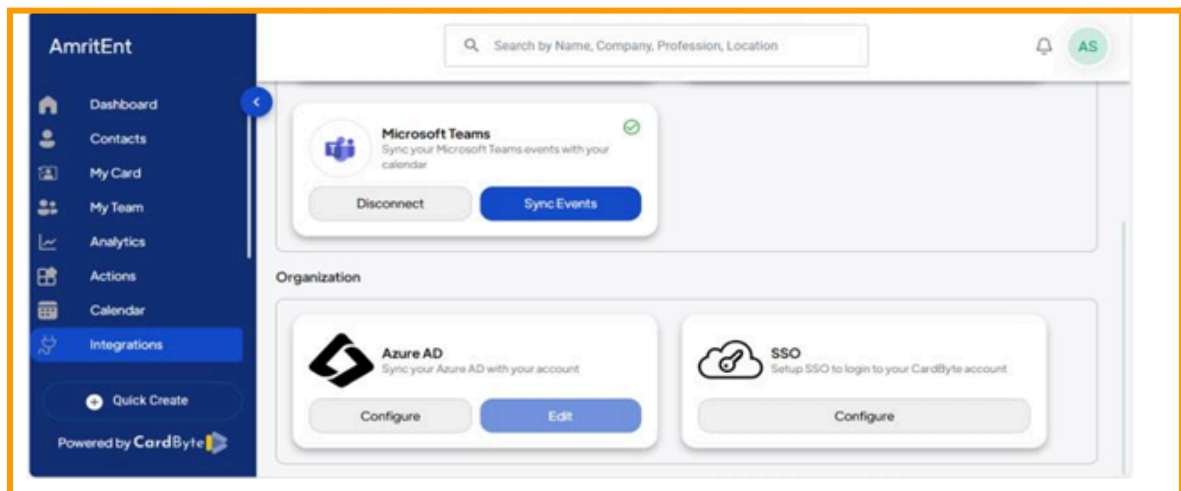


How to invite users via Azure Entra ID

This guide outlines the steps to integrate the CardByte application with Azure Active Directory (Azure AD). A valid Azure AD credential is required for the integration.

Integration Process

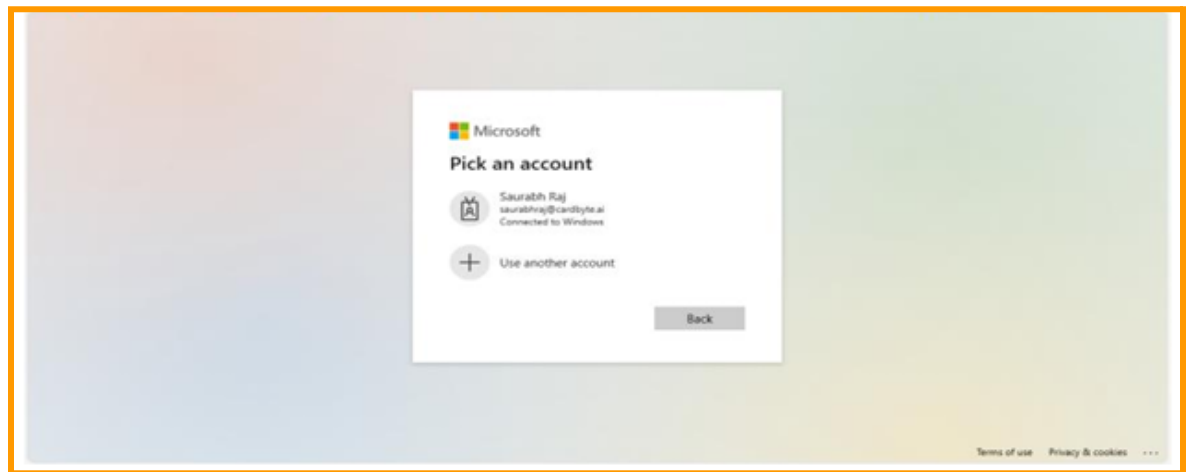
- **Log in to CardByte**
 - Log in to the CardByte web app as an Admin user.
 - From the left navigation panel, go to Integrations.



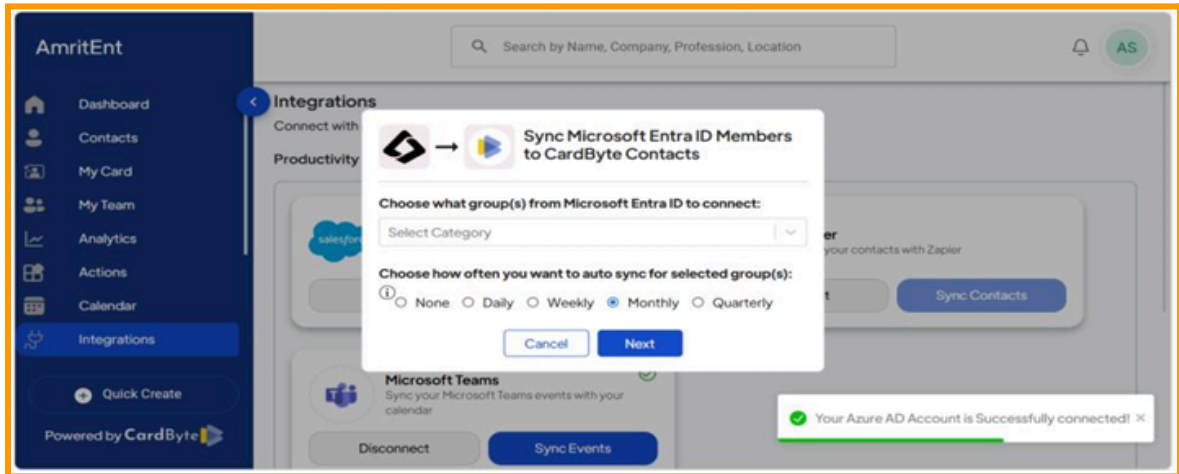
- **Configure Azure AD**
 - Scroll to the Organization section.
 - Click on Azure AD.
 - Tap on Configure and then tap Next to allow access to information.

- **Sign In with Microsoft Credentials**

- Scroll to the Organization section.
- Enter your Microsoft (Azure AD) credentials (username and password) to proceed.
- If already logged in with a valid Azure AD account in the same browser, you may continue without entering credentials again.



- **Select Azure Group & Sync Settings**
 - Scroll to the Organization section.
 - Once connected successfully, select the Azure AD group whose users need to be invited.
 - Set the sync frequency for the selected group.



- **Prerequisites**
 - Ensure that the Azure group (group of users) is created in the customer's Azure account beforehand.
 - Mandatory fields need to be filled in Azure AD with the following mandatory fields: first name, Last Name, Email ID, and Mobile Number.

- **Invite Users**

- Tap Next to see the number of users to be invited from the selected Azure group.
- Tap Send Invite to send invitations via email.
- Invited users must accept the invitation and log in using their Microsoft credentials.

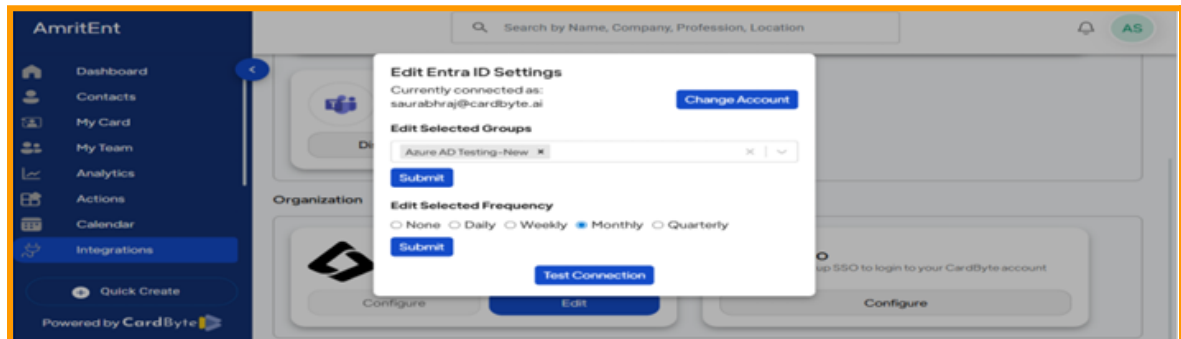
The screenshot shows the 'AmritEnt' application interface. A modal form is open for adding a new user. The form fields are: First Name* (Saurabh), Last Name* (Raj), Phone Number* (IN +91 8817647920), Email ID* (saurabhraj@cardb), Designation, and Address. Below the form are 'Back' and 'Send Invite' buttons. A message at the bottom of the modal states: '-1 new records have been imported successfully.' The background shows the 'Integrations' section of the app with a search bar and a list of integrations including 'Microsoft teams'.

- These are the details that will be synced from Azure - Name , Email , Job Title , Company , Profile photo , Phone number , Address.

The screenshot shows the 'AmritEnt' application interface. A dialog box titled 'Microsoft Entra ID' is open, asking to connect to a Microsoft Entra ID account. The dialog lists the information that will be synced: Names, Emails, Job Titles, Company, Profile Photos, Phone Numbers, and Address. A red note states: 'Please Note: You need to have admin credentials of your organization's Entra ID account or else have the request approved by administrator for successful connection.' Below the note are 'Close' and 'Next' buttons. The background shows the 'Integrations' section of the app with a search bar and a list of integrations including 'Microsoft teams'.

Post-Configuration Options

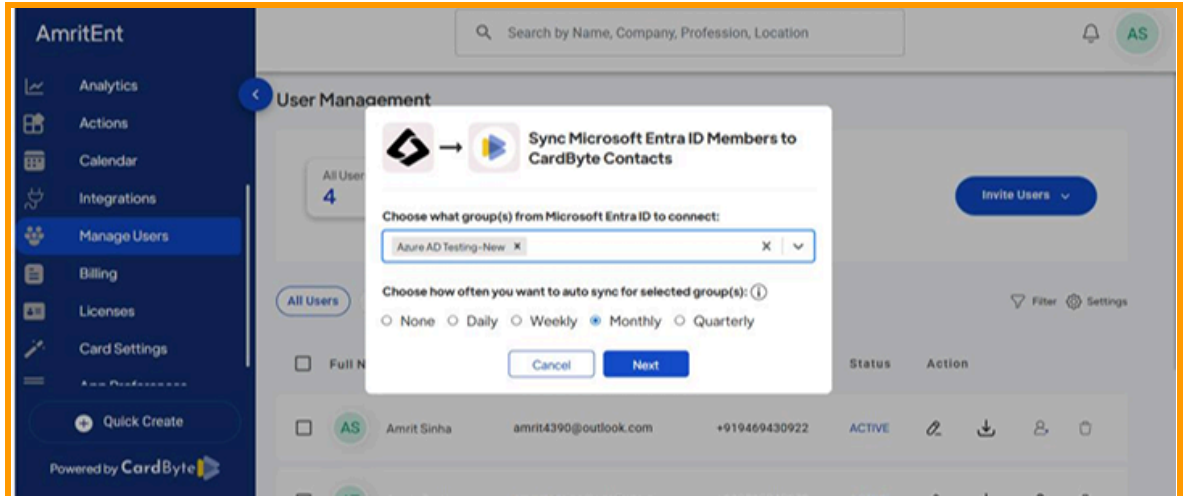
- Once configured: The Edit button becomes enabled, allowing changes to the group and sync frequency.
- The Test Connection button checks the connection status.
- The Change Account button allows you to disconnect the current account and connect to a different Azure AD account.



Inviting Users from the Manage Users Page

You can also invite users via the Manage Users page:

- (a) Navigate to Manage Users from the left navigation panel.
- (b) Click the Invite Users dropdown button.
- (c) Select Sync with Microsoft Entra ID.
- (d) Choose the group and tap Next.
- (e) Tap Send Invite to complete the process.



Azure Account Configuration Requirements

To enable integration, ensure the following on the Azure account:

- Create the necessary Azure AD groups containing the users you want to sync with CardByte.

Logging in with a Microsoft Account

Users can log in directly using the "Log In With Microsoft" option available on the login page.

