



INTEGRATION WITH CRMS

Configure Integration With Other CRMs Settings

Administrator Guide > Configuration > Integration with CRMs

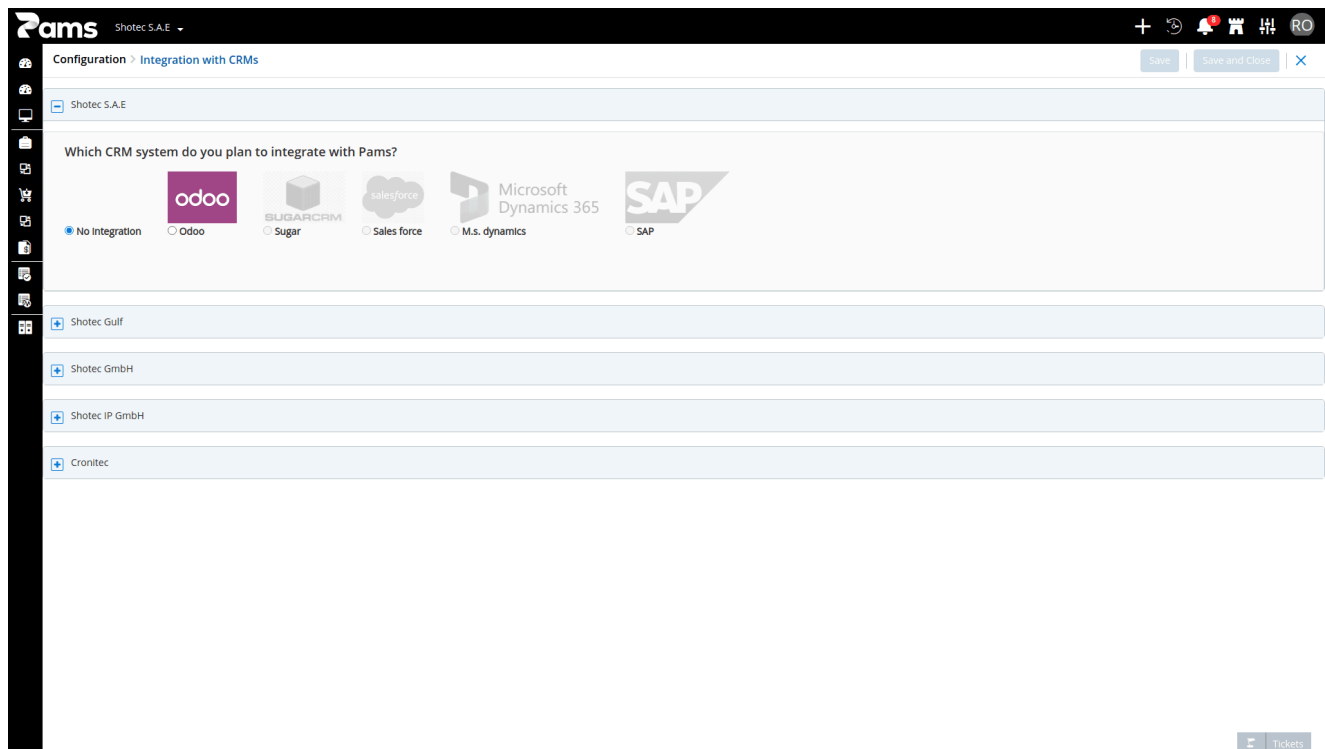
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CONTENTS

1	Overview	2	7	Shotec IP GmbH	9
2	Before you start	2	8	Cronitec	11
3	Steps	3	9	Tips & cautions	13
4	Shotec S.A.E	3	10	Troubleshooting	13
5	Shotec Gulf	5	11	Result	13
6	Shotec GmbH	7	12	Related pages	13

Administrator Guide > Configuration > Integration with CRMs*Integration with CRMs — Configurations > Integration With Other CRMs Settings*

1 Overview

Use **Integration With Other CRMs Settings** to maintain company-specific integration settings for external CRM applications. Administrators configure the settings separately for each company tab, including Shotec entities and Cronitec. Use this page when integration procedures must be established or updated for a specific company.

2 Before you start

Ensure that you have access to **Configurations** and the **Integration With Other CRMs Settings** page. Prepare the required integration values for the company that you intend to configure.

3 Steps

- 1 Navigate to **Configurations > Integration With Other CRMs Settings**.
- 2 Select the company tab for which you want to configure integration settings. Review and update the settings displayed for that company.
- 3 Select **Save** to validate and save the company integration settings.
- 4 If you want to save the settings and exit the page, select **Save and Close**.

4 Shotec S.A.E

The **Shotec S.A.E** tab contains the integration settings record for Shotec S.A.E. Use this tab to maintain the settings presented for this company before saving the configuration.



Integration with CRMs — Configurations > Integration With Other CRMs Settings

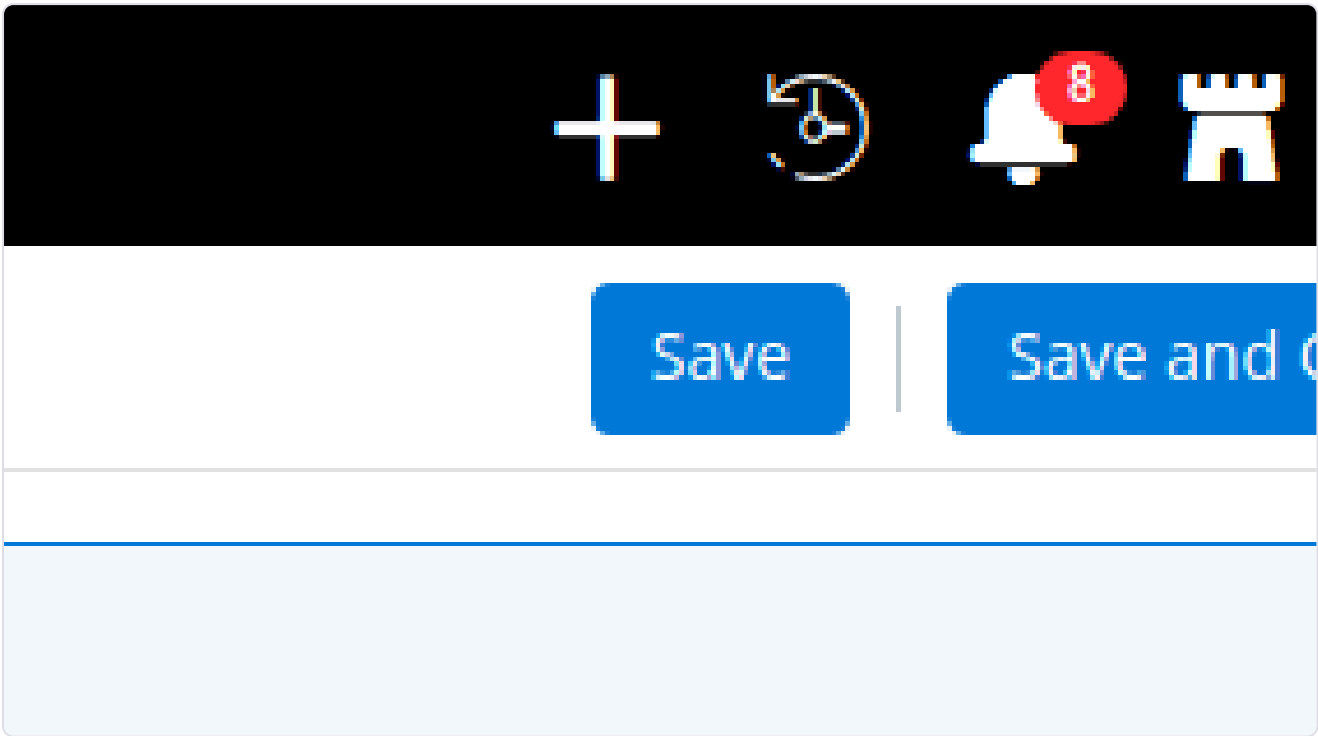


Figure 1

Save

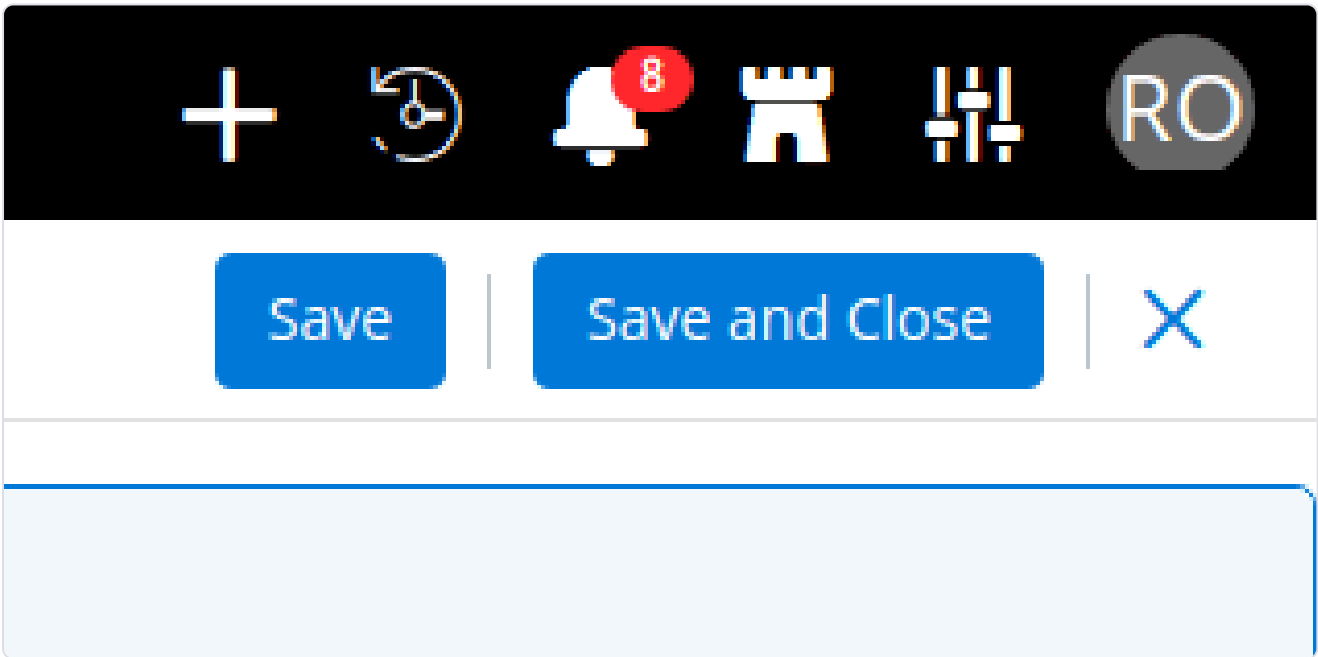
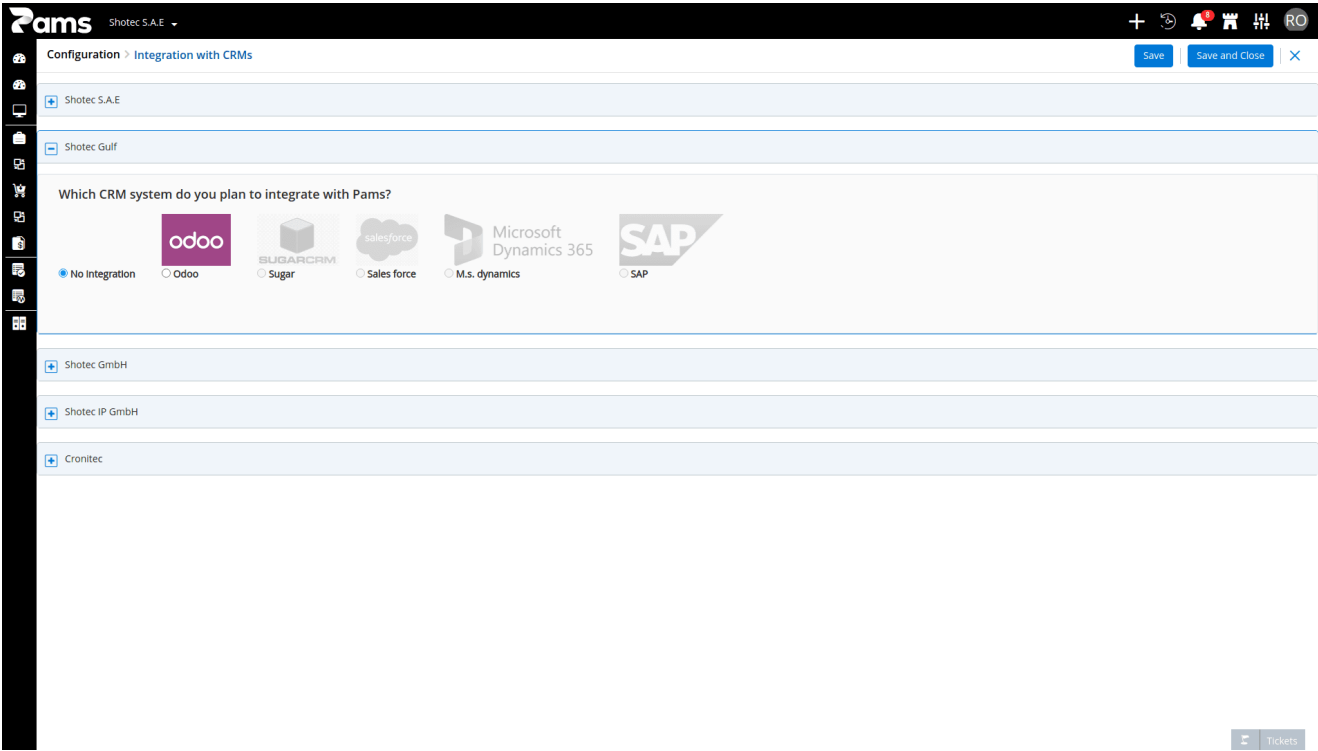


Figure 2

Save and Close

5 Shotec Gulf

The **Shotec Gulf** tab contains the integration settings record for Shotec Gulf. Select this tab when the required external CRM integration configuration applies to Shotec Gulf.



Integration with CRMs — Configurations > Integration With Other CRMs Settings

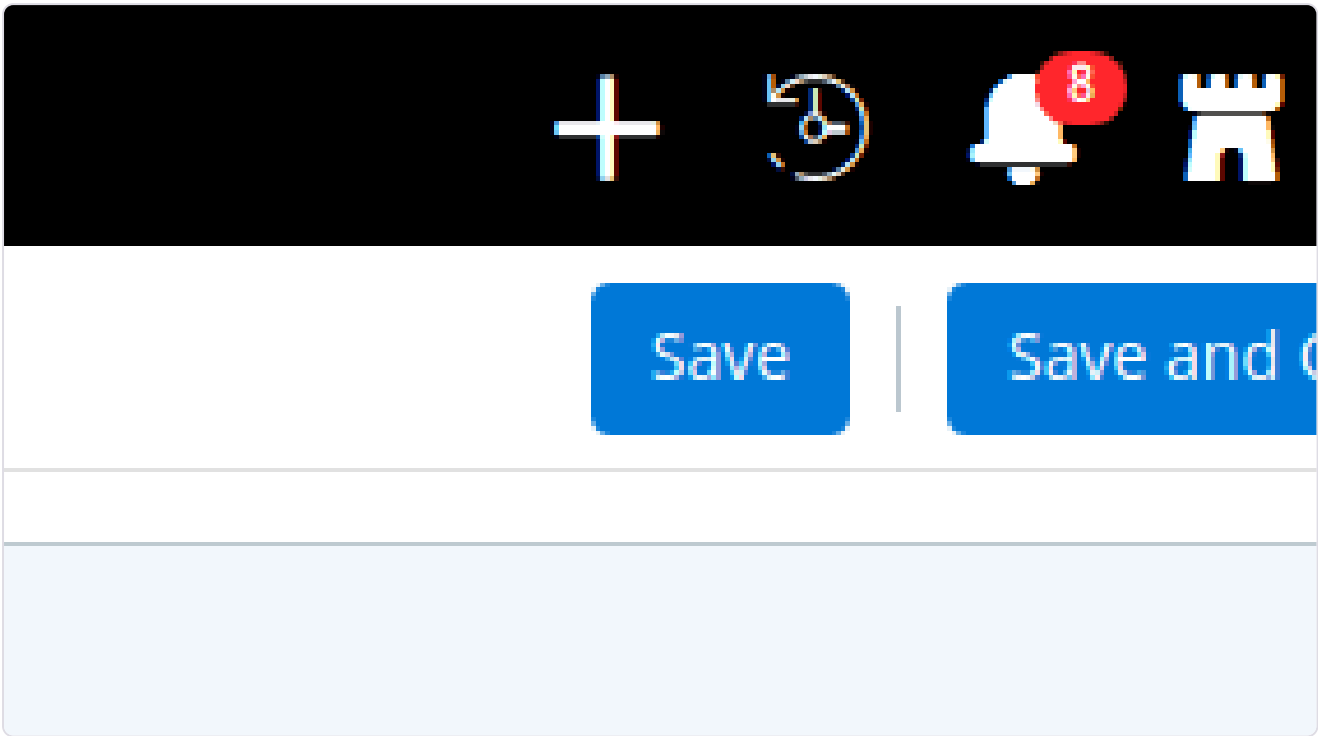


Figure 3
Save

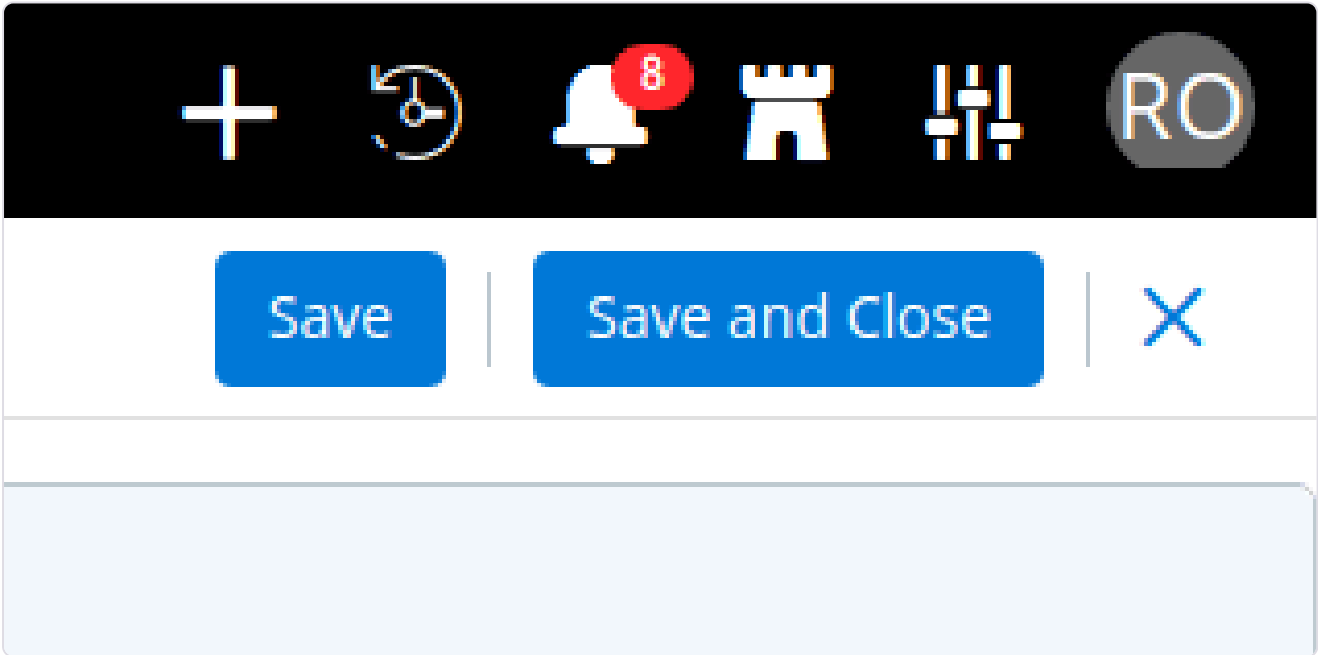


Figure 4
Save and Close

6 Shotec GmbH

The **Shotec GmbH** tab contains the integration settings record for Shotec GmbH. Use the displayed settings to configure the company-specific integration procedure, then save the changes.

Pams

Shotec S.A.E

+🕒🔔🏠👤RO

Configuration > Integration with CRMs

SaveSave and CloseX

+ Shotec S.A.E

+ Shotec Gulf

- Shotec GmbH

Which CRM system do you plan to integrate with Pams?

☒ No integration



☐ Odoo



☐ Sugar



☐ Sales force



☐ M.s. dynamics



☐ SAP

+ Shotec IP GmbH

+ Cronitec

Tickets

Integration with CRMs — Configurations › Integration With Other CRMs Settings

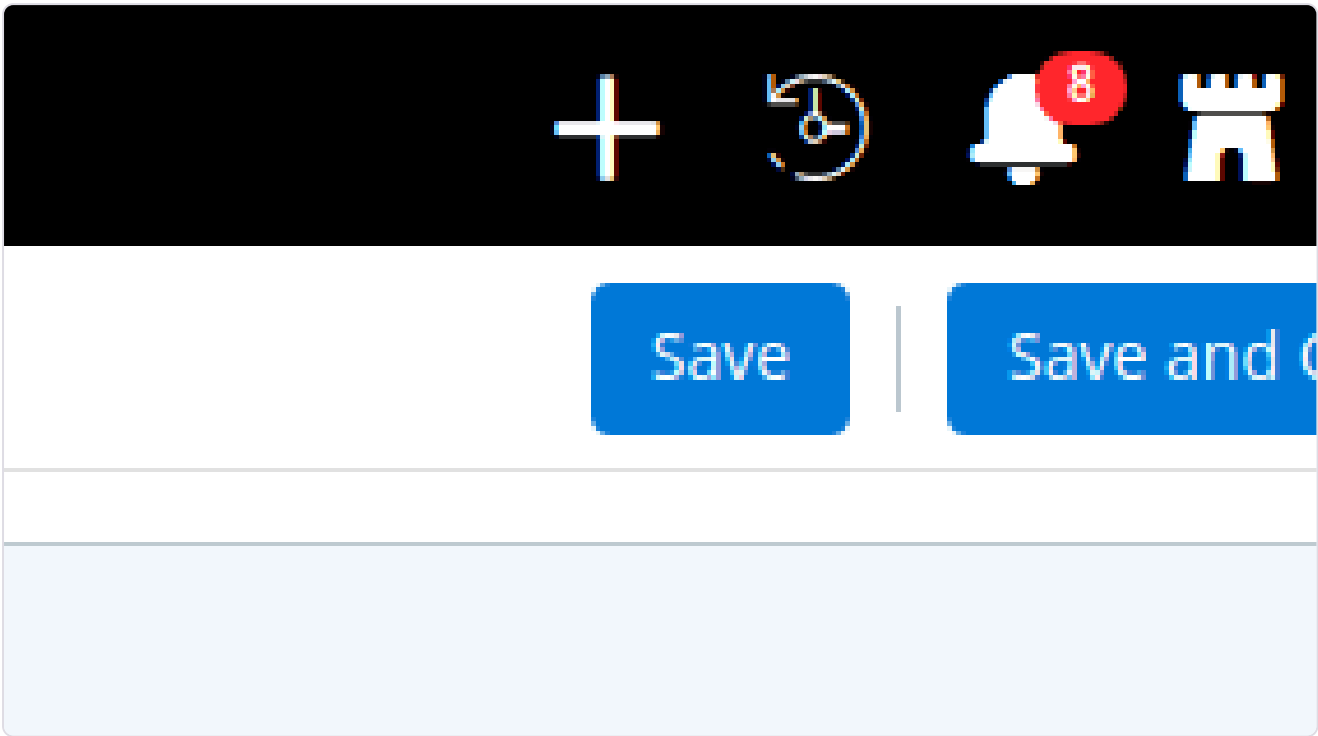


Figure 5

Save

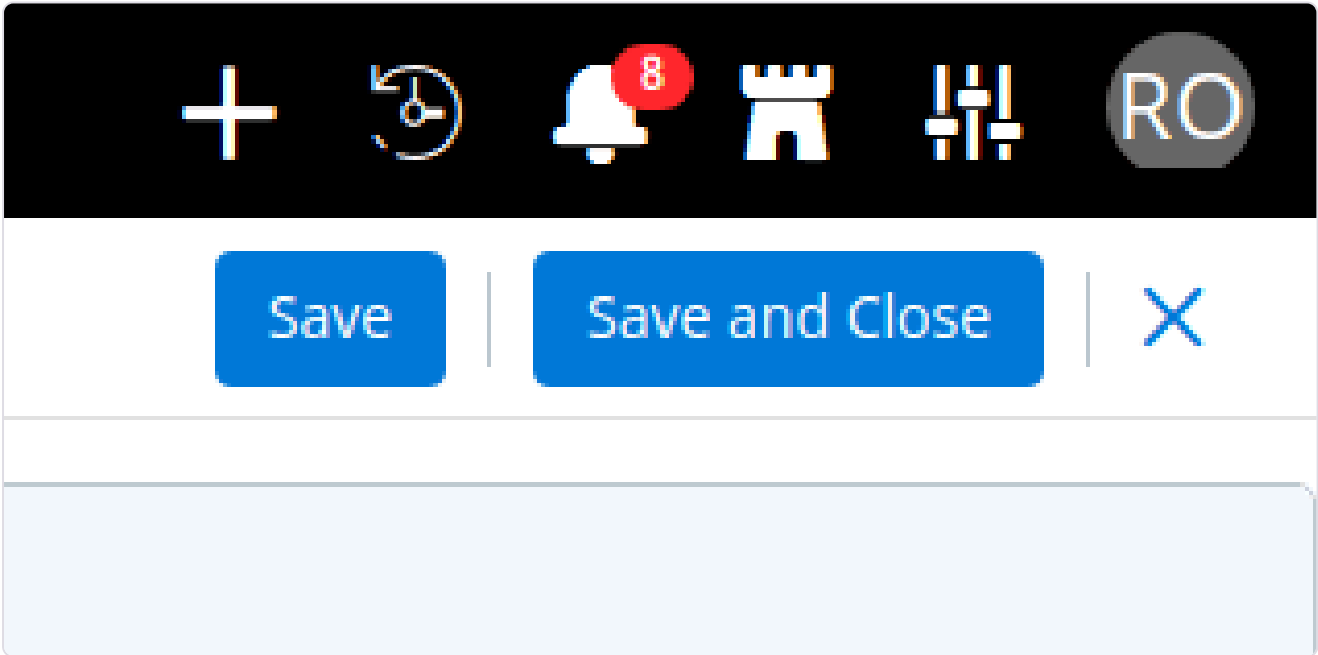
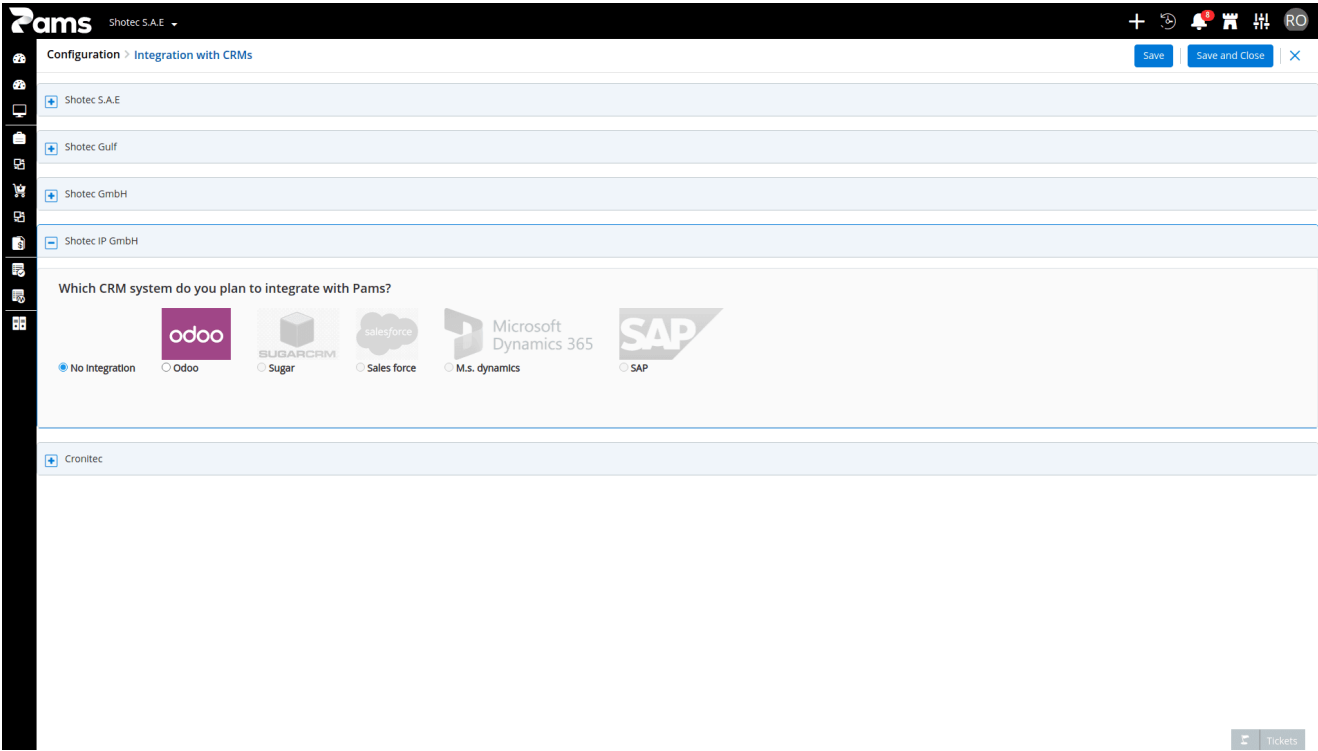


Figure 6

Save and Close

7 Shotec IP GmbH

The **Shotec IP GmbH** tab contains the integration settings record for Shotec IP GmbH. Maintain the settings on this tab when configuring integration for this company.



Integration with CRMs — Configurations > Integration With Other CRMs Settings

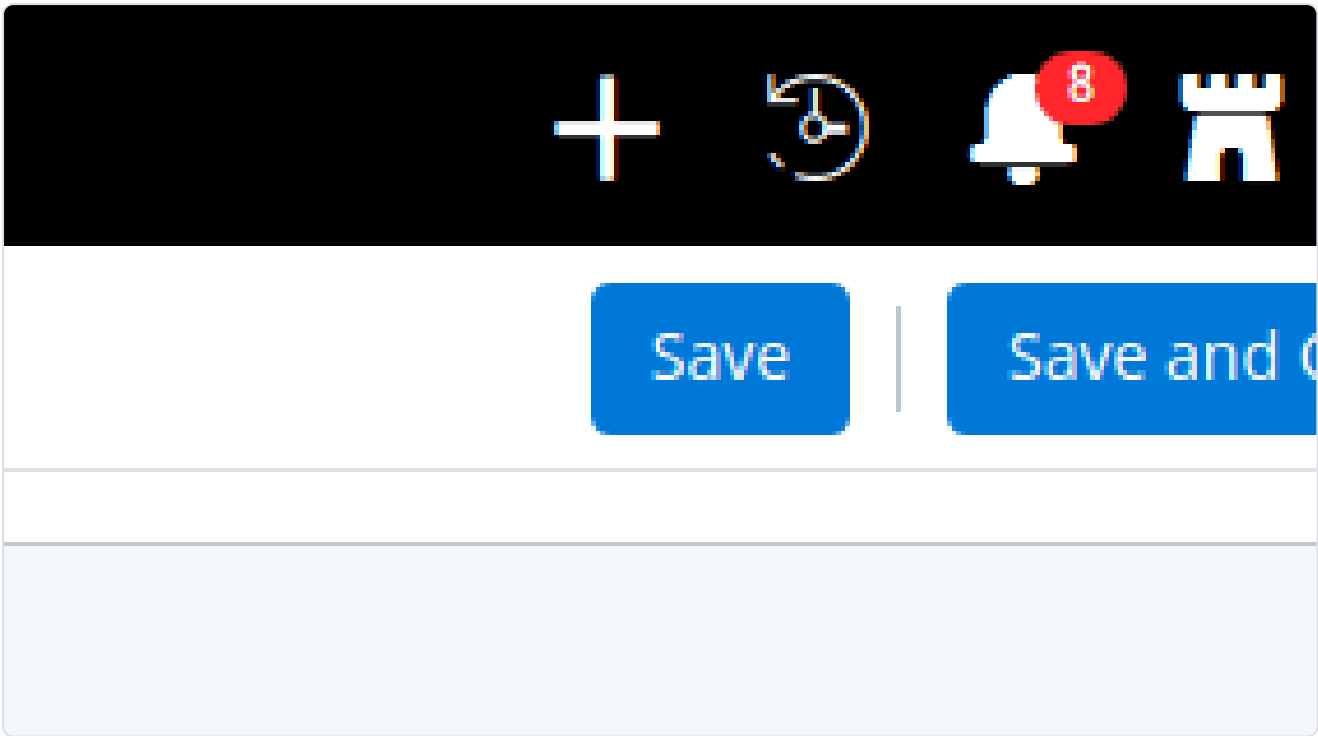


Figure 7
Save

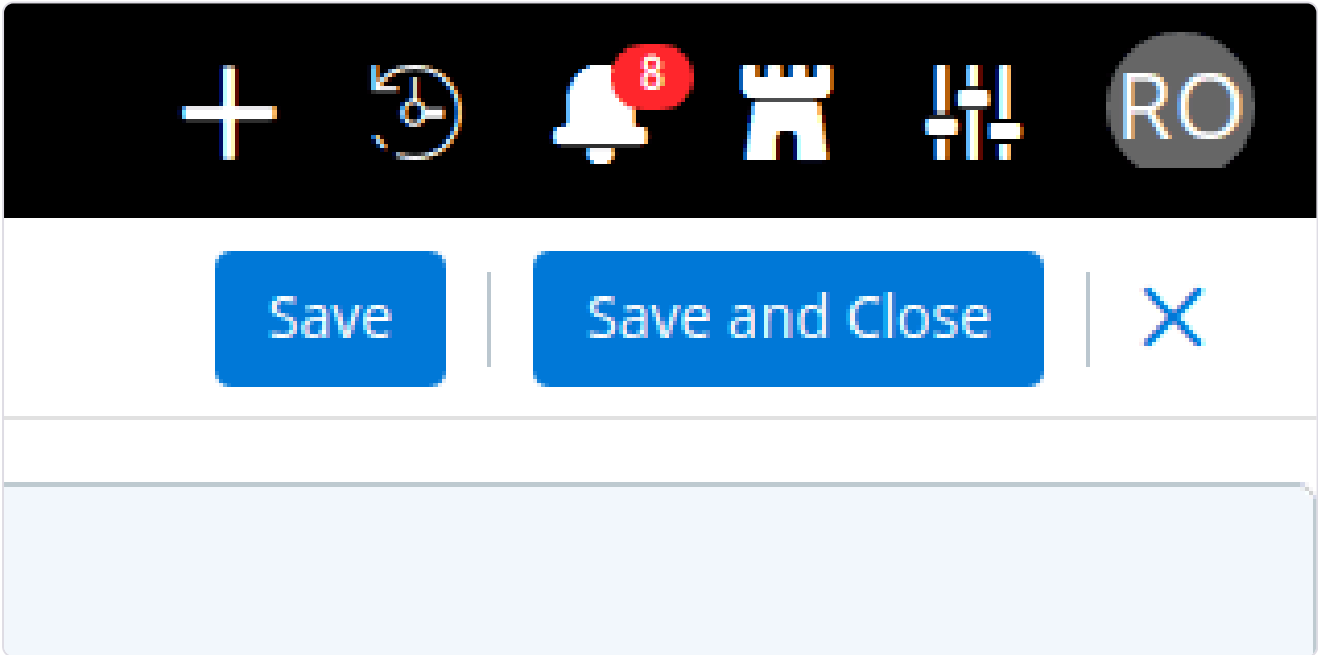
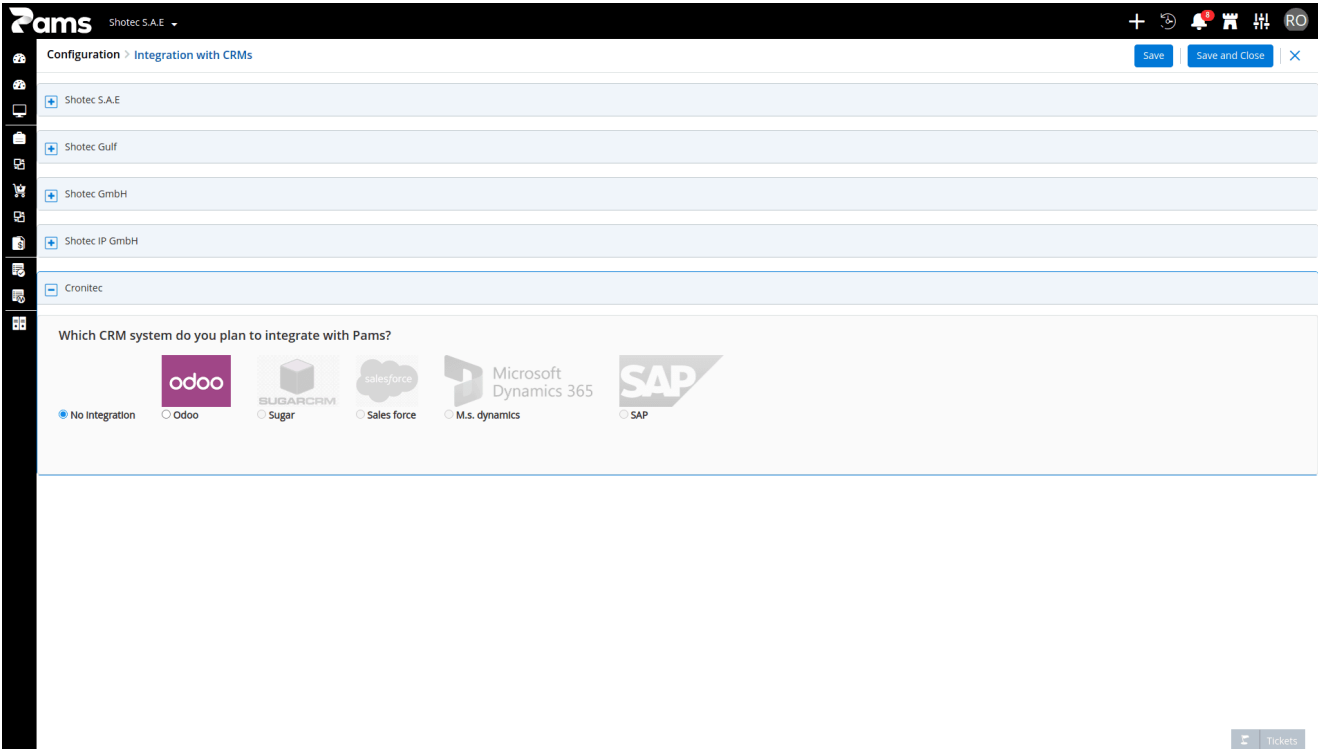


Figure 8
Save and Close

8 Cronitec

The **Cronitec** tab contains the integration settings record for Cronitec. Use this tab to review and configure the integration settings that apply to Cronitec.



Integration with CRMs — Configurations › Integration With Other CRMs Settings

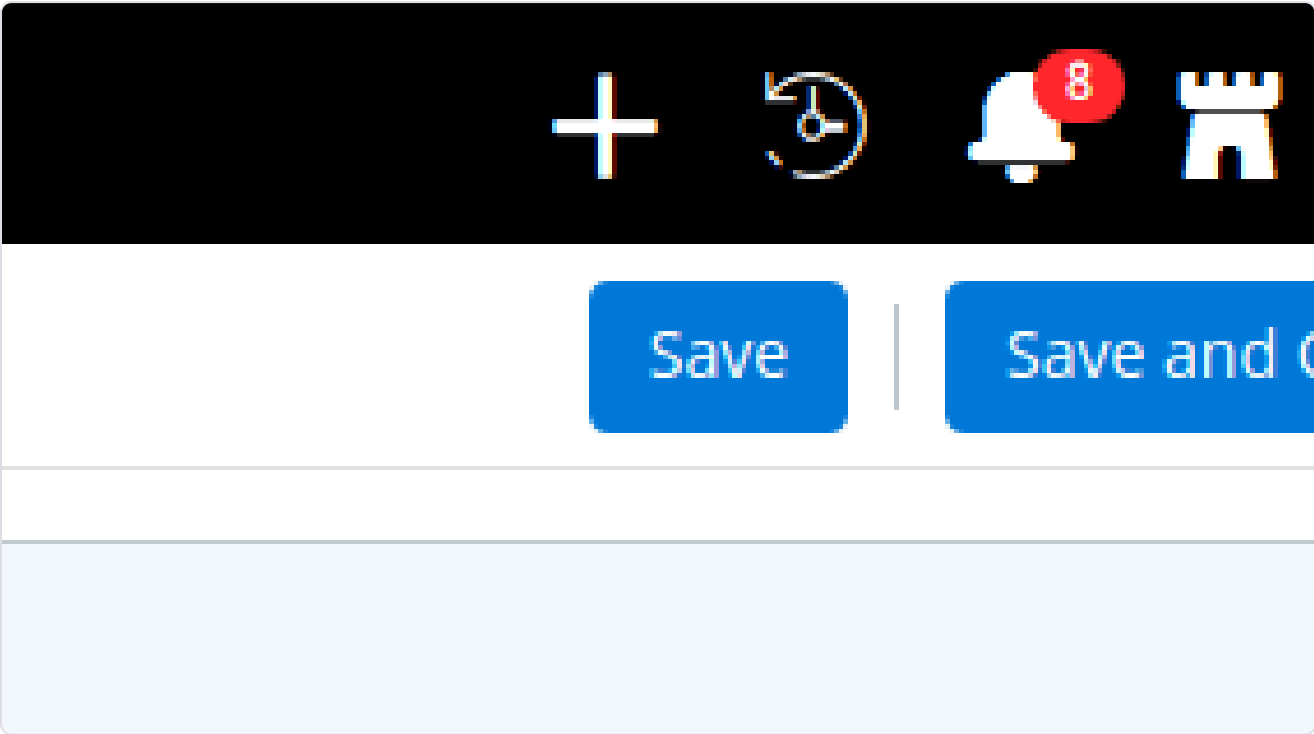


Figure 9
Save

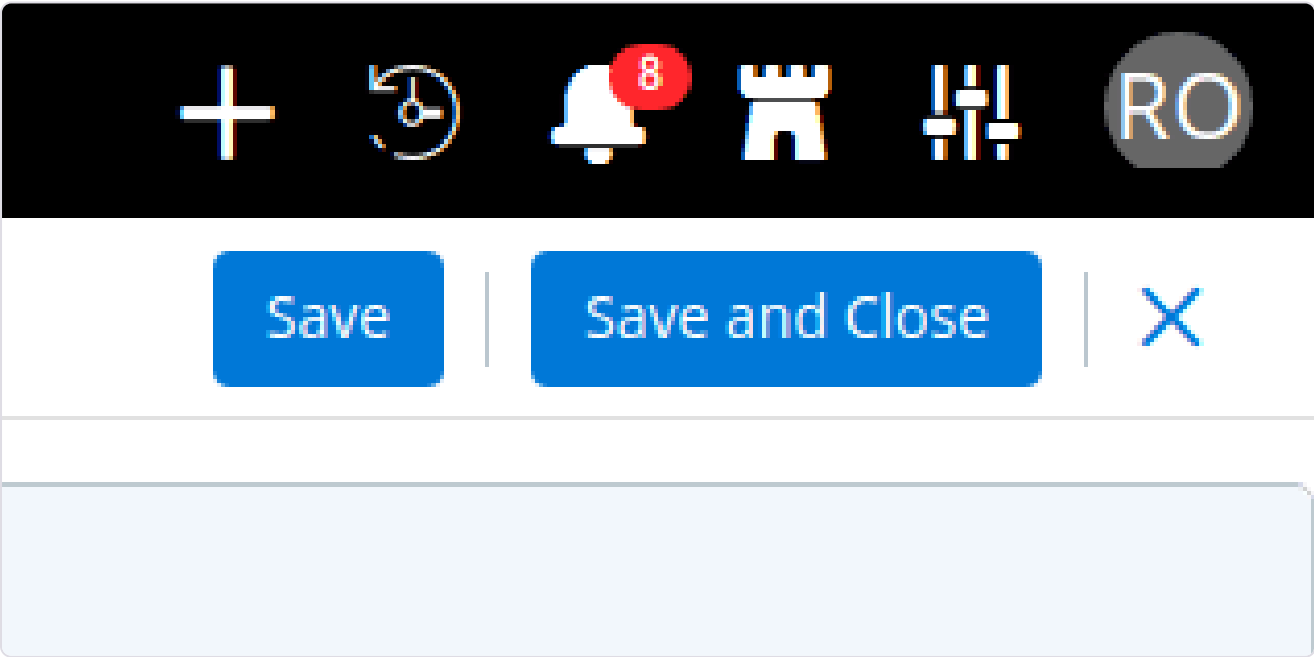


Figure 10
Save and Close

9 Tips & cautions

Warning: The application validates the settings before saving. Complete all required settings before selecting **Save**.

Warning: If you leave the page after making changes without saving, the application displays a warning about unsaved changes.

Tip: Configure and save each company tab independently to ensure that the correct company integration settings are retained.

10 Troubleshooting

- Settings do not save → A required setting is missing → Complete the required settings on the selected company tab, then select **Save**.
- A warning appears when leaving the page → Unsaved changes are present → Select **Save** to retain the changes, or leave the page only when the changes are not required.
- Integration settings are updated for the wrong company → A different company tab was selected → Select the correct company tab, update its settings, and select **Save**.

11 Result

The integration settings for the selected company are validated and saved.

12 Related pages

- [Configure 2 Factor Authentication](#)
- [Configure Account Managers](#)
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