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.

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