PAMS FRESH GENERATION

Understanding the interface

September 10, 2026

Understanding the interface

Review the Dashboard and choose the view that matches your work.

If you need to…	Go to
Reach the Dashboard and understand the main navigation	Navigation basics
Understand the Dashboard's purpose and measures	Dashboard overview
Find a card or chart by its title	Dashboard widget catalog
Read a Principals Report	Principal report
Change dashboard tabs or widgets	Personalizing your workspace
Get help when your role has no dashboard	Getting help

What the Dashboard is for

The Dashboard is a set of role-based tabs that displays the measures your organization has chosen
for your work. Its visible tab names divide the information into separate views, so you can review
the view that answers your current business question without changing information first.

Before you open the Dashboard

Prerequisites

- You are signed in.
- Dashboard access is included for your subscription.
- Your role has a dashboard with at least one dashboard tab.

You see the Dashboard after signing in. Its tabs and content appear when dashboard access is included. Your dashboard view appears when it is selected and at least one dashboard tab is available.

If your role has no dashboard, the page displays `Your role has no dashboard` and `Kindly, Contact your administrator to define a dashboard`. Contact your administrator to have a dashboard defined for your role.

Open the Dashboard and orient yourself

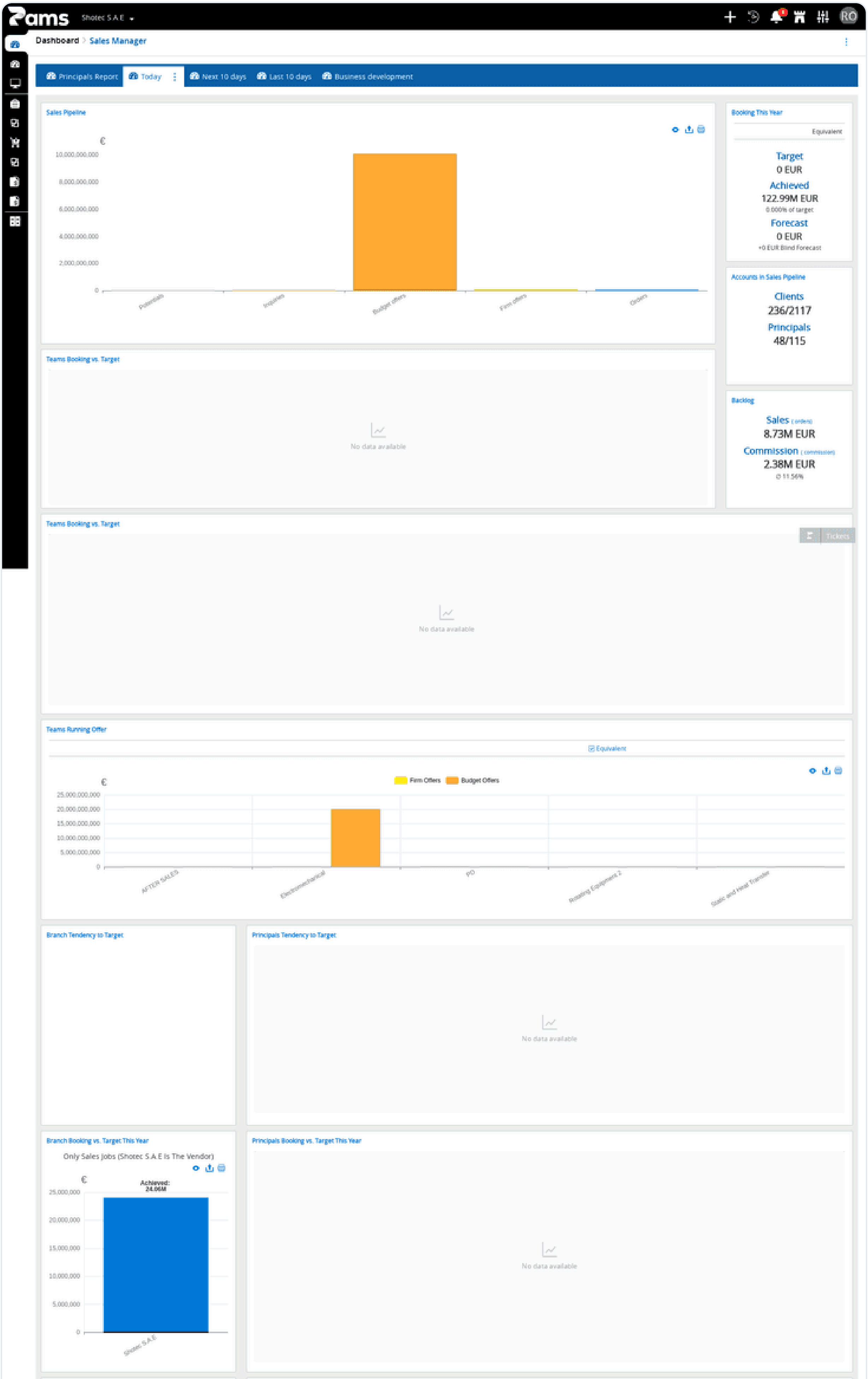
Open the **Dashboard** to review the measures selected for your role.

Prerequisites

- You are signed in.
- Your role has a dashboard with at least one dashboard tab.

Steps

1. Open the **Dashboard**.
2. Locate **Dashboard** and **Principals Report** in the tab strip.
3. Review the cards, charts, and headings on the active dashboard view.
4. Locate the sorting control for the measure you want to review: **Sort by Booking**, **Sort by Target**, or **Sort by Achievement**.


Dashboard
Sales Manager
Principals Report
Today
Next 10 days
Last 10 days
Business development
Sales Pipeline
Booking This Year
Equivalent
Target
0 EUR
Achieved
122.99M EUR
Forecast
0 EUR
Accounts in Sales Pipeline
Clients
236/2117
Principals
48/115
Backlog
Sales
8.73M EUR
Commission
2.38M EUR
Teams Booking vs. Target
No data available
Teams Booking vs. Target
No data available
Teams Running Offer
Branch Tendency to Target
Principals Tendency to Target
No data available
Branch Booking vs. Target This Year
Only Sales Jobs (Shotec S.A.E Is The Vendor)
Principals Booking vs. Target This Year
No data available

Some controls use icons without text labels. Use the text displayed on the page rather than
guessing what an icon-only control does.

Result: The Dashboard view is on screen with its tabs, cards, charts, and visible sorting
controls.

Select a dashboard view

A dashboard view is a tab containing a distinct set of measures for review. Select a visible tab
when the question you need to answer belongs to another view.

Prerequisites

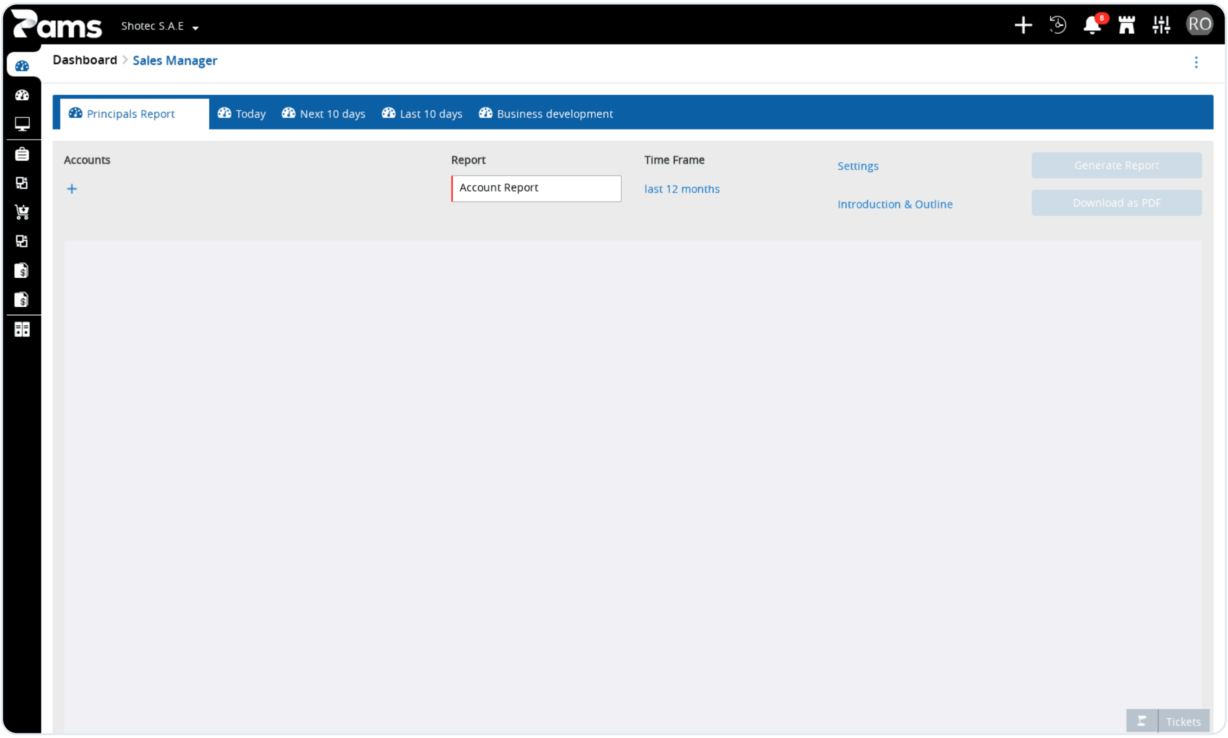
- The Dashboard is open.
- At least one visible dashboard tab is available.

Steps

1. Select the tab that matches the view you need.

If you need to…	Select
Review the dashboard cards and charts	**Dashboard**
Review the principals report surface	**Principals Report**

2. Read the controls and readouts on the selected view.
3. In the **Principals Report** view, use **Report** as the required report field.
4. Use **Generate Report** to generate the report.
5. Use **Download as PDF** to download the report as a PDF.



The **Principals Report** view displays Accounts, **Report**, and Time Frame. **Report** carries a
required marker. The view also displays **Generate Report** and **Download as PDF**.

The Dashboard can also show an Eagle View or an MRM report when those views are available.

If you are editing a dashboard, the available controls include **Widget**, **Save**, **Rename tab**,
and **Delete tab**. The tab menu also provides **Search for widget** when the active tab contains
widgets. Use Personalizing your workspace for that editing
task.

When a new or edited tab name is required, the field is **New Tab** and the message is `This Field Is Required`.

When restoring standard tabs, the confirmation message is `Are you sure you want to replace your tabs with standard tabs?`.
When ultimately deleting a tab, the confirmation message is `Are you sure you want to ultimately delete this tab and all it's content ?`.

After a dashboard save action, PAMS uses `Your request was completed successfully` for success and
`An error occurred while processing your request` for an error.

Result: The selected dashboard view is on screen, and the Principals Report view exposes its report field and report actions when that tab is selected.

Review the visible measures

The dashboard presents business measures as cards, charts, headings, and values. Review the displayed heading before deciding which view or widget answers your question.

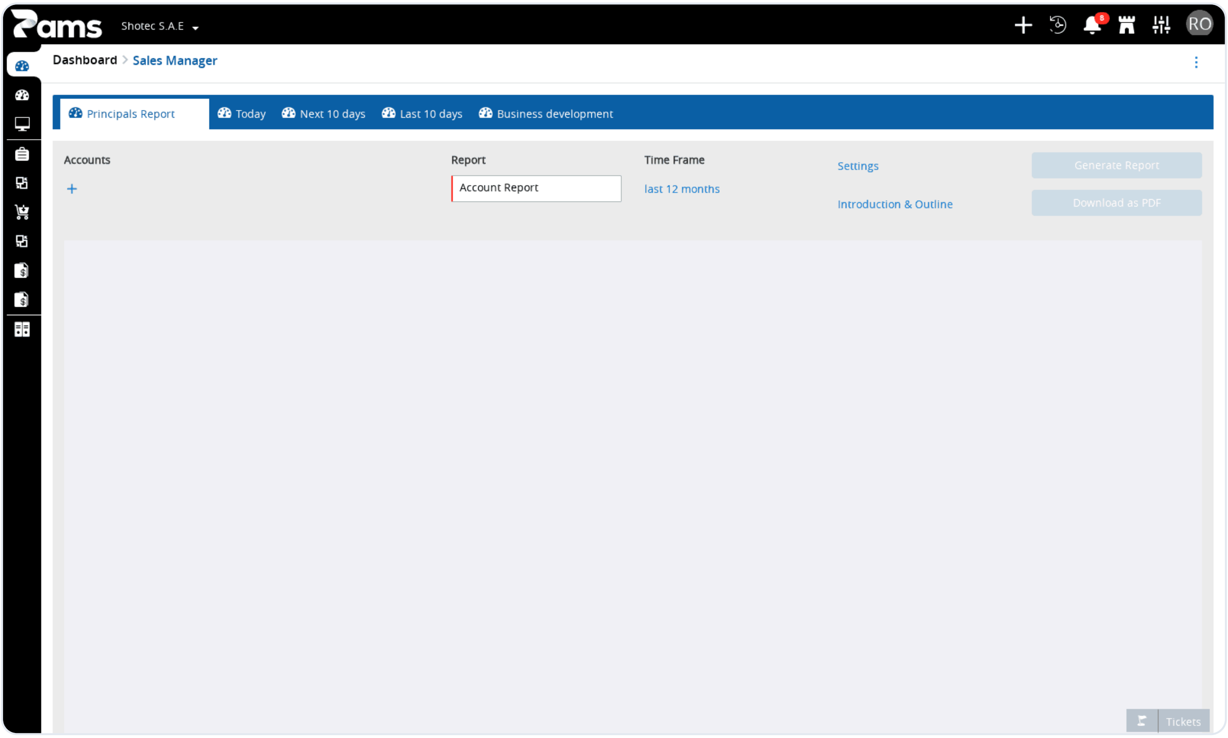
Area	What you can review
Sales pipeline	Sales Pipeline, Potentials, Inquiries, Budget offers, Firm offers, and Orders
Booking	Booking This Year, Equivalent, Target, Achieved, and Forecast
Backlog	Backlog, Sales (orders), and Commission (commission)
Trend and status views	Teams Booking vs. Target, Teams Running Offer, Branch Tendency to Target, and Principals Tendency to Target

Prerequisites

- The Dashboard is open.
- A dashboard view with measures is selected.

Steps

1. Read the headings and values on the active dashboard view.
2. Locate the sorting control for the measure you want to review: **Sort by Booking**, **Sort by Target**, or **Sort by Achievement**.



Result: The active dashboard view remains on screen with its displayed measures and the three
visible sorting controls.

Troubleshooting

What you see	What it means	What to do
`Your role has no dashboard`	Your role does not have a dashboard defined.	Contact your administrator to define one for your role.
`This Field Is Required`	The **New Tab** field is required when adding or editing a tab.	Enter a tab name.
`Are you sure you want to replace your tabs with standard tabs?`	The restore action is asking for confirmation.	Confirm only if you want to replace your tabs with the standard tabs.
`Are you sure you want to ultimately delete this tab and all it's content ?`	The delete action is asking for confirmation.	Confirm only if you want to delete the tab and all its content.
`An error occurred while processing your request`	The dashboard request returned an error.	Review the action and contact your administrator if the error remains.