

SharePoint Integration with Clientshare

14th January 2021

Overview

You will now be able to integrate your SharePoint folders within Clientshare. This integration will allow you to display all your key files with your customers.

To integrate your SharePoint folder with Clientshare, you will need the following credentials which you can obtain from your SharePoint account:

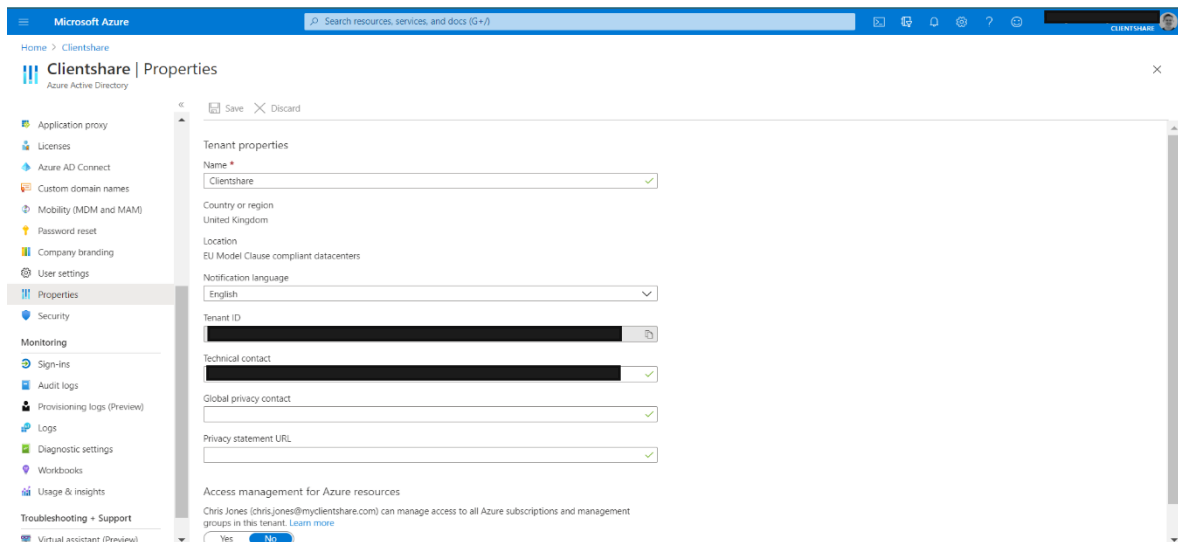
1. **Azure Active Directory Id/Tenant-Id** from Azure-portal
2. **Client ID** from the Sharepoint app
3. **Client Secret** from the Sharepoint app
4. **Target host** {{yourtenantname}}.sharepoint.com
5. **Principal ID** for more details [click-here](#) eg:
00000003-0000-off1-ce00-000000000000

Points 2-5 can be retrieved from your SharePoint portal.

Tenant ID | AAD ID

To get **Azure Active Directory(AAD) ID** from **Azure** following are the steps:

1. Login to Azure portal as administrator.
2. Select Azure Active Directory.
3. Select the directory that you are using with your Office 365 tenant.
4. Under Properties, you can find the Directory ID. This is your tenant ID.



SharePoint Credentials

To get credentials from the SharePoint portal following are the steps:

1. To register an app in SharePoint, go to the “New App Registration” page or copy this URL:

https://{{yourtenantname}}.sharepoint.com/_layouts/15/appregnew.aspx

Please remember to replace {{yourtenantname}} with your tenant name.

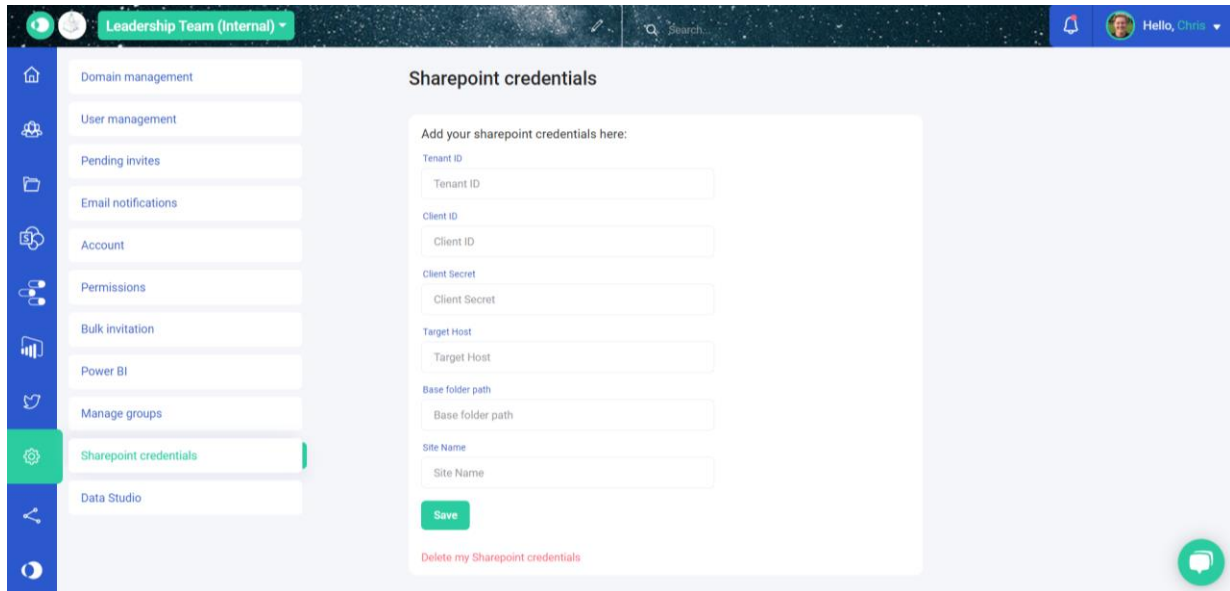
2. Generate and/or fill the details and create the app.
3. Once you have created the details for your SharePoint site, go to the “appinv.aspx” page (with which you can grant permissions to an app). You can use the following URL to access this page:
https://{{yourtenantname}}.sharepoint.com/_layouts/15/appinv.aspx

Please remember to replace {{yourtenantname}} with your tenant name.

4. Paste the Client ID you have just created into the “App ID” text box and click on “Lookup”.
This will load the details of the app that were previously registered.
5. In the “Permission Request XML” paste the following XML. If you need to provide different permissions, please look at this [article](#).

```
<AppPermissionRequests AllowAppOnlyPolicy="true">  
<AppPermissionRequest  
Scope="http://sharepoint/content/sitecollection/web"  
Right="FullControl"/>  
</AppPermissionRequests>
```

6. Once this has been approved, click “Create” followed by “Trust it”.
7. Copy the credentials you created during Step 2 and enter them into the SharePoint plug-in on Clientshare.



The screenshot shows the Clientshare interface for configuring SharePoint credentials. The page title is "Sharepoint credentials". On the left is a navigation menu with options: Domain management, User management, Pending invites, Email notifications, Account, Permissions, Bulk invitation, Power BI, Manage groups, Sharepoint credentials (highlighted), and Data Studio. The main content area is titled "Add your sharepoint credentials here:" and contains several input fields: Tenant ID, Client ID, Client Secret, Target Host, Base folder path, and Site Name. A "Save" button is located at the bottom of the form, and a link "Delete my Sharepoint credentials" is visible below it. The top of the page shows the user's name "Hello, Chris" and a search bar.

The **Target Host** is the name before ‘sharepoint’ on the URL within your SharePoint site. This is typically your company name.

The **Base Folder Path** is where you can narrow down the visibility of files within your SharePoint site. Start by typing ‘Documents’ or ‘Shared Documents’ followed by ‘/’. If you would like to give your Clientshare community full access to your SharePoint site files, you can stop typing after ‘/’. The folder path can be narrowed by adding the folder names after the forward slash.

Finally, the **Site Name** is necessary if you are gaining access to a specific site within your SharePoint account. You can typically find the name of the site in the URL next to ‘sites/’.