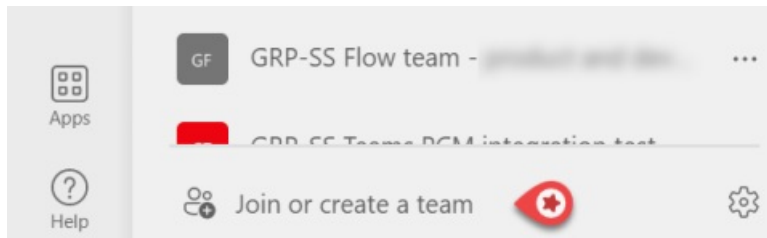


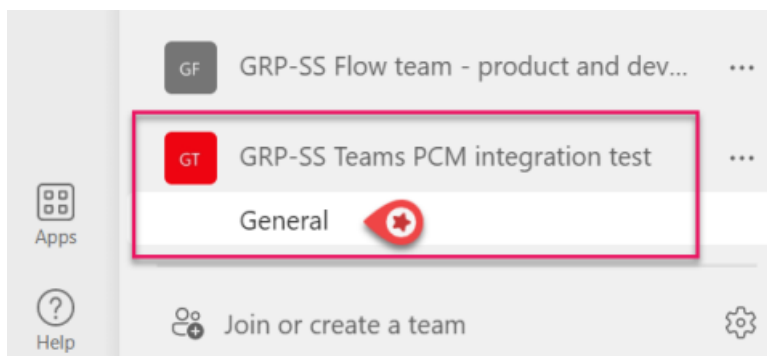
## Microsoft Teams Integration with Puzzel Case Management

To integrate Microsoft Teams with Puzzel Case Management, you need to:

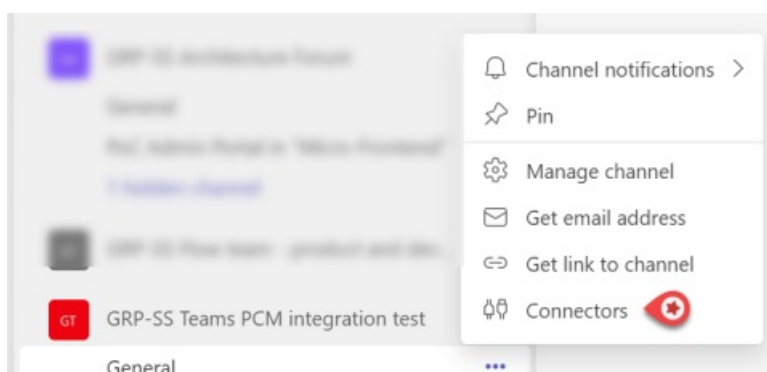
1. Go to Microsoft Teams, Create a new Team by clicking on the **Join or create a team** tab at the bottom left and select **Create a team** option. You can also connect an existing team to Puzzel Case Management. If you already have a team, go to step 4.



2. Click **From Scratch** box and choose if the team needs to be Private or Public based on your requirements.
3. Give an appropriate name for the team and click **Create**. You can also add members to the team at this point or skip to add at a later stage.
4. Go to the newly created team[or an existing team you wish to connect Puzzel Case Management to] and select **General** under it. Click on the three dots against it to reveal the menu options.



5. Select **Connectors**, then search for **Incoming Webhook** and click on the **Add** button.



6. Click on **Configure** option, specify a name for the webhook connector and upload an image[a default image will be assigned if no image is uploaded]. Click **Create**. A Webhook URL will be generated for you. Copy the URL to clipboard as you will need to save this at the Puzzel Case Management end.

## Connectors for "General" channel in "GRP-SS Teams PCM integration test" team ×



### Incoming Webhook

[Send feedback](#)

The Incoming Webhook connector enables external services to notify you about activities that you want to track. To use this connector, you'll need to create certain settings on the other service, which needs to support a webhook that's compatible with the Office 365 connector format.

Fields marked with \* are mandatory

Enter a name for your IncomingWebhook connection. \*



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.



Url is up-to-date.

[Done](#)

[Remove](#)

- Click **Done** to finish the process.
- In Puzzel Case Management, click on Settings -> Integrations -> Outbound Integrations -> Webhooks. Click on **New Webhook** and copy the URL from Microsoft Teams into the URL bar. Give your Webhook a name, make sure **Method** is set to POST, and **Authenticates via** is set to None. Click **Save**.

## Teams webhook

URL\*

Name\*

Method\*

POST

Authenticates Via\*

None

Custom headers

Name	Value *	
<input type="text" value="New Attribute Name"/>	<input type="text" value="New Attribute Value"/>	<a href="#">+</a>

[Cancel](#)

[Save](#)

- As a next step, create your Schema by navigating to Settings -> Integrations -> Outbound Integrations -> Schemas. Then click "New Schema". Give your Schema a Name, and set Content Type to JSON. Copy and paste the below

### Content in the Content box

```
{
  "text": "Hello, Customer: {{customer:name}} has an escalated case requiring your attention. Link: https://example.logicalware.com/tickets/{{ticket:ticket_ref}}"
}
```

Schema Details

Name

Test schema

Content Type

JSON

Content

```
{
  "text": "Hello, Customer: {{customer:name}} has an escalated case requiring your attention. Link: https://product.logicalware.com/tickets/{{ticket:ticket_ref}}"
}
```

### Note

You can use placeholders in your Schema which will dynamically populate with the relevant attributes. For a list of full placeholders visit this [help article](#).

- Create an Event Rule condition to trigger your webhook. Settings -> Productivity -> Event Rules. Learn more about creating Event rules [here](#).

Rule Details

Name

Webhook trigger

Group

Default Group

Priority Order

0

Put out of action

☐ Rule is disabled

Rule Conditions

if

all

of the following conditions are met:

User

is equal to

Jay

Remove

Ticket Event

is equal to

User Changed

Remove

+ Add condition

☒ Stop checking further rules if the conditions of this rule are met.

☒ Stop checking further groups if the conditions of this rule are met.

Rule Actions

Assign To Team

Off

All Users

Set Form/Form Fields

Off

Complaints form

Webhooks

Teams webhook

Test schema

+ Add Webhook

### Example use case

As a supervisor, I would like Microsoft Teams to notify me when an agent assigns a case directly to me. This will help me

navigate to Puzzel Case Management through the link provided in Teams.

In the above example, I would create an event rule with a condition which looks as shown below. In the 'Rule Actions', select the webhook and the schema which should be used when the conditions of my rule are met.

Rule Conditions

If all of the following conditions are met:

User	is equal to	Jay...nar	<span>✕ Remove</span>
Ticket Event	is equal to	User Changed	<span>✕ Remove</span>

+ Add condition

A notification will be sent to Teams if a ticket is assigned to you as shown in the image below.

