

What can you do with PAMS

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PAMS is an agent-centric CRM for B2B sales operations, connecting sales work with principals, suppliers, purchasing, warehousing, delivery, invoicing, and follow-up work. Use this page to choose the business area that matches your next task.

What you can do with PAMS

PAMS brings the sales operation together from the first inquiry through final delivery. The same flow can include bidding, tenders, procurement, delivery coordination, and commission work. Principal work covers the companies and manufacturers you represent;

supplier work covers purchasing coordination and related operational records.

The business flow connects customer work with principal, sales, purchasing, and warehouse work:

```
flowchart LR
    Customer --> Inquiry
    Inquiry --> Pricing
    Pricing --> Offer
    Offer --> Order
    Order --> Delivery
    Delivery --> Invoice
    Invoice --> Payment
    Inquiry --> MRQ
    MRQ --> RFQ
    RFQ --> PurchaseOrder[Purchase Order]
    PurchaseOrder --> GoodsReceipt[Goods Receipt Note]
    GoodsReceipt --> Warehouse
    Warehouse --> Delivery
```

Use the orientation table to choose a starting point:

If you need to...	Go to
understand what PAMS is and how it fits your operation	What is PAMS
choose the work area for a sales record	Run the sales and operations flow
open the Home orientation surface	Open Home
read the business views on Home	Read Home
sort a visible Home view	Choose a Home sort
follow a sales job from inquiry to delivery	Sales jobs lifecycle
prepare purchasing work from a sales need	Pricing Quotation overview
continue warehouse and delivery work	Warehouse fulfillment flow
manage invoices and payments	Invoice lifecycle
manage shared contacts	Contacts overview
manage tasks and activities	My Desk workspace
manage a client or supplier project	Project management workspace
review reports and performance detail	Reports hub
get help with a notification or unavailable view	Getting help

Before you start

The Home route requires a signed-in session. Your role and subscription setup determine which Home areas are available, so use the views that appear for your role rather than expecting every Home option to be present.

Prerequisites

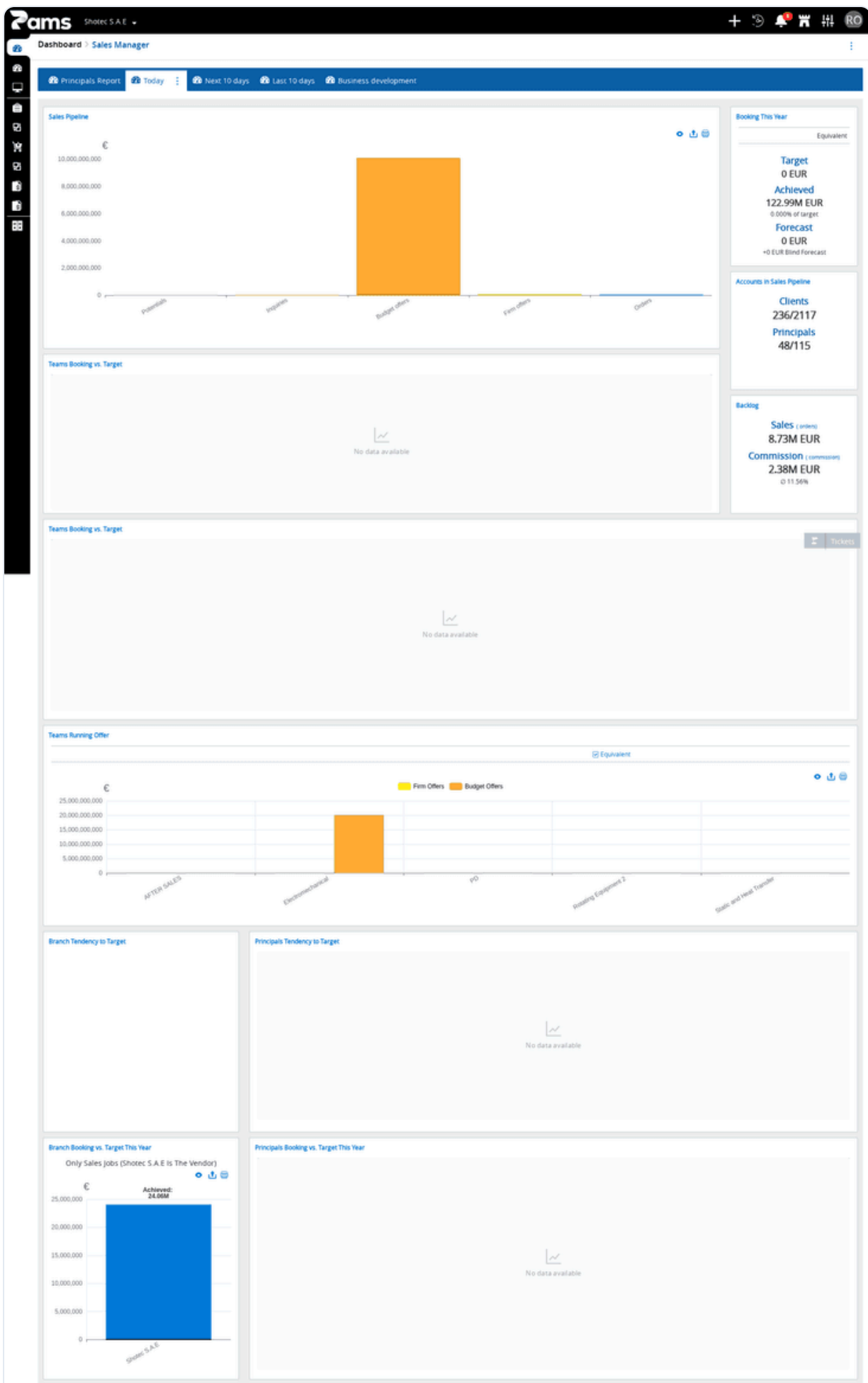
- Have an account that can sign in to PAMS.
- Know which business work you need to start: sales, purchasing, warehouse, invoicing, contacts, activities, projects, or performance review.
- Expect Home to reflect your role and subscription setup.

Note: The views available on Home reflect your role and subscription setup.

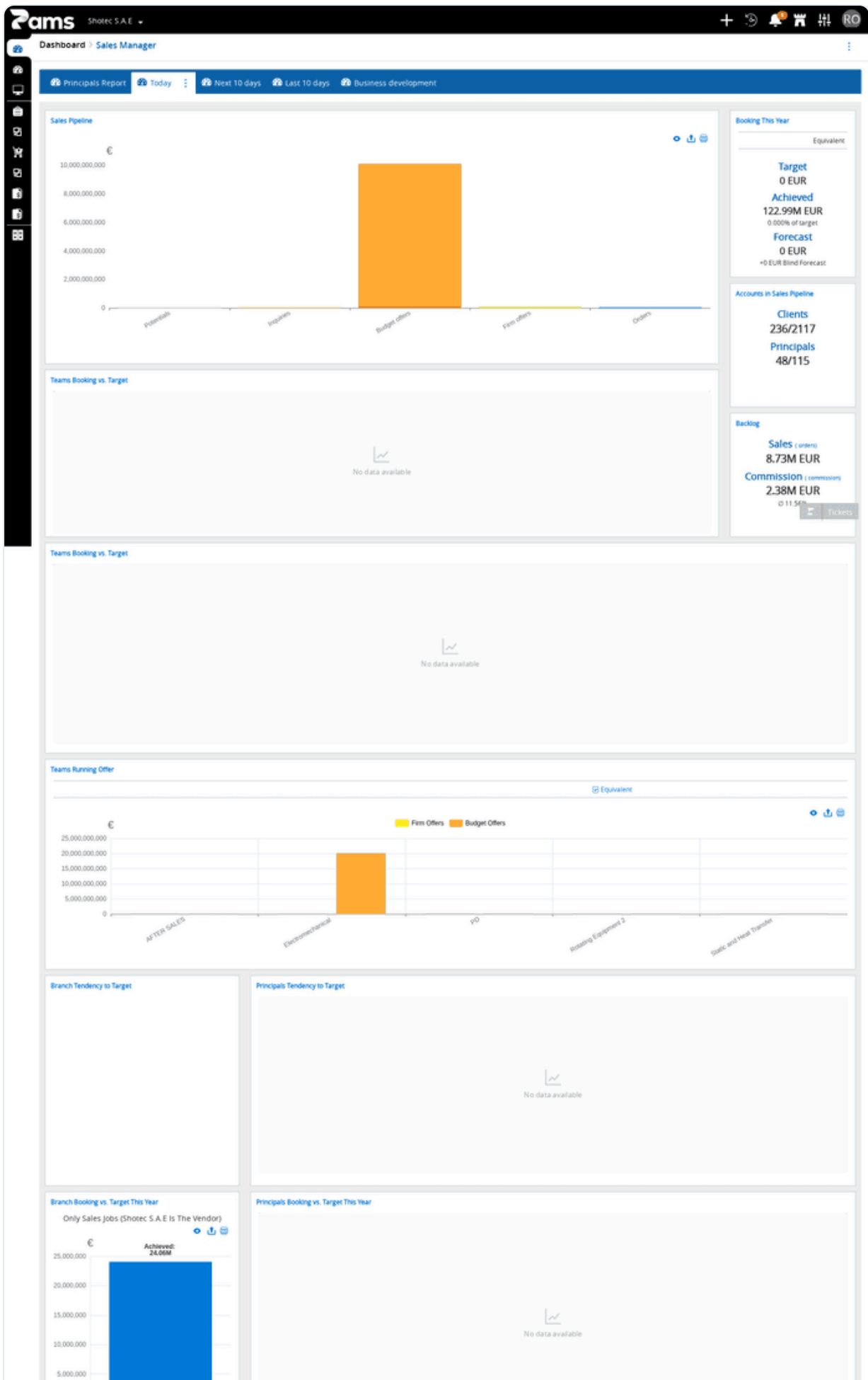
The Home surface is an orientation surface rather than a record-entry form. The current screen shows three fields, no required markers, and no action buttons.

Open Home

Home is the surface where PAMS brings together the business views available to your role.



If you are reviewing...	Look for...
early sales work	Potentials, Inquiries
offer and order work	Budget offers, Firm offers, Orders
booking and target performance	Booking This Year, Target, Achieved, Forecast
accounts and teams	Accounts in Sales Pipeline, Clients, Principals, Teams Booking vs. Target
backlog and running offers	Backlog, Teams Running Offer, Branch Running Offers, Principals Running Offers
trend and performance views	Branch Tendency to Target, Principals Tendency to Target, Branch Booking vs. Target This Year, Principals Booking vs. Target This Year



own procedure without treating Home values as fixed product settings.

Choose a Home sort

Use a Home sort when you want the visible performance view arranged around a different comparison.

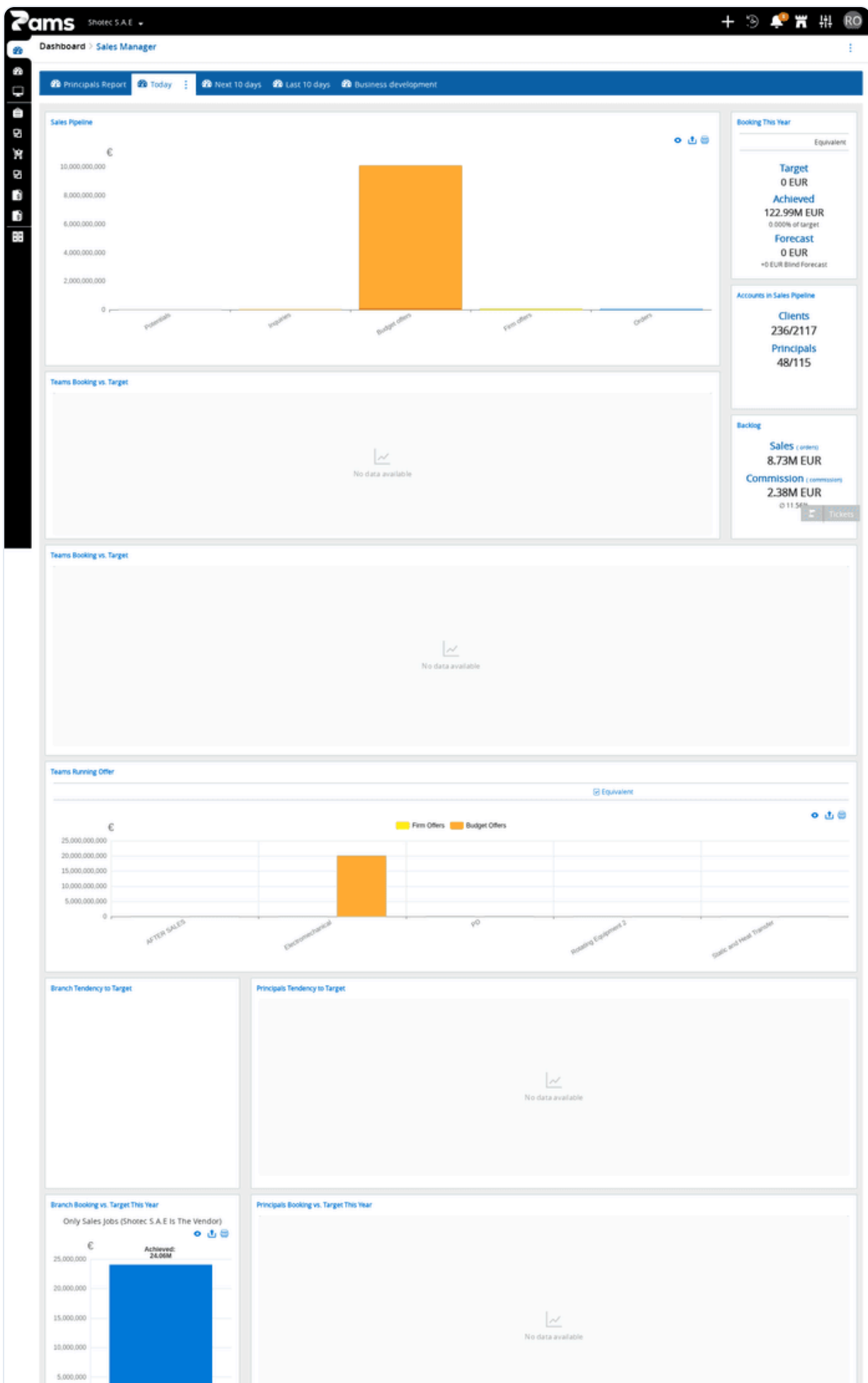
Prerequisites

- Be on Home with the view that contains the sorting controls.

Steps

1. Select the sorting choice that matches the comparison you need.

If you want to compare by...	Select
booking	Sort by Booking
target	Sort by Target
achievement	Sort by Achievement



payments, and commission invoices. Related supplier work includes material requisitions, requests for quotation, purchase quotations, purchase orders, goods receipts, warehouse work, and delivery.

Prerequisites

- Know whether the next task concerns a customer, principal, supplier, or internal purchasing hand-off.
- Have the business record or request that starts the next part of the flow.

Steps

1. Identify the next work area from the task you need to complete.

If you need to...	Open
move a sales job through its stages	Sales jobs lifecycle
continue from an order into delivery	From orders through delivery
prepare supplier purchasing work	Purchase jobs procurement chain
prepare pricing and purchasing quotations	Pricing Quotation overview
continue warehouse fulfilment	Warehouse fulfillment flow
handle invoices and payments	Invoice lifecycle

2. Follow the detailed procedure for that work area.

Result: You are at the procedure for the sales, principal, supplier, purchasing, warehouse, delivery, invoice, or payment work you selected.

Manage relationships, activities, and projects

Relationship work keeps the people and organisations around a business flow available to the team. PAMS describes a shared, searchable contact database, a filtered view of activity across the sales operation, and a connected project flow for clients and suppliers.

Prerequisites

- Know whether you need a contact, a follow-up activity, a task, or a project workspace.
- Know which sales, client, or supplier work the relationship information supports.

Steps

1. Choose the workspace that matches the supporting work.

If you need to...	Open
work with shared contacts	Contacts overview
review tasks and activities	My Desk workspace
manage a client or supplier project	Project management workspace
review a job's comments, files, contacts, or history	Sales job record

2. Use the linked workspace for the supporting work.

Result: The supporting contact, activity, task, project, document, or history work is open in its own workspace.

Monitor performance and decide what to do next

Use Home to scan performance views, then move to the detailed report or profitability page

when the decision needs more detail. PAMS describes equivalent booking values as a way to

compare performance where commission rates or margins differ. Its reporting capabilities include booking, target, forecast, invoice, principal, and profitability signals.

Steps

1. Read the Home view that matches the decision you need to make.
2. Open the detailed page for that decision.

If you need to...	Open
review Home use and widget choices	Home overview
prepare or read a principal report	Principal report
assess job profitability	Job profitability overview
continue invoice and payment work	Invoice lifecycle

Result: The detailed performance, report, profitability, invoice, or payment workspace is open for the next decision.

For a Home action that returns a notification, the success text is

Your request was completed successfully . An error notification reads

An error occurred while processing your request .

Related pages can show these messages:

- Principal Report: Please choose one or more principals .
- Login: Incorrect username or password .