Basic Terminology

August 18, 2026

Basic Terminology

This glossary explains common words used throughout PAMS CRM. Some screens and actions may not be available to you, depending on your role, branch access, and your company's subscription.

Term	What it means	Where it appears
Account	A company or organization that PAMS CRM stores as a client, principal, or sub-supplier.	Accounts, sales, purchasing, and finance records.
Activity	A planned or completed piece of communication, such as a call, meeting, visit, or email.	Activities, calendars, and related records.
Address	A saved location for an account, such as its main, billing, shipping, or delivery address.	Account records, orders, invoices, and deliveries.
Approval	A confirmation that a record is ready to move forward, usually from an authorized user.	Orders, invoices, procurement records, and other controlled work.
Attachment	A file added to a record, such as a quotation, photo, or supporting document.	Files, comments, activities, tickets, and business records.
Branch	A company location or business unit that has its own people, records, and settings.	The branch selector and Company Branches.
Calendar	A schedule showing tasks, meetings, visits, and other planned activities.	Calendar and Reminders and My Desk.
Client	An account that buys products or services from your company.	Clients and Contacts, sales jobs, offers, orders, and invoices.
Comment	A message added to a record so users can share updates or ask questions.	Record details, tasks, activities, and Comments and Record Tags.
Contact	A person linked to an account, such as a client contact or supplier contact.	Account records, activities, offers, orders, and invoices.

Term	What it means	Where it appears
Dashboard	A page of summaries, charts, and lists that helps you monitor work and performance.	My Desk, Business Analysis Dashboard, and other dashboard areas.
Delivery	The process of sending ordered products to a client or another destination.	Sales orders, shipping orders, and Delivery Notes.
Document	A saved business file, such as a quotation, invoice, certificate, or template.	Record attachments, Files and Libraries, and document areas.
Draft	A record that has been started but is not yet final or ready for the next step.	Offers, orders, invoices, activities, and other work records.
Due date	The date by which a task, activity, payment, or other work should be completed.	Tasks, activities, invoices, payments, and dashboards.
Email activity	An email created and sent from PAMS CRM that can be linked to related work.	Email Activities and activity lists.
Filter	A way to show only records that match chosen conditions, such as a branch, owner, date, or status.	Lists, dashboards, reports, and Generic Grid Tools.
Folder	A place for organizing related files in a library.	Files and Libraries.
History	A record of important changes, actions, and updates made to a business record.	Audit History and record history areas.
Invoice	A request for payment for products, services, commissions, or additional charges.	Invoices, Purchase Invoices, and finance dashboards.
Item	An individual product, service, cost, or other line within a larger record.	Offers, orders, invoices, requisitions, and purchase records.
Job	A sales-related piece of work that follows a business opportunity from lead through delivery, invoicing, and review.	Sales Jobs, costing, purchasing, and profitability areas.
Layout	The saved arrangement of columns, filters, and display choices in a list.	Lists and Custom Fields and Layouts.
Lead	An early sales opportunity that may develop into an inquiry, offer, or sales order.	Leads and Offers and sales jobs.
Library	A shared place for storing and organizing files for a team or company.	Files and Libraries.

Term	What it means	Where it appears
Lookup value	A selectable value from a prepared list, such as a country, payment method, status, or product type.	Forms throughout PAMS CRM and Addresses and Lookup Values.
Margin	The amount remaining after costs are taken away from sales value, often shown as an amount or percentage.	Offers, sales orders, cost calculations, and Job Profitability.
Milestone	An important planned event or date in an order, purchase, payment, or project.	Procurement, purchasing, invoices, and project-related records.
My Desk	Your personal workspace for reviewing assigned work, calendars, lists, and dashboards.	My Desk.
Notification	An alert that tells you about an update, assignment, comment, reminder, or other action that needs attention.	Notifications and the top navigation area.
Offer	A quotation prepared for a client or received from a supplier.	Leads and Offers, Procurement Inquiries and Offers, and purchasing areas.
Order	A confirmed request to sell, buy, move, produce, or deliver products or services.	Sales Orders, Procurement Orders, and warehouse operations.
Owner	The user responsible for managing a record or following up on its next action.	Accounts, jobs, tasks, activities, and other records.
Payment	Money received from a client or paid to a supplier.	Payments, Outgoing Payments, invoices, and payables.
Principal	An account representing a manufacturer, brand owner, or main supplier.	Principal Accounts, products, procurement, and principal invoices.
Product	A product, material, or service that your company sells, buys, stores, or uses.	Products, offers, orders, warehouse records, and invoices.
Project	Related commercial and operational work managed together for a client or business objective.	Project Management, sales jobs, registrations, and linked records.
Purchase order	A confirmed order sent to a supplier for products or services.	Purchase Orders, receiving, purchase invoices, and payables.
Recently Opened	A list of records you viewed recently, making them easy to open again.	Recently Opened.

Term	What it means	Where it appears
Record	A saved entry in PAMS CRM, such as an account, task, product, order, invoice, or shipment.	Throughout PAMS CRM.
Reminder	An alert scheduled before or on a task or activity due date.	Calendar and Reminders, tasks, and activities.
Report	A saved view of business information used for reviewing performance or details.	Reports Library, dashboards, and account reporting.
Role	A set of permissions that controls which PAMS CRM areas and actions a user can access.	Roles, user records, and security settings.
Sales order	A confirmed client order for products or services.	Sales Orders, delivery, invoicing, and job records.
Search	A way to find records by entering a name, number, or other detail.	Lists, lookup fields, and navigation areas throughout PAMS CRM.
Stage	The current step of a record's business journey, such as lead, offer, order, delivery, or paid.	Sales jobs, procurement, warehouse work, invoices, and dashboards.
Status	A label that shows the current condition of a record, such as open, pending, completed, cancelled, or paid.	Throughout PAMS CRM.
Stock	Products and materials currently held in a warehouse.	Warehouse Stock, receiving, inspections, storage, and shipping.
Sub-supplier	An account used as an additional supplier in product and purchasing work.	Sub-Supplier Accounts, products, and procurement records.
Subtask	A smaller task created under a main task to divide work into clear steps.	Tasks.
Supplier	A company that provides products or services to your business.	Account records, procurement inquiries, purchase orders, and purchase invoices.
Tag	A link added to a comment or record to connect it with another relevant record.	Comments and Record Tags.
Task	A piece of work assigned to yourself or another user, with a status and due date.	Tasks, My Desk, calendars, and notifications.
Team	A group of users who work together within a branch or business area.	Teams, assignments, dashboards, and security settings.

Term	What it means	Where it appears
Template	A reusable starting format for a document, email, or other standard business communication.	Document Templates.
User	A person with permission to sign in to PAMS CRM.	Users, assignments, comments, tasks, and activities.
View	A selected way of looking at a list of records, often with chosen columns, filters, and sorting.	Lists, dashboards, and Generic Grid Tools.
Warehouse	A location where products are received, inspected, stored, moved, and issued.	Warehouse Stock, receiving, storage, transfers, and shipping.
Workflow	The usual sequence of steps a record follows from creation to completion.	Sales jobs, procurement, warehouse operations, invoices, and support tickets.