

pivot

O365 Integration



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Introduction

O365 integration with pivot streamlines the service scheduling workflow, saving time and effort in scheduling resources to service a room.

When an incident is triggered in pivot, the room resource calendar data is pulled by pivot. All available time slots within business hours for a 2-day period from the incident trigger are identified and stored. Then the incident notification email is sent to users, the client and the service provider, based on notification preferences. The incident notification will include the available timeslots, thereby allowing the service provider to secure an open time slot for troubleshooting efficiently.

This Guide will walk you through the process of enabling calendar data to be shar between Microsoft to pivot.

Please review “Who this is for” and “What You Need Before Starting” before beginning, and if any questions arise, please do not hesitate to reach out to your pivot Integration Specialist or to contact support@pivotnow.io

Who is this for

- Microsoft Teams integration is a Client level integration.
- Note: It is not possible to integrate O365 Calendar from a Service Provider or Subcontractor account.

What is needed before starting

- A pivot account with “Admin” permission
- A Microsoft Admin Account that has:
 - Access to the room booking calendar
 - Permissions to generate a “Service” Account

What permissions are required are required for this integration

- Calendars.Read.Shared - Read user and shared calendars
- Calendars.ReadBasic - Read basic details of user calendars
- Place.Read.All - Read all company places
- User.Read - Sign in and read user profile

What data is utilized

- Rooms
 - name
 - email
- Calendars
 - name
 - id

- **Events**
 - subject
 - start
 - end
 - organizer [Future]
 - attendees [Future]
 - locations
 - originalStartTimeZone
- **Mailbox Settings**
 - Timezone

Note: Data synced may be periodically updated to enhance monitoring and incident workflows.

Setup Walkthrough

This Guide provides instructions for creating a Microsoft Office Service Account and configuring your pivot portal for O365 Integration.

Step 1: Create a service account

- Login into the Office 365 administrator account.
- Click on the app launcher icon and the Admin.
- On the left menu, click Users, then select Active Users.
- Click Add a User.
- Set the Display Name to pivot. Set the Username to pivot.
- Select "Let me create the password" and enter a password. Also, you need to uncheck "Require this user to change their password when they first sign in".
- Click through the steps and click Finish Adding at the end.

Step 2: Share organizational calendar

- Navigate to the Office 365 Calendar.
- Click the Share button at the top of the screen.
- Send a share invite to the email address of the service account you created in Step 1 (pivot@your-domain-name.com). This will allow your service account to view rooms and events in your calendar.
- Ensure that the share details are set to Can View All Details. This is necessary so that pivotnow.io knows who the meeting host is in the event of a technical issue.
- After that, you need to sign in to outlook with the service account credentials, navigate to your mailbox and accept the invite.

Step 3: Sign into pivot and connect the service account

- Use a separate browser (incognito/private) to avoid automatic Microsoft logins.
- Log into your Client Admin pivot account.
- Navigate to the "Integrations" tab on the left.
- Select "Continue" under Microsoft: Office 365 Scheduling.

- Navigate through the Steps, and on Step 3, click on “Sign In to Office 365”
 - Sign into your newly created service account using the previous link. This will automatically perform a sign-in in the current window, make sure you are signed in to the service account created in the previous step.
- Permission Requests will pop up for approval. Detailed description of why those permissions are requested is located at the bottom of this document.
- The page will refresh at this point.

Step 4: Select Calendar

- Select “Connect” again on the Microsoft: Office 365 Scheduling.
- Under Calendar Name, select the Calendar that correlates to the Room booking Calendar.
- Under Location, select the Site Location that this calendar correlates to.
- Select “Next”.

Step 5: Calendar Room Automapping

- pivot will review the calendar to pair up the Calendar Room Names to the pivot Room Names. You can make edits and changes after the initial setup. Select “Yes” if the rooms automapping is sufficient, or if you would like to manually map all your rooms, select “No”
- Select “Next”.

Step 6: Automated Scheduling

- To enable to Automated Scheduling aspect, Select “Yes”. If you would like to hold off for now, you can select “No”.
- Select “Next”.

Step 7: Final Completion

- To finalize the Automatic Scheduling, navigate into your Integrations Tab, and under Microsoft Office 365 Scheduling, select “Manage”.
- Complete any Rooms to Map with your Schedule.
- Select “Complete Service Provider Profile” button.
- Enter your Service Provider details and SLA’s for each location.