Overview

Integration overview

Claritalk integrates with ten systems today. This article lists for each integration how you connect, what you choose when planning a conversation, and what is written back exactly after completion.

How an integration works

You manage all integrations in one place: Profile › Marketplace. Find the integration, click connect and complete the registration. Most integrations use the same standard procedure:

1. You click **Connect** in Claritalk for the desired integration.
2. You are redirected to the platform itself.
3. You log in there with your own account.
4. The platform asks you for permission for the access that Claritalk needs.
5. You return to Claritalk and the integration is set to **Connected**.

Two integrations deviate: with **Odoo** and **FID-Manager** you enter connection details yourself instead of clicking through to a login screen. For those integrations, the exact details you need are specified below.

Per user or per organization
Almost all integrations are **personal**: each colleague connects their own account and only sees what they themselves are allowed to see in that system. **FID-Manager** is an exception: it is set up once for the entire organization by an organization administrator from the admin screen. **Wally** is also different: you set up that integration (per user) from Wally itself.

Microsoft asking for approval?
When connecting to Microsoft 365 integrations, you may see the screen "Admin approval required". This is due to a setting in your organization's Microsoft environment and not due to an error in Claritalk. The article **Admin approval required** explains what you can do yourself and what your IT department needs to set up.

All integrations at a glance

The ten integrations below are operational. Which ones you see in your own marketplace depends on your package and your sector.

Integration	For what	You choose during a conversation	Claritalk sends back
AdminPulse Accountancy	Office and client management	A relationship	Interaction on the timeline, with reports and to-do's
Silverfin Accountancy	File management and reporting	A file	Reports as notes, to-do's as tasks
FID-Manager Accountancy	Fiduciary administration	A client	Reports under *Documents for approval*
Brokercloud Insurance	Client and policy management	A party	Reports under *Files*
OdooAll sectors	Business software	An event	Reports with the event, to-do's as tasks
Zoho CRMSales	CRM, with WorkDrive for documents	An event	Reports with the event, PDF to WorkDrive, to-do's as tasks
Outlook 365 CalendarAll sectors	Calendar	Nothing — your calendar items *are* your conversations	Appointments you plan from Claritalk
Outlook 365 Mail All sectors	Mailbox, read-only	Nothing	Nothing — provides only context for your preparation
Microsoft OneNote All sectors	Notebook	A section in a notebook	One page per conversation, with checkable to-do's
WallyAccountancy	AI assistant	Nothing — you set up the integration in Wally itself	Your meeting notes appear as conversations in Wally

Office, file and CRM systems

With these six integrations you link a conversation to a client, file or event in the external system. After completion, Claritalk writes the report and to-do's back to it.

AdminPulse

Accountancy Per user Login
Standard procedure: connect, log in to AdminPulse, grant permission.

When planning
You choose a **relationship**.

After completion

An **interaction** automatically appears on that relationship's timeline, with the reports and to-do's attached to it.

Extended guide: Integration with AdminPulse

Silverfin

Accountancy Per user Login
Standard procedure.

When planning
You choose a **file**. Silverfin works with large amounts of data, so next to the file selection there is a **refresh button** with which you can retrieve the list again if your file is not yet in it.

After completion
Reports arrive as notes in the file.

To-do's from Claritalk appear under tasks in Silverfin.

FID-Manager

Accountancy One integration per organization First in FID

1. Log in to FID-Manager.
2. Go to **More › Access parameters external software** and enable access for Claritalk.
3. Under **Document rights** choose a folder — an existing one or one you create beforehand.
4. Click that folder, give Claritalk rights and enter a **partner code**.

Email from FID
You then receive an email with a **base URL**, a **username** and a **password**.

Then in Claritalk
When connecting, enter the base URL, username and password **from that email** — not your regular FID login details.

Enter the **partner code** that you created above in the integration settings.

When planning
You choose a **client**.

After completion
The reports end up under **Documents for approval** in FID, linked to the chosen folder and client.

Extended guide: How do I set up an integration with FID-Manager

Brokercloud

Insurance Per user Login

Standard procedure.

When planning
You choose a **party**.

After completion
The reports are placed with that party under **Files**.

Limitation
You cannot choose or create a folder: the files always end up in the default location.

Odoo

All sectors Per user Login
Base URL — for example https://claritalk-test.odoo.com. Leave out anything that comes after .com, like /odoo/events.

Database name — you'll find this in the top right of Odoo, next to your profile icon. If it's not there, ask the administrator of your Odoo.

Username and password — from your Odoo account.

When planning
You choose an **event** in Odoo.

After completion
The reports are added to the event.

To-do's appear under **Tasks**, with a link to the related event in the description.

Extended guide: How can I integrate Odoo with Claritalk

Zoho CRM

Sales Per user Login
Standard procedure. The integration includes Zoho CRM as well as **Zoho WorkDrive** for documents.

When planning
You choose an **event** in Zoho.

After completion
The reports are added to the event.

The notes contain links to **Zoho WorkDrive**, where the reports are also uploaded as files.

To-do's from Claritalk appear under tasks in Zoho.

Microsoft 365

These three integrations work differently from the systems above: they don't write reports to a client file, but ensure that your calendar, your email context and your notes keep up with Claritalk. All three use your Microsoft 365 work account.

Microsoft Outlook 365 Calendar

Calendar Per user Login
Standard procedure with your Microsoft 365 account. Claritalk requests access to your profile and calendar.

What it does
Your calendar items appear in Claritalk, so you can start a conversation from an existing appointment instead of re-entering them.

Calendar changes follow automatically: if you move or cancel an appointment in Outlook, Claritalk adapts accordingly.

If you schedule an appointment from Claritalk, it is placed as a real appointment in your Outlook calendar, including participants.

When connecting
You choose which calendars Claritalk is allowed to follow. If you haven't selected any, your default calendar will be used.

Good to know
Claritalk does not write reports to your calendar items. The calendar is used to plan and recognize conversations, not to store documents in them.

Microsoft Outlook 365 Mail

Read-only Per user Login
Standard procedure with your Microsoft 365 account. Claritalk requests only **read access** to your mailbox.

What it does
When preparing a conversation, Claritalk retrieves your recent correspondence with that client so you can immediately see what was agreed on last time.

Privacy
The mail is **retrieved live at the moment of preparation** and is not copied or stored in Claritalk.

This integration is strictly personal: your correspondence is never shared with colleagues at the file level.

Claritalk cannot send, modify or delete emails.

Microsoft OneNote

Notes Per user Login
Standard procedure with your Microsoft 365 account.

When connecting
Claritalk immediately creates its own notebook **Claritalk** with the section **Conversations**. This way there's always a place where you're sure to have write access, even if you only have read access in shared notebooks.

When planning
You choose the **section** where the notes should be placed. This can be Claritalk's own section or a section in one of your existing notebooks.

After completion
For each conversation, one **page** is created, with the conversation title as the page title and the report as formatted text.

The to-do's are added as real OneNote tasks that you can check off in OneNote yourself.

AI assistant: Wally

This integration differs from all others: you don't set it up **in the Claritalk marketplace**, but **from Wally itself**.

Wally

Accountancy Per user Login
Go to app.wally.be/integrations in Wally, choose Claritalk under **AI-notes** and log in with your own Claritalk account (the integration is personal, per user). A Wally subscription is required.

When planning
Nothing — you don't need to choose anything in Claritalk.

After completion
Recorded meetings and conversations arrive as a **conversation in Wally**, with the report as context. This way Wally can better answer questions, find appointments that were made during a conversation, or draft the follow-up email.

Extended guide: Integrate Claritalk with Wally

Send data later

Did you not choose a relationship, party or event when creating the conversation? Or wasn't the integration active then? Then you don't need to do anything again: you can send the data later.

- As soon as there is an active integration, a **CRM block** appears in the conversation.
- From that block you send the data to the linked integration.

Attention
If the data was sent earlier, or you send it multiple times, **duplicate data** can appear in the external platform. Claritalk cannot clean that up there again.

What you can set per integration

Each integration has its own settings, so you determine exactly what is sent. You'll find them in the Marketplace for the relevant integration.

- **Which reports** — you select which report or reports to send as PDF.
- **Where to** — for example the PDF report to the event, to WorkDrive, or both.
- **In what form** — as PDF or as formatted text.
- **To-do's** — with Zoho you can turn off tasks, with Silverfin you can exclude reports.
- **Per conversation topic** — you link a custom action to one specific conversation topic instead of all.
- **Processes** — you turn background processes on or off, or start them manually when you don't want to wait for the scheduled run.

If an integration stops working

- **Message that authentication failed?** The access right has expired or been revoked. Go to Profile › Marketplace and click reconnect for the integration.
- **Microsoft asking for admin approval?** See the article Admin approval required.
- **Your file or relationship is not in the list?** With Silverfin use the refresh button. With the other integrations it helps to disconnect and reconnect the integration so the data is retrieved again.
- **Password changed at Odoo or FID-Manager?** Those integrations work with the details you entered yourself. Update them in the integration settings.

Your system not listed?
The marketplace also has integrations that we are preparing or that are only available for certain packages. Feel free to ask at support@claritalk.com what is possible for your

organization.

More questions? Email support@claritalk.com with the name of the integration and your organization, and we'll take a look.

Claritalk Support · last updated September 14, 2026