
Марадо	Directory (tenant) ID 1769ed /
Basa dina	Object ID : 17040b1
Branding	🚯 Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph
Authentication	upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. Learn more
Certificates & secrets	
Token configuration	Call APIs
API permissions	
Expose an API	📥 🙈 🛻 🏴 🗉
🐣 App roles   Preview	
Owners	
Roles and administrators   Preview	
0 Manifest	Build more powerful apps with rich user and business data from Microsoft services and your own company's data
Support + Troubleshooting	View ADI normissions
19 Traublachasting	

- 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

← → C 🔒 portal.azure.com		4	
			🛱 🖈 💿 🖻 🗟 🖓 🖓 😁
Microsoft Azure	P Tenant proper	×	🗵 🕼 🗘 🎯 ? 🙄 igor.stuy
Home > Properties Ware Active Directory @ See X Discard Tenant properties Name * Country or region Location Notification language	Services  The interpretext properties  Services  Services  Services  Notestults user found.  Due: for study to user study to the  Services and the properties of the services	Marketgiace Re results were found See at Documentation See at Occession of BaseAddal Infrastructure Preview in Azure = Tubrish to configure Azure Active Developy 320 km h. = Tubrish and and-senart demonstrate Azure = Azure AD note descriptions and permissions - Azure Active = Azure AD note descriptions and permissions - Azure Active = Resource Groups No results were found.	
Texel 0  Tex	Tanagament groups		

9) Set API permissions:

The below shows the recommended settings for COLLABORATION Butler:

Home > App registrations > SharePoint-p						
	рос					
	permissions 🖈 …					
₽ Search «	🕐 Refresh 🛛 🖗 Got feedback?					
Overview	Successfully granted admin cons	ent for the req	uested permissions.			
4 Quickstart						
🚀 Integration assistant	Configured permissions					
Manage	Applications are authorized to call AP	Is when they	are granted permissions by users/admins as part of the conse	nt process. The list of conf	figured permissions sho	uld include
Branding & properties	all the permissions the application ne	eds. Learn mo	ore about permissions and consent			
Authentication	+ Add a permission 🗸 Grant a	dmin consent	for CloudCrossing			
📍 Certificates & secrets	API / Permissions name	Туре	Description	Admin consent requ	Status	
Token configuration	∽ Microsoft Graph (11)					
API permissions	Channel.Create	Delegated	Create channels	Yes	🥑 Granted	
Expose an API	ChannelMember.ReadWrite.All	Delegated	Add and remove members from channels	Yes	Granted	
App roles	ChannelSettings.Read.All	Delegated	Read the names, descriptions, and settings of channels	Yes	Granted	
A Owners	Chat.ReadWrite	Delegated	Read and write user chat messages	No	🕑 Granted	
Roles and administrators	Files.ReadWrite.All	Delegated	Have full access to all files user can access	No	🕑 Granted	
Manifest	Mail.Send	Delegated	Send mail as a user	No	🥑 Granted	
Support + Troubleshooting	Sites.ReadWrite.All	Delegated	Edit or delete items in all site collections	No	🕑 Granted	
P Troubleshooting	Team.Create	Delegated	Create teams	No	🥑 Granted	
New support request	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 0365 emails via SFDC
  - Allow Chat ReadWrite: Optional, only if you want to sent Teams Chat messages via SFDC
  - Allow Team Management: Optional, only if you want to manage Teams, Channels and Members via SFDC
  - Allow Invite: Optional, only if you want to invite 0365 users via SFDC

SUTLER	Q Search
PDF Butler Get Started Data Sources 🗸 Doc Configs 🗸 Pdf Butler Admin	PDF Butler Packs V * Collaboration Butler Admin V X
Collaboration Butler Admin	
SharePoint Application details	
* Application ID * Application secret *Tenant ID	
Allow Mail Send	
Allow Chat ReadWrite	
Allow Team Management	
Allow Invite	
WARNING: Changing these setting INVALIDATE all user tokens.	
Save configuration	
Redirect URL: https://cadmuscollab-dev-edcadmus-una.vf.force.	.com/apex/cadmus_unaoauthpopupcallback

- After setting up, click "Save configuration"

Dec Configs      Por Butter Get Started Data Sources      Doc Configs      Por Butter Admin	All 👻 Q. Search Salesforce PDF Butler Packs 🗸 Opportunities 🗸 Batch Infos 🗸	* Collaboration Butler Ad 🗸 🗙	** 🖬 ? 🌣 📌 🐻
Collaboration Butler Admin	, A. HURLE – HANS-21 (⊂ 7772,~ (11; 77–30400)	A MINE AN ALL ZZZ AND LAN	SNNS SNN STUTE
Application details			
Information saved.			
Change configuration			
Redirect Url: https://cadmustest-dev-edcadmus-una.eu17.visual.f	orce.com/apex/cadmus_unaoauthpopup	callback	

- 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

- 📊 Lightning App Builder 🌓 Paj	es V Opportunity Record Page			
5 0 % 8	🖵 Desktop 🔹 Shrink To View 💌 🥂			Analyze Activation San
omponents	Participation with a state of the	NE CHERRY AND NE SHOW	20 <i>M</i> CARCARCARCARCARCARCARCARCARCARCARCARCARC	Page > COLLABORATION Butler (O3
s Search 🕸 -	Burlington Textiles Weaving Plant Generator		+ Follow New Case New Note Clone 👻	Site library URL
	Account Name Close Date	Amount Opportunity Owner		https://cloudcrossingautomation.sharepo
Record Detail	Burlington Textiles Corp of America 18/02/2019	EUR 405.000,00 👸 Igor Stuyver 🖍		*Pith to direction
Related List - Single     Delated List Ould's Lieks	<u>s</u>			To Path of Path of Path
Related Lists		A A A A A A A A A A A A A A A A A A A	Manufaction (P) Closed and Mark States as Convolute	
Related Record			regulation/ac. Coses Contact angle of compare	Subfolders to create
Report Chart				Opportunities,Cases.Contracts,Contracts/
Rich Text	Activity Chatter Details COLLABORA	TION Butler	COLLABORATION Butler 🚵	
Tabs				Doc configs Ids
Topics	Opportunity Owner	Amount	Allow sharepoint access	a042p00000wivFCAAY
Trending Topics	B Igor Stuyver	EUR 405.000,00	login to Sharepoint	
Visualforce		EUR 303.750,00		Pack Ids
	Opportunity Name	Close Date		3072p00001DkNJTAA3
Custom (2)	Burlington Textiles Weaving Plant Generator	18/02/2019	PDF Butler Document Previewer	
LC SendEmail	Account Name Burlington Textiles Corp of America	18/03/2019	TEMPLATE FORMAT	Locale held
PDFButler LightningConvert	Type	Next Step	Get Thumbnails Uni PDF	TILBE
	Existing Customer - Upgrade	COLLABORATIONTEST/Shared Documents		Alternative name
Custom - Managed (6)	Other	Proposal/Price Quote		'name
	Opportune surrency	Probability (%)	Products (3+)	
COLLABORATION Butter (G-Suite	Current Intelle	75%	<u> </u>	Regex used to filter files
COLLABORATION BUTTER (0385	en_US	Printing campaign aconce	GenWatt Diese 10kW Quantity: 2,00	/*/.*/.docx
	Alternative Field		Sales Price: EUR 5.000,00	
C Statici/aluarComponent	Sau To Data		GenWatt Diesel 1000kW	Limit docx to profiles
PDF Butler DocConfigs	Burlington Textiles Corp of America/Opportunities/Burlington Textiles Weaving Plant Generator		Quantity: 3,00 Sales Price: EUR 100.000,00 Date:	

### 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.

$\oplus_{\boldsymbol{\xi}} \rightarrow$	C C cloudcrossing	gautomation.sharepoint.com/sitee/COLLABORATIONTEST/Shared%20Documents_Forms/Allitems.aspst?Roof5older=%27sites%2FC0LLABORATIONTEST%25fared%20Documents%2F1ouTube%2FCustomers%2= 🍓 🚖 💿 😒 😨 🤜 📀 📿	🛪 🍲 E
III s	harePoint	🔎 Search this library 🤤 🎯	? 📳
c	COLLABO Private group	RATIONTEST	➡ Following R 1 member
Home		+ New 🗸 🕆 Upload 🗸 🗄 Edit in grid view Le <sup>0</sup> Share 🐵 Copy link 🕃 Sync 🛓 Download 🖏 Add shortcut to OneDrive 🐧 Export to Excel 🗞 Power Apps 🗸 R <sup>0</sup> Automate 🗸 … 🚍 All Documents 🗸 🖓	7 🛈 🖍
Conv	ersations		
Docu	ments	Documents > YouTube > Customers > Burlington Textiles Corp of America > Opportunities > Burlington Textiles Weaving Plant Generator	
Share	d with us	Non     Modified V Modified By V + Add column V	
Notel	book		
Pages			
Contr	acts Test		
Site c	ontents	V	
Recyc	le bin		
Edit			
		Drag files here	

### **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:
  - 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. <u>Path to directory:</u> 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