

Integrations Module

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1. Integrations: Overview

The **Integrations** module is where you manage all third-party and internal service connections (e.g. AI providers, telephony platforms, payment gateways). Use it to configure credentials, set endpoints, and control which integrations are active per project.

Navigating to Integrations

1. **Open the Sidebar:** Click the “hamburger” icon (☰) in the top-left to expand the main menu.
2. **Locate Integrations MS:** Scroll down to the **Security MS** or **Client Area** section. You’ll see a sub-entry labeled **Integrations MS** (with a puzzle-piece icon).
3. **Enter Integrations:** Click **Integrations MS → Integrations**. The page header updates to “**Integrations**” and you’ll see your list of configured integrations.

List View Layout

Filter & Search Bar (top row):

Type ▼: Opens a dropdown of all integration categories (e.g. Telephony, AI, Payments).

Search...: Live-filters cards by name, URL, or credential key.

Integration Cards:

Each card shows the integration’s icon and name.

On hover, two icons appear in its top-right corner:

☰ **Edit** - Opens the configuration drawer.

🔗 **Copy Link** - Copies a shareable deep link to this integration.

Adding a New Integration

1. **Click + Add** (upper-right corner)
2. **In the “Add integration” drawer** (right side):
 - Project:** Dropdown of your Projects—limits which data context this integration can act on.
 - Type:** Select from predefined types (e.g. **Telephony, AI, Webhook, Payment**).
3. **URL(s):**
 - Click **+ Add** to reveal a blank URL field.
 - Paste or type each endpoint (you can add multiple URLs).
4. **Credentials:**
 - Click **+ Add** to add a new key/value row.
 - Enter the credential name (e.g. `apiKey`, `secretKey`) and its value.
 - Use the trash icon at right to remove any you no longer need.
5. **Save:** The drawer slides closed and your new integration appears as a card.

Editing an Existing Integration


1. **Click** ⇨ **Edit** on any integration card.
2. **In the “Edit integration” drawer:**
You can **reassign Project, change Type, update URLs, or add/remove Credentials** exactly as you did on add.
Fields that have been saved are read-only until you click into them.
3. **Save** to persist your changes.

Filtering & Finding

Type Filter: Click the **Type** dropdown above the cards. Select one or more categories to instantly narrow the list.

Search Box: Enter any substring (integration name, URL fragment, or credential key). Cards filter in real time as you type.

Lifecycle & Best Practices

1. **Scope by Project:** Always assign each integration only to the projects that need it—this reduces blast radius if credentials leak.
2. **Credential Hygiene:** Rotate secrets regularly: open the Edit drawer, overwrite the old value, then click Save. Only users with the **manageOwn** or **manageAll** rights on the Integrations form can view/edit these fields.
3. **Audit & Linkage:** Use the  **Copy Link** icon on any card to paste a direct URL into your runbooks or team chat. If you remove a Project assignment, any services relying on that integration will immediately lose access.

With this walkthrough you'll always know exactly where you are in the UI, which controls to use, and how to keep your integrations organized and secure.

2. Integrations: Telephony

The Integrations module supports telephony providers such as **CommPeak**, **CrocoCalls**, **Voiso**, **Imperitel**, **MomVoip**, **Sancom**, and other SIP-based platforms. Once configured, employees can place outbound calls directly from the Clients module.

Steps to Configure

Navigate to Integrations:

Go to **Integrations MS** → **Integrations**.

Locate the card in the list.

Hover and click the ⇨ **Edit** icon.

Assign Employee Numbers:

In the **Edit integration** drawer, scroll down to the **Employees** section.

From the first dropdown, select the employee who should be able to make calls.

In the field to the right, enter their assigned **phone number**.

Click the + button to save the mapping.

Repeat for additional employees if needed.

Save:

Click **Save** at the bottom-right of the drawer.

The integration now knows which employees are linked to which phone numbers.

Role Permissions

Before calling works, ensure the employee's role includes the **"Call"** right:

1. Go to **Roles** → **Edit Role**.
2. Under the **Clients** section, enable the checkbox **Call**.
3. Save the role configuration.

Without this permission, the Call action will not be available in the Clients module.

Making a Call

1. Go to the **Clients** module.
2. Search for and select the desired client record.
3. Open the **Actions** dropdown.
4. Click **Call**.
5. In the pop-up, confirm the telephony provider and click **Call**.
6. A SIP call will be initiated, and you'll be connected to the client's phone number.

Notes & Best Practices

Each employee must have a valid **phone number** mapped in the integration before they can place calls.

Calls are logged in the client's drawer under **Actions**, ensuring traceability.

Always verify permissions when onboarding new team members.

3. Integrations: AI

The **AI Integrations** section is used to connect external artificial intelligence providers (such as OpenAI) to the platform. These integrations enable AI-powered features like automation, analysis, and content generation within selected projects.

What You Can Configure

1. **Project scope** - define which project can use the AI integration
2. **API endpoints** - add one or more provider URLs
3. **Credentials** - securely store API keys or secret tokens
4. **Status control** - activate or deactivate the integration at any time

Common Use Cases

1. AI-driven text generation and processing
2. Automated workflows using external AI services
3. Internal tools powered by large language models
4. Smart assistants or background AI tasks

How It Works

Each AI integration is configured as a separate card. Once active, it becomes available only to the projects it is assigned to. Credentials and endpoints can be updated without affecting other integrations.