

What is PAMS

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This page explains how PAMS connects B2B sales work from first inquiry through delivery and how to reach the dashboard view available to your role.

What PAMS is

PAMS is an agent-centric customer relationship management (CRM) system for sales representatives and agencies that need to manage more than contacts or isolated deals. It covers the sales process from first inquiry to final delivery, while keeping follow-ups, documents, reports, and operations together.

Use PAMS when your work includes several connected parties and hand-offs. The product

also acts as a partner relationship management (PRM) system for represented companies

and manufacturers, with visibility into offers, orders, targets, and commissions. Its supplier relationship management (SRM) features support BOMs, MRQs, RFQs, and procurement coordination, while selected enterprise resource planning (ERP) features cover warehousing, invoicing, and internal workflow execution.

If you need to...	Go to
Understand who uses PAMS	Who uses PAMS
Review the capabilities described for PAMS	What can you do with PAMS
Open the Home dashboard	Open the Home screen
Understand the visible dashboard surface	Read the Home dashboard
Choose a role-based dashboard view	Choose the dashboard view available to your role
Personalize dashboard tabs and widgets	Personalize the Home dashboard
Learn the wider interface	Understanding the interface

If you need to...	Go to
Learn navigation basics	Navigation basics

Before you open PAMS

Prerequisites

- You are signed in.
- Your role has a dashboard configuration, or you are prepared to work with the dashboard variation that your role provides.
- You know that dashboard tabs, widgets, role choices, and report content depend on your saved setup.

The **Home** screen is available from the application root, which redirects to **Home**, and the Home content is shown for a signed-in reader. Dashboard content appears when the custom dashboard is selected and dashboard tabs are available.

Open the Home screen

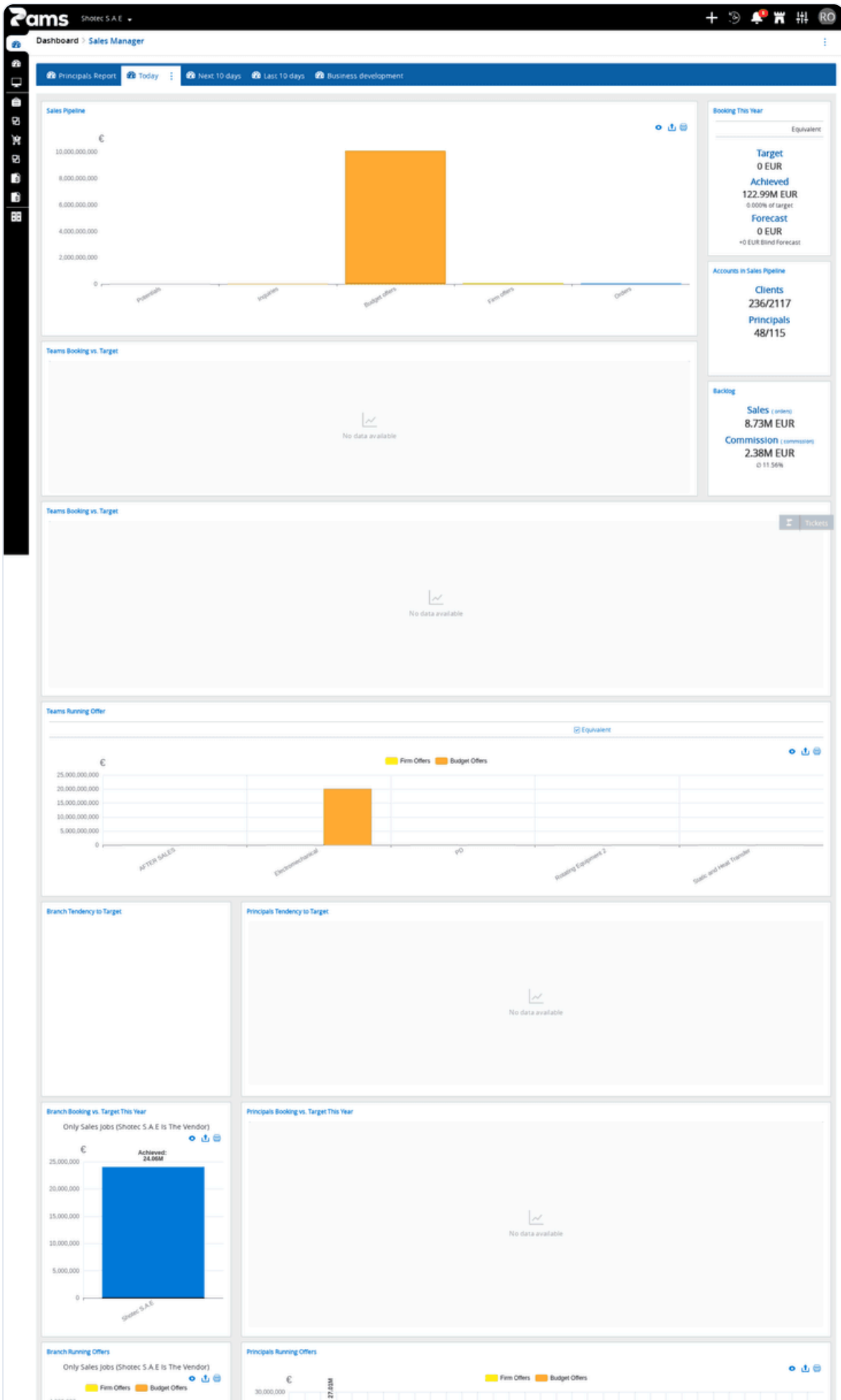
Home is the starting surface for the dashboard views available to your role.

Prerequisites

- You are signed in.

Steps

1. Open **Home**.
2. Confirm that **Home** remains on screen after it loads.





Result: The **Home** dashboard is on screen.

Read the Home dashboard

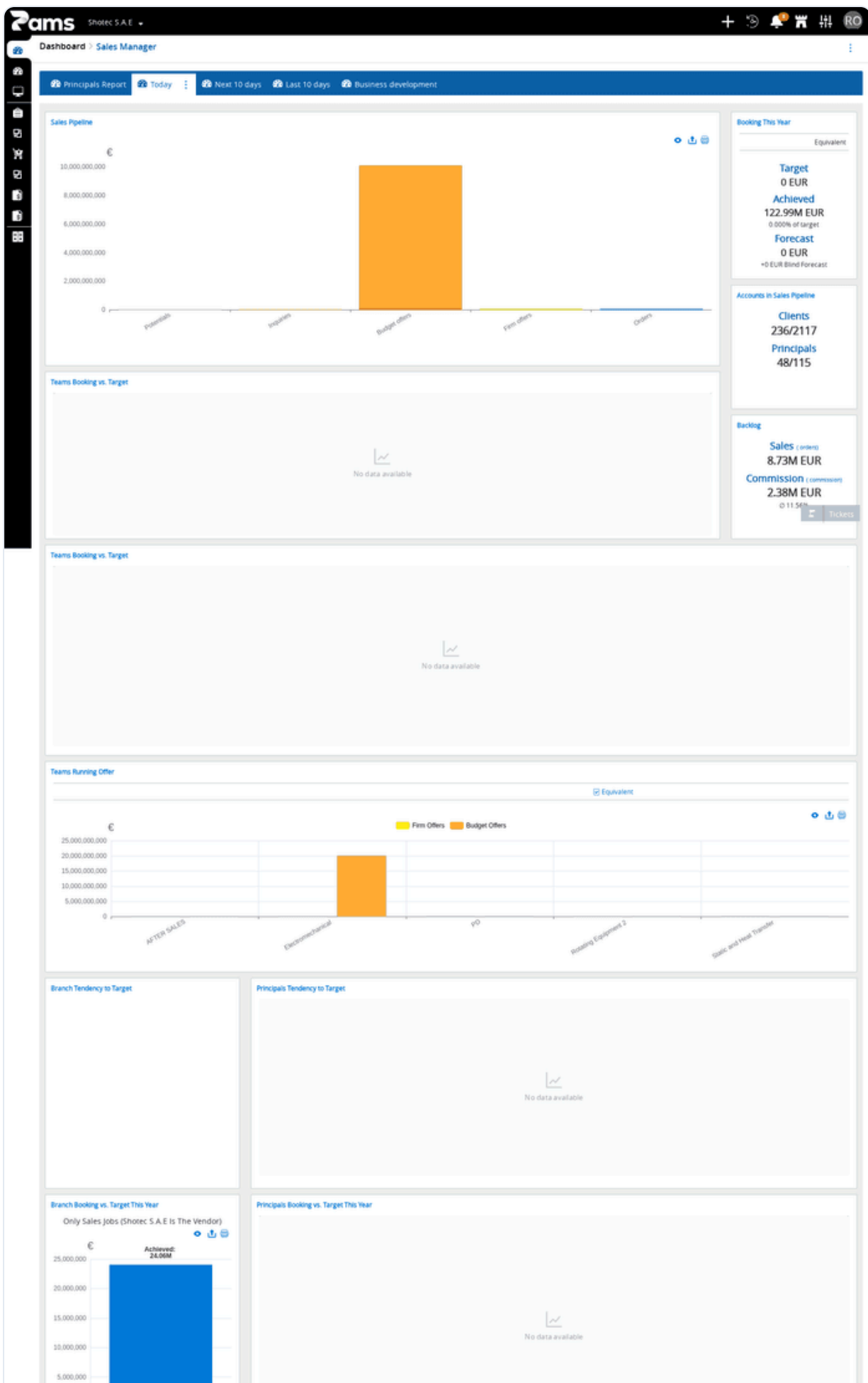
The Home dashboard brings together business views such as **Sales Pipeline**, **Potentials**, **Inquiries**, **Budget offers**, **Firm offers**, **Orders**, **Booking This Year**, **Accounts in Sales Pipeline**, **Backlog**, and running-offer views. The visible figures describe the current dashboard contents; use the labels and headings on your screen rather than treating the displayed record values as fixed product values.

When dashboard tabs are available, the tab choices can include a configured tab title, **Principals Report**, and **Eagle View**. The configured title comes from the title saved

for that tab. The **Home** screen has no record-entry fields.

The **Home** screen includes three labelled input controls. They do not carry required markers.

Control	What it changes
Sort by Booking	The visible ordering for that dashboard view
Sort by Target	The visible ordering for that dashboard view
Sort by Achievement	The visible ordering for that dashboard view





Choose the dashboard view available to your role

A role dashboard is the dashboard configuration prepared for a role. Choosing one changes which dashboard setup Home loads.

Prerequisites

- You are signed in.
- Your role has one or more configured dashboard choices.

Steps

1. Open the dashboard choices menu on Home.
2. Select the configured dashboard name shown beside its radio option.

If you need to...	Select
Use a dashboard prepared for your role	The configured dashboard name shown beside its radio option
Work with the custom dashboard surface	The configured dashboard whose Home view opens the custom dashboard

If you need to...	Select
Review a report tab when it is available	Principals Report
Review the Eagle View when it is available	Eagle View

3. Confirm that the selected dashboard view appears on **Home**.

After the dashboard switch, the application can display `Your request was completed successfully` when the switch succeeds or `An error occurred while processing your request` when it fails.

Result: **Home** shows the dashboard view selected for your role.

Personalize the Home dashboard

Dashboard personalization changes the tabs and widgets shown in the custom dashboard.

The controls below are available while Home is in edit mode.

Prerequisites

- You are signed in.
- Home is in edit mode.
- The custom dashboard has tabs available to edit.

Steps

1. Select **Widget** to add a widget to the dashboard.
2. Select **Restore the Standard Tabs** to open the restore menu.

If you need to...	Select
Close the restore menu without restoring tabs	Cancel
Replace the current tabs with standard tabs	Restore

3. Select one option from the restore menu.
4. Read the confirmation message `Are you sure you want to replace your tabs with standard tabs?` .
5. Select **Save** to save the dashboard changes.

Result: The Home dashboard remains available with the tab and widget arrangement shown after the operation.

When Home does not look as expected

Home can show different content when the role or saved dashboard setup differs. The custom dashboard appears when the custom dashboard view is selected and dashboard tabs are available.

When no dashboard is available, Home shows the no-dashboard messages; when you are not signed in, it shows the login screen.

What you see or hear	What to do
Your role has no dashboard	Contact your administrator to define a dashboard for your role.
Kindly, Contact your administrator to define a dashboard	Contact your administrator to define a dashboard for your role.
An error occurred while processing your request	Review the current dashboard choice and try the dashboard switch again.
No success message after saving dashboard changes	Check whether the dashboard arrangement changed on screen before leaving Home.

After selecting **Save**, check whether the dashboard arrangement changes on screen.

No error message is emitted in the empty error callback.

The dashboard contents and report columns follow your saved role and report setup.

Continue from Home

After you understand the Home surface, use the page that matches your next goal:

Next goal	Continue with
Understand the people and roles around PAMS	Who uses PAMS
Review what PAMS can support	What can you do with PAMS
Recognize the wider application interface	Understanding the interface
Move through the application	Navigation basics

Next goal	Continue with
Review dashboard details	Dashboard
Personalize your workspace	Personalizing your workspace
Check deployment requirements	System requirements
Get help with a problem	Getting help

Result: You have a route from the Home overview to the page for your next task.