Sirma

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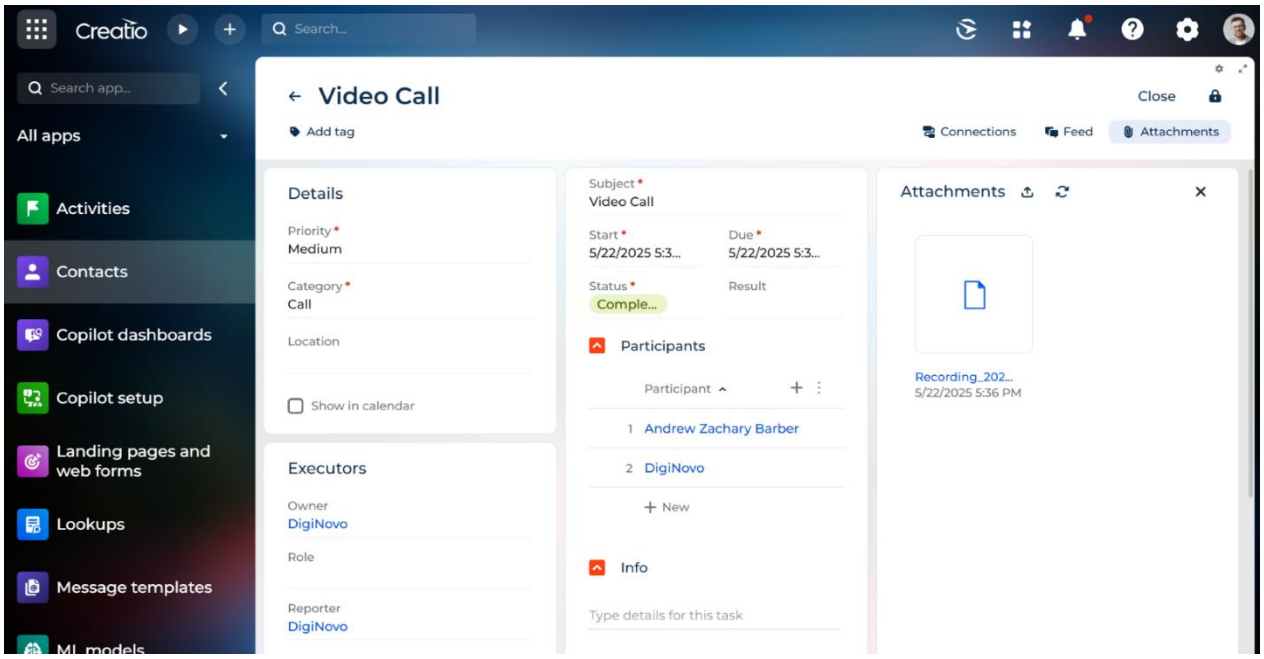
Video Calls by Sirma overview

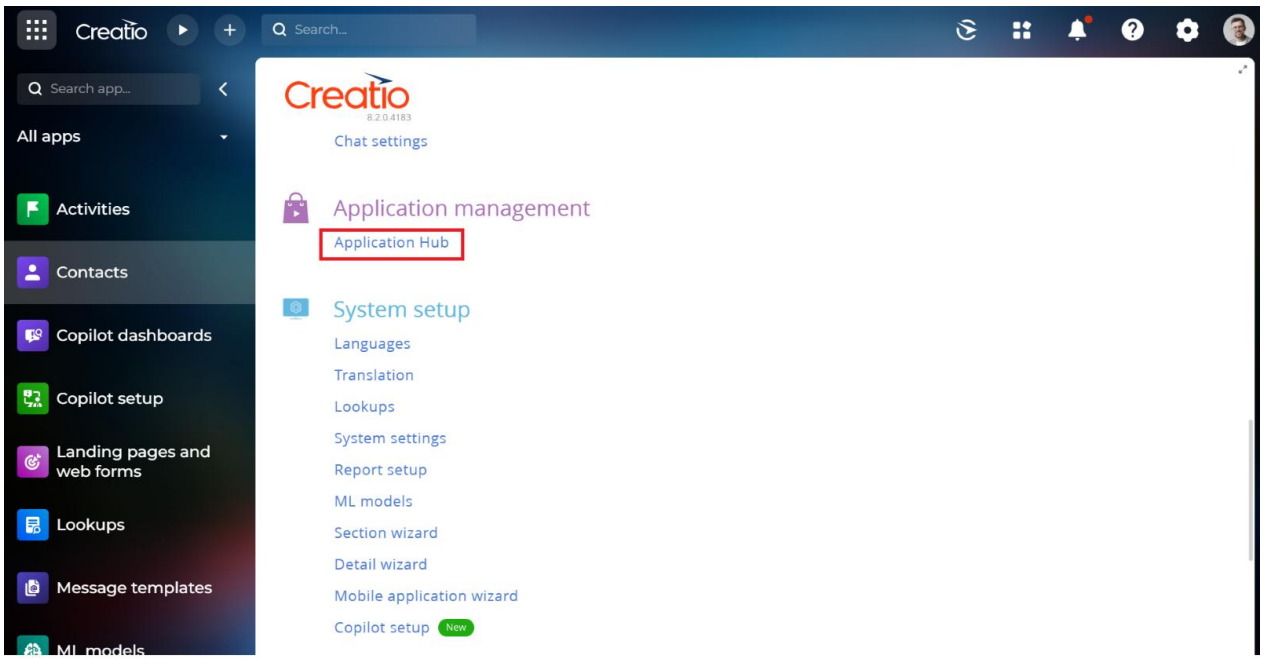
This application streamlines the integration between Creatio and the DigiNovo platform, enabling users to initiate, manage and document secure video meetings directly within the Creatio platform. It enhances communication with customers and partners by allowing one-click generation of private, time-limited meeting links from key system areas such as Contact, Lead, Opportunity, and custom object pages. With full support for public portal integrations, reusable UI components, and deep CRM synchronization, this add-on is ideal for insurance, sales, support, and any service-driven industry seeking to modernize customer engagement and streamline back-office operations.



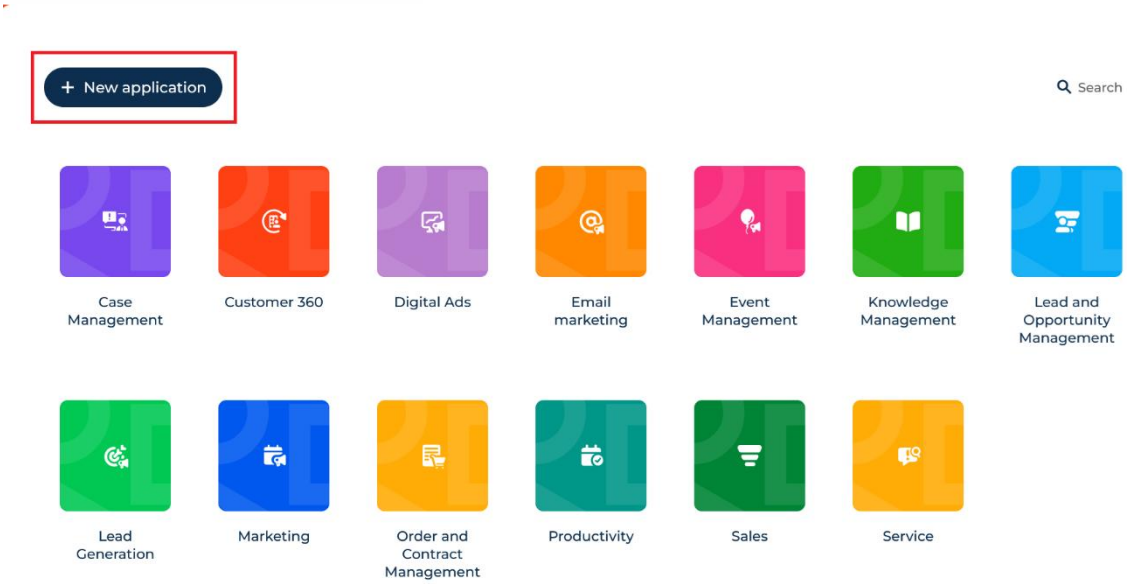
Configuration Guide

Follow these steps to set up the application in your instance:

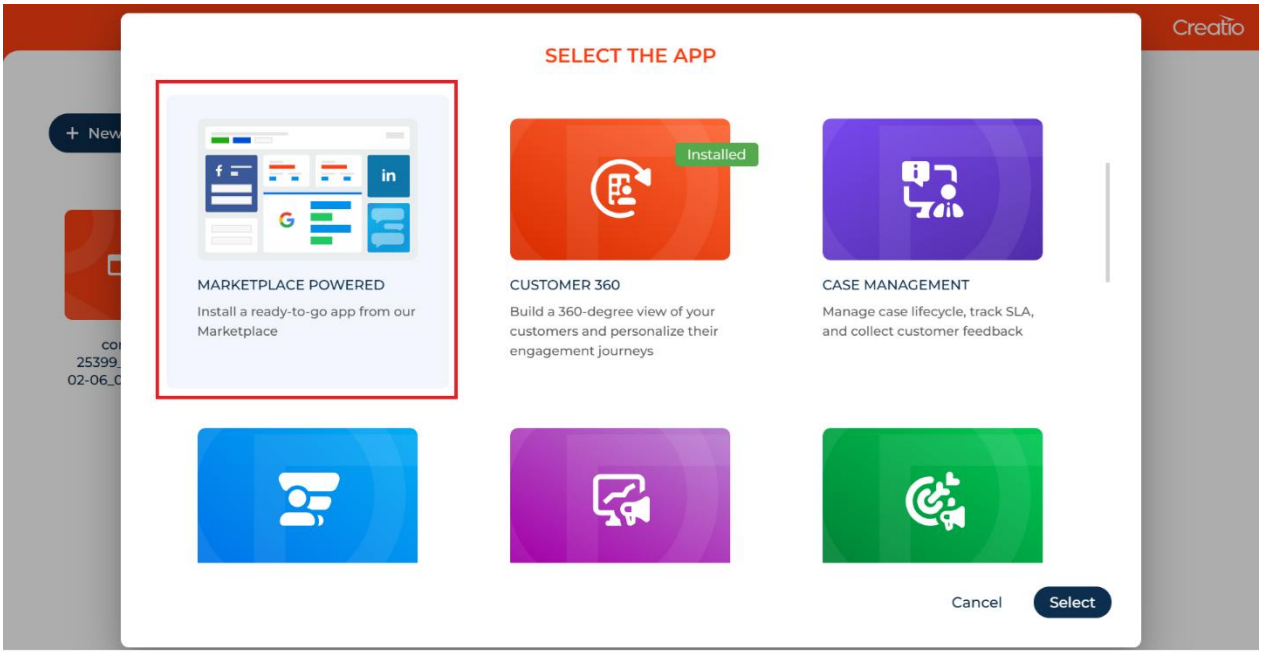
1. Go to Settings-> Application Management-> Application Hub



2. Click on “New application”



3. Click On “Marketplace powered”



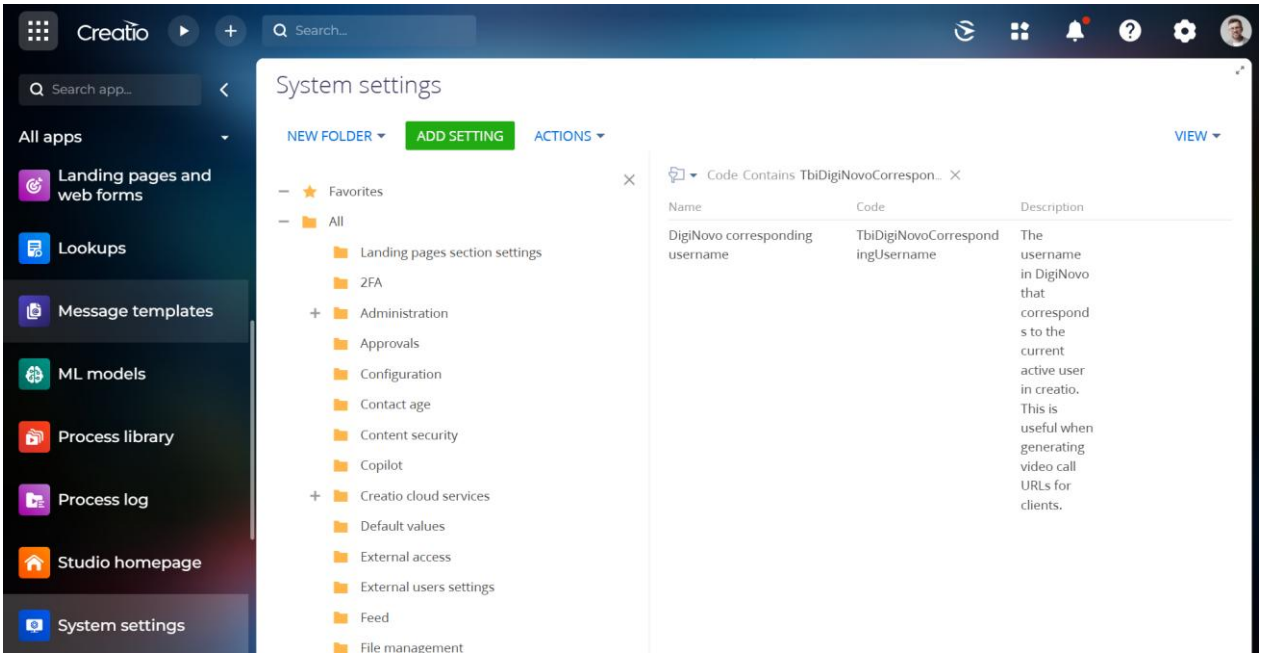
4. Search “Video calls by Sirma” and Click “Install”

Custom system settings

To configure the DigiNovo video call integration, the system administrator must set up the following system settings.

To do this:

1. Open the [System settings] section;
2. Filter the data by the [Code] field;
3. Specify the desired code;



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Set up the following system settings:

Name	Code	Description
DigiNovo API User Id	TbiDigiNovoAPIUserId	ID of the user that is used during the authentication process for the DigiNovo API.
Mailbox for sending video call links to contacts	TbiVideoCallLinksMailbox	Mailbox used when sending emails with links for video calls.
DigiNovo API Call File List Route	TbiDigiNovoAPICallFileListRoute	Endpoint route that returns a list of all files for a given call—recordings, chat, exchanged files, etc.
DigiNovo corresponding username	TbiDigiNovoCorrespondingUsername	Username in DigiNovo that matches the currently active user in Creatio. Used when generating client video call URLs.
DigiNovo API HMAC Key	TbiDigiNovoAPIHMACKey	HMAC key used for authenticating API requests.
DigiNovo API Password	TbiDigiNovoAPIPassword	Password required for API authorization.
DigiNovo API Username	TbiDigiNovoAPIUsername	Username required for API authorization.
DigiNovo API Auth Token Lifespan	TbiDigiNovoAPIAuthTokenLifespan	Duration (in seconds) for which the API auth token remains valid. Recommended max: 3600 seconds (1 hour).

DigiNovo Portal Base URI	TbiDigiNovoPortalBaseURI	Portal base URI used to generate video call URLs and other necessary links. May differ from the API base URI.

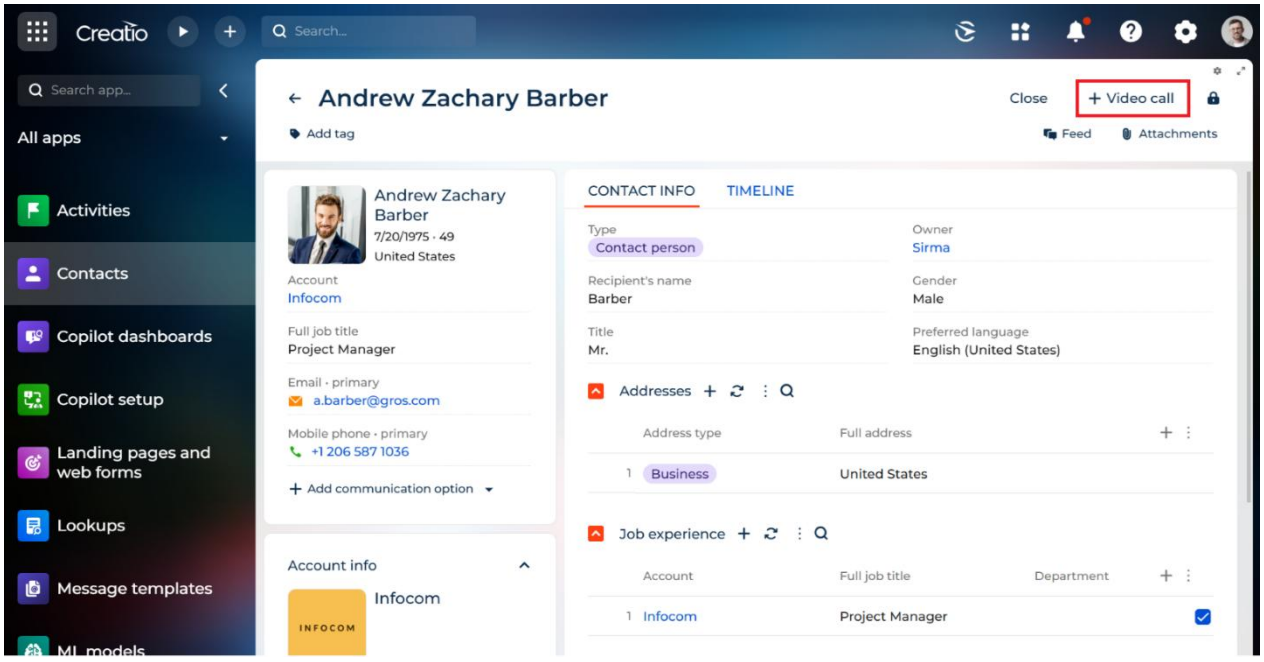
Setting up the application

To begin using the Video Calls by Sirma, follow these setup steps:

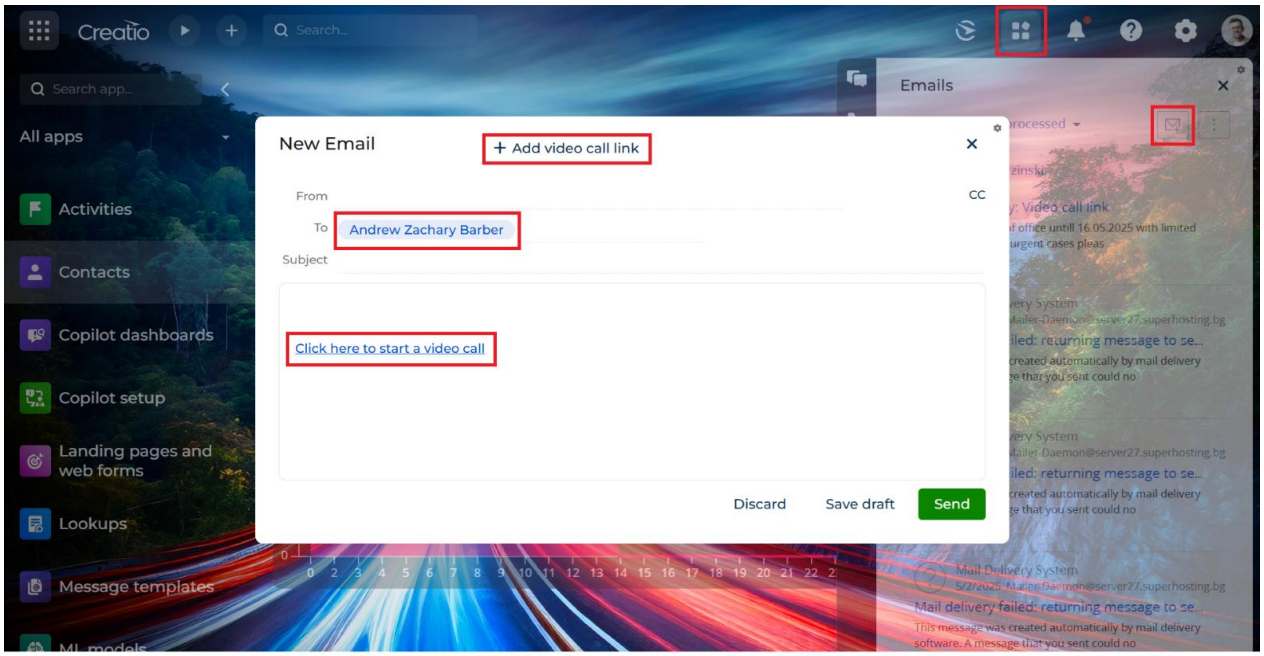
1. **User Identification in DigiNovo**
   Each Creatio user initiating video calls must have a corresponding DigiNovo username set in the system setting **TbiDigiNovoCorrespondingUsername** to ensure proper call routing.

2. **Video Call Link Generation**
   Video links can be generated in two ways:

- From a page button (e.g., Contact or Opportunity) called [Video call] which opens a dialog for selecting a contact and optionally sending an email with the link.



- From within the **Send Email** dialog, as long as a recipient email address is provided.



3. **Activity Logging**
   After each video call, the system automatically creates an **Activity record** in Creatio, capturing:

- Date, time, and duration of the call
- Participants
- Status (Completed, Missed, etc.)
- Attachments including video recording, chat transcript, and shared files

Optional: Adding the Video Call Button to other pages

To enable the use of the "Video Call" button in sections beyond the Contact page, you can manually add it by following these steps:

1. Open the **Freedom UI Form page Designer** for the desired section (e.g., *Lead, Case,* or a custom object).
2. Add a new button to the page layout.
3. Go to "**Action**"-> Click "**Run process**"-> and under "**Which process to run**" select the name of our custom business process: "**Video Call - Generate link and send over email**".
4. Optionally, adjust the visibility rules and styling to match the context of the specific section.

This approach makes the feature flexible and actionable across the Creatio platform.