Set up Claritalk Enterprise SSO and user management

With this guide, you connect Claritalk to your organization's Microsoft environment. Plan for approximately 20 minutes. You'll need two browser tabs open: the **Sign in & SSO** page in Claritalk and the **Microsoft Entra admin center**.

What you'll achieve

Component	What it does	Required?
Connect Microsoft environment (step 1)	Claritalk knows which Microsoft environment belongs to your organization	Yes, always first
User management via Entra (steps 2 to 4)	Colleagues you assign to Claritalk in Entra automatically get an account. Those you remove lose access in Claritalk too	Recommended
Require sign in via Microsoft (step 5)	Colleagues can only sign in with their Microsoft account	Optional

Terminology

- **Microsoft Entra ID**: Microsoft's service where your organization manages its users and their access (formerly Azure Active Directory).
- **Enterprise application**: an app in Entra where you control which users get access to another application, here Claritalk.
- **Provisioning**: Entra automatically creates, updates and disables accounts in Claritalk. In Claritalk this is called **User management**.
- **Connection key**: the address and secret key that allows Entra to communicate with Claritalk.

What you need

- Enterprise SSO is activated for your organization by Claritalk. If you don't see **Sign in & SSO** in the admin panel, contact your account manager.
- In Claritalk: an administrator account for your organization.
- In Entra: the role **Cloud Application Administrator**, **Application Administrator** or **Global Administrator**. If unsure, check with your IT administrator.

- A Microsoft **work account** in that environment, with the same email address as your Claritalk account.

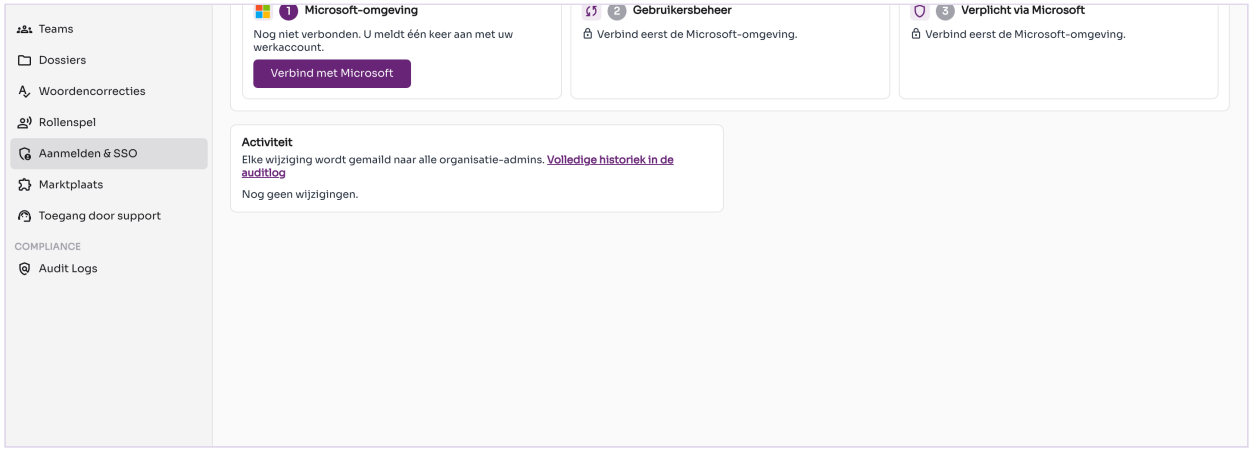
Overview of the process

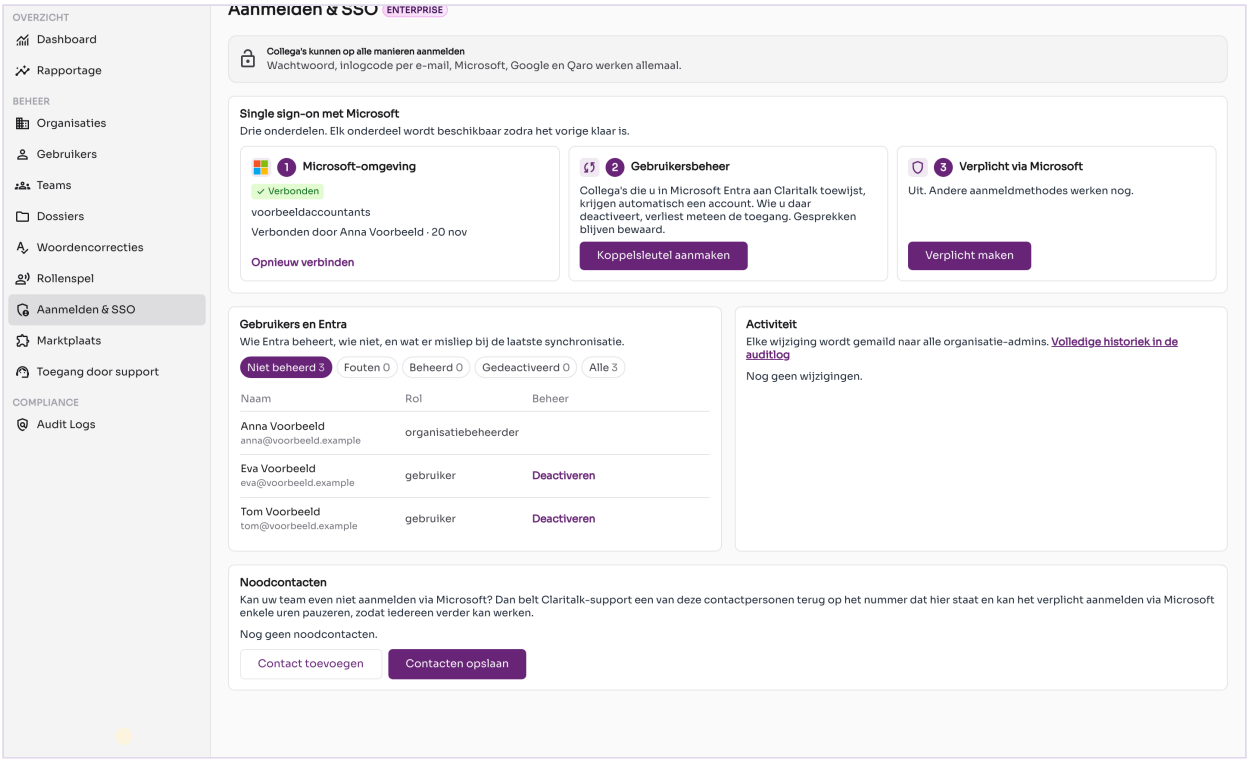
1. Claritalk: connect your Microsoft environment.
2. Entra: create an app for Claritalk.
3. Claritalk and Entra: create the connection key and paste it in Entra.
4. Entra: choose who gets access, test and start.
5. Claritalk: verify, and optionally require sign in via Microsoft.

Step 1 — Claritalk: connect your Microsoft environment

You sign in once with your Microsoft work account. This tells Claritalk which Microsoft environment belongs to your organization and makes User management and Require via Microsoft available.

1. Sign in to Claritalk and open the **admin panel**.
2. In the left menu, choose **Sign in & SSO**. You'll see three components side by side: **Microsoft environment**, **User management** and **Require via Microsoft**.
3. At **Microsoft environment**, click **Connect with Microsoft**.
4. Sign in with your Microsoft **work account**, not a personal account (such as @outlook.com or @hotmail.com).
5. Does Microsoft ask for permission for Claritalk? Check **Consent on behalf of your organization**, if that option appears, and click **Accept**.
6. You'll return to Claritalk automatically. At Microsoft environment you now see **Connected**, with your environment name and your name.



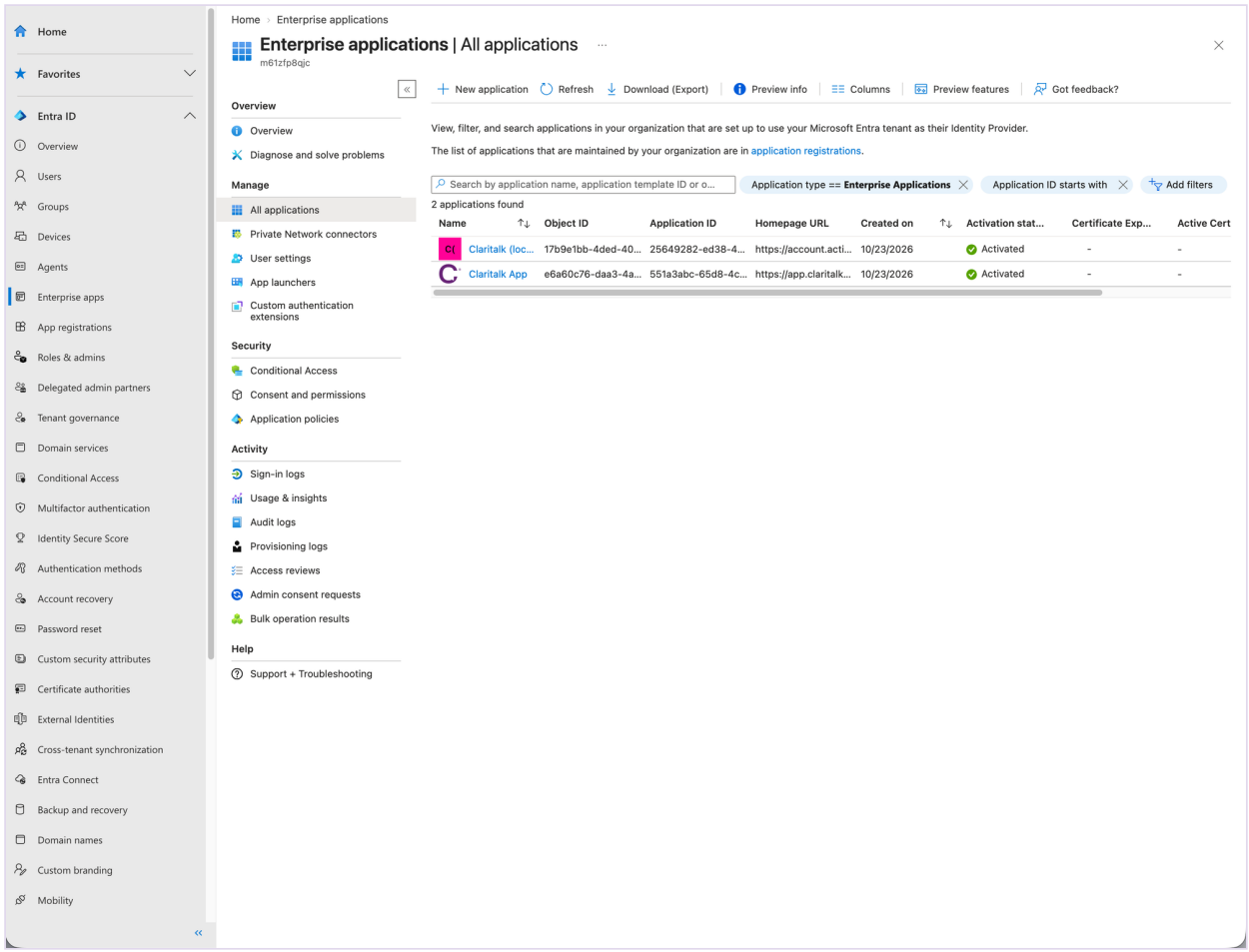


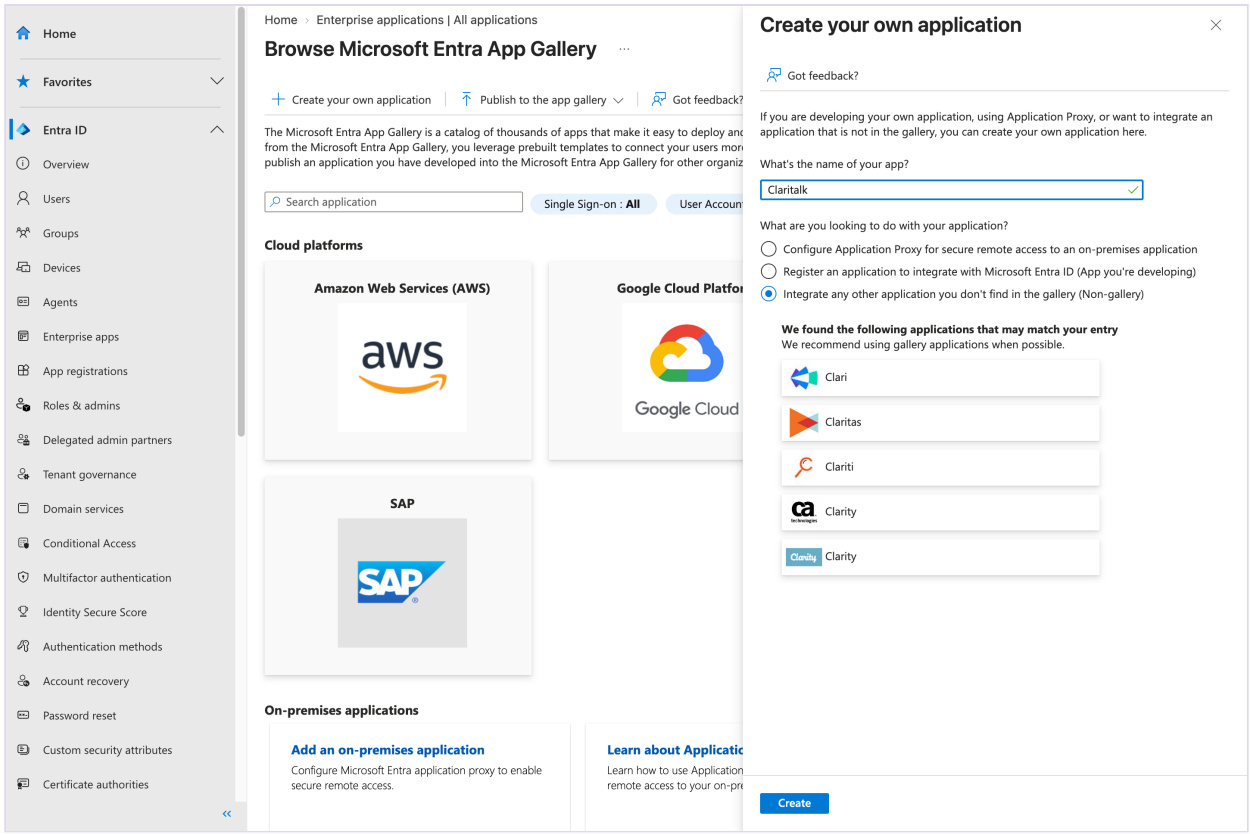
Do you only want colleagues to sign in with Microsoft? Then you don't need to do anything else in Entra: that works via Claritalk's app, which you just authorized. Go straight to step 5.

Step 2 — Entra: create an app for Claritalk

In this app you'll control which colleagues get a Claritalk account. The Entra admin center is usually in English; button names appear below as you'll see them.

1. Open the Microsoft Entra admin center in a new tab and sign in.
2. In the left menu, go to **Entra ID** > **Enterprise apps**.
3. At the top, click **New application**.
4. On the page that opens, at the top click **Create your own application**. A panel slides in on the right.
5. At **What's the name of your app?**, enter **Claritalk**.
6. Choose the third option: **Integrate any other application you don't find in the gallery (Non-gallery)**. This is usually already checked.
7. At the bottom, click **Create**. After a few seconds, the new app opens.





Watch out for two pitfalls

- Below the name, Entra suggests apps like *Clari* or *Clarity*. These are other products. Don't click them; just click **Create**.
- Do **not** choose the second option, *Register an application to integrate with Microsoft Entra ID (App you're developing)*. That gives you a form with account types and a redirect URI, and the app later can't send users to Claritalk. The same applies to an app under **App registrations**. Already done? Delete that app and start over at step 3.

Step 3 — Claritalk and Entra: create the connection key and paste it

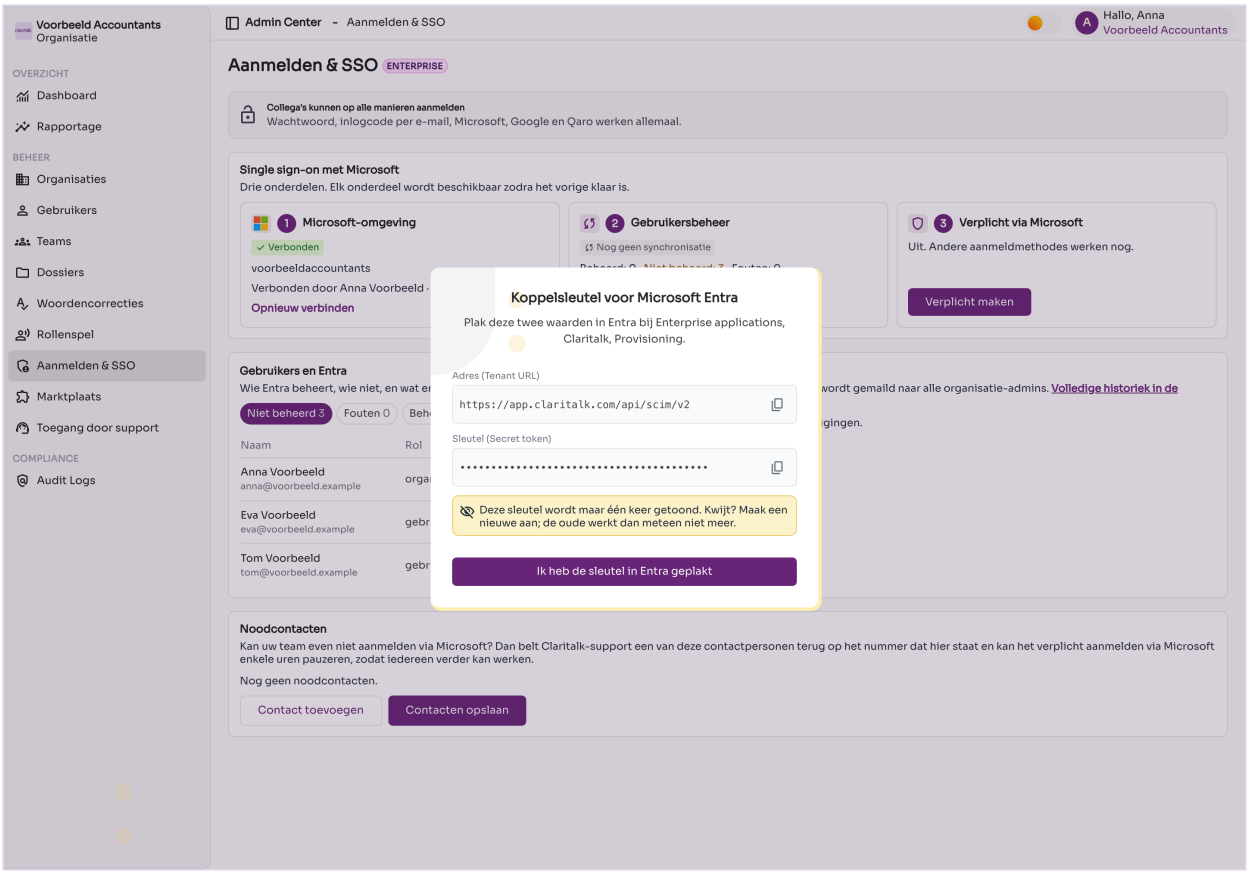
The connection key consists of two values: an **address** and a secret **key**. Claritalk shows the key **only once**. Keep both tabs open and paste it in Entra right away.

In Entra: open the screen where the key goes

1. In the **Claritalk** app you created in step 2, in the left menu, choose **Provisioning**.
2. On the **Get started** tab, click **Connect your application**. The **Connectivity** page opens.
3. At **Select authentication method**, choose **Bearer authentication**.

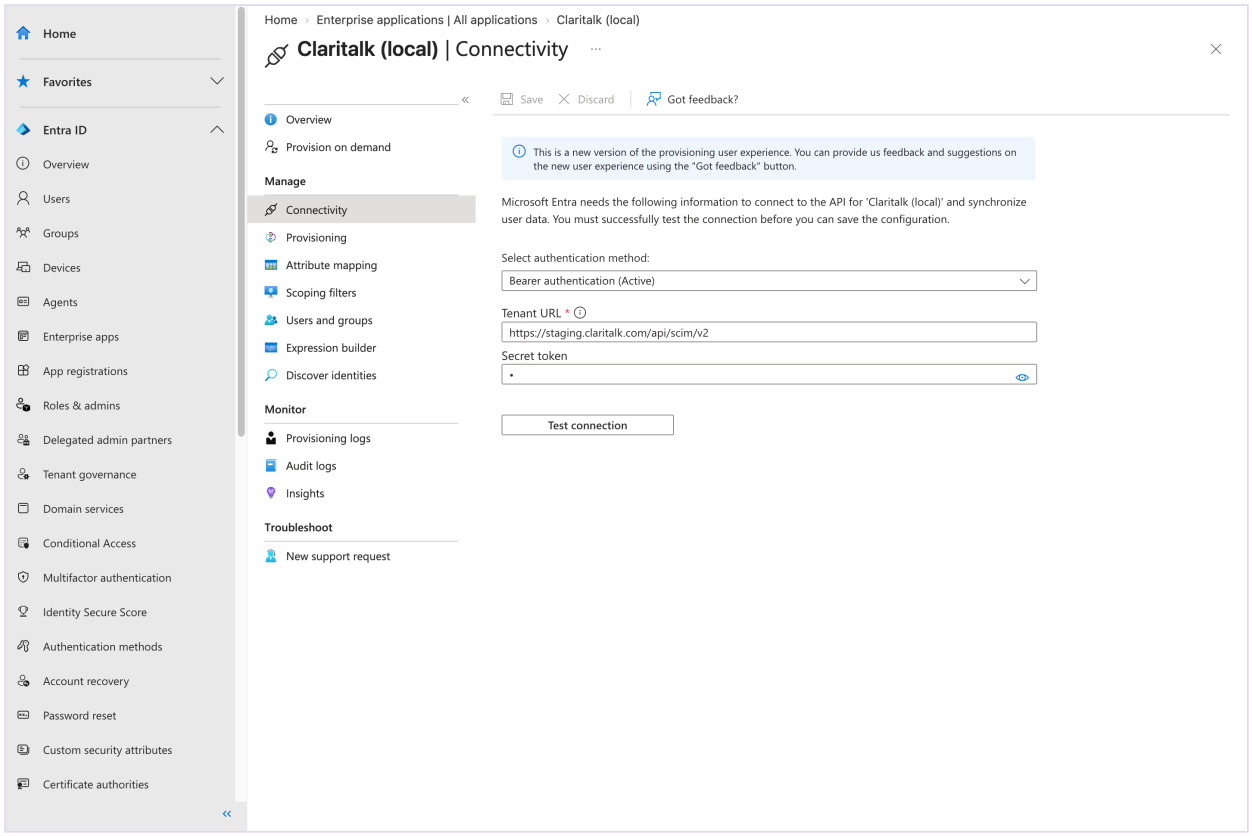
In Claritalk: create the key

1. Go to the Claritalk tab, page **Sign in & SSO**.
2. At **User management**, click **Create connection key**. A window opens with two values: **Address (Tenant URL)** and **Key (Secret token)**. Don't close this window yet.



In Entra: paste the key and test

1. In Claritalk, copy the **Address** with the copy icon and paste it in Entra at **Tenant URL**.
2. In Claritalk, copy the **Key** and paste it in Entra at **Secret token**.
3. In Entra, click **Test connection**. After a few seconds, Entra confirms the connection succeeded.
4. At the top, click **Save**.
5. Go back to Claritalk and in the window click **I pasted the key in Entra**.



The key grants access to your organization's accounts: don't share it in emails, chats or screenshots. Closed the window too early or lost the key? In Claritalk, at User management click **New key** and paste it again in Entra. The old key stops working immediately.

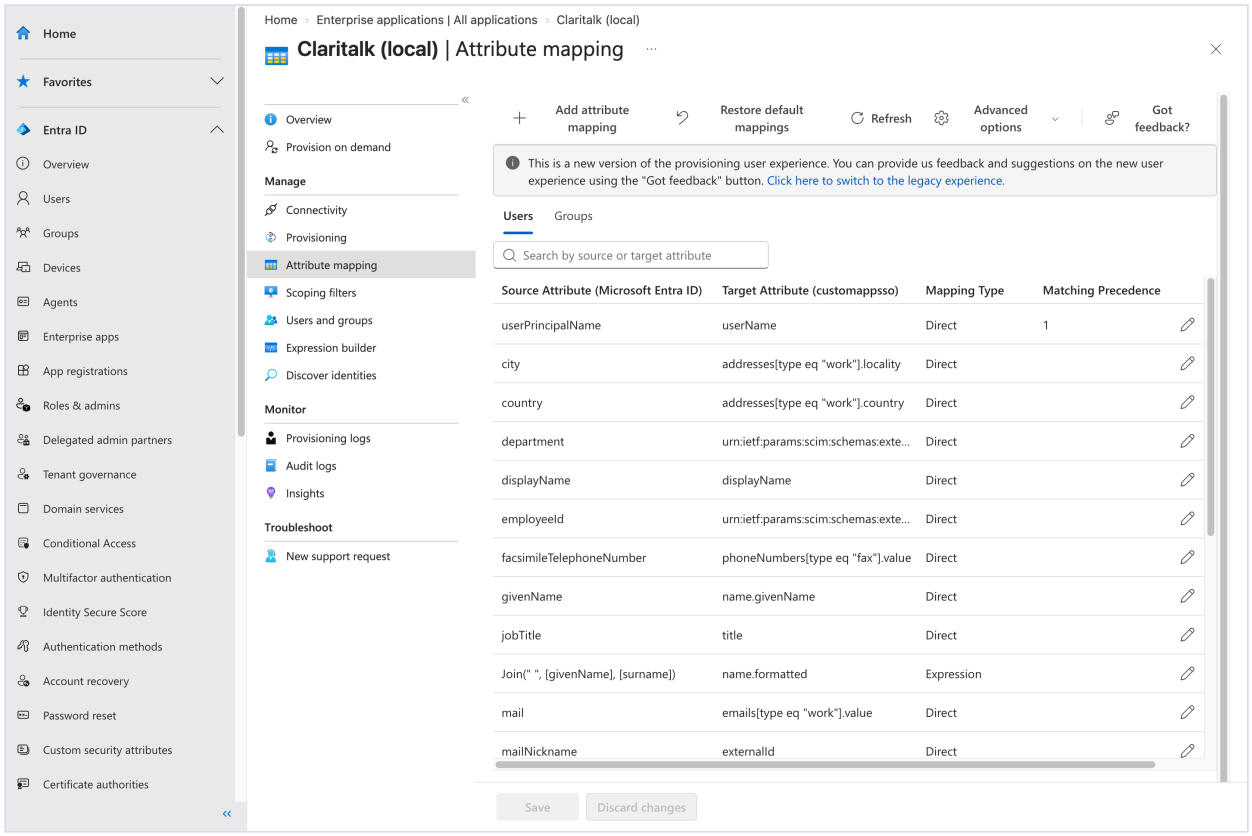
Step 4 — Entra: choose who gets access, test and start

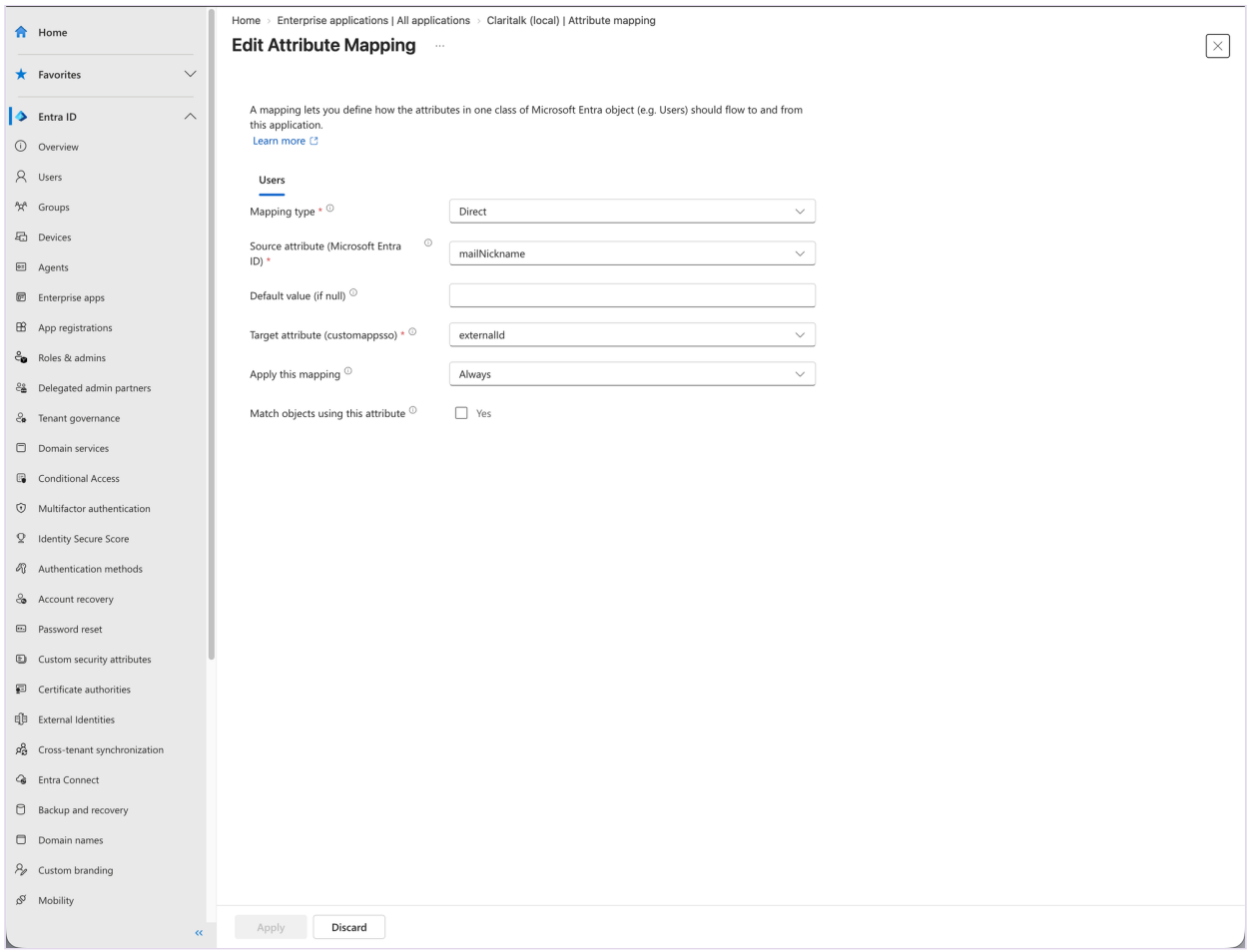
Everything in this step happens in the **Claritalk** app in Entra. Do the parts in this order.

a. Stably link users (recommended, before assigning users)

By default, Entra links a user to Claritalk via the *mailNickname*, the part of the email address before the @. This can change, for example with a name change. The *objectId* never changes and is thus the safer choice.

1. In the left menu, choose **Attribute mapping** and open the **Users** tab.
2. Scroll to the row where the Target Attribute column shows **externalId**. On the left is **mailNickname**.
3. On the right, click the pencil icon for that row. The **Edit Attribute Mapping** window opens.
4. At **Source attribute**, choose **objectId** instead of mailNickname. Leave the other fields as they are.
5. At the bottom, click **Apply**, and then back in the list, click **Save**.

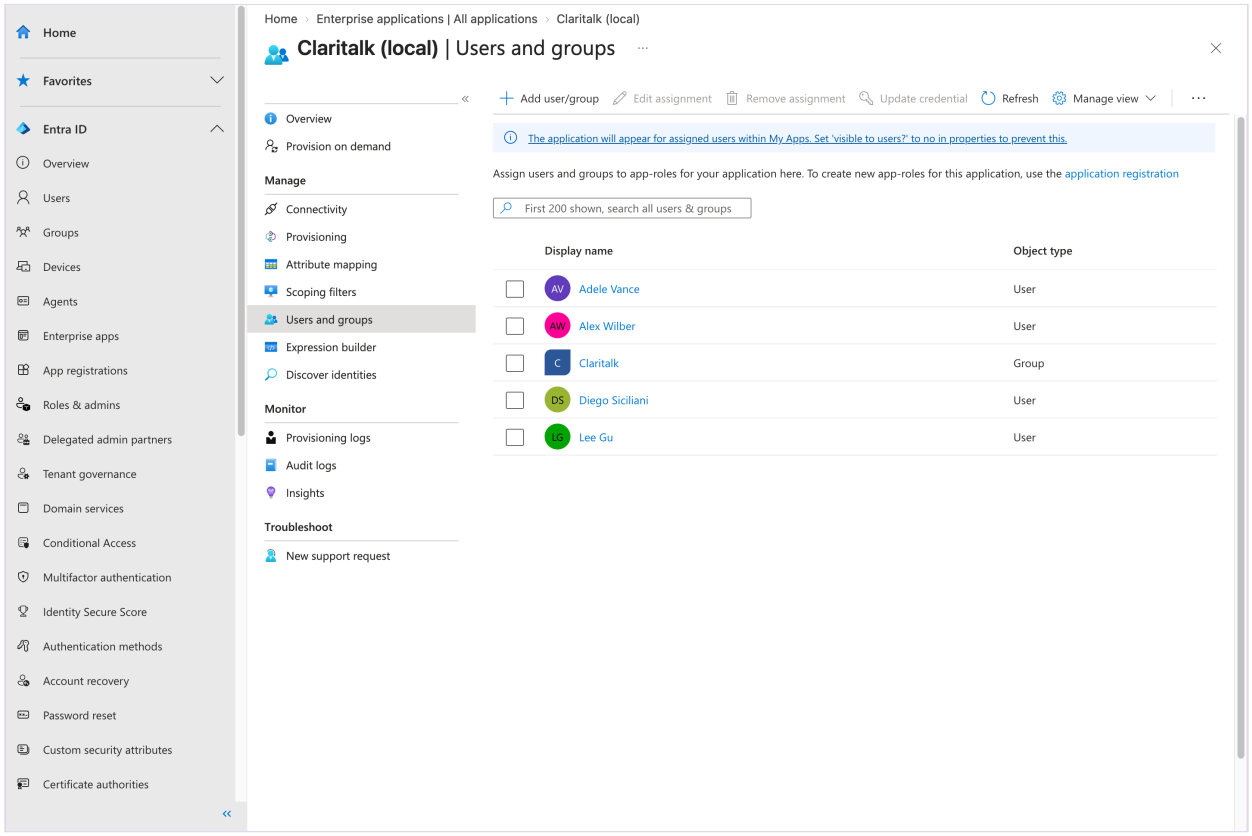




b. Assign colleagues

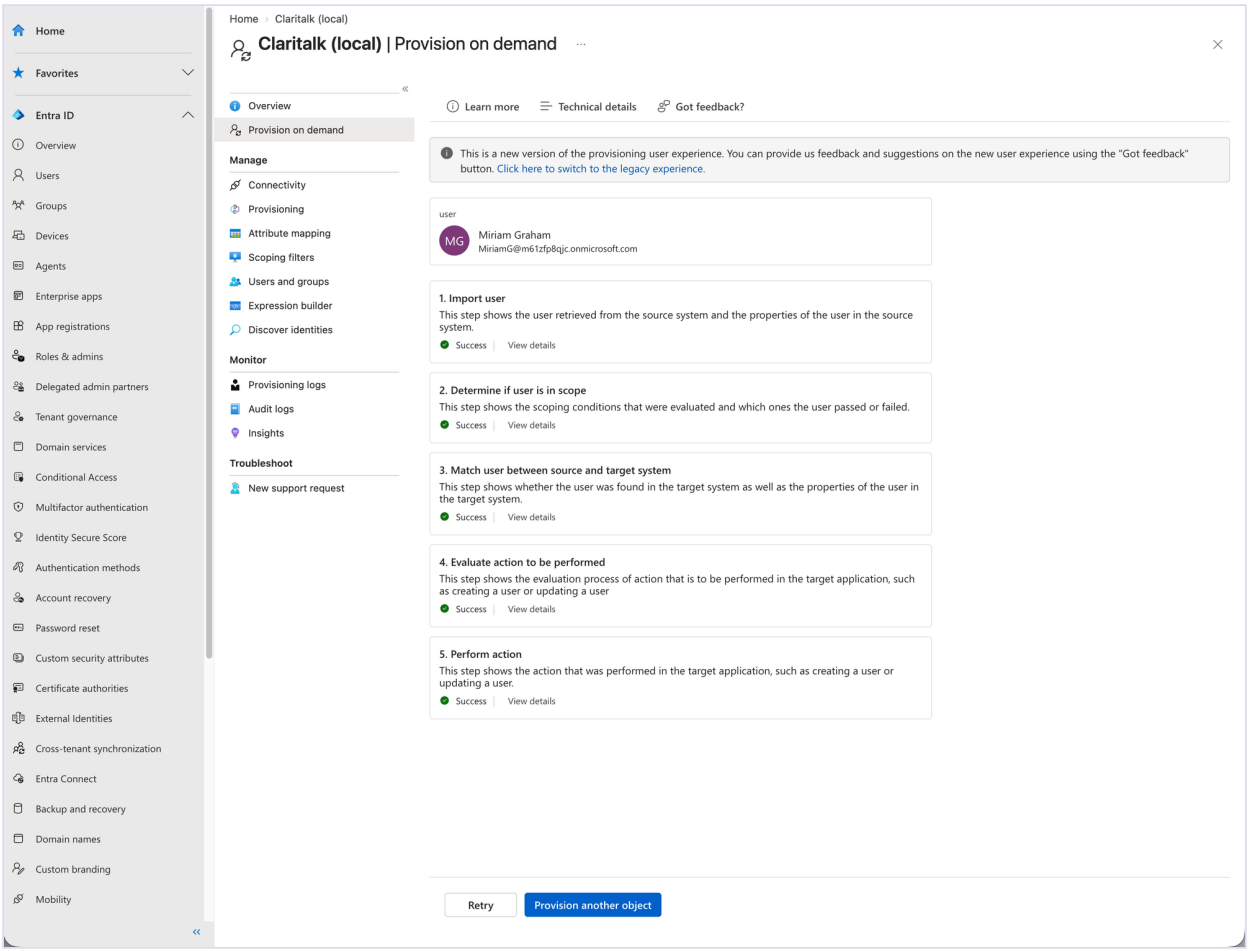
1. In the left menu, choose **Users and groups** and click **Add user/group**.
2. At Users, click **None Selected**, check the colleagues who should use Claritalk and click **Select**.
3. Click **Assign**.

Assign individuals, not groups: Claritalk creates accounts per person.



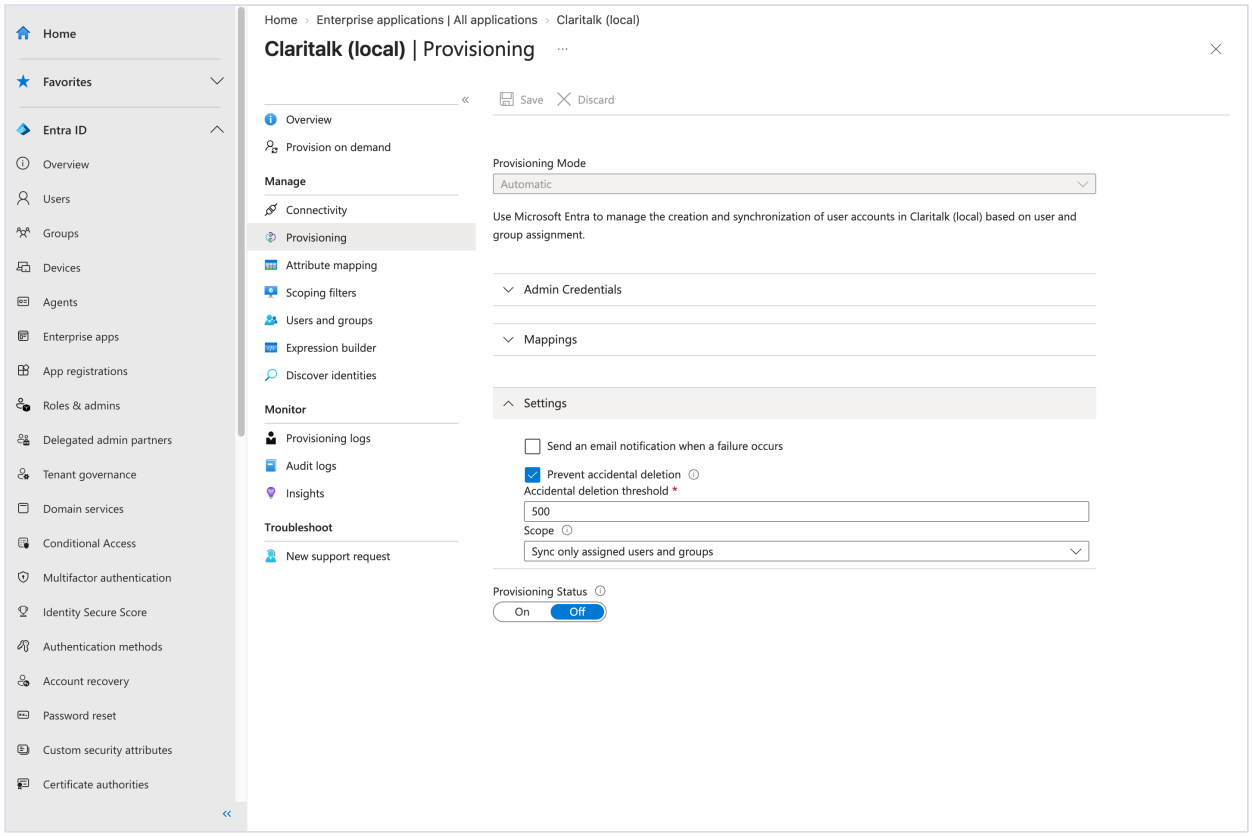
c. Test with one colleague

1. In the left menu, choose **Provision on demand**.
2. Search for a colleague you just assigned and click **Provision**.
3. After a few seconds you'll see five steps, each showing **Success**. In Claritalk, that colleague now has an account and will receive a welcome email. If a step shows an error, click **View details** and see Troubleshooting.



d. Start

1. In the left menu, choose **Provisioning** and open **Settings**.
2. Check that **Scope** is set to **Sync only assigned users and groups**. This ensures only colleagues you assign get an account.
3. Set **Provisioning Status** to **On** and at the top click **Save**.

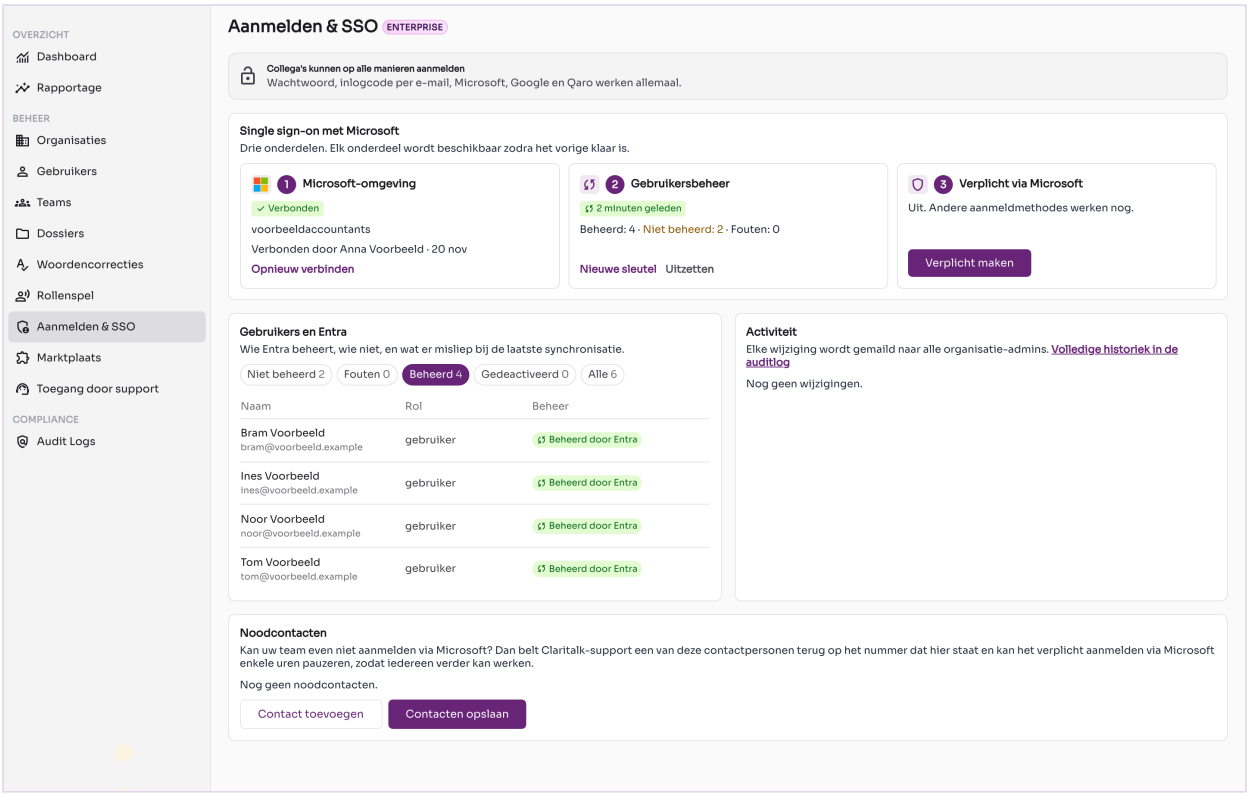


From now on, Entra keeps Claritalk in sync, roughly every 40 minutes. If you later assign a colleague, change a name or disable someone in Entra, Claritalk updates automatically. The first round may take a bit longer.

Step 5 — Claritalk: verify and require sign in via Microsoft

a. Verify that your colleagues arrive

1. In Claritalk, open **Sign in & SSO**.
2. At **User management**, you see when Entra last sent something, and how many colleagues are **Managed** (by Entra) and **Unmanaged**.
3. In the **Users and Entra** list, click **Managed**. The colleagues you assigned in Entra appear here with **Managed by Entra**. Colleagues who already had a Claritalk account with the same email address are linked and not duplicated.
4. If something appears under **Errors**, you'll see per colleague what went wrong (see Troubleshooting).



When you remove a colleague from the app in Entra or disable their account, that colleague will lose access to Claritalk too at the next sync round. Their conversations remain saved.

b. Add emergency contacts (do this before requiring sign in)

If Microsoft has an outage, no one in your organization can sign in. Claritalk support will then call one of your emergency contacts and can pause required sign in for a few hours.

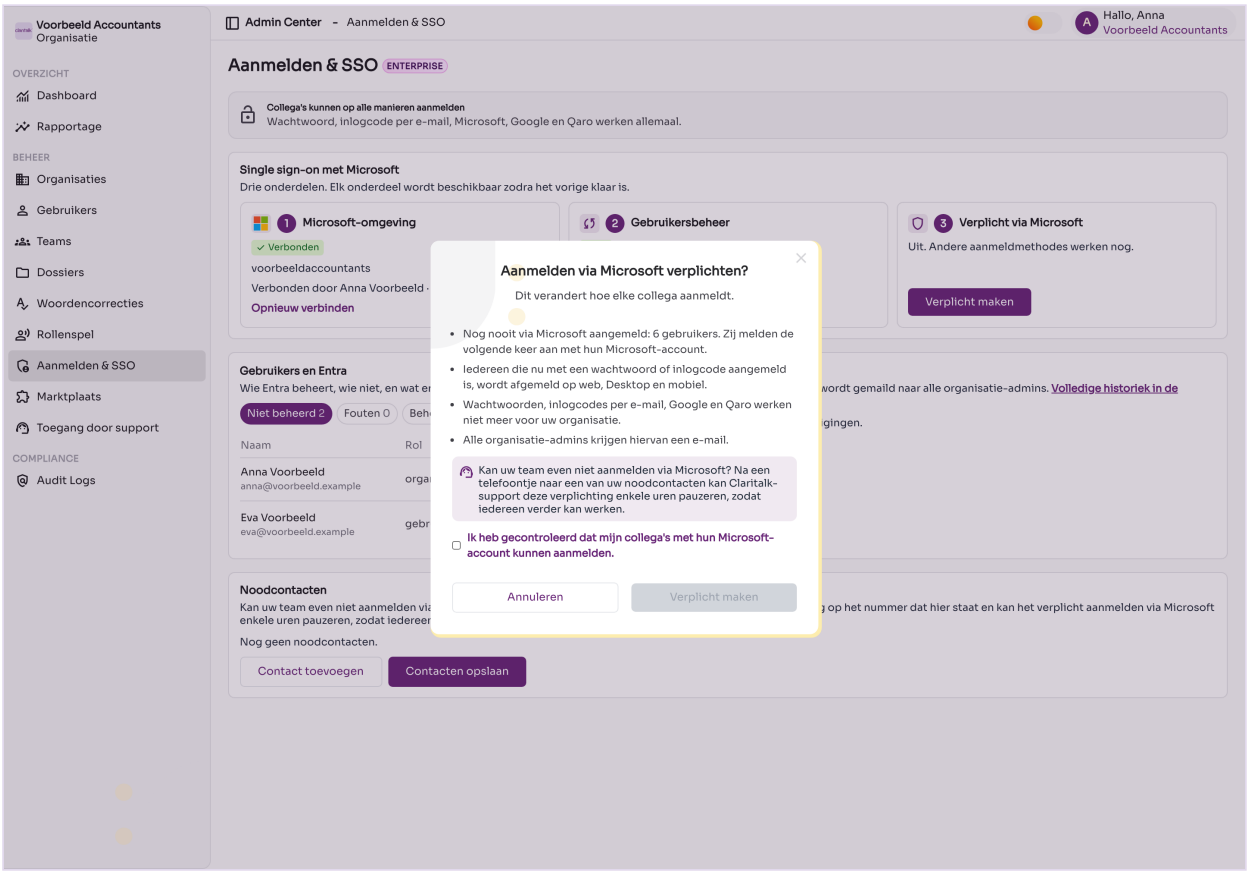
1. At the bottom of the page, at **Emergency contacts**, click **Add contact**.
2. Enter name, role and phone number. Preferably add two people.
3. Click **Save contacts**.

c. Require sign in via Microsoft (optional)

After this, your colleagues can only sign in with their Microsoft account, on web, Desktop and mobile. First check that **every colleague** in Claritalk has a Microsoft account in your environment with the **same email address** as in Claritalk. Anyone without it won't be able to sign in after this step.

1. At **Require via Microsoft**, click **Require**.
2. If you haven't signed in with Microsoft in this session, the window will ask first: click **Sign in with Microsoft**. This ensures you can still access Claritalk afterward.
3. Read what will change. The window also shows how many colleagues have never signed in via Microsoft: they'll do so at their next sign in.

4. Check that you've verified your colleagues can sign in with their Microsoft account, and click **Require**.



What happens then: passwords, login codes via email, Google and Qaro no longer work for your organization, and anyone currently signed in another way will be logged out. All administrators receive an email of every change. You can always reverse this: at Require via Microsoft, click **Turn off**.

Troubleshooting

What you see	Why	What to do
Sign in & SSO is not in the admin panel	Enterprise SSO is not yet activated for your organization, or you're not an administrator	Contact your account manager
"This Microsoft account does not belong to an organizational environment"	You signed in with a personal Microsoft account	Sign in with your work account (step 1)
"Connect the Microsoft environment first"	Step 1 hasn't been completed yet	Do step 1 first

What you see	Why	What to do
In Entra, Provisioning shows a warning and **Get started** is grayed out	The app was created with the wrong option (*App you're developing*) or under App registrations	Delete that app and create it again with the **Non-gallery** option (step 2)
Test connection fails	Address or key pasted incorrectly or incompletely, or a new key was created in the meantime	In Claritalk, click **New key** and paste both values again (step 3)
An assigned colleague does not appear in Claritalk	The colleague is not assigned, Scope is set wrong, Provisioning Status is Off, or the next sync round hasn't happened yet	Check steps 4b and 4d, and use **Provision on demand** to test immediately
A colleague in **Errors** shows: "this email address already belongs to another Claritalk organization"	That email address already has an account in another Claritalk organization	Contact Claritalk support
A colleague you disabled in Entra can still sign in to Claritalk	Entra hasn't sent the change yet	Wait for the next sync round (up to 40 minutes) or use **Provision on demand** for that colleague
A colleague cannot sign in after requiring sign in	That colleague has no Microsoft account in your environment, or a different email address than in Claritalk	Make sure the email address in Entra and Claritalk is the same. If that's not possible right away, temporarily turn off Require via Microsoft
No one can sign in due to a Microsoft outage	Microsoft is unavailable	Call Claritalk support; after checking with your emergency contacts, support can pause required sign in for a few hours

Can't figure it out? Send Claritalk support the exact message and a screenshot (without the key) via the support button in Claritalk or via support@claritalk.com.