Integration

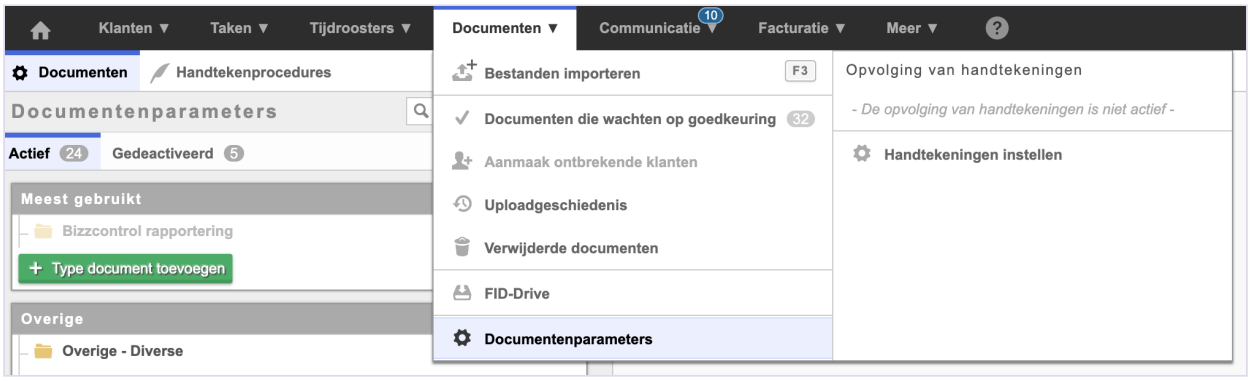
Connection with FID-Manager

With the FID-Manager connection, the PDF of each meeting is automatically added to the correct contact. You only need to complete these steps once.

Step 1 — In FID-Manager

1. **Open the document parameters**

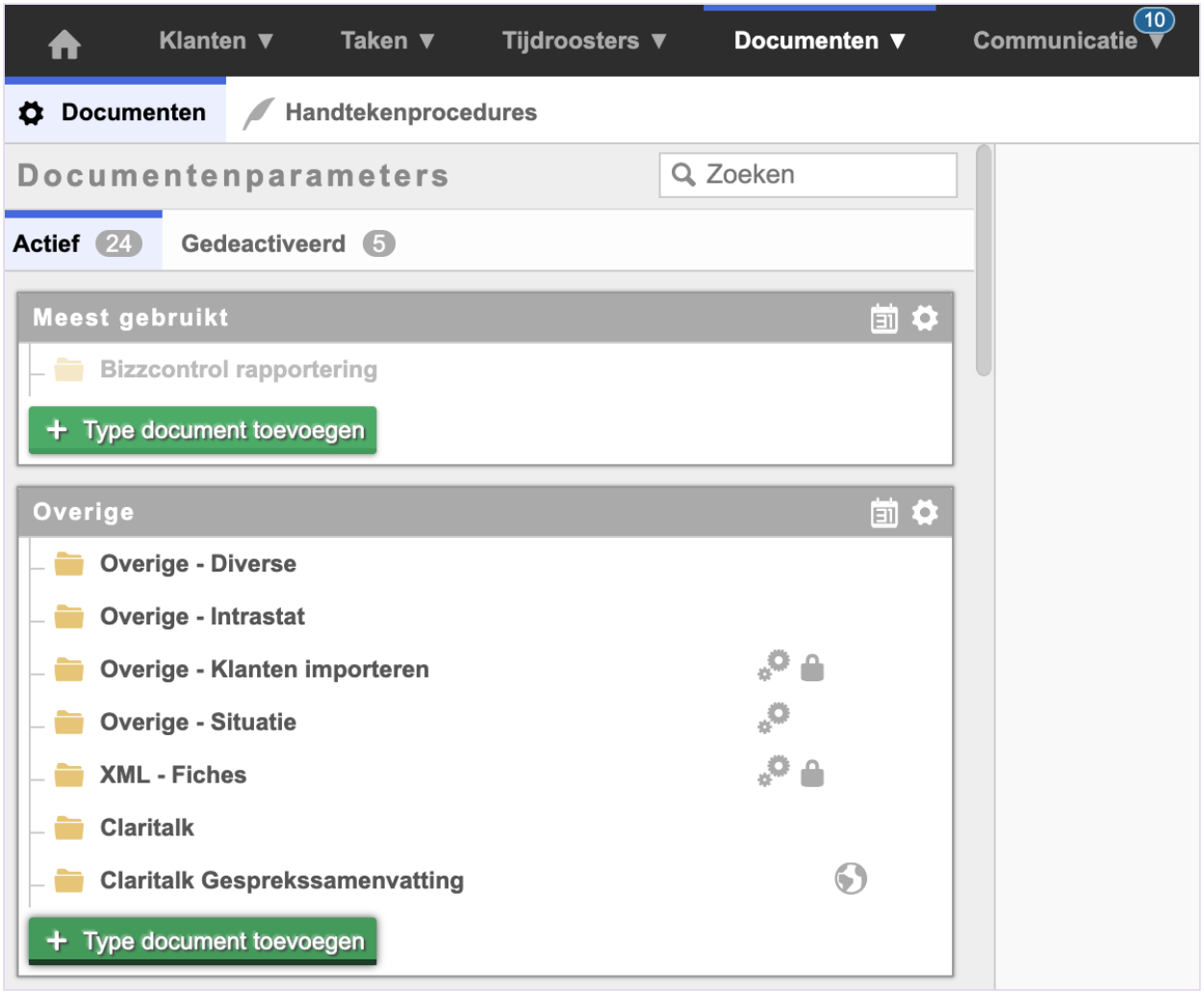
   Go to **Documents / Document parameters**.



Documents › Document parameters in FID-Manager

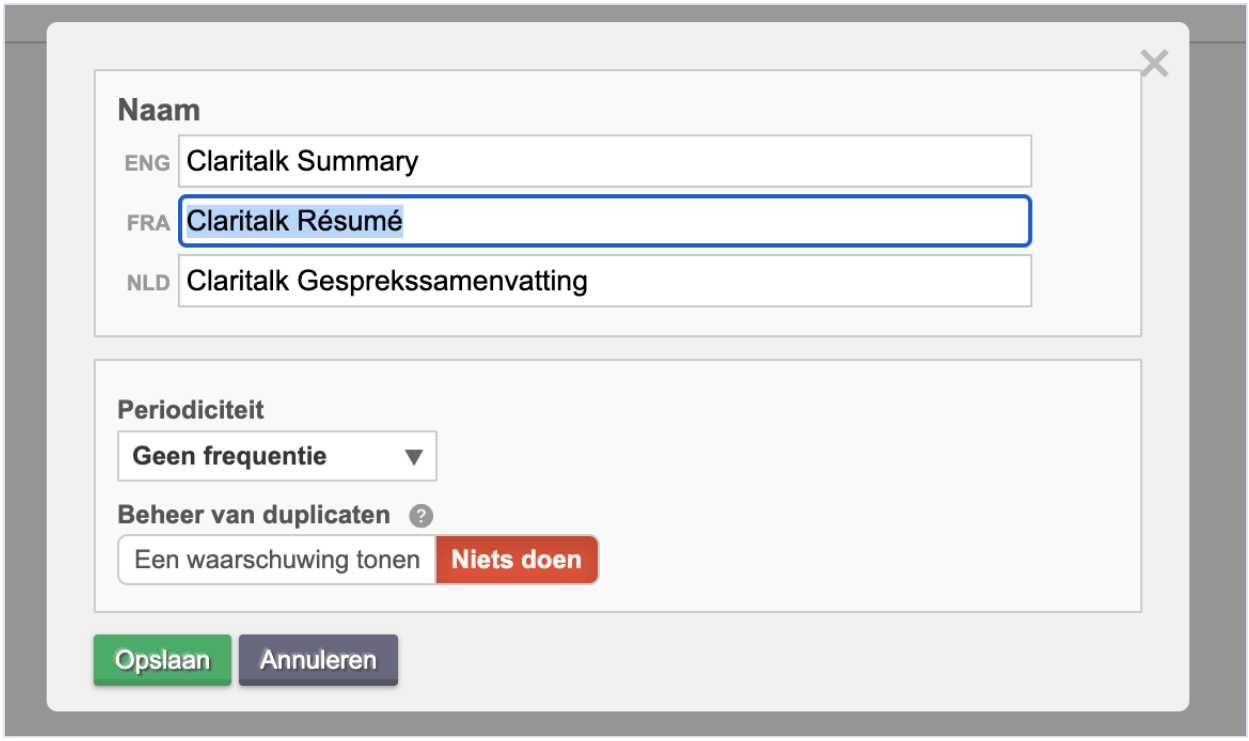
2. **Add a new document type**

   Click on **Add document type**.



Add document type

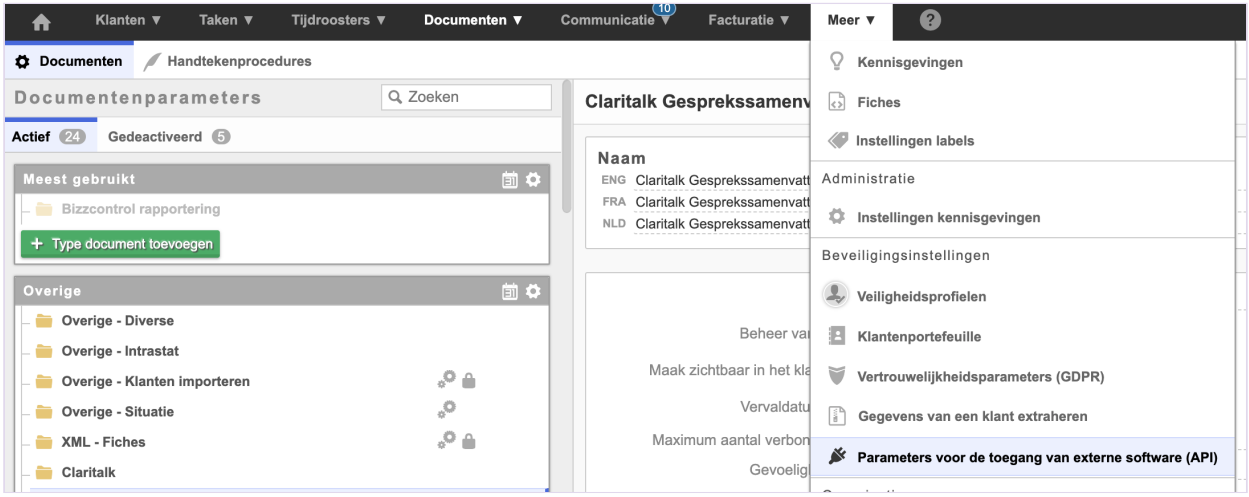
Enter: Claritalk Summary.



Enter document type "Claritalk Summary"

3. **Make the document type available to the API**

   Click on **"Parameters for external software access (API)"** and then click on **Claritalk**.

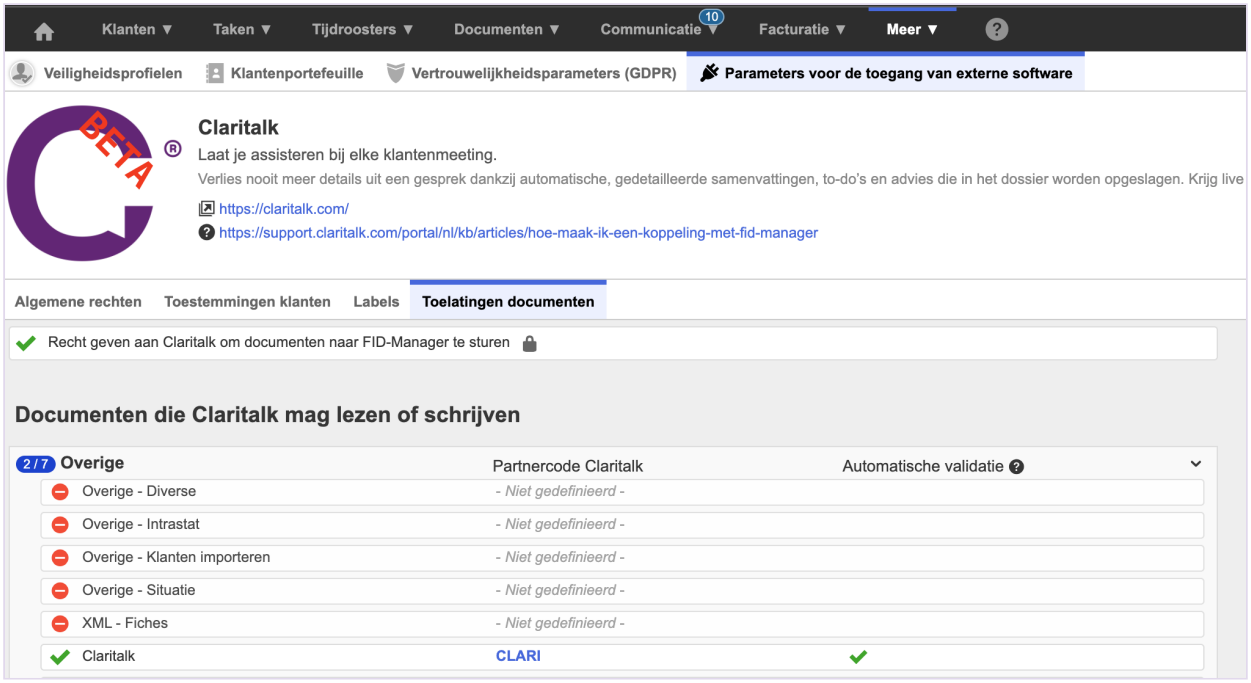


Activate API access for Claritalk

   You will receive an email with the access codes.

4. **Enter the partner code**

   Click on **"Document authorizations"** / **Other** and enter CLARI for Claritalk.



Enter partner code CLARI in Document authorizations

Attention

The password that FID-Manager sends is **one password per company** and must be used by everyone. Share it with other users who need FID-Manager access. With **each new request, FID deletes the previous password**.

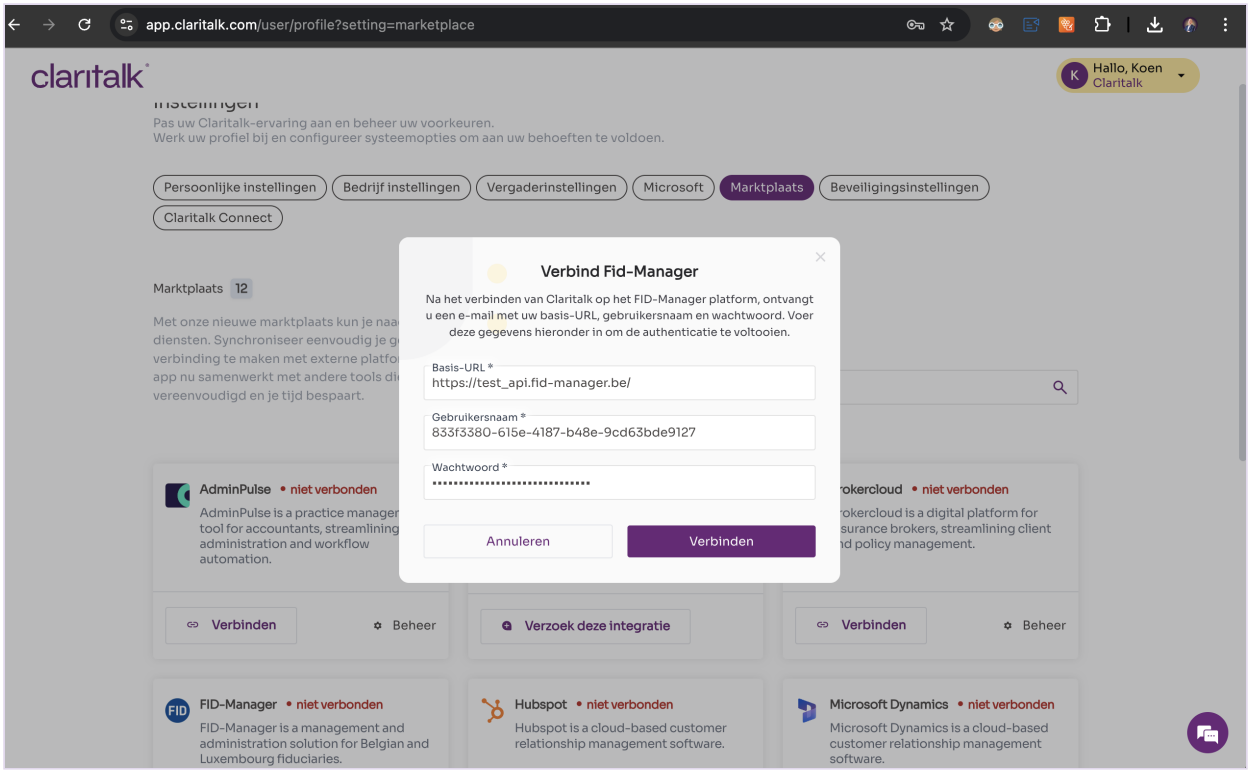
Step 2 — In Claritalk

1. **Open the marketplace**

   Go to app.claritalk.com › profile › marketplace and click on **FID-Manager**.

2. **Enter the access codes**

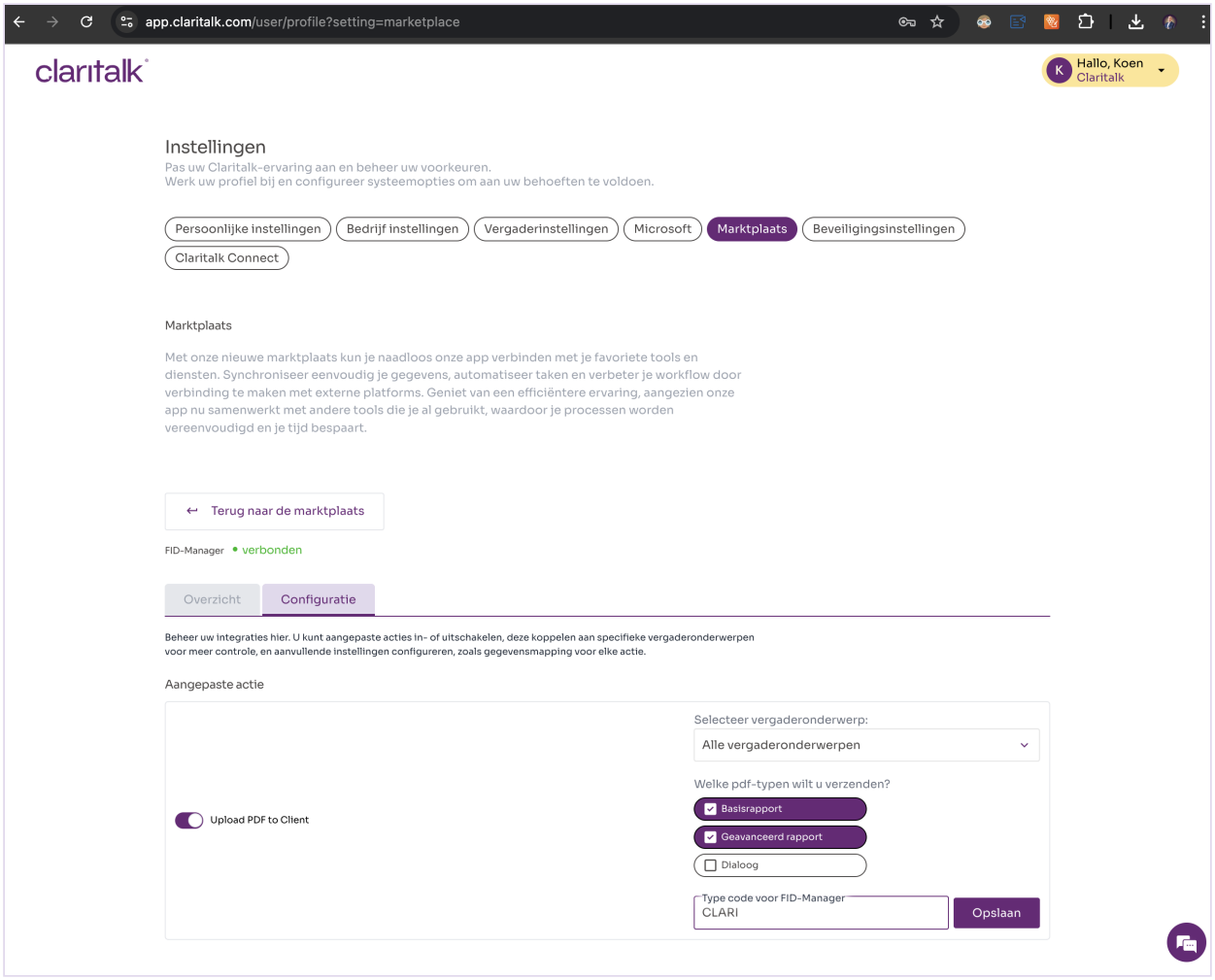
   Use the codes from the email from FID-Manager.



Enter access codes in Claritalk

3. **Enter the partner code**

   Click on **Configuration** and enter the partner code CLARI.



Enter partner code CLARI in the configuration

The result

Done

When starting a meeting, you can now select the **contact** you are meeting with. After the meeting, the **PDF of the meeting is automatically added to that contact**. Good luck!

Found an error or need an addition? Send a message to support@claritalk.com and we will help you further.