

ClickUp stops being another place to update.

We connect ClickUp to the systems a business already runs, so work moves between them without anyone retyping it.

A team adopts ClickUp, then keeps the spreadsheet, the CRM and the shared inbox running alongside it. The same job gets entered three times and the records quietly disagree. We design the flow of data between those systems, build it, and prove the two sides agree before anyone depends on it.

API v2

ClickUp REST API, personal token or OAuth

Two-way

CRM records and Custom Fields kept aligned

Native first

Automations and App Center before anything external

Owned

Code and credentials stay in the client's accounts

WHAT WE CONNECT CLICKUP TO

01

CRM

Sales and delivery reading the same record.

- HubSpot
- Zoho CRM
- Pipedrive
- Custom Field mapping
- Stage-driven task creation

02

Comms

Requests captured where they actually arrive.

- Gmail and Workspace
- Slack
- Outlook
- Shared-inbox triage
- Comment threading

03

Intake

Every enquiry becomes a task, correctly filed.

- Jotform and Typeform
- Website forms
- Inbound webhooks
- Voice and phone intake
- Deduplication

04

Data

Reporting that does not need a weekly export.

- Google Sheets and Drive
- Airtable
- Supabase
- Sanity
- Dashboard field hygiene

WHERE NATIVE STOPS AND CODE STARTS

ClickUp Automations

Anything that happens inside the Workspace. Status, assignee, due-date and priority changes; tags, moves and reassignment. If ClickUp can already do it, we do not write code to do it again.

App Center integration

A supported tool with a connector ClickUp maintains, such as Slack, GitHub, Google Calendar and Drive, or native time tracking. Configured properly, then left alone.

n8n, Trigger.dev or the API

Field mapping and transformation between systems, multi-step orchestration across more than two tools, bulk migration, and anything with no native action behind it.

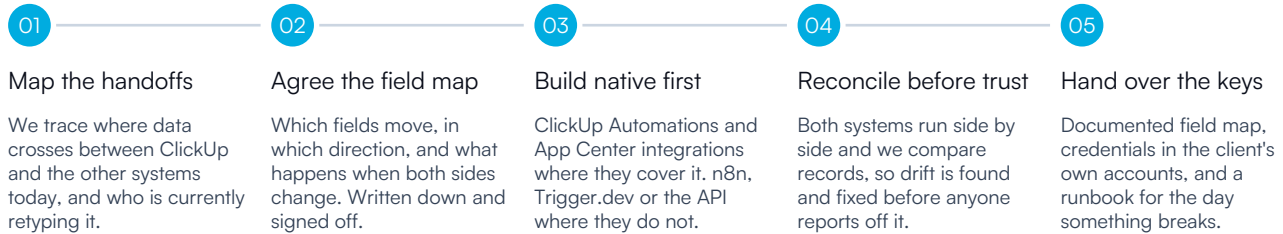
YOU END UP WITH

A signed-off field map · working flows in both directions · a reconciliation report · a runbook · every credential in your own accounts



HOW WE DELIVER

Agree the contract before writing the connector.



IN PRODUCTION

ELEMRA · INTERNAL	CLIENT WORKSPACE	PATTERN
Elena OS Our own AI operations assistant runs on the ClickUp API. It creates tasks, posts audit-trail comments, manages dependencies and reacts to webhooks across every client engagement. API v2 · webhooks · Custom Fields · dependencies	Ladder We operate inside the client's own ClickUp Workspace alongside ours, through a scoped write guard so we can only ever touch the tasks that belong to the engagement. Cross-workspace · scoped writes · full audit trail	Inbound to task Client email, form submissions and third-party webhooks arrive as ClickUp tasks in the right list, with the right assignee and the fields reporting depends on already populated. Deduplicated · idempotent · reconciled

WHAT WE NEED FROM YOU

- Admin on the Workspace
Enough access to read the hierarchy, create Custom Fields and configure Automations.
- Credentials for the other side
API access to the CRM, inbox or database we are connecting, issued in your own accounts.
- One person who owns the map
Someone who can decide which field wins when two systems disagree. Usually an hour a week.

Connected, reconciled,
documented.

One conversation to map what should talk to what.

Book a strategy call → elemra.com/consultation