paperbot

# Integration Services

## Bring your chosen platforms into a more connected business.



Connect third-party software to your CRM, website or business platform. Paperbot handles the agreed configuration and integration, so the tools you choose can work within the way your business operates.

# Your tools.
# Working together.

An existing website, a CRM from another provider or a custom business application can be the starting point. Integration Services is built around the connection you need, wherever that connection belongs.



### Your CRM

Connect an external platform to the client or operational workflows your CRM needs to support.

### Your website

Configure a third-party service within an existing website, including one built by another provider.

### Your platform

Review a connection for another business system around its available interfaces and intended use.

**The starting point is your requirement, not who built the platform.**

# Handcrafted
# for your business.

Thoughtful connections.
Technology that fits the way you work.



### Start with the purpose

We first understand what the connection needs to accomplish: the service being used, the system it needs to work with and the experience your team or customers should have. That purpose shapes the work.

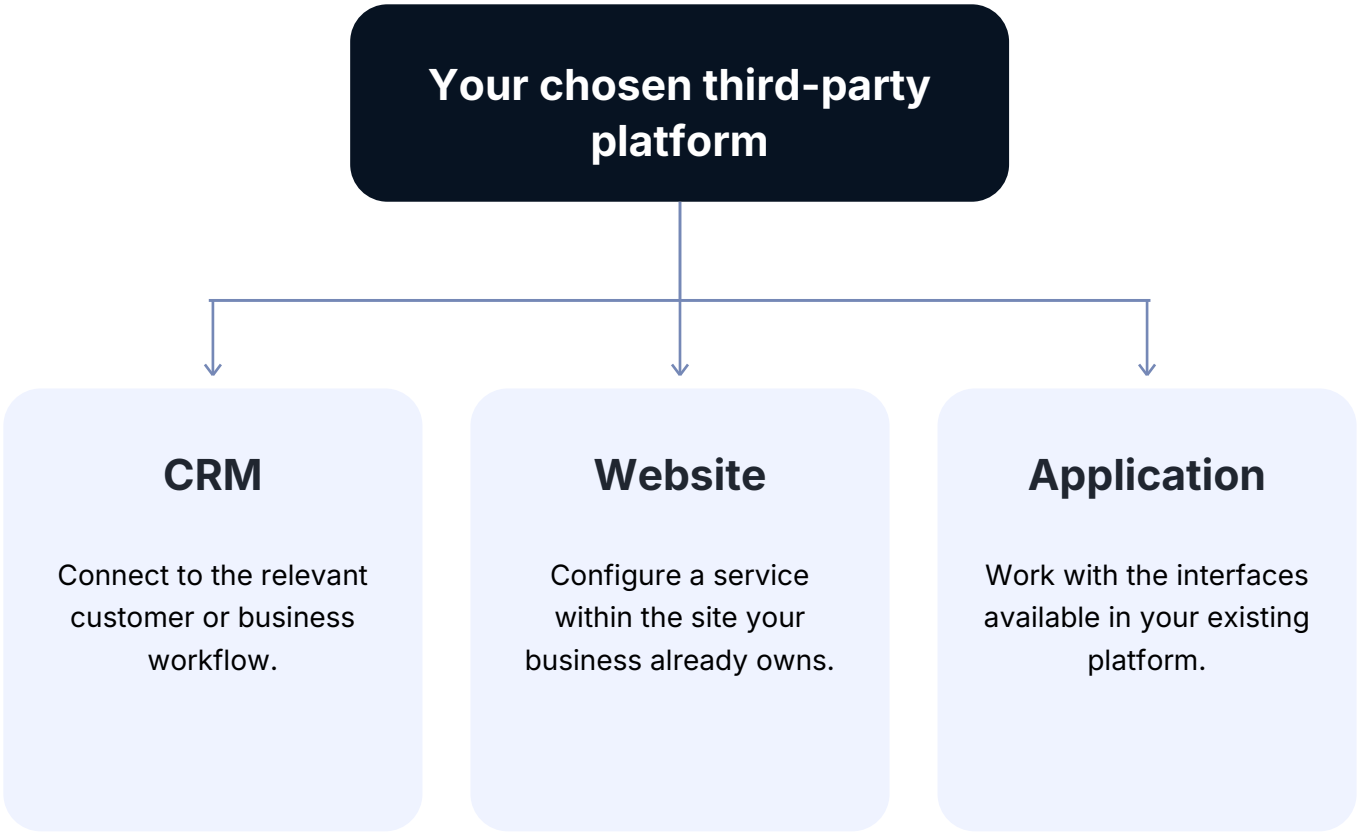
### Make the connection feel considered

Our role brings practical configuration and integration expertise to the tools your business has chosen. We focus on a clear result that fits the existing environment, rather than asking your operation to start again.

A better connection begins with understanding.

# Your platform.
# Our integration expertise.

Integration is a service around the systems you already use. Paperbot CRM is one possible destination; it is not a requirement for working with us.




## Built by someone else? That is a valid starting point.

Share the platform details and the result you need. We review the available configuration, interfaces and access before agreeing the connection. Feasibility depends on what the systems support.

# Your email provider. Connected to your system.

Email is a useful example of the distinction between providing a service and helping you configure a provider you have already chosen.



### Configure the provider you choose

Connect the email platform your business uses to its CRM, website or application. Paperbot reviews the provider settings and the intended sending workflow, then carries out the configuration included in the agreed scope.

### A connection with a clear purpose

The work may involve applying the provider's SMTP settings and checking the agreed sending flow within your CRM, website or application. The external provider remains responsible for the underlying email service.

External email is an example. The same approach applies to other supported third-party services and platforms.

# A clear connection.
# A considered approach.

Every integration begins with the platforms involved and the outcome you need. We shape the work around your existing environment, supported interfaces and business requirements.

### The platforms involved

Identify the software or service you want to connect and the CRM, website or application it needs to work with. Existing systems from other providers are a valid starting point.

### The connection required

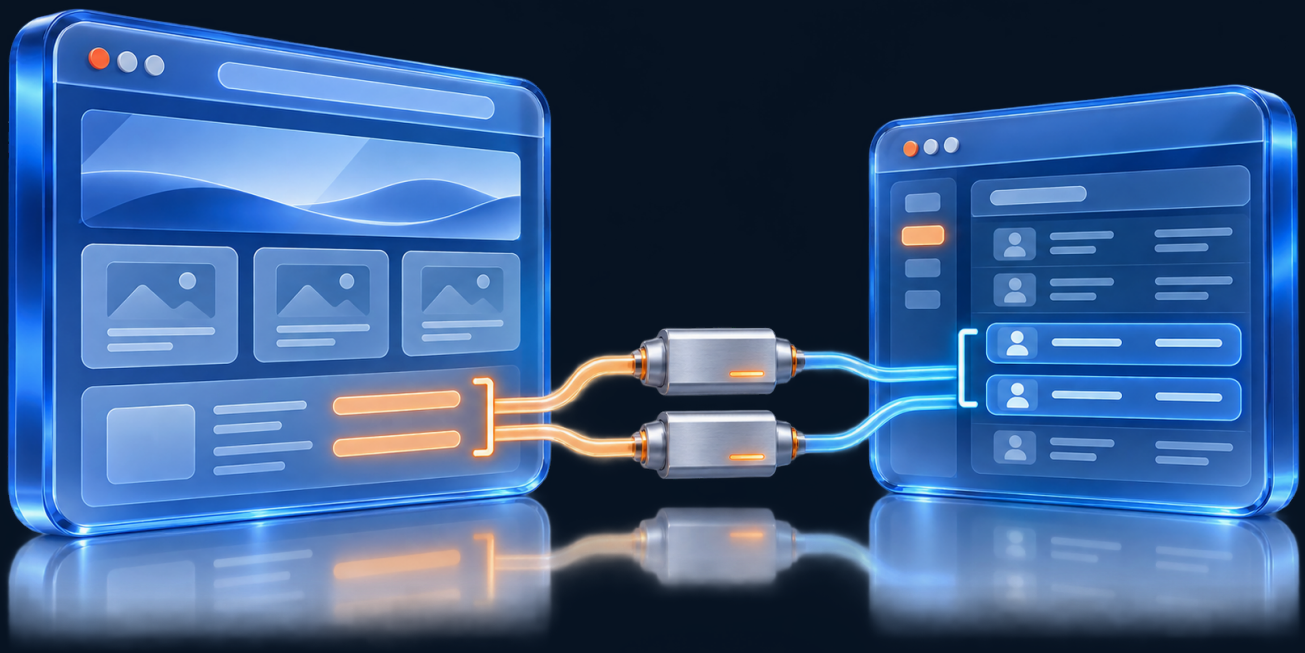
Define the settings, interfaces and workflow needed for the intended result. Paperbot reviews feasibility and access before agreeing the configuration or integration work.

## A scope built around your requirement

The engagement describes the connection to be delivered and the responsibilities of each party. The underlying platforms, provider accounts and service arrangements remain distinct from the integration work.

# Connect around the interfaces available.

Every platform offers a different way to connect. We review the options available before defining the right integration approach for the outcome you need.



### Configuration where it is supported

Some connections can be made through existing settings, credentials and provider configuration. We work within the supported options of the systems involved and the access agreed with your business.

### An integration shaped to the requirement

Where a connection needs API work or another supported interface, the required development is defined in the engagement. Capabilities, data flows and limitations are confirmed against the platforms involved.

Platform compatibility and access are reviewed for the specific connection; universal compatibility is not assumed.

# The right access. A clear scope.

A successful connection starts with a shared understanding of the systems involved and the access needed to work within them.

## Your business provides

Identify the platforms, maintain the required provider accounts and arrange authorised access to the relevant settings or environments. Share available documentation and the result you expect the connection to support.

## Paperbot handles

Review the requirement, agree the integration scope and carry out the configuration or development included in that engagement. Check the agreed connection with your team before handover.

## Agree responsibilities at the start

Where another provider controls a platform, their access rules, supported interfaces and approvals may affect the work. Any changes outside the agreed connection are reviewed separately.

# A working connection. A result you can recognise.

The purpose of integration is the outcome it enables. We check the agreed workflow in the intended environment, rather than treating saved settings as the whole result.



### Check the intended outcome

Review the connection against its agreed use. For an email setup, that can mean checking the application's sending flow with the chosen provider. Other connections are checked against their own expected behaviour.

### Make handover clear

Confirm what has been connected, where the relevant configuration sits and which accounts or providers remain part of the workflow. Your team should understand the connection it is taking forward.

Checks relate to the agreed integration. Availability and performance also depend on the connected systems and their providers.

# Know what connects. Keep ownership clear.

Integration adds a connection to your existing environment. It does not replace the providers, accounts or ownership arrangements behind the services you use.

## Your platforms remain yours

Your website, CRM and external accounts stay within their existing ownership and service arrangements. We work with the access authorised for the agreed integration.

## The engagement remains focused

The deliverable is the connection or configuration described in the agreed scope. Hosting, service subscriptions, platform redesigns and unrelated development are not automatically part of that engagement.

## Plan for changes where needed

If a provider changes its interface or your business needs additional work later, ongoing support and further integration changes can be agreed separately. They are not assumed to be included in the initial setup.

# Built around the connection you need.

You may know exactly which setting needs attention, or simply know that two platforms need to work together. Bring us the requirement and we will help define the integration work.



### Share the starting point

Tell us which service you have chosen, where it needs to connect and what your team wants to achieve. Existing systems and third-party platforms are part of that conversation.

### Agree a focused engagement

We review feasibility, the access available and the work required. The result is a clearly defined integration scope, shaped around your business and the platforms it depends on.

Integration Services is a separate professional service. The external product or platform is not supplied as part of it.

# Make your platforms work better together.

Third-party services, existing websites and business systems. Thoughtfully connected around the way your business works.

### Let's discuss the connection

Share the platform you use, the service you want to connect and the outcome you need. We will review the requirement and help you shape the right integration engagement.

**Connect with Paperbot**


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