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.

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