Configuring CRM Integrations

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Confirming Access and Preparing Branch Details

Before changing CRM connections, make sure you are signed in to Pams with access to **Configuration** and **Integration with CRMs**. CRM settings affect the branch currently selected in Pams, so only users responsible for company or branch administration should make these changes.

Identify the branch or branches that need a CRM connection. This is especially important when your company uses **Branches** to separate sales teams, locations, principals, clients, or operational data. A branch may use its own CRM environment, while another branch may use a different connected service account. Do not assume that a connection already used by one branch is suitable for every branch.

Prepare the information required by the connected service before opening the settings. During the connection process, Pams may ask you to sign in to the connected service or confirm the account or tenant that should authorize the connection. Use the account details assigned to the branch you are configuring.

Review the intended branch-to-service arrangement with the people responsible for the connected CRM service. Confirm:

- Which branch you are configuring in Pams.
- Which connected service account belongs to that branch.
- Whether another branch already has a separate CRM connection.
- Whether the branch should remain unconnected because it does not use that CRM environment.

[SCREENSHOT: Pams Configuration area showing the Integration with CRMs option and the branch currently selected]

If you manage multiple branches, record which service account is intended for each one before making changes. This helps prevent a branch from being connected to the wrong CRM environment and keeps branch-specific client, contact, and sales activity aligned with the correct team.

Opening CRM Integration Settings for a Branch

Open the CRM integration area from **Configuration** in Pams. Select **Integration with CRMs** to view the available connected service settings. The settings you see apply to the branch currently selected, not automatically to every branch in your company.

1. Open **Configuration** from the Pams navigation.
2. Select **Integration with CRMs**.
3. Find the branch selector on the screen.
4. Select the branch you want to review or configure.
5. Wait for the page to refresh, then locate the connected service entry shown for that branch.

Before selecting any connection or authorization option, pause and check the branch name displayed in the branch selector. This is the most important check on the page. If the wrong branch is selected, any saved change will affect that branch's CRM connection instead of the one you intended to update.

Use the connected service entry to identify whether the selected branch already has a CRM connection. If the entry shows an existing connection, review it before replacing or reconnecting it. A working connection may belong to the current branch and may need to remain unchanged.

[SCREENSHOT: Integration with CRMs settings with the branch selector highlighted and a connected service entry visible]

When you need to compare branches, use the branch selector to open one branch at a time. Review the service entry for each branch separately rather than relying on a previous screen view. Pams keeps these settings in the selected branch context, allowing branches to use different CRM environments where required.

Connecting a Platform Service to the Selected Branch

Use the CRM integration settings to connect the service intended for the branch currently shown in the branch selector. Confirm the branch first, then choose the connected service that will provide CRM data for that branch.

1. In **Configuration > Integration with CRMs**, select the required branch from the branch selector.
2. Locate the connected service entry you need to configure.
3. Choose the option to start the service connection or authorization process.

4. Enter or confirm the connection details requested on screen by the connected service.
5. Complete the sign-in or authorization prompt presented by that service.
6. Return to **Integration with CRMs** in Pams after the authorization process finishes.
7. Review the connected service entry to confirm that the connection is shown for the selected branch.

The information requested during authorization depends on the service being connected. Follow the labels and prompts displayed during the connection process. Use only the account or tenant intended for the selected branch. If your organization has separate CRM environments for separate branches, signing in with the wrong account can link the branch to the wrong source of CRM data.

Do not change the branch selector while the connection process is in progress. If you need to configure more than one branch, finish and save the current branch connection first. Then return to the branch selector and begin the connection process for the next branch.

[SCREENSHOT: Connected service authorization prompt followed by the Pams Integration with CRMs page showing the selected branch]

If the connected service asks you to review access before continuing, confirm that the service account shown belongs to the branch you selected in Pams. When the process is complete, the CRM settings should show the service as connected for that branch.

Saving CRM Settings for Each Branch

After connecting or changing a service, review the branch and service selection before saving. Pams stores CRM integration settings for the branch currently selected, so this final review prevents a connection from being saved against the wrong branch.

1. Check the branch name in the branch selector.
2. Confirm that the displayed connected service is the one intended for that branch.
3. Review any service-specific details shown in the CRM integration settings.
4. Click **Save**.
5. Wait for Pams to confirm that the settings were updated.
6. Stay on the page long enough to confirm that the selected branch and connected service remain displayed after saving.

If Pams shows a confirmation message after you click **Save**, treat that message as confirmation that the current branch configuration was updated. If no confirmation appears or the service does not remain displayed as connected, do not continue to another branch until you have reviewed the current branch settings again.

To configure another branch, select it from the branch selector and repeat the connection process only when that branch needs its own CRM connection. Each branch can retain a separate service account or CRM environment. For example, one branch may connect to one CRM environment while another branch connects to a different one.

[SCREENSHOT: Integration with CRMs page after Save, showing the selected branch and its connected service]

Avoid replacing an existing branch connection simply because another branch uses a different service account. Keep each branch configuration separate unless the responsible business team has confirmed that the branches should use the same connected CRM environment. Saving branch settings carefully helps preserve the correct connection for each branch's users and records.

Reviewing Branch-Specific CRM Connections

CRM integration settings in Pams are branch-specific. The branch selected in the branch selector determines which connection you are viewing and changing. A connection shown on screen belongs to that selected branch; it does not confirm that other branches have the same connection.

Use the branch selector to review each branch that uses CRM integration. For every branch, check the connected service entry and determine whether it shows an active connection or whether the branch still needs configuration. A branch without a configured service should be handled separately from a branch that already displays the intended connection.

When comparing branch settings, focus on the relationship between the selected branch and its connected service:

- A branch can have a connection that is different from another branch.
- A branch can require its own authorization through its own service account or tenant.
- A branch that has not been configured may not show a connected service.
- Changes made while one branch is selected apply to that branch only.

- A service displayed for one branch should not be treated as evidence of a connection for all branches.

[SCREENSHOT: Branch selector opened in Integration with CRMs, showing multiple branches available for review]

If you find that one branch has the wrong connection, select that affected branch before changing anything. Do not attempt to correct the issue while viewing another branch, even if both branches use similar names or work with the same principals and clients.

This branch-by-branch review is useful after organizational changes, such as adding a branch, separating teams into different CRM environments, or updating the service account used by a branch. It also helps you verify that the CRM connection matches the way your Pams branches are organized for sales operations.

Verifying the CRM Integration Setup

Verify each CRM connection from the same branch context used to create it. Open **Configuration > Integration with CRMs**, then make sure the branch selector shows the branch you intended to configure before reviewing the connected service entry.

1. Open **Configuration** and select **Integration with CRMs**.
2. Use the branch selector to choose the branch you configured.
3. Confirm that the intended connected service is displayed for that branch.
4. Review the displayed connection status or connected indication.
5. If the connection is missing, start the service connection process again from that branch.
6. Complete the authorization prompts and return to the CRM integration settings.
7. Click **Save** if Pams requires you to save the updated configuration.

A missing connection often results from reviewing a different branch than the one originally configured. Always check the branch selector first. If the branch selector shows a different branch, switch back to the correct branch and review its settings before attempting to reconnect anything.

If authorization did not finish, reconnect the service while the correct branch is selected. Follow the service prompts again and return to Pams to confirm the connected indication. Do not assume authorization succeeded merely because you completed a sign-in prompt; the connection must also appear in the CRM integration settings for the selected branch.

[SCREENSHOT: Verification view showing the branch selector, connected service entry, and connected status]

When a branch displays the wrong CRM connection, explicitly select that branch, start the appropriate service connection or authorization process, and click **Save** after confirming the correct service is displayed. Then reopen the settings for that branch to make sure the correction remains in place.

Overview

Integration with CRMs in Pams is where administrators manage CRM connections for individual branches. These settings support organizations that operate multiple branches and need each branch to connect to the appropriate external CRM environment or connected service account.

The key principle is simple: Pams applies the CRM settings in the context of the branch selected on the **Integration with CRMs** screen. Before you connect, change, save, or verify a service, check the branch selector. This ensures that the connection belongs to the correct branch.

Branch-specific configuration is useful when branches work independently or use different CRM environments. For example, sales teams may be organized by location, business unit, principal portfolio, or market. Each branch can retain the service connection that matches its own operating arrangement, without automatically changing another branch’s CRM settings.

Use the CRM integration settings when you need to:

- Connect a branch to a CRM service for the first time.
- Reconnect a service after authorization was not completed.
- Replace an incorrect connection for one branch.
- Review which connected service is assigned to each branch.
- Confirm that different branches are not accidentally sharing the wrong CRM environment.

[SCREENSHOT: Pams Integration with CRMs screen showing a selected branch and its service configuration]

CRM integration settings are administration settings rather than day-to-day sales records. Configure them carefully and only after confirming the correct branch and service account. Once a branch’s connection is shown as connected and saved, review it again from the branch selector to confirm the result.

Prerequisites

Complete the following checks before using **Configuration > Integration with CRMs**. These preparations help you avoid connecting a branch to the wrong CRM environment or interrupting a connection that is already working.

- You are signed in to Pams with permission to access **Configuration** and **Integration with CRMs**.
- You know which Pams branch needs to be connected, reviewed, or corrected.
- You can identify the branch in the branch selector before making any changes.
- You know which connected service should be used for that branch.
- You have the account or tenant information required by the connected service during its authorization process.
- You have confirmed whether the branch should use a separate CRM environment from other branches.
- You have reviewed any existing connected service entry for the selected branch before replacing it.
- You can complete the authorization prompts presented by the connected service.

If more than one branch needs a CRM connection, prepare the intended connection for each branch separately. Work with one branch at a time: select the branch, connect or review its service, click **Save**, and verify the connected indication before selecting another branch.

[SCREENSHOT: Preparation view showing the selected branch before a CRM service is connected]

Keep branch configurations separate when branches use different service accounts or CRM environments. A connection that is correct for one branch may be incorrect for another, even when both branches work with the same clients, products, principals, or sales teams.

After confirming your CRM connections, continue with Managing Default Layouts to set the default layouts used in Pams.