

Connecting and Managing External Integrations

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Checking What You Need Before Connecting a Service

Before you click **Connect**, make sure you are starting from the right place in Atloria and using the right account in the external service. In most cases, you will begin from **Settings > Integrations**, where Atloria shows the services you can connect and any services that are already linked.

Check these items first:

- Make sure you can open **Settings > Integrations** and see connection actions such as **Connect**, **Manage**, **Edit**, or **Reconnect**. If you can view the page but do not see a way to start a connection, your access may be limited.
- Identify the service you want from the **Available Integrations** list. This helps you avoid authorizing the wrong provider when several options are listed.
- Confirm that you have an active account in the external service. Some services also require approval from an administrator in that service before you can authorize Atloria.
- Gather the details you may need during the sign-in window, such as your email address, password, approval prompt, or the correct workspace or account to select after sign-in.
- Decide where the connection should apply before you start. Some connections are meant for a broader settings area, while others are used only inside a specific project workflow. Starting in the wrong place can lead to a connection that does not appear where your team expects it.

If you are unsure whether you should connect a service from a general settings area or from inside a project, review your project setup first in [Choosing Between Manual and Connected Project Setup](#).

[SCREENSHOT: Settings > Integrations page showing Available Integrations and Connected Integrations sections]

Connecting a Supported External Service

1. In Atloria, open **Settings > Integrations**.
2. In the **Available Integrations** area, find the service you want to connect. Review the service name carefully, then click **Connect**.
3. Atloria opens the provider sign-in flow. Depending on the service, this may appear in a pop-up window or take you to a separate authorization page.
4. Sign in with the external account you want Atloria to use. If the provider asks you to choose an account, team, or workspace, select the one that matches the work you want available in Atloria.
5. Review the access request shown by the provider. If the details are correct, approve the connection so Atloria can use that service.
6. Wait for Atloria to return you to the integrations area. After the authorization finishes, the service should move from **Available Integrations** to **Connected Integrations**.
7. Check the initial status shown next to the service. Right after setup, Atloria may show:
 - **Connected** if the link is ready to use
 - **Pending** if Atloria is still finishing the first setup or sync
 - **Needs Attention** if Atloria needs you to review or complete something before the connection can be used

If the provider window closes and nothing changes in Atloria, refresh the page and check **Connected Integrations** again before trying a second time. This helps you avoid creating confusion about whether the first connection already succeeded.

[SCREENSHOT: Connect button in Available Integrations]

[SCREENSHOT: Provider authorization window asking for sign-in and approval]

[SCREENSHOT: Connected Integrations list with a newly added service]

Reviewing Integration Status and Connection Details

After a service is connected, use the **Connected Integrations** list as your main checkpoint. This is where Atloria shows whether a connection is healthy and ready for project use.

For each connected service, look for these details:

What to check	What it tells you
Status	Whether the connection is active or needs action
Last synced	When Atloria last updated information from that service
Connected account or workspace name	Which external account, team, or workspace is linked

Open the service details using **Manage** or a similar action in the integration row. In the details view, review which parts of Atloria are using that connection. This is especially helpful when one service is tied to specific project work rather than every project in your workspace.

Common status labels usually mean:

- **Connected:** Atloria can use the service normally.
- **Expired:** The previous approval is no longer valid and needs to be renewed.
- **Error:** Atloria could not complete a recent action or sync with that service.
- **Reconnect Required:** The service is no longer authorized and must be connected again before Atloria can continue using it.

Also check the scope shown in the integration settings. Some connections apply broadly, while others are limited to selected projects. If a teammate says a connected service is missing inside their project, the first thing to verify is whether that integration is active for all projects or only for certain ones.

[SCREENSHOT: Connected Integrations list showing status badges and last synced values]

[SCREENSHOT: Integration details panel showing connected account and project scope]

Updating Access, Reconnecting, or Removing an Integration

Connections sometimes need maintenance after the first setup. A password change, a revoked approval, or a change in the external service's workspace structure can all interrupt a working integration. When that happens, use the action shown in the integration row instead of starting over from **Connect**.

If the service is already listed under **Connected Integrations**, look for options such as **Manage**, **Edit**, or **Reconnect**. These actions let you update the existing connection without creating a second copy of the same service.

Use these actions when:

- The status shows **Expired**, **Error**, or **Reconnect Required**
- The linked external account has changed
- The selected workspace or team in the provider has been renamed or replaced
- Your organization reset access in the external service
- You changed your sign-in details and Atloria can no longer use the old authorization

When you click **Reconnect**, Atloria sends you through the provider approval flow again. Sign in with the correct external account and confirm access. After you return, check that the same integration entry now shows an updated healthy status.

If the connection is no longer needed, open its settings page and use **Disconnect** or **Remove**. Once removed, Atloria stops using that service in related workflows right away. Any project area that depends on that connection may stop showing linked content, sync results, or provider actions until the service is connected again.

If you need to change how the service is used rather than remove it completely, use **Edit** or **Manage** first so you can keep the existing connection history and settings where possible.

Understanding Where Integrations Affect Project Workflows

A connected service only becomes useful when you can see where it affects your day-to-day work. In Atloria, those effects usually appear inside project areas rather than only on the **Integrations** page.

After connecting a service, look for signs of it in the project screens your team uses. Depending on the connection, Atloria may show:

- linked items from the external service
- synced content or imported records
- provider-specific actions in a project workflow
- sync indicators or status messages that show whether outside information is current

If a connection becomes unavailable, the experience in those project areas changes. You may still be able to open the project, but actions that depend on the external service can stop updating, linked content may not appear, or Atloria may show a warning that attention is needed. This is why it is important to check both the integration status and the project screen where the connection is supposed to be used.

There is also an important difference between connecting a service in **Settings > Integrations** and using that service inside a specific project workflow. The settings connection gives Atloria permission to access the external service. The project workflow is where that permission is actually put to use. A service can be connected in settings but still not appear in a project if it was linked in the wrong scope or not enabled for that project.

For project-specific setup decisions, continue with [Configuring Project Webhooks and Related Controls](#) or [Managing Project Administration from the Project Home](#), depending on where your team uses external connections.

Verifying the Connection Is Working

1. Go back to **Settings > Integrations** and find the service in **Connected Integrations**.
2. Confirm the status shows **Connected**. If Atloria also shows a **Last synced** value, wait for it to update after the initial authorization finishes.
3. Open the project area that should use the service. Look for the expected result, such as linked content, imported data, sync activity, or provider-specific actions.
4. If the service appears connected in settings but nothing shows up in the project, check whether the connection was made in the correct workspace or project scope. A healthy connection in the wrong place will not help the project that needs it.
5. If the status shows **Error** or **Reconnect Required**, click **Reconnect** and complete the provider sign-in flow again. Pay close attention to which external account, workspace, or team you select during that step.
6. Return to the same project area and check again for the expected linked content or actions.

A successful verification usually means two things are true at the same time: the integration row shows a healthy status, and the project screen that depends on that service shows usable results. If only one of those is true, keep checking the connection scope and the selected external account before removing and reconnecting the service.

[SCREENSHOT: Connected integration showing Connected status and updated Last synced]

[SCREENSHOT: Project screen showing linked external content or provider action]

Overview

Atloria's **Integrations** area is where you connect supported external services and keep those connections working over time. The main screens you will use are **Settings > Integrations**, the **Available Integrations** list, the **Connected Integrations** list, and each service's **Manage**, **Edit**, **Reconnect**, **Disconnect**, or **Remove** actions.

The basic workflow is straightforward:

- choose a service from **Available Integrations**
- click **Connect**
- complete the provider sign-in and approval screen
- return to Atloria and confirm the service appears under **Connected Integrations**
- verify that the related project workflow shows the expected linked content or actions

Once connected, the most important things to monitor are the **Status** badge, the **Last synced** value, and the connected account or workspace name. These details help you quickly tell whether Atloria is still using the right external service and whether the connection is healthy enough for project work.

You will also use the integrations area for ongoing maintenance. If a provider approval expires or the external account changes, Atloria may show **Expired**, **Error**, or **Reconnect Required**. In those cases, use **Reconnect** or **Manage** on the existing row instead of starting from scratch.

This document focuses on the connection and maintenance side of integrations. If you need help deciding which kind of external connection best fits your project workflow, continue next with [Choosing and Maintaining External Connections for Project Workflows](#).

Prerequisites

Before working with **Settings > Integrations** in Atloria, make sure these basics are in place:

- You can sign in to Atloria and open the settings area where **Integrations** is available.
- You can see the service you want in the **Available Integrations** list.
- You have a valid account in the external service you plan to connect.

- You know which external account, team, or workspace should be linked during the provider sign-in step.
- You are allowed to approve Atloria's access request in the external service, or you have the right person available to approve it.
- You know whether the connection should support a broad settings-level use or a specific project workflow.
- You have access to the project area where you plan to verify the connection after setup.

It also helps to check related Atloria guidance before you begin:

- For account access questions, see [Signing In to Atloria and Solving Access Problems](#).
- For project setup choices, see [Choosing Between Manual and Connected Project Setup](#).
- For broader admin access and settings responsibilities, see [Using the Admin Workspace](#).

If you are ready to move from basic connection steps into deciding which external links should stay active for ongoing project work, the next document is [Choosing and Maintaining External Connections for Project Workflows](#).