PAMS V2

Integration With Other CRMs Settings

July 29, 2026

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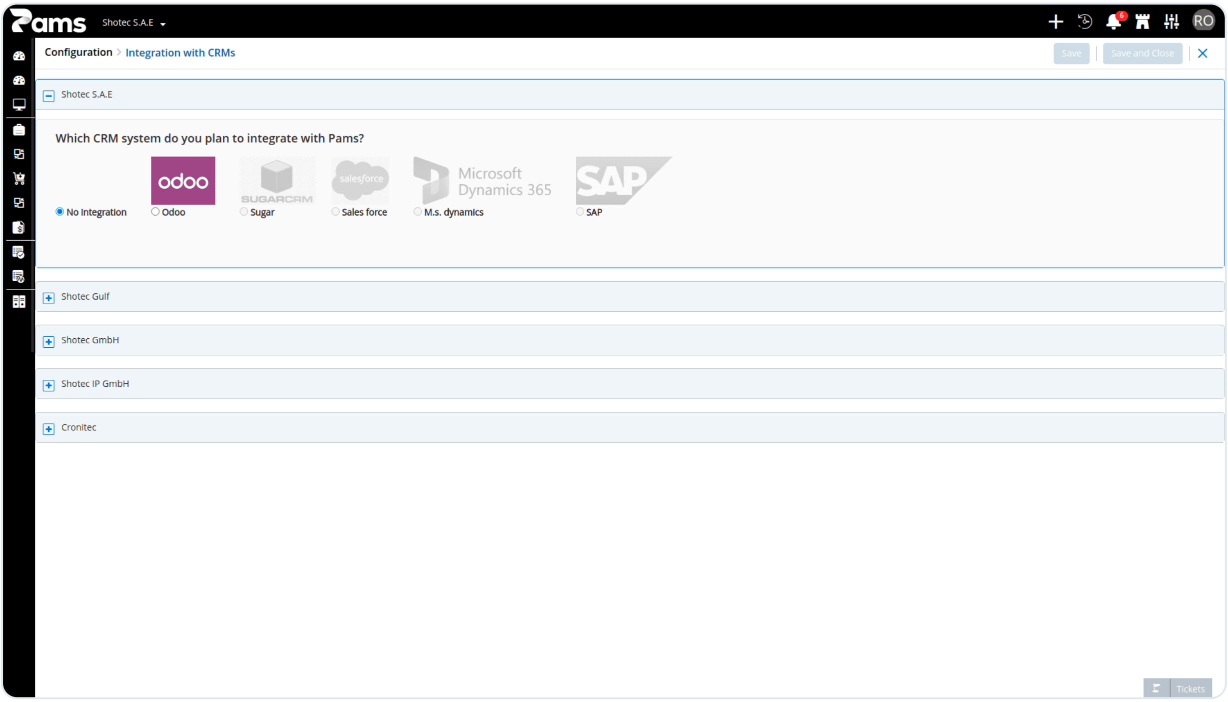
Applications › Configurations › Integration With Other CRMs Settings



Integration with CRMs — Configurations › Integration With Other CRMs Settings

Overview

Use Integration With Other CRMs Settings to maintain the ExternalApp setting and related files for the available CRM integration contexts. Sales representatives, account managers, project managers, and finance or operational users can review the applicable integration tab before relying on information received from an external CRM.

The page is organized into five tabs. Review the tab that corresponds to the required integration context, update the ExternalApp value where appropriate, attach supporting files if required, and save the record.

Settings

Open **Configurations** > **Integration With Other CRMs Settings** to display the **Integration with CRMs** page.

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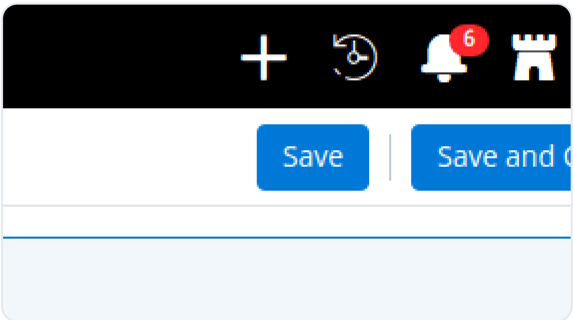
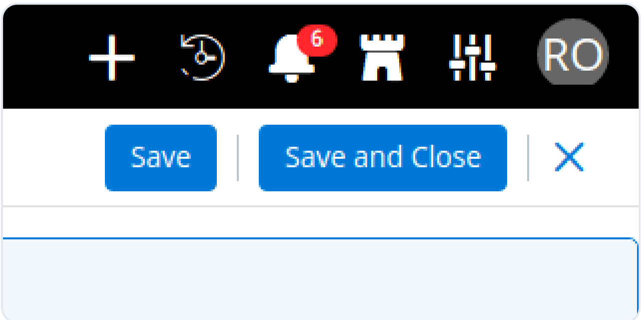




The page provides the following settings:

Setting	Description
ExternalApp	Identifies the external application used in the integration setting.
files[]	Holds files attached to the integration setting.

> **Note:** Review the selected tab before changing **ExternalApp**. Each tab represents a separate integration context.

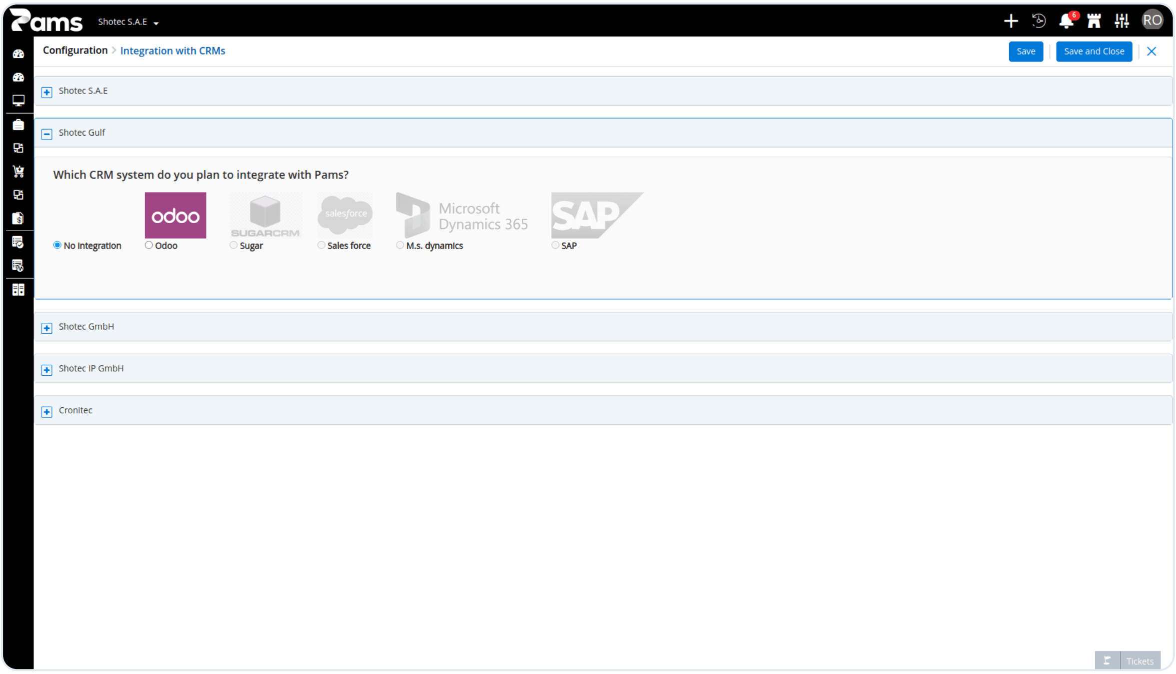
To maintain the settings:

1. Select the relevant integration tab.
2. Review **ExternalApp** and update it when the external application reference must be changed.
3. If supporting material is required, select **Attach** and add the required file to **files[]**.
4. Select **Save** to retain the changes and continue working, or select **Save and Close** to retain the changes and leave the page.

> **Tip:** Attach concise, current documentation that helps users identify the applicable external CRM integration setting.

Workflow

1. Open **Configurations** > **Integration With Other CRMs Settings** and review the current integration context.



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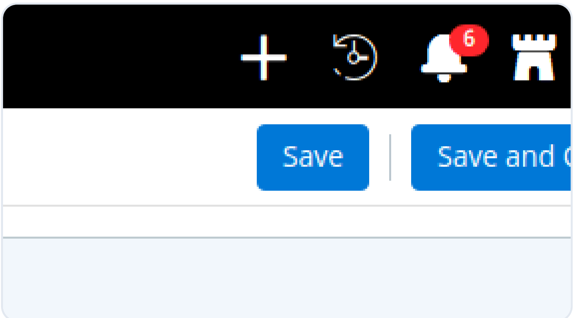
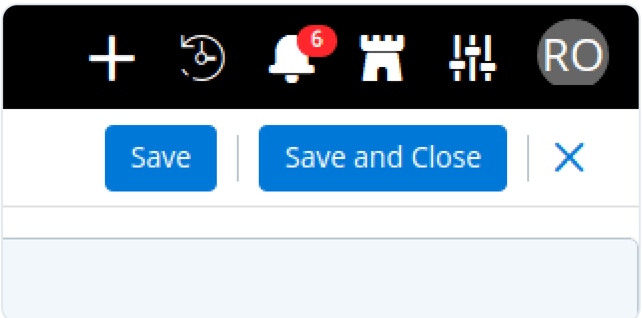




Decide which CRM integration context applies. Select the corresponding tab before reviewing or editing **ExternalApp**.

2. Review the relevant tab and decide whether the external application setting requires revision.

If no revision is required, leave **ExternalApp** unchanged and continue to review any attached files. If a revision is required, update **ExternalApp** with the approved external application value.

3. Decide whether supporting files are needed.

   Select **Attach** when you need to add a file to **files[]**. After completing the attachment action, use **Ok** where it is presented to confirm the action.

   > **Warning:** Do not assume that an attachment replaces the **ExternalApp** setting. Review both the application value and the attached files before saving.

4. Decide whether to continue editing or finish the maintenance task.
   - Select **Save** to save the current changes and remain on the Integration with CRMs page.
   - Select **Save and Close** to save the current changes and close the page.
5. Use **Tickets** only when you need to access the ticket action available from this page. The available screen information does not define a workflow transition between the integration tabs; changing tabs is used to review the separate tab contexts.

Shotec S.A.E

The Shotec S.A.E tab presents the integration setting context for Shotec S.A.E. Review the **ExternalApp** value and any entries in **files[]** to confirm that the setting and supporting material are appropriate for this context.

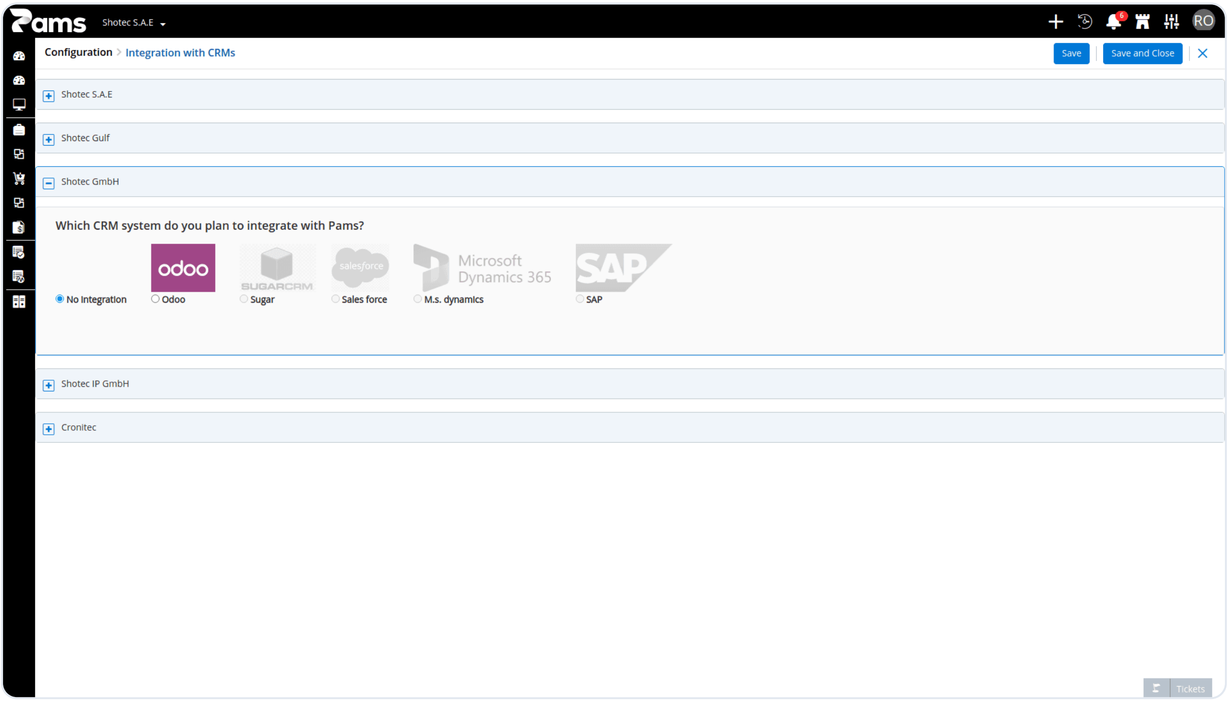
No control is provided that moves records into or out of this tab. Use the tab to view or maintain the settings displayed there, then select **Save** or **Save and Close** when your changes are complete.

Shotec Gulf

The Shotec Gulf tab presents the integration setting context for Shotec Gulf. Use this tab to review the configured **ExternalApp** value and any files associated with the setting.

No tab-transition action is available in the listed controls. Update the displayed values only when required, attach supporting files through **Attach** when needed, and save the completed setting.

Shotec GmbH



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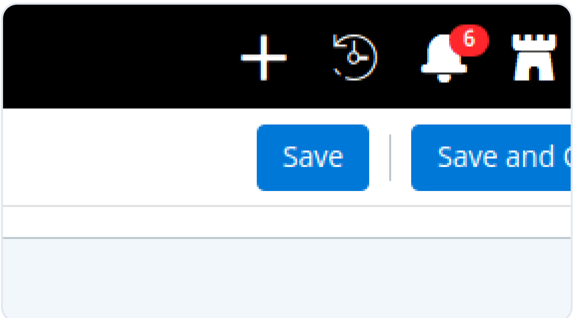
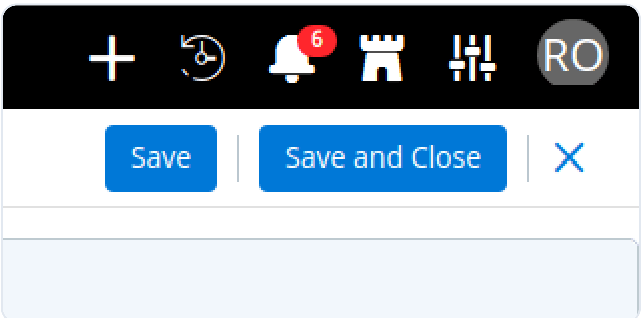
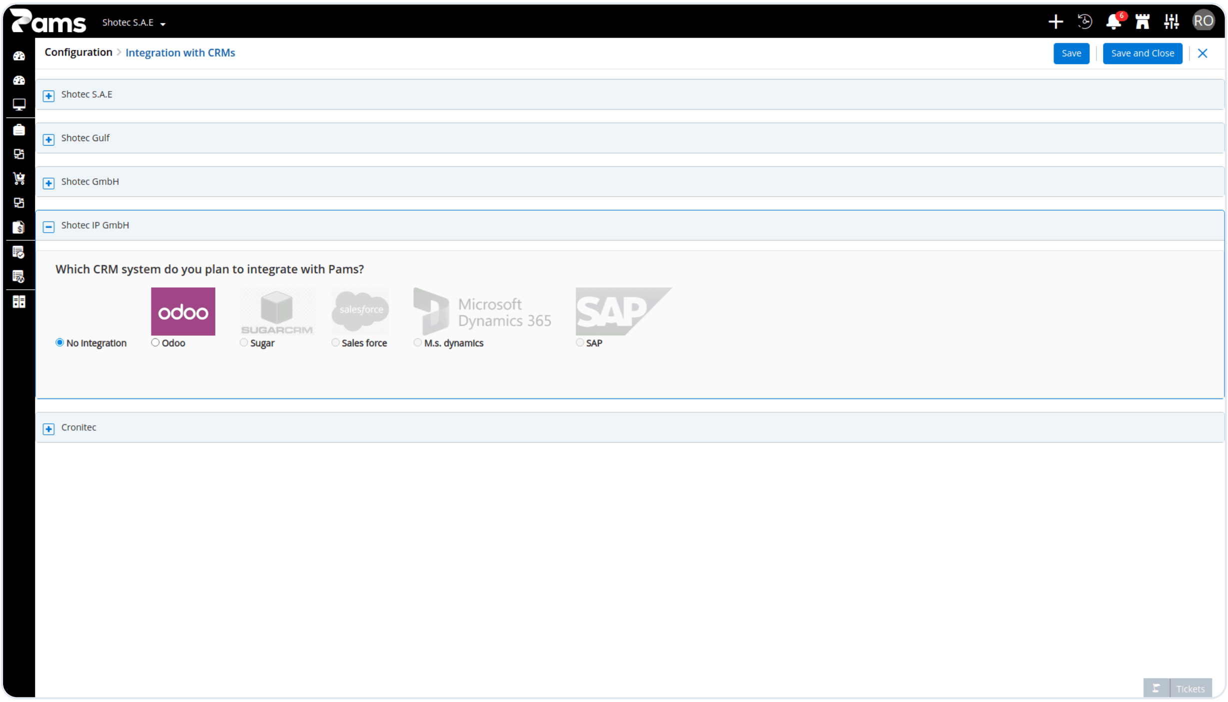




The Shotec GmbH tab holds the integration setting view for Shotec GmbH. Confirm that **ExternalApp** identifies the intended external application and that **files[]** contains the relevant supporting files.

The available controls do not define a record movement into or out of this tab. Save changes using **Save**, or use **Save and Close** when you have finished maintaining this integration context.

Shotec IP GmbH



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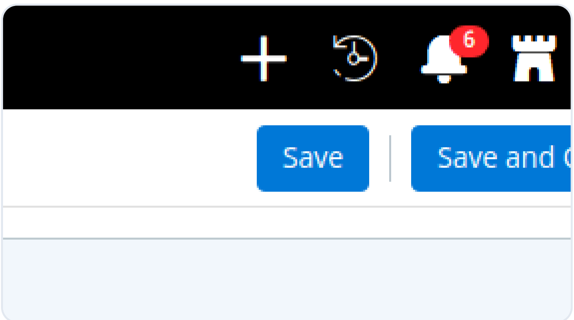
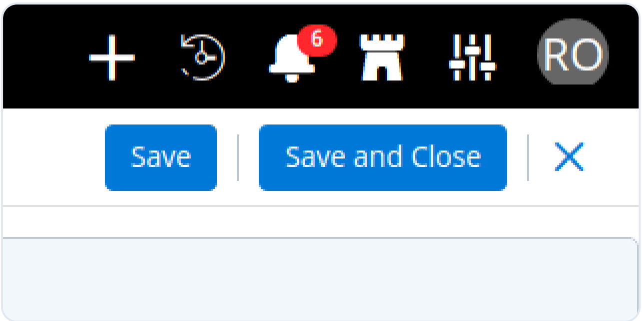
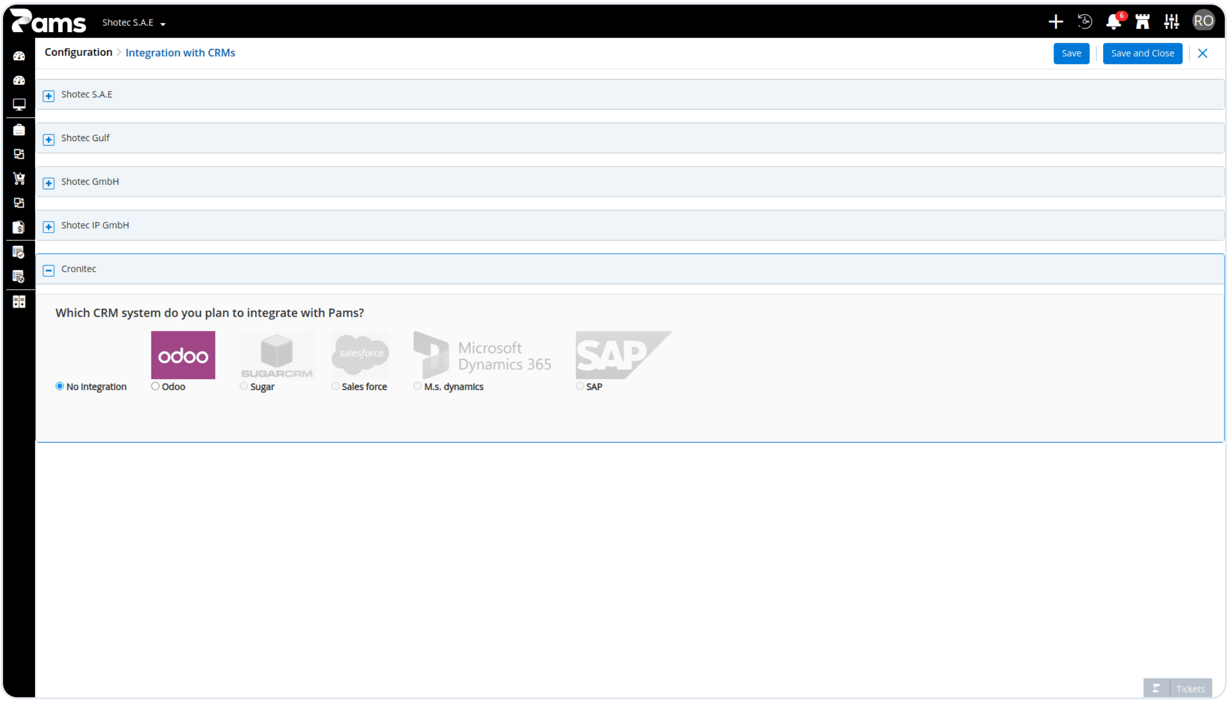




The Shotec IP GmbH tab displays the integration setting context for Shotec IP GmbH. Review the available **ExternalApp** setting and attached files before using this context for CRM-related work.

No workflow control is listed for moving a record between tabs. Use **Attach** to add a supporting file when necessary, confirm with **Ok** if prompted, and save the record after review.

Cronitec



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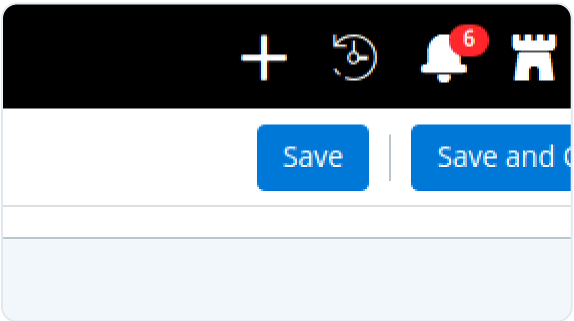

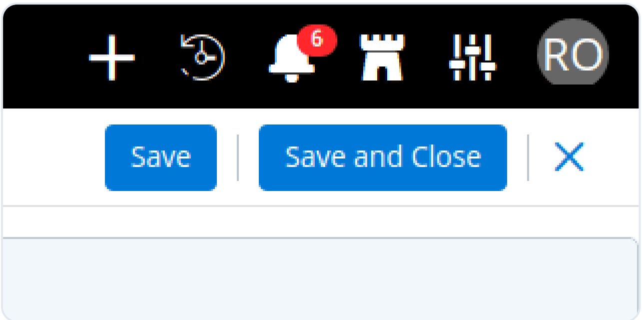

The Cronitec tab displays the integration setting context for Cronitec. This is where you verify or maintain the **ExternalApp** value and the related **files[]** attachments for that context.

The listed actions do not provide a transition into or out of the Cronitec tab. Complete any required maintenance in the tab, then select **Save** to remain on the page or **Save and Close** to finish.

Examples

A sales operations user needs to confirm the external CRM reference for the Shotec Gulf integration context before reviewing customer-related information originating from the external system.

1. Open **Configurations** > **Integration With Other CRMs Settings**.
2. Select the Shotec Gulf tab.
3. Review **ExternalApp** to confirm that it contains the approved external application reference for Shotec Gulf.
4. Review **files[]**. If the team requires supporting integration notes, select **Attach** and add a file such as `Shotec-Gulf-CRM-Integration-Notes.pdf`. Select **Ok** if the attachment process displays that action.

5. Select **Save** if you need to verify another tab, or select **Save and Close** after the Shotec Gulf setting and its supporting file have been reviewed.

Tips

> **Tip:** Use the tab names consistently when discussing an external CRM setting with Sales, PM, Purchasing, Warehouse, or Finance teams. This avoids reviewing the correct setting in the wrong integration context.

> **Note:** The available tabs are displayed in this order: Shotec S.A.E, Shotec Gulf, Shotec GmbH, Shotec IP GmbH, and Cronitec.

> **Warning:** Save changes before leaving the page. Use **Save and Close** only after confirming that the selected tab and **ExternalApp** value are correct.

Troubleshooting

Symptom	Likely cause	Fix
The required CRM integration setting is not visible.	The incorrect tab is selected.	Review each available tab and select the integration context required for the task.
A supporting document is missing from the setting.	No file has been added to **files[]**, or the attachment has not been confirmed.	Select **Attach**, add the required file, select **Ok** if prompted, and then select **Save**.
Changes to the ExternalApp value are not retained.	The page was closed or another tab was selected without saving.	Return to the relevant tab, review **ExternalApp**, and select **Save** or **Save and Close**.
The user is unsure whether the setting applies to the intended business context.	The tab name was not checked before reviewing the field values.	Confirm the tab name first, then review **ExternalApp** and **files[]** within that tab.

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