

# TD SYNEX Digital Bridge Microsoft Apps Plugin

## Installation Steps

Version 2.0.0

Last Updated 2.12.26

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*TDS Digital Bridge - MS Apps - Install Requirements - v2.0.pdf*

### Access TD SYNEX data where work already happens.

The Digital Bridge | Microsoft Apps Plugin streams live pricing, inventory, order tracking, subscriptions, and the My Business Dashboard straight into Outlook and Teams. One install, one sign-on—no more jumping to EC Express. Quote faster, resolve order questions, and reach your TD SYNEX contacts without ever leaving your inbox or chat.

### How the Plugin Shows Up

Surface	What users see	Why it matters
Personal App (Outlook sidebar & Teams left rail)	Full panel with Part Search, Order Status, My Business Dashboard, Subscriptions, and Contacts.	One click to all critical data—follows the user across Outlook, Teams (desktop, web, mobile).
Tabs (Teams channels, chats, meetings)	Pin any plugin view (e.g., live order board) at the top of a workspace.	Keeps project stakeholders aligned without extra logins.

*Note: The plugin does not post proactive messages today; message-extension support is on the roadmap.*

### Permissions Requested at Install

The unified manifest requires the **least-privilege** Graph scopes needed to operate in both Outlook and Teams:

1. **User profile** – Read basic info (name, email) to personalize the panel.
2. **Team / chat metadata** – Read channel or chat name and roster so the plugin can load participant-specific pricing or contacts.
3. **Message content (user initiated)** – Access text the user selects (e.g., PO # or Part #) to run a search; no background mailbox access.

4. **Send and receive data to TD SYNEX APIs** – Secure outbound HTTPS calls for pricing, inventory, order status, and dashboard metrics.

**Note:** The plugin is **multi-tenant**; once an admin grants consent in either Teams Admin Center or Microsoft 365 › Integrated Apps, Outlook and Teams are both covered. No separate Outlook approval is required.

## User Installation Steps

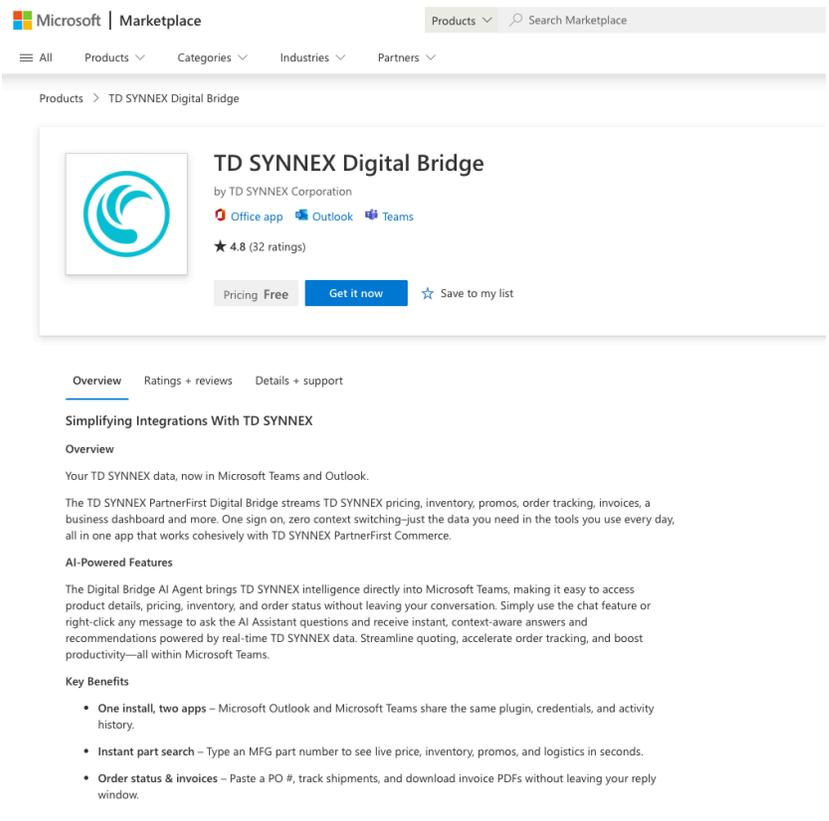
### 1. Accessing the App Install Page

**Locate the Plugin:** Open [Microsoft AppSource](#) and search for “TD SYNEX Digital Bridge.”

**Click ‘Get it Now’:** On the app detail page, click the “Get it now” button to initiate the setup process.

Direct URL:

<https://appsource.microsoft.com/en-us/product/office/WA200008050>



The screenshot shows the Microsoft AppSource interface for the TD SYNEX Digital Bridge app. The page header includes the Microsoft logo and 'Marketplace' text, along with navigation menus for 'Products', 'Categories', 'Industries', and 'Partners'. The main content area displays the app's name, 'TD SYNEX Digital Bridge', by TD SYNEX Corporation, with icons for Office app, Outlook, and Teams. It shows a 4.8 star rating from 32 reviews and a 'Get it now' button. Below the app details, there are tabs for 'Overview', 'Ratings + reviews', and 'Details + support'. The 'Overview' section is active, featuring a heading 'Simplifying Integrations With TD SYNEX' and an 'Overview' sub-section. The text describes how the app streams TD SYNEX data into Microsoft Teams and Outlook. It also lists 'AI-Powered Features' and 'Key Benefits'.

Microsoft | Marketplace

Products > TD SYNEX Digital Bridge

TD SYNEX Digital Bridge

by TD SYNEX Corporation

Office app Outlook Teams

★ 4.8 (32 ratings)

Pricing Free Get it now Save to my list

Overview Ratings + reviews Details + support

#### Simplifying Integrations With TD SYNEX

##### Overview

Your TD SYNEX data, now in Microsoft Teams and Outlook.

The TD SYNEX PartnerFirst Digital Bridge streams TD SYNEX pricing, inventory, promos, order tracking, invoices, a business dashboard and more. One sign on, zero context switching—just the data you need in the tools you use every day, all in one app that works cohesively with TD SYNEX PartnerFirst Commerce.

##### AI-Powered Features

The Digital Bridge AI Agent brings TD SYNEX intelligence directly into Microsoft Teams, making it easy to access product details, pricing, inventory, and order status without leaving your conversation. Simply use the chat feature or right-click any message to ask the AI Assistant questions and receive instant, context-aware answers and recommendations powered by real-time TD SYNEX data. Streamline quoting, accelerate order tracking, and boost productivity—all within Microsoft Teams.

##### Key Benefits

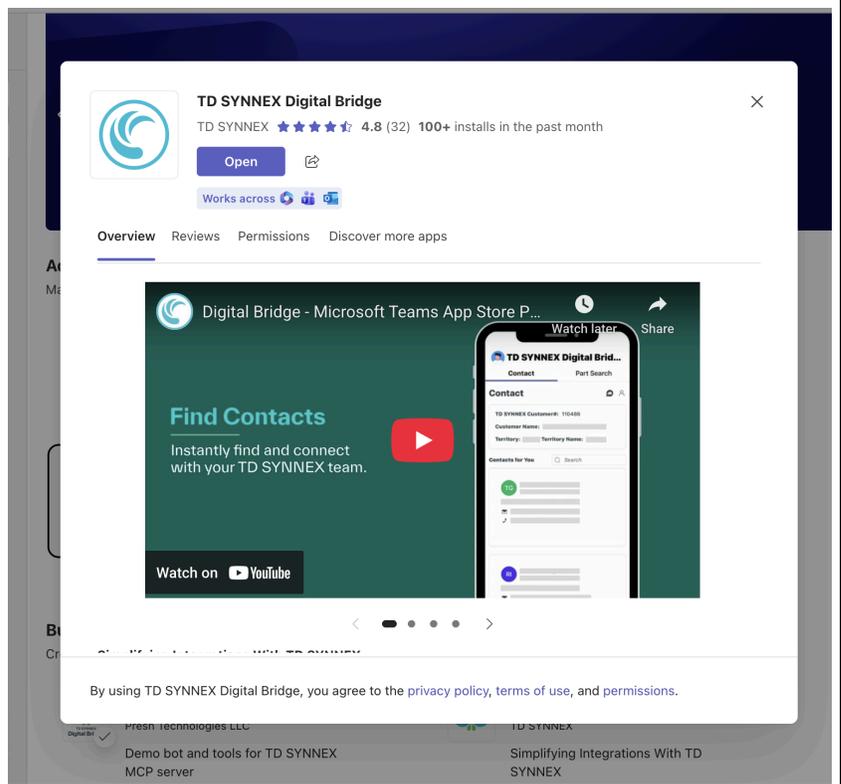
- **One install, two apps** – Microsoft Outlook and Microsoft Teams share the same plugin, credentials, and activity history.
- **Instant part search** – Type an MFG part number to see live price, inventory, promos, and logistics in seconds.
- **Order status & invoices** – Paste a PO #, track shipments, and download invoice PDFs without leaving your reply window.

## 2. Setting Up the Connector

Once the app opens, follow any on-screen prompts to set up the connector. This process typically involves:

Selecting your organization.

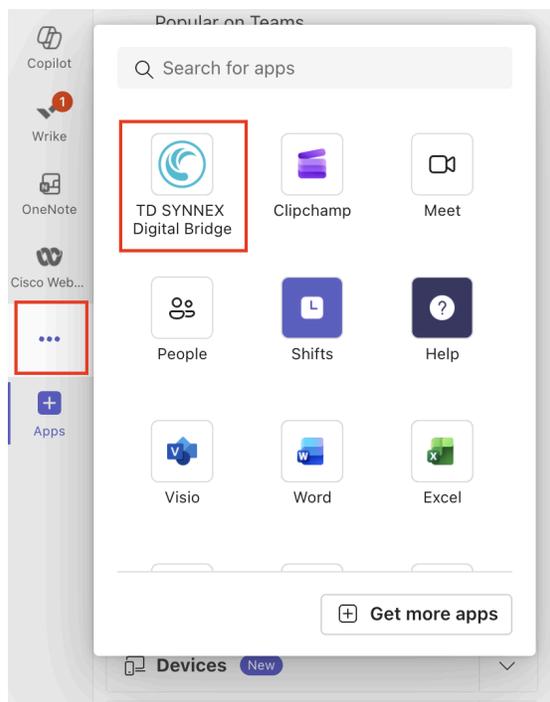
Granting permissions for the plugin to connect to your Microsoft Teams account.



## 3. Pinning the Plugin for Quick Access

### Access the Plugin:

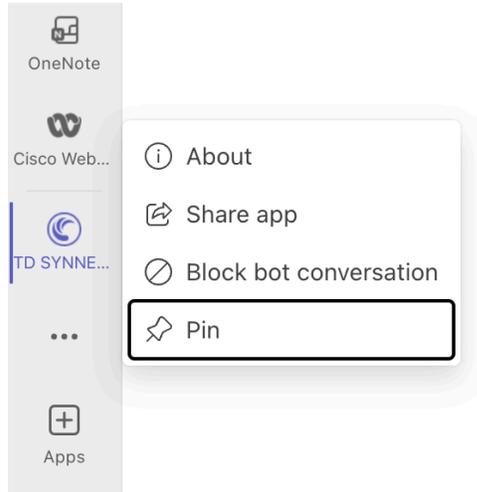
After setup, locate the plugin in your Microsoft Outlook or Teams interface by clicking on the three dots (...) in the left-hand navigation bar.



### 3. Pinning the Plugin for Quick Access (cont.)

#### Pin the Plugin:

Right-click on the plugin name and select “Pin” from the context menu. This action will add the plugin to your sidebar for easy access.

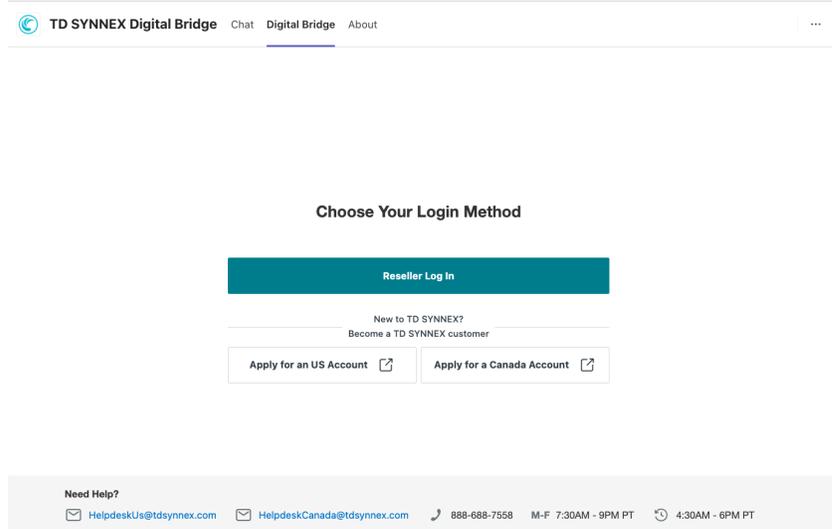


### 4. Authenticating with TD SYNNE X

#### Access the Plugin:

Click the pinned plugin in the sidebar.

Click ‘Reseller Log In’ on the initial page.



### 4. Authenticating with TD SYNNE X (cont.)

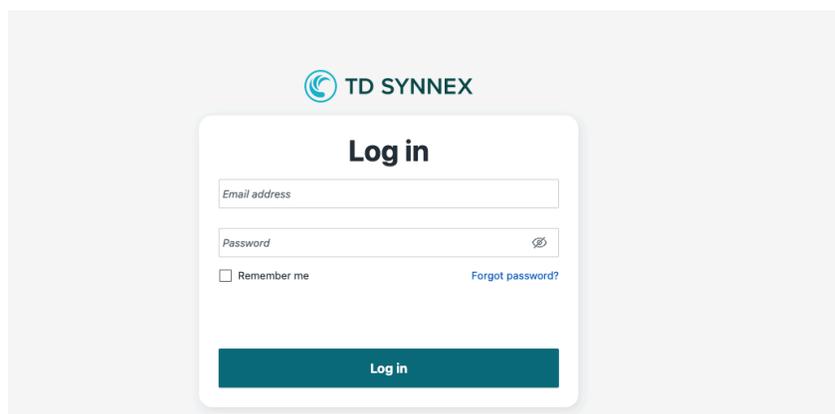
#### Sign-In Page:

You will be directed to the EC Express sign-in page.

Enter your login credentials associated with your TD SYNNE X account.

#### Verify Login:

Once successfully logged in, you can begin using the app.



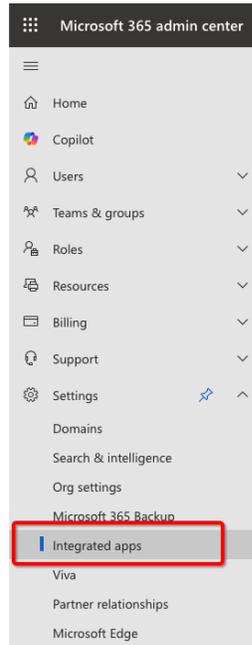
# Microsoft Apps Admin Instructions

Steps for how you can allow the TD SYNEX Digital Bridge app for your organization in Microsoft 365 Admin center.

Navigate to [Integrated Apps](#) in the Microsoft 365 Admin center.

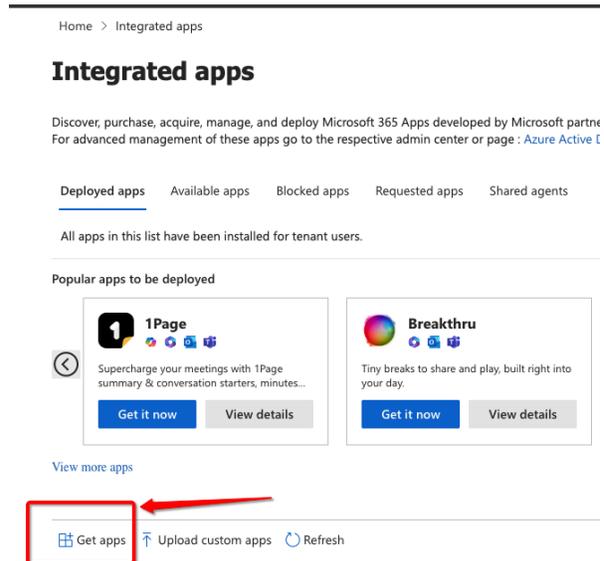
Microsoft 365 admin center > Settings > Integrated apps

<https://admin.microsoft.com/?&source=applauncher#/Settings/IntegratedApps>



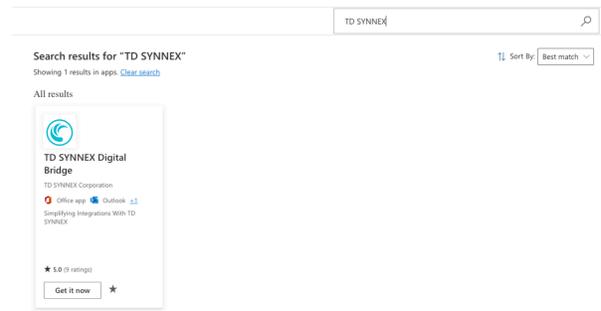
Click 'Get apps'

- Once on the Integrated Apps page, select 'Get apps' at the top of the app table that shows already installed apps



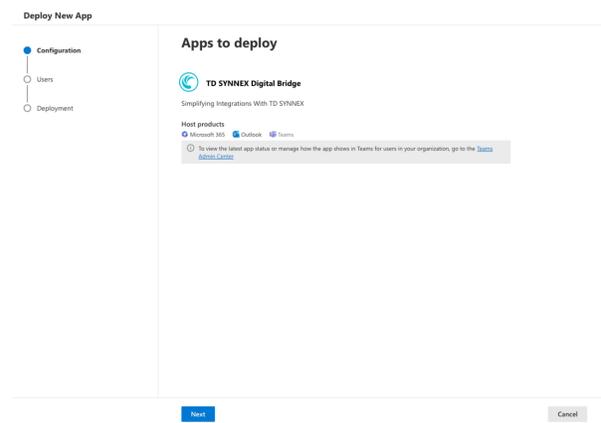
## Search for TD SYNEX Digital Bridge

Once searching, click 'Get it now'



## Deploy New App

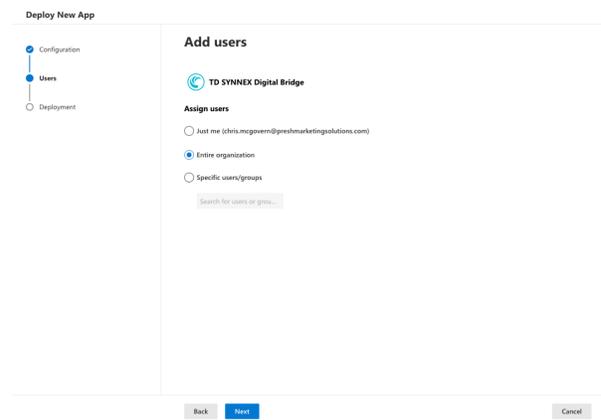
Follow the steps to accept permissions and grant access to the new Microsoft Plugin for TD SYNEX Digital Bridge.



## Approve Access by Org, Group, or Users

Determine if your entire organization, specific groups, or specific users are able to access the plugin.

Any user with access will still be required to enter their TD SYNEX EC Express credentials to login once they have installed the plugin.



# Eligibility to Add the Plugin

To install and use the TD SYNEX Digital Bridge plugin in Microsoft Teams, users must meet specific permissions and access requirements. This guide outlines the criteria for adding the plugin, including necessary permissions, organizational settings, and profile information.

## User Permissions:

- Users must have the necessary permissions to install apps within Microsoft Teams.
- If organizational policies restrict app installations, only users with admin permissions or those in roles with the ability to install apps can add the plugin.

## Team and Chat Settings:

- The app can be added to group chats, channels, or meetings as a **tab** at the top, so users need to have access to these functionalities in their Teams environment.
- The organization's Microsoft Teams admin center must allow third-party apps or this specific plugin to be installed.

## Personal Access:

- Any individual user with standard permissions in Teams can add the plugin as a **personal app** to keep track of content and information, provided their admin hasn't restricted this feature.

## Profile Information Requirements:

- Users must be willing to grant access to their profile information, including:
  - Name, email address, company name, and preferred language.
- This implies that users within the organization must use Teams with fully configured profiles to allow integration.