

 **Implementation manual**
TOPdesk – MS Teams integration



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1. Summary

The TOPdesk - MS Teams integration lets you send information to Teams directly from the TOPdesk Call Management module. In a Teams conversation, a short message is posted with a link to the TOPdesk call. An event in TOPdesk determines when the call information is shared to Teams.

In this first version, only details from a few TOPdesk fields will be shared, based on the creation of a new call. The call fields that are shared to MS Teams are: Request, Brief description and Call number.

The integration makes use of:

- Teams Webhook
- TOPdesk Action Sequences
- TOPdesk Events

Version information

V1.0

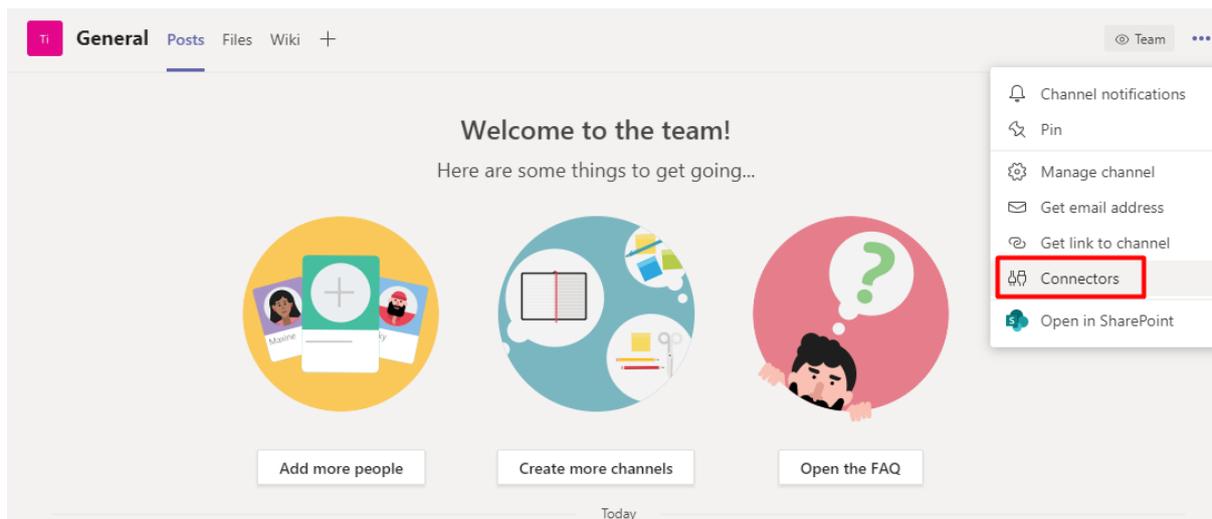
- Basic incident information: request, brief description and incident number
- URL to the call made available in Teams

2. Steps in Teams

Create a Webhook

First, set up a webhook in your Team in Microsoft Teams.

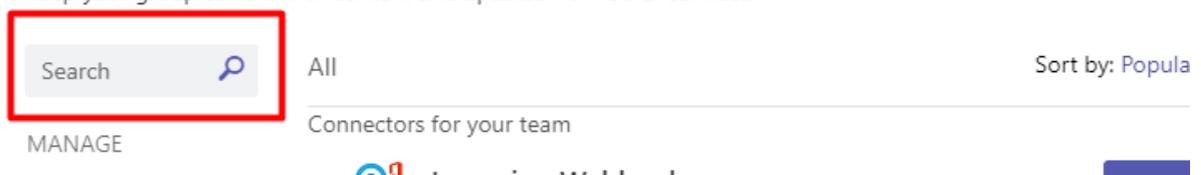
1. Open the team you want the TOPdesk calls to be posted in
2. Select **Connectors** from the team's settings in the upper right-hand corner



3. In the pop-up, use the Search option to locate the **"Incoming Webhook"** connector

Connectors for "General" channel in "Test integration" team

Keep your group current with content and updates from other services.



4. Add the **Incoming Webhook** connector

Connectors for "General" channel in "TOPdesk Teams Integration" team



Keep your group current with content and updates from other services.

Incoming Webhook Search Results Sort by: Popularity ▾

MANAGE
Configured
My Accounts

 **Incoming Webhook**
Send data from a service to your Office 365 group in real time. **Add**

5. Click **Add** once more

 **Incoming Webhook**
Utilities, Microsoft

Add

Send data from a service to your Office 365 group in real time.
The Incoming Webhook connector enables external services to notify you about activities that you want to track.

About
More from Microsoft Corp.
Privacy and Permissions

Notifications
Get notifications from the app in a channel
Created by: [Microsoft Corp.](#)
Version 1.0

More from Microsoft Corp.


6. Enter a name for the webhook, upload an image (optional) and click **Create**

Connectors for "General" channel in "TOPdesk Teams Integration" team

Fields marked with * are mandatory

To set up an Incoming Webhook, provide a name and select Create. *

Customize the image to associate with the data from this Incoming Webhook.

Upload Image



Create

Cancel

7. **Copy** the webhook URL. You need this URL later on when creating an action sequence in TOPdesk

Connectors for "General" channel in "TOPdesk Teams Integration" team

Customize the image to associate with the data from this Incoming Webhook.

Upload Image



Copy the URL below to save it to the clipboard, then select Save. You'll need this URL when you go to the service that you want to send data to your group.



Done

Remove

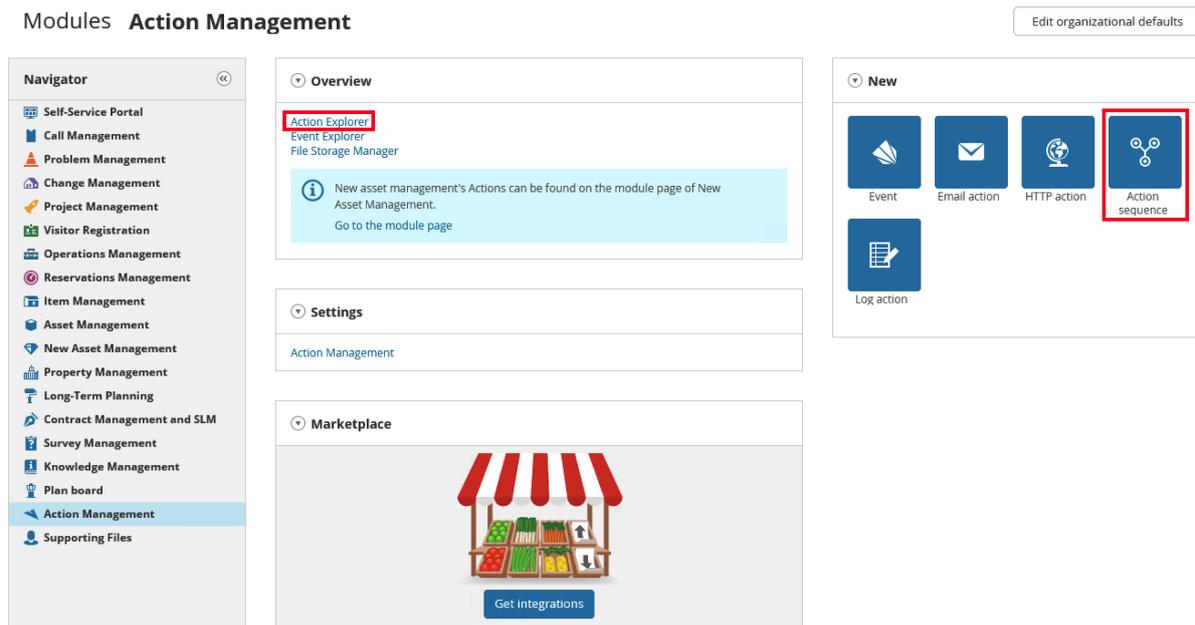
8. After copying the URL, click **Done**

3. Steps in TOPdesk

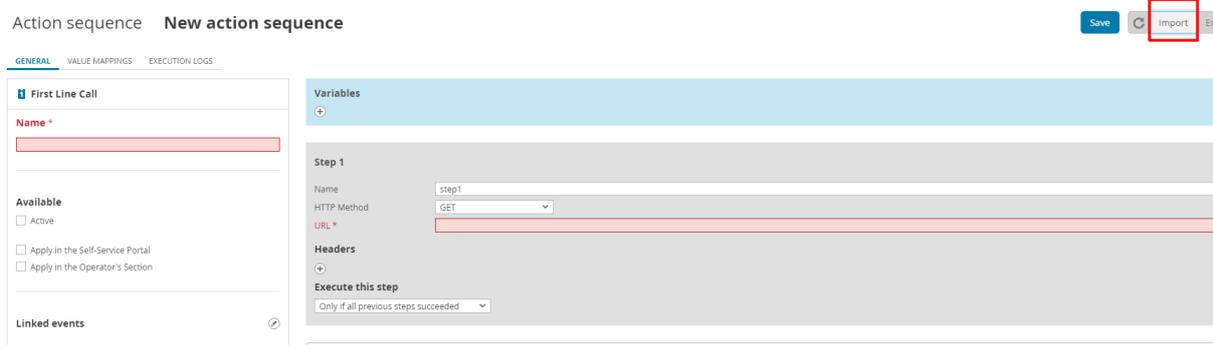
Create an action sequence

Call information will be sent to Teams via an action sequence from TOPdesk.

1. Go to Modules > Action management
2. Click **New: Action Sequence**, or go to Action Explorer > **Create**



3. Create an Action sequence for **First Line Calls**
4. In the new Action sequence, click **Import** to import the json file. In the pop-up, click **Import** again

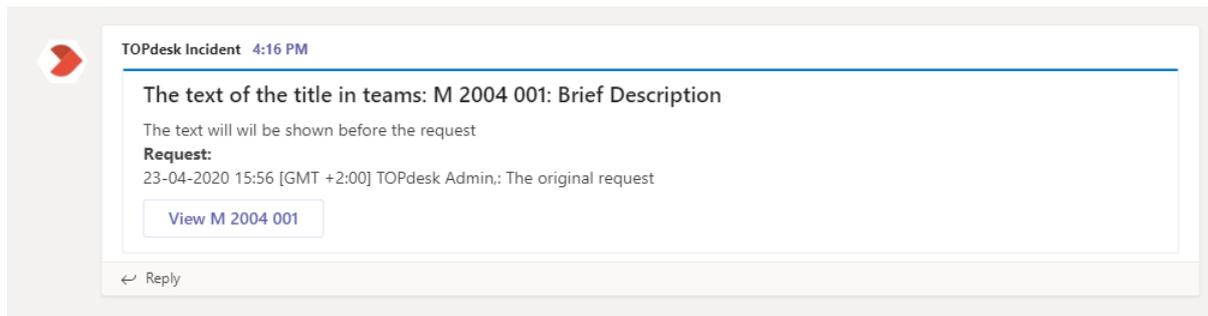


You now see the imported action sequence, with a number of fields already filled in.

5. In the **Variables** section, enter the Webhook URL that you copied from Teams, and the URL of your TOPdesk

Variables	
Name	Value
Teams_WebHook	https://outlook.office.com/webhook/ead89c26-2474-428b-829c-df51a5ba952d@110262a5-90b3-4c8b-bd83-7211c22e3368/IncomingWebhook/126005d9e2664cfd88
TOPdesk_Url	https://example.topdesk.com
Teams_title	The text of the title in teams
Teams_text	The text will be shown before the request

Below, enter a text for the Teams title and Teams text (a line of text preceding the request field data). In Teams this will look as follows:



So, for example, if you let the action sequence trigger when a new first line call was created, you could enter *New first line call* as Teams title, and *A new first line call just came in*. Click below to view the call in TOPdesk as Teams text.

6. Activate the Action Sequence: tick **Active**, and **Apply in the Self-Service Portal** and/or **Apply in the Operator's Section** (depending on where the calls will be created)

Available

Active

Apply in the Self-Service Portal

Apply in the Operator's Section

7. If you intend to create several different action sequences for use with Teams, change the **Name** of the action sequence to something more specific, e.g. *Teams new first line call*.

8. Click **Save**

Set up an event

The action sequence will be triggered by an event. To create an event that will trigger the action sequence that you just set up:

1. Go to Modules > Action management
2. Click **New: Event**, or go to Event Explorer > **Create**
3. Create an event for **First Line Calls**

4. In the **Details** block, enter a **Name** for the event, tick **Active**, and make sure Choose type is set to **New card**.

Event **New first line call** Save ↻ Delete

First Line Calls

Details

Name

Active

Choose type

Description

When a new card is created

Linked actions ✔

Teams new first line call

Conditions

Apply

5. Under **Linked Actions**, select the action sequence you created earlier.
6. Click **Save**.

When a new call is created, a message should now appear in Teams.

Specify when the message is sent

If you only want the event to trigger for certain calls, add conditions to the event. Or you can add a second event + action sequence, with conditions and message text different from the first set.

1. In the **Conditions** block of the event, tick **Apply** and select one or more conditions.

*Because the event is set to trigger as soon as a call is created, only select conditions that are already recorded on the card when the call is first logged. If you want to send a message to Teams when a call is changed, e.g. when it is assigned to different operator group, change Choose type to **Edit card**.*

Event **New first line call - NL** Save ↻ Delete

First Line Calls

Details

Name

Active

Choose type

Description

When a new card is created by a caller from TOPdesk NL

Linked actions ✔

Teams new first line call

Conditions

Apply

Event occurs when	<input type="text" value="All conditions apply (AND)"/>
Attribute	Value
Branch (Caller) equals	<input type="text" value="TOPdesk Nederland BV"/>

Add

For example, if you want to send a message to Teams only for new calls with priority P1:

1. Create an event with a condition 'Priority equals': 'P1'

Event **New P1 call** Save ↻ Delete

First Line Calls

Details

Name:

Active:

Choose type:

Description

When a call with Priority 1 is created

Linked actions

Teams new P1 call

Conditions

Apply

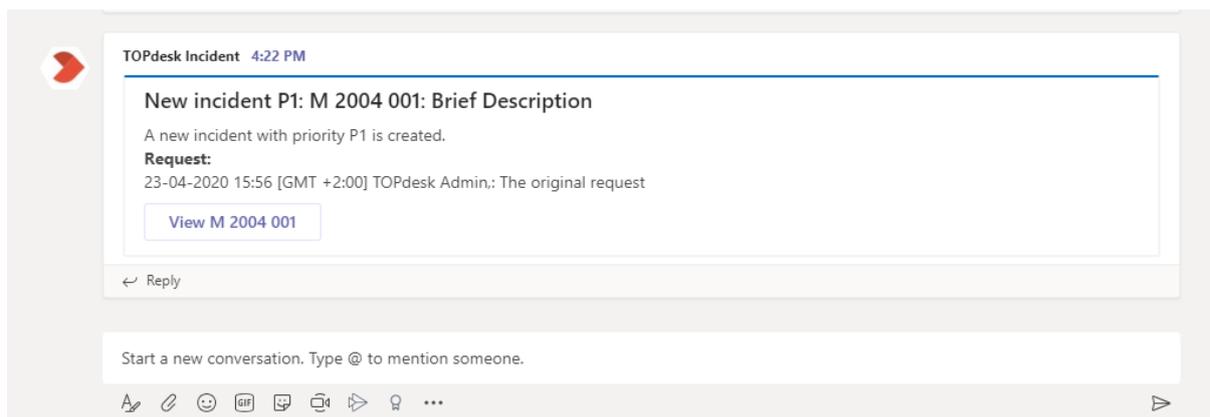
Event occurs when:

Attribute: Value:

2. Create an action sequence with a Teams title and Teams text to reflect this, e.g. Teams_title: *New P1 call* and Teams_text: *A new call with priority P1 was just created.*

Variables	
Name	Value
<input type="text" value="Teams_WebHook"/>	<input type="text" value="https://outlook.office.com/webhook/ead89c26-2474-428b-8"/>
<input type="text" value="TOPdesk_Url"/>	<input type="text" value="https://example.topdesk.com"/>
<input type="text" value="Teams_title"/>	<input type="text" value="New incident P1"/>
<input type="text" value="Teams_text"/>	<input type="text" value="A new incident with priority P1 is created."/>

In Teams this will look as follows:



You can create a second event for when an existing call has its priority changed to P1, and link it to the same action sequence (or create a new action sequence if you want a different message text in that case).