The new CRM (v8.0.5.8 onwards) integration requires that an Azure App Registration needs to be completed. Without this being completed the PDi CRM application will not be able to link to your SharePoint documents.

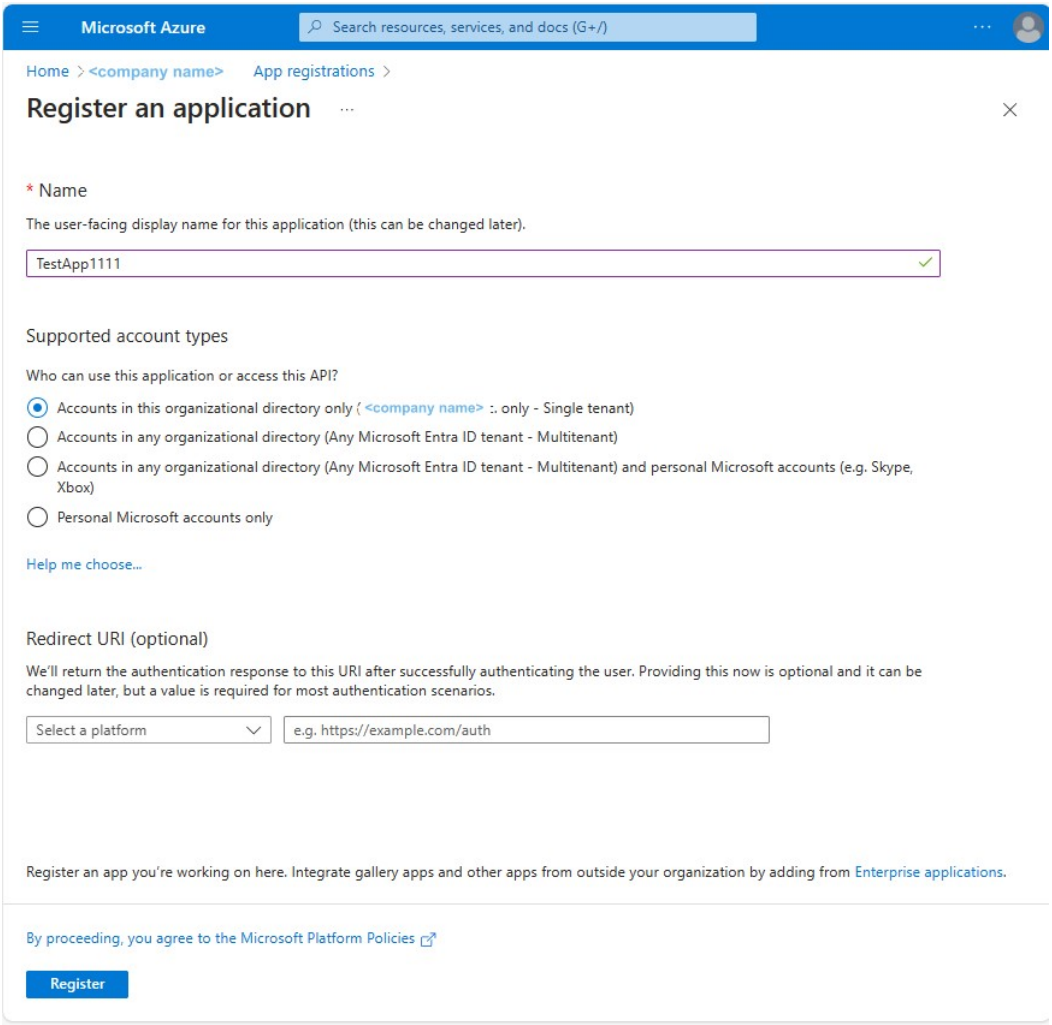
Browse to the url: https://portal.azure.com

The above website must be loaded and logged-in with your primary Microsoft account, before the following steps can be completed.

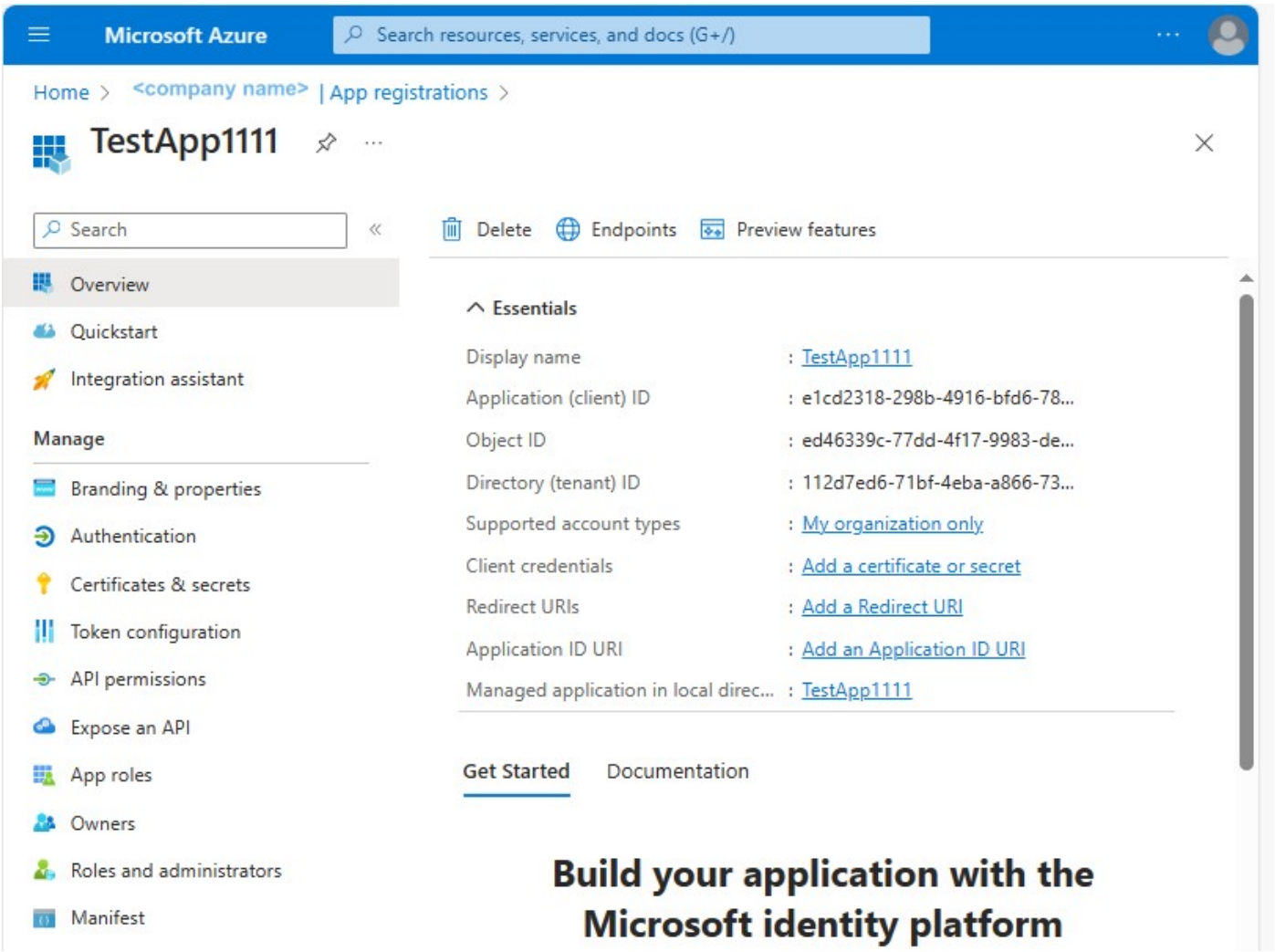
1. Registering an application

The standard option is to choose the single-tenant account type

The redirect will typically be set to the http://localhost:9017 to receive any required tokens, but is not required for this PDiCRM SharePoint integration.



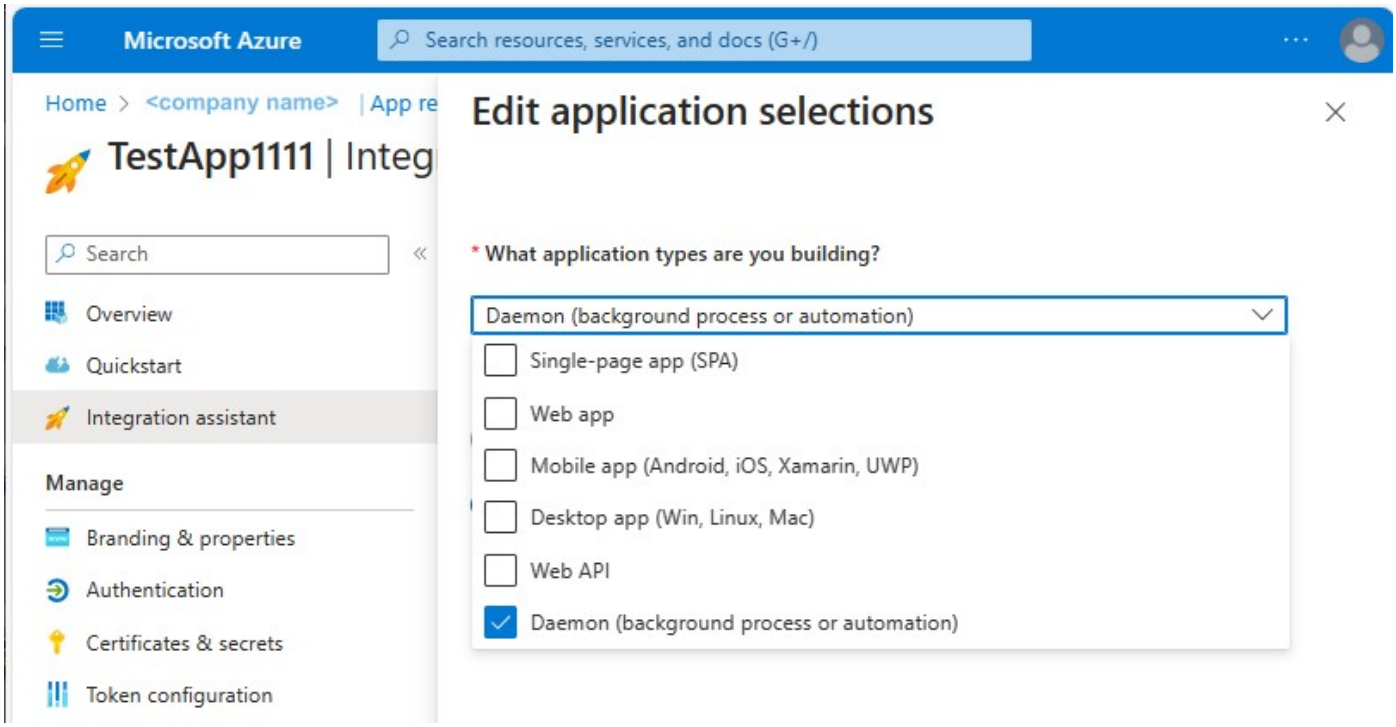
2. Note your application (client) ID and Directory (tenant) ID



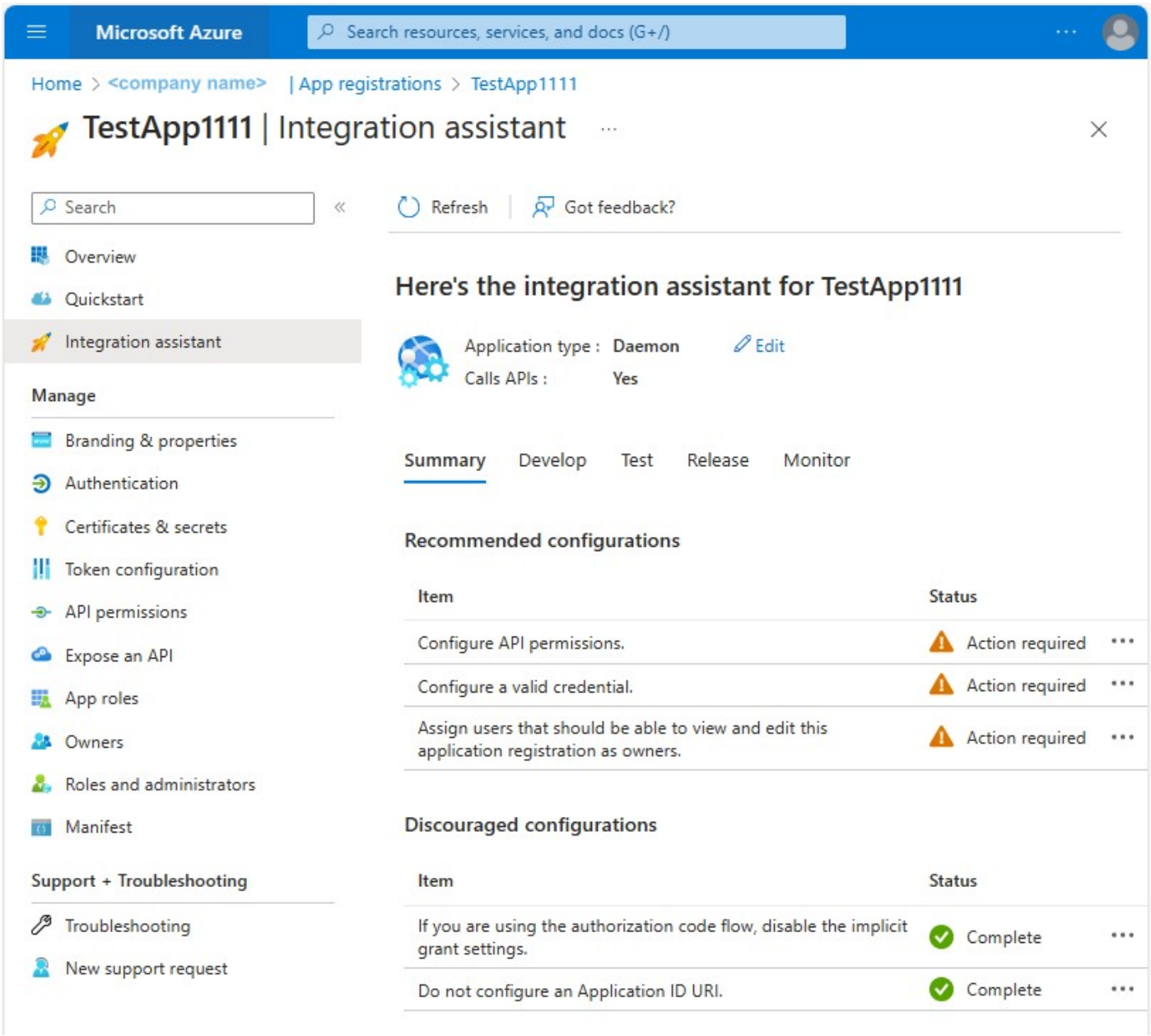
Make note of your Client ID and tenant ID. It will be needed with the PDi CRM Screens.

3. Have a look at the Integration Assistant

Choose “Daemon (background or automation)”



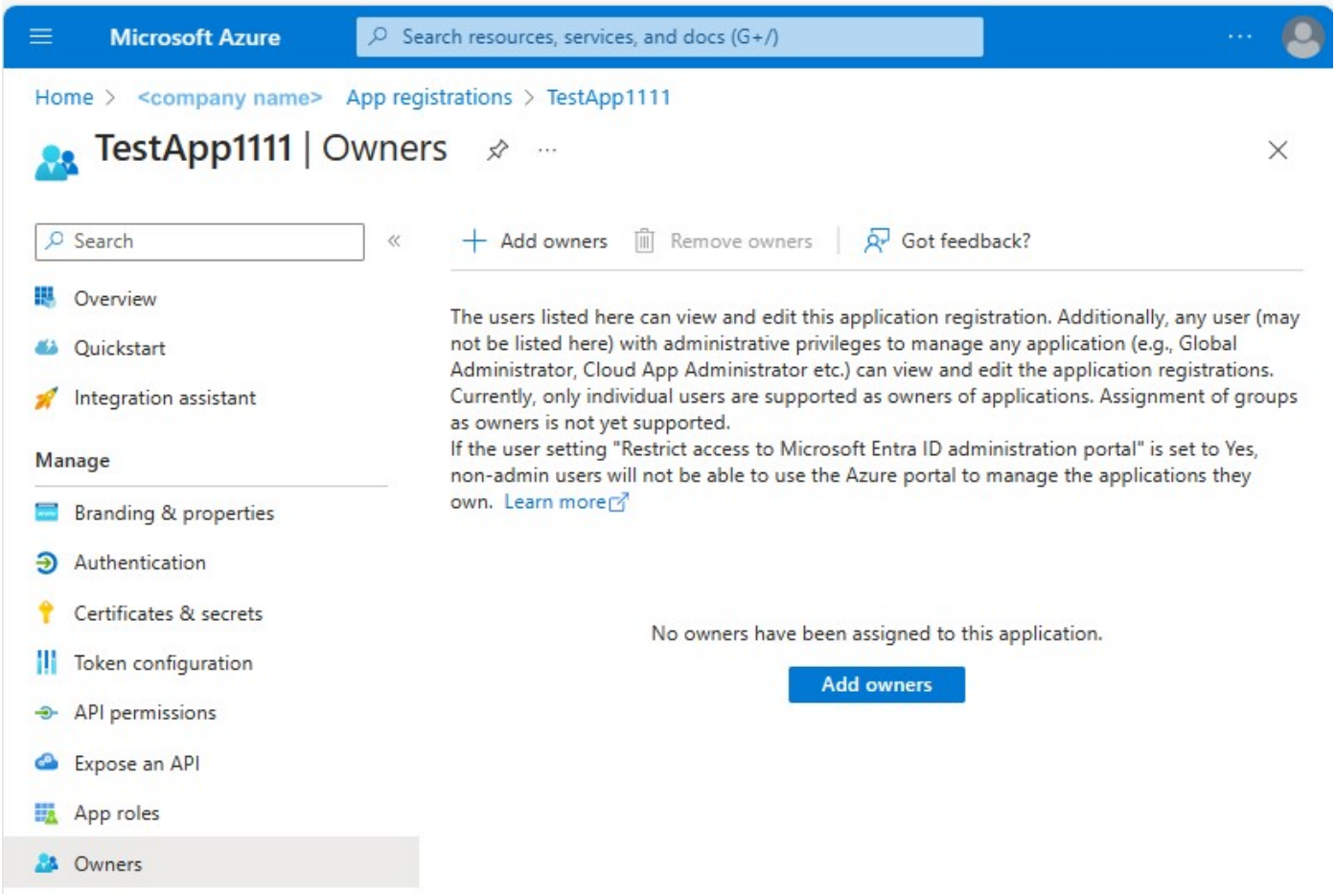
4. See what still needs to be done.



Confirm the API permissions and any other statuses with [Action required].

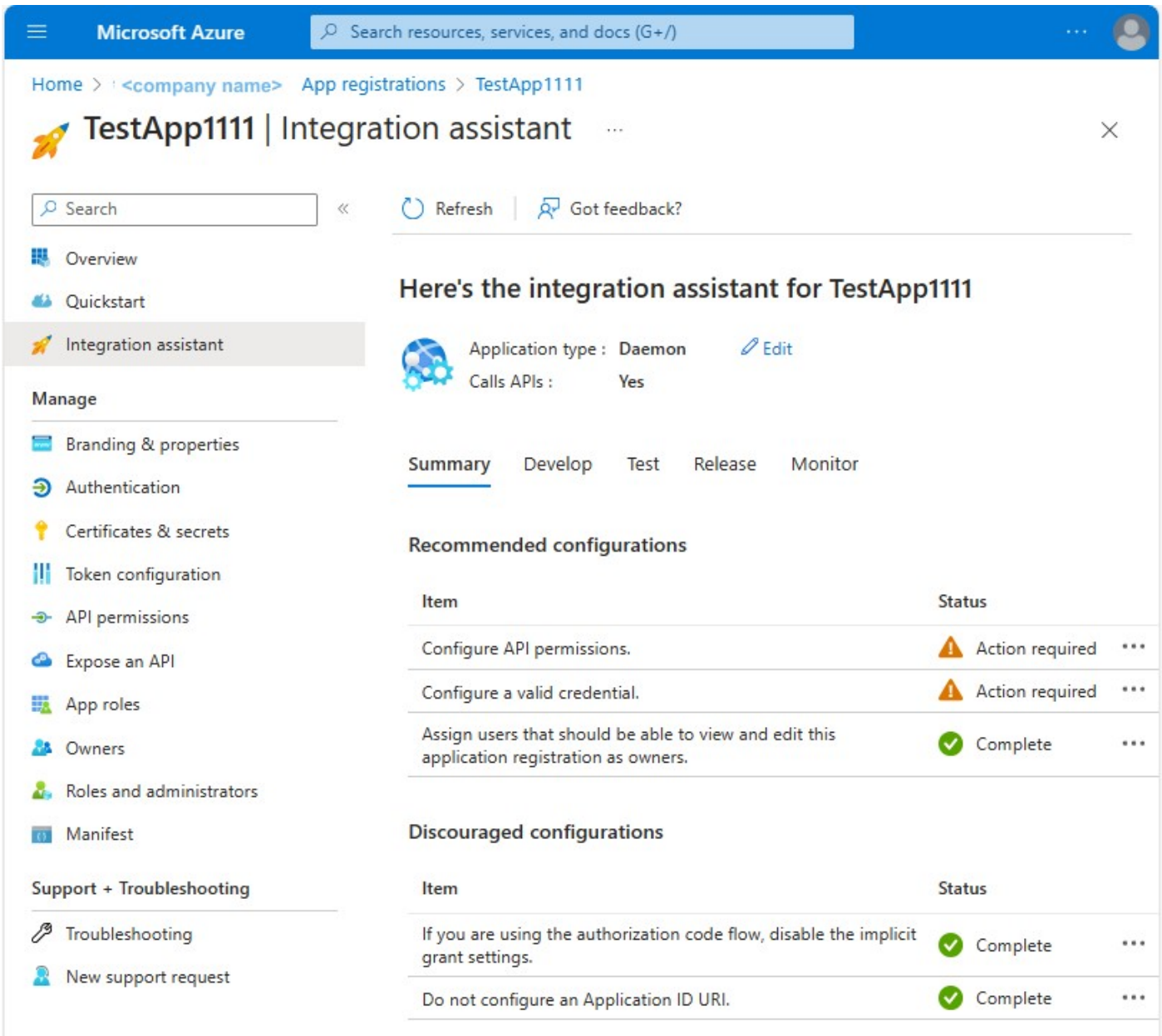
5. Assign a user as the Owner

Click on “Owners” (located in the left rail). Then click on “Add owners” and add your user as the owner.



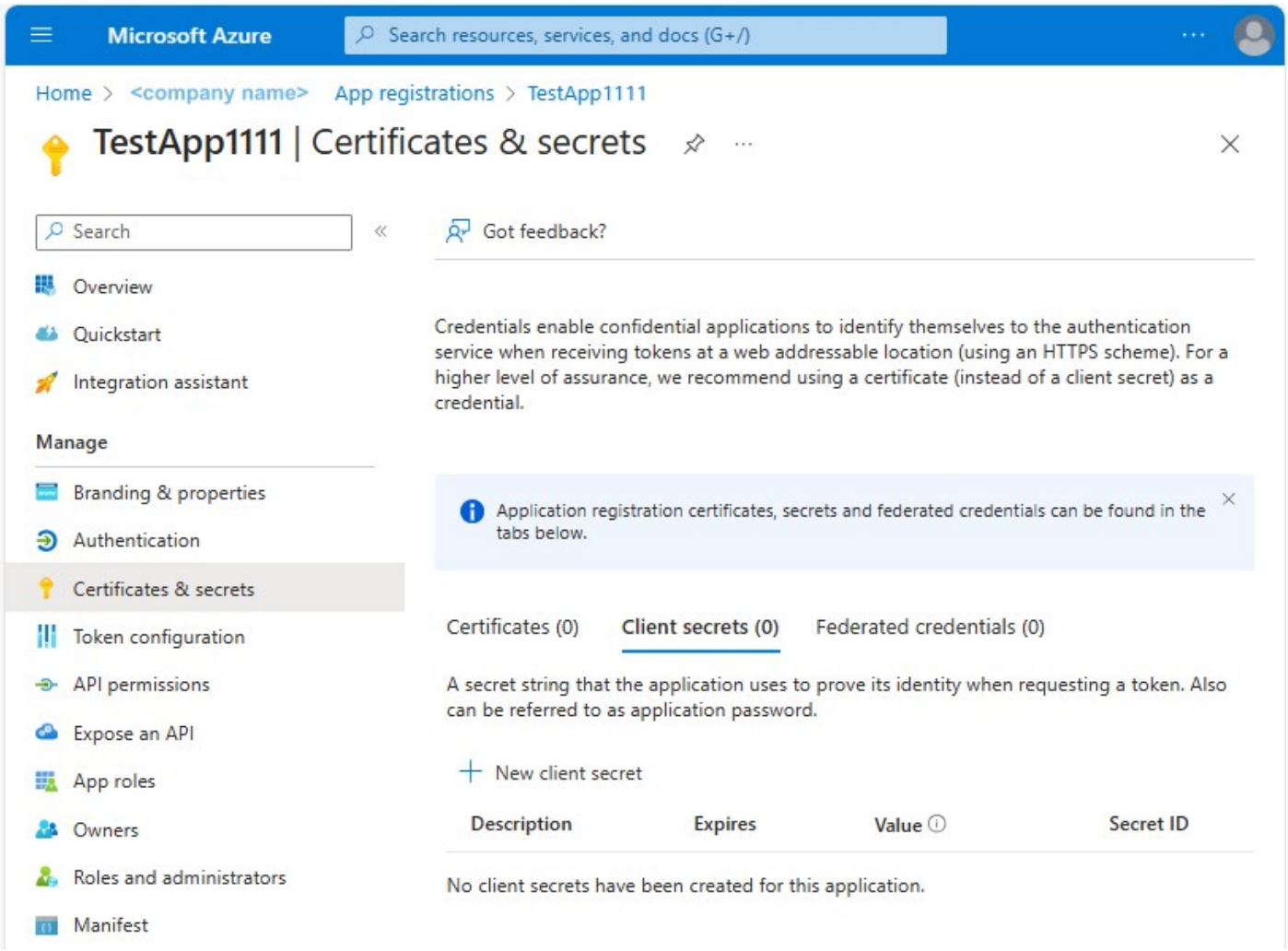
6. Go back to the Integration Assistant.

See if there are any tasks remaining. In the example screen below, there are two tasks remaining.



7. Configure a Valid Credential

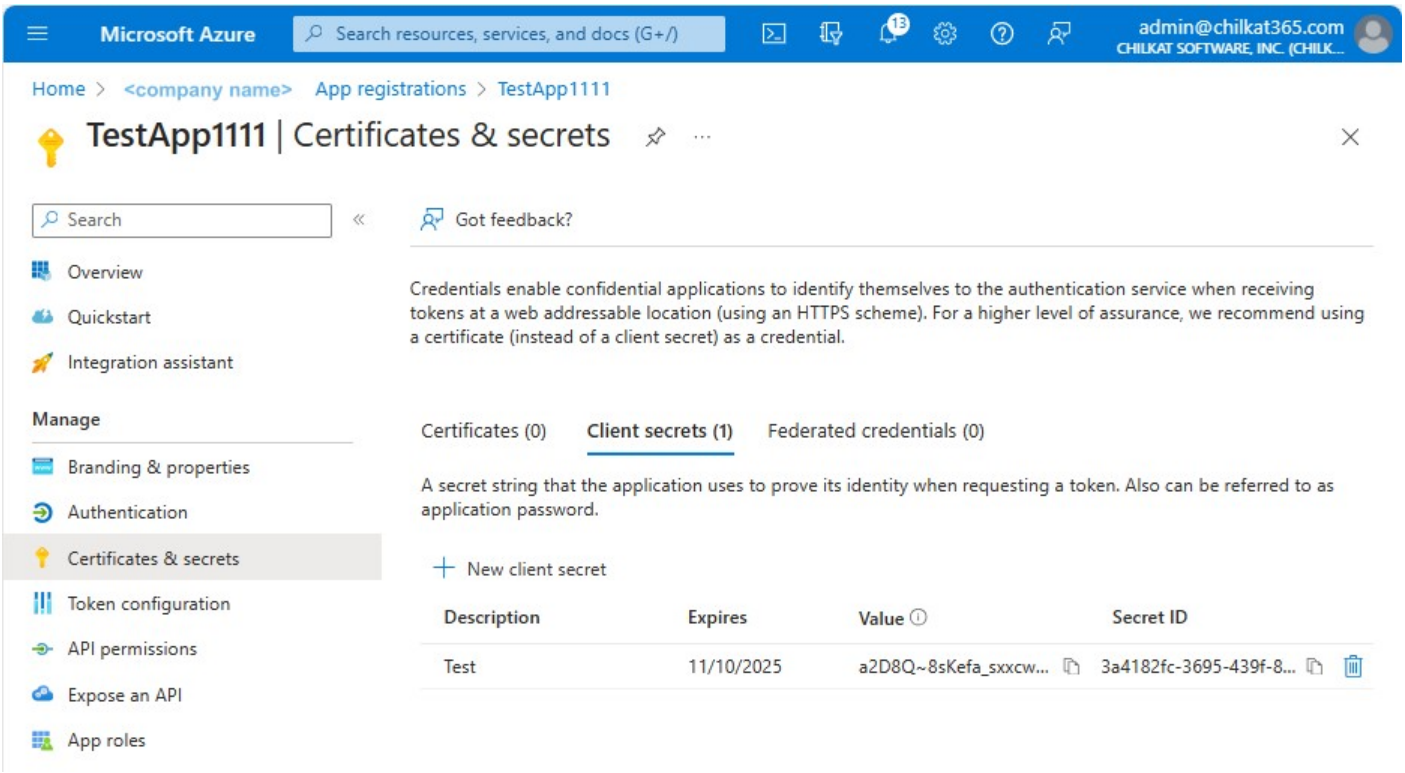
Click on the “Certificates and secrets”. Create a new Client secret.



Click on “+ New client secret”

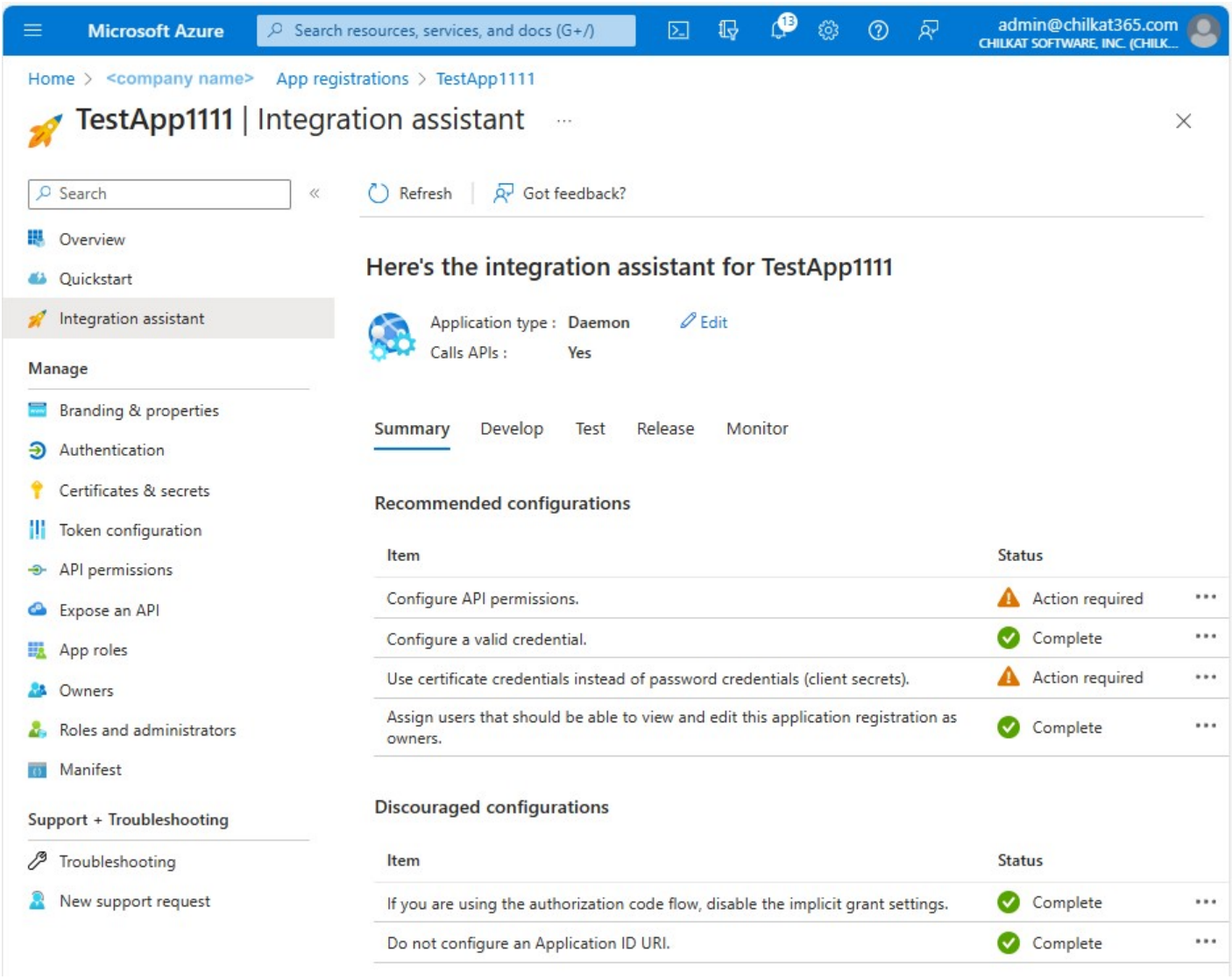
Copy the **Value** and **Secret ID** of the client secret. You need to copy it here. It will no longer be available after leaving this screen.

You’ll need the client secret Value in your program. (the Secret ID may not be needed but copy it just in case.)



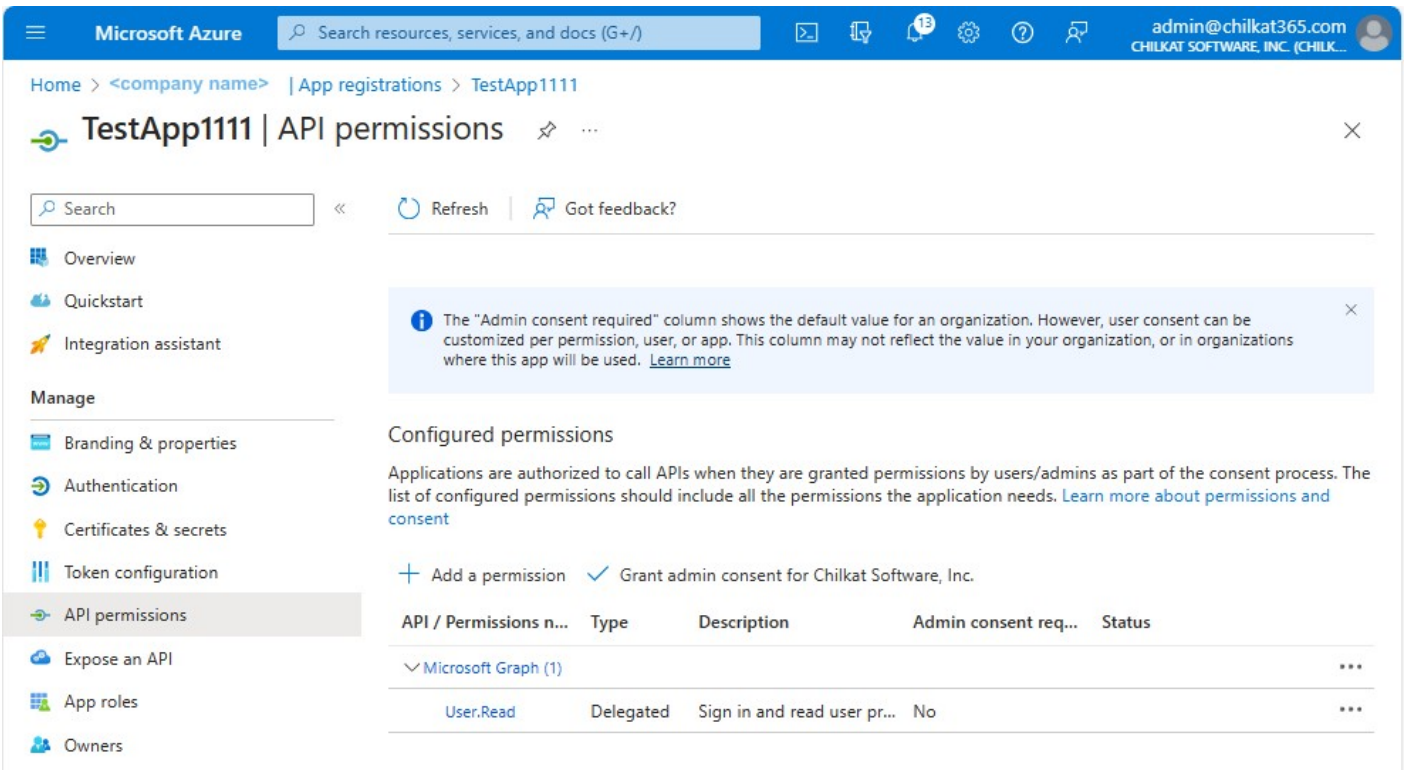
8. Go back to the Integration Assistant.

Azure would prefer you to use the certificate credentials, but it is not required. You can use the shared secret credential that was previously created.

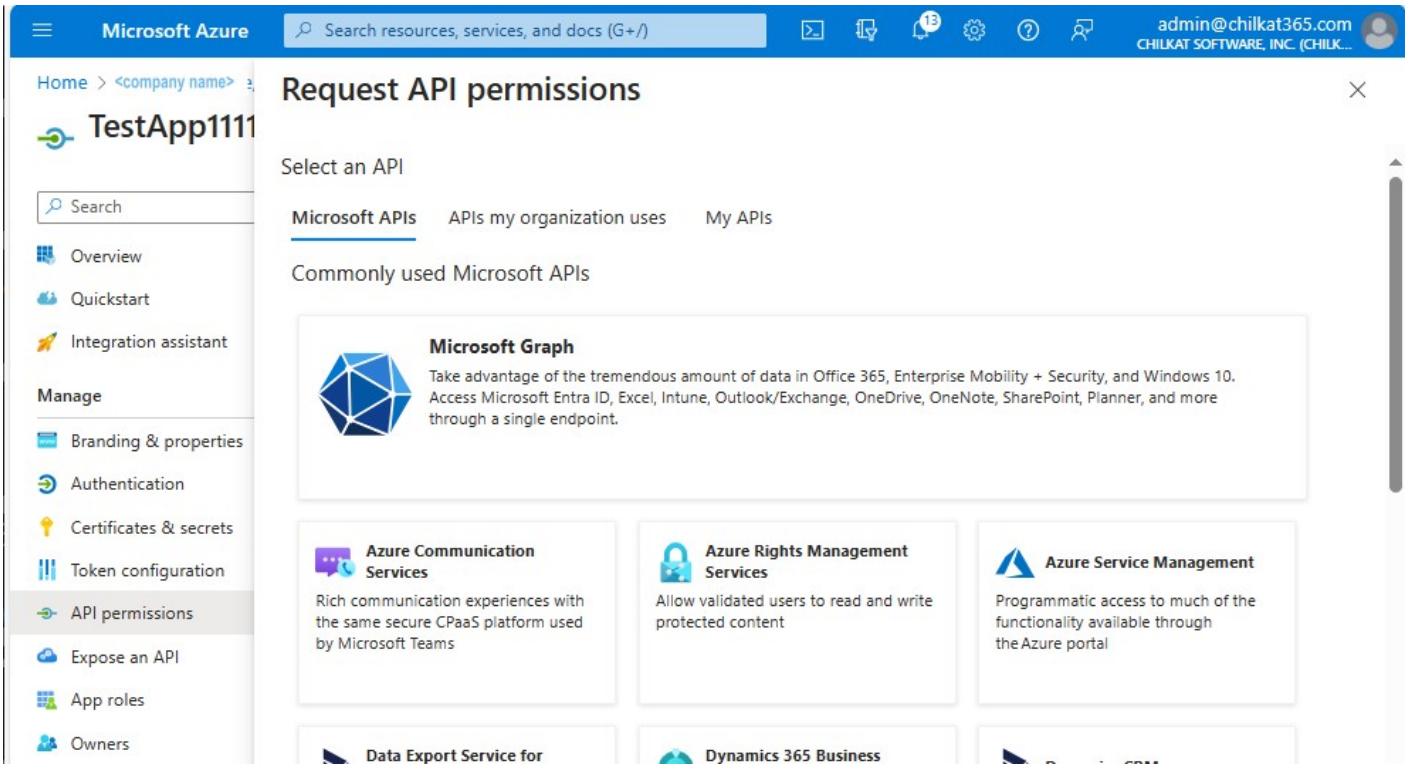


9. Add API Permissions

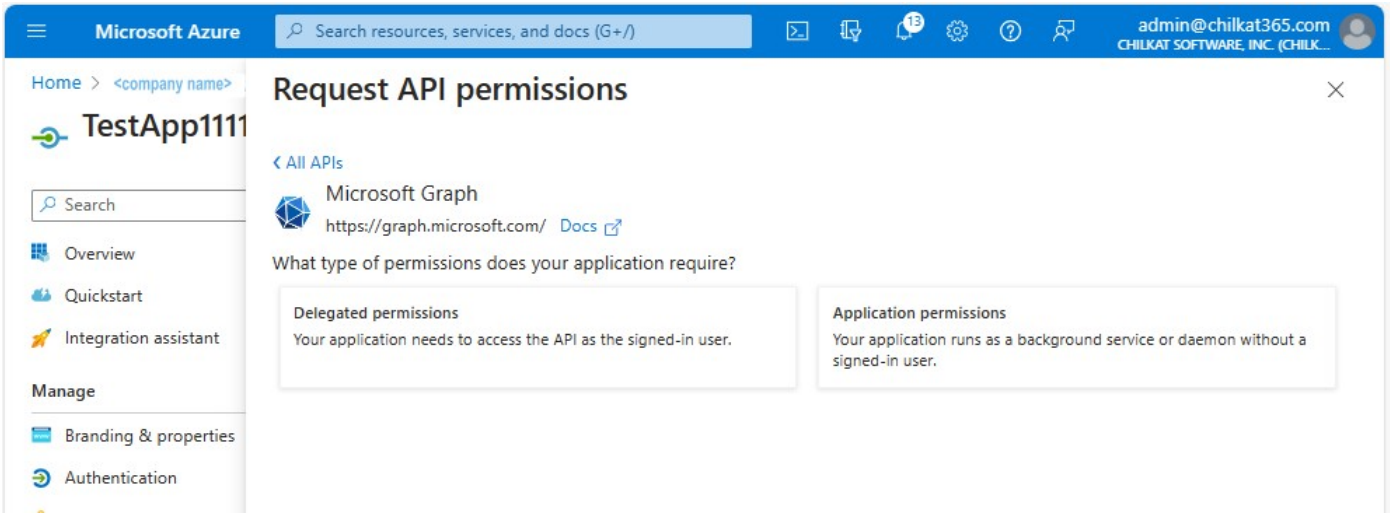
Click on “API Permissions”



Click on “+ Add a permission”. Then click on “Microsoft Graph”



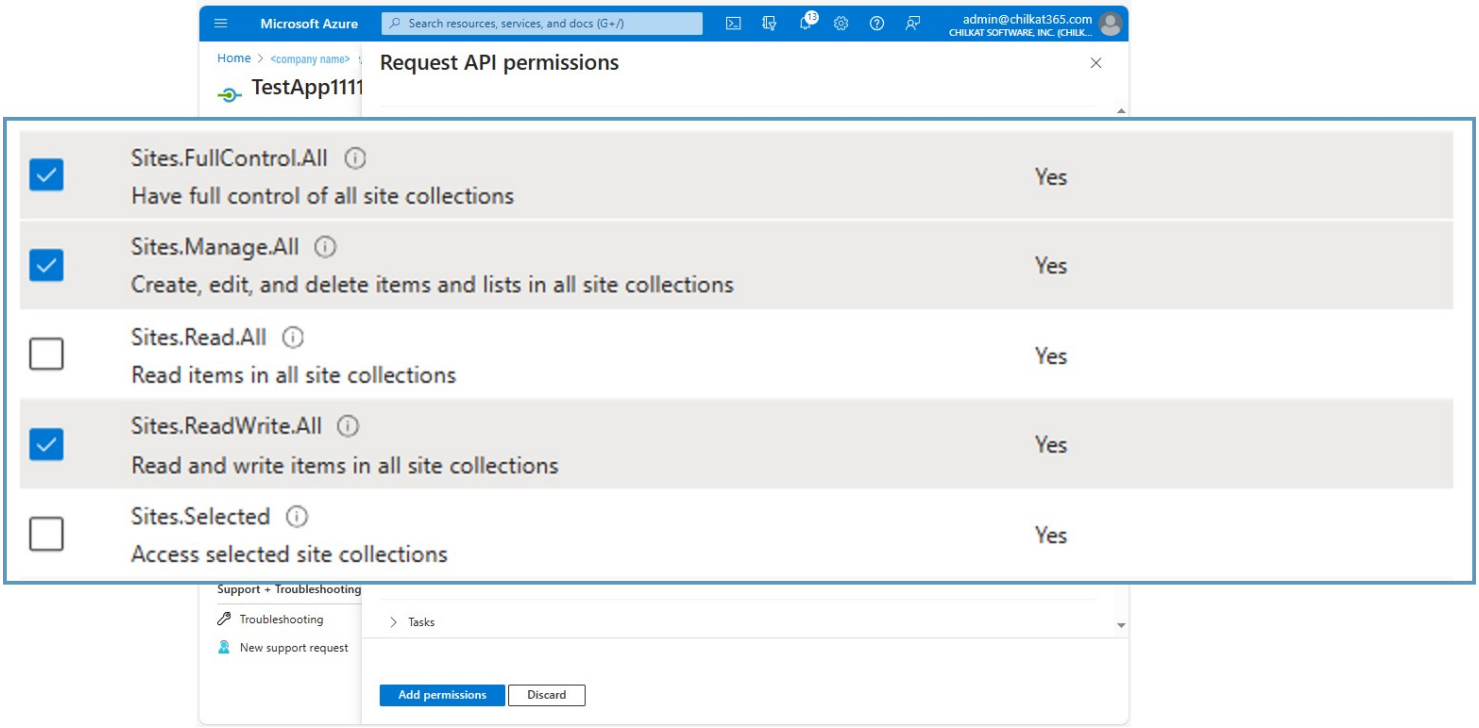
Click on “Application permissions”



Select the Permissions you’ll Need.

For example, to provide permissions for SharePoint Online, click on the needed “Sites” permissions. Then click “Add permissions”.

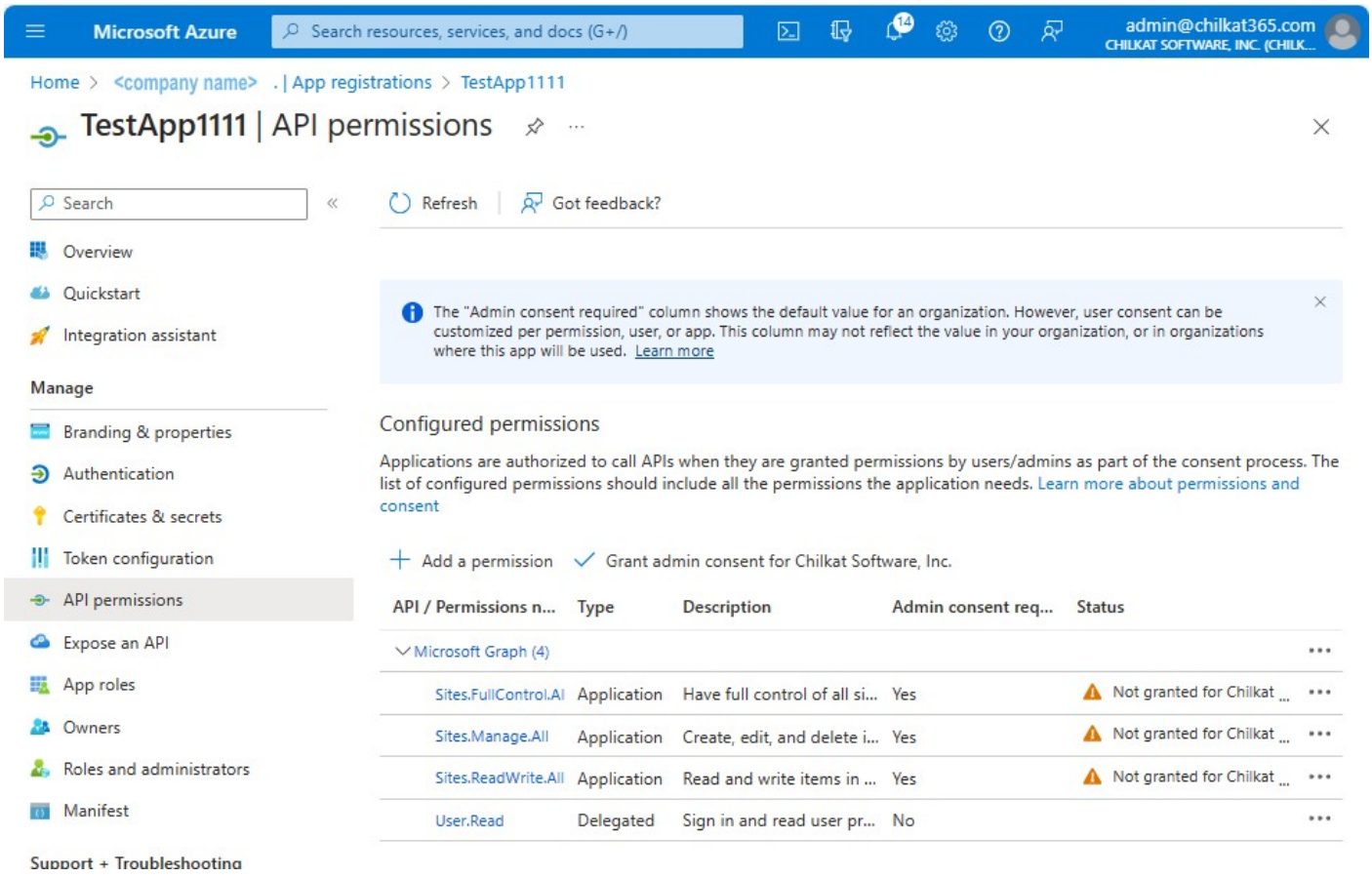
Important: You will need to add the necessary API permissions based on what your application wishes to do. For example, if needing to create an Online meeting for MS Teams, you’ll need to add the **OnlineMeetings.ReadWrite.All** permission. The Microsoft REST API online documentation tells you what Permissions are needed. For example, see https://learn.microsoft.com/en-us/graph/api/application-post-onlinemeetings?view=graph-rest-1.0&tabs=http



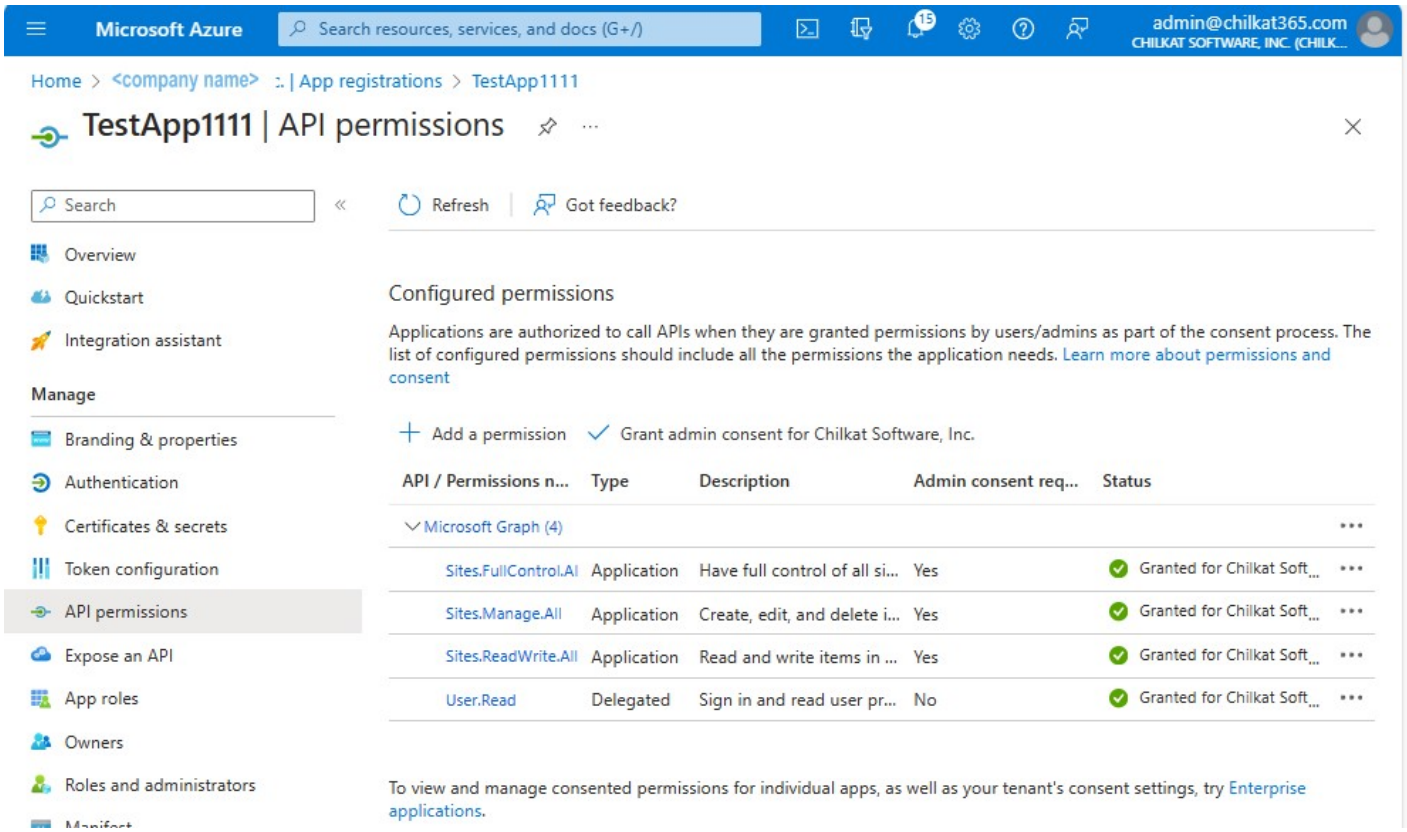
10. Grant Admin Consent for the permissions you

added.

You're not yet done with permissions. Grant admin consent by clicking on the Grant admin consent for



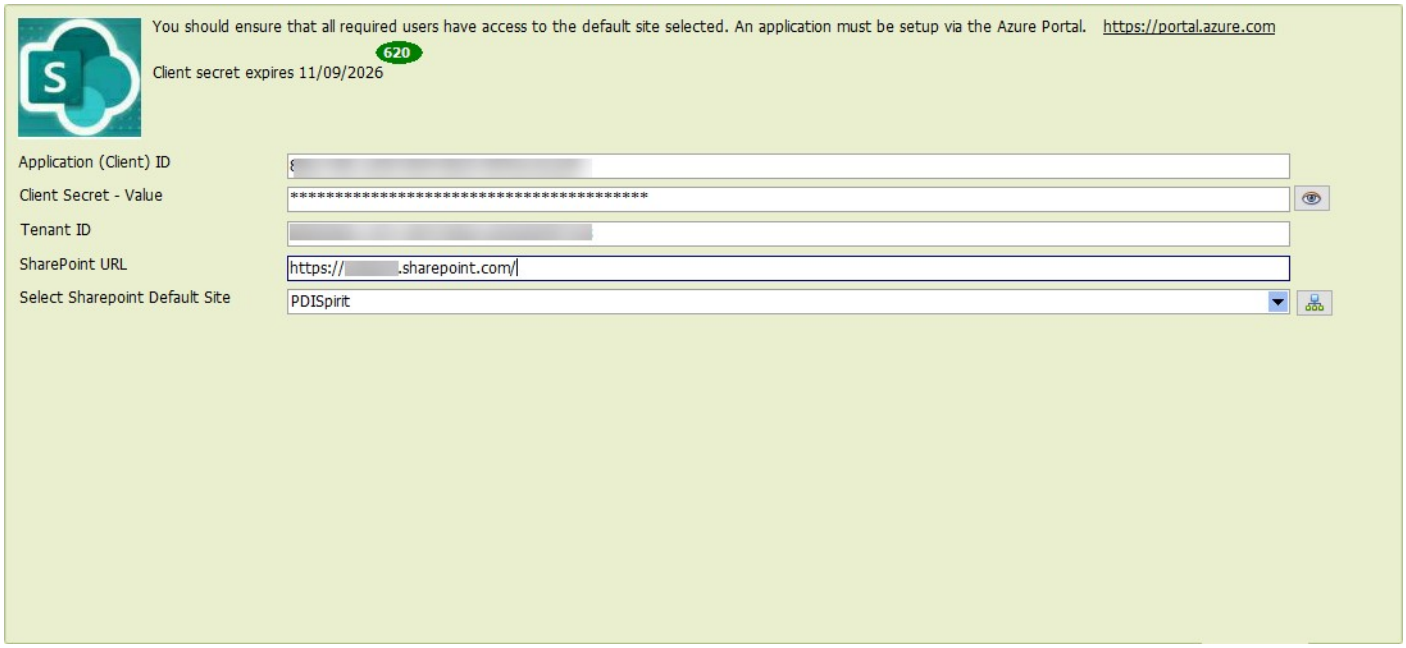
After clicking “Grant admin consent for…” your API permissions should look like this:



11. OK, Finished.

Your App Registration should now be set up to allow for the OAuth 2.0 client credentials, grant type, for the API Permissions you have configured.

In **PDi CRM > Setup CRM Options > SharePoint integration** tab the credentials you save previously can be added to the setup screen.



Enter your Application (Client) ID, Client Secret – Value and Tenant ID that you saved earlier.

Enter your Company SharePoint URL.

Select the default SharePoint site, if your settings are correct then the drop-down box will be populated when using the [Retrieve available sites] button.

If all settings and API permissions are correct, then you will be able to link to your SharePoint documents with the PDi CRM Document cases.

Individual users can be linked to a different default site with the PDi CRM Setup Users module.

Important: Please note that the SharePoint integration with PDi CRM requires a new license to gain access to the setup functions. Please contact your authorized PDi Spirit distributor to apply for this license.