First Time Login

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Before You Begin

To sign in to PAMS CRM for the first time, you need:

- The PAMS CRM web address provided by your company
- Your work email address or user name
- Your temporary password or sign-in details from your administrator
- Access to the email inbox connected to your PAMS CRM account, if verification is required

If you do not have these details, contact your company's PAMS CRM administrator.

Sign In to PAMS CRM

1. Open your usual web browser.
2. Enter the PAMS CRM web address provided by your company.
3. On the sign-in page, enter your email address or user name.
4. Enter your password.
5. Select **Sign In**.

If PAMS CRM asks you to verify your sign-in, follow the instructions shown on the page. You may receive a verification message by email.

If You Cannot Sign In

Check that you entered your email address or user name and password exactly as provided.

If you have forgotten your password, select **Forgot Password** on the sign-in page and follow the prompts to create a new one.

Contact your PAMS CRM administrator if:

- You did not receive a password-reset message.
- Your account is not recognized.

- Your account is locked or inactive.
- You are unsure which PAMS CRM web address to use.

Change Your Temporary Password

Your company may ask you to change a temporary password when you first sign in.

1. Enter your temporary password.
2. Enter a new password that you can remember but others cannot easily guess.
3. Confirm the new password.
4. Select **Save** or **Continue**.

Do not share your password with anyone.

Complete the First-Time Setup

Some companies use a first-time setup page in PAMS CRM. If you see one, complete the requested details before continuing.

You may be asked to:

- Confirm your name and contact details
- Add a profile photo
- Change your password
- Confirm your branch
- Review company information or terms of use

Enter only the information requested by your company. Select **Save** or **Finish** when you are done.

If you do not see a setup page, your profile may already have been prepared by your administrator.

What You See After Sign-In

After signing in, PAMS CRM opens your main workspace. The exact content depends on your role, branch access, and the features your company uses.

You may see:

- A dashboard with business information, reminders, or performance figures

- A menu for opening areas such as sales, purchasing, warehouse, finance, or reports
- Your current branch, if you can work with more than one branch
- Notifications for tasks, activities, comments, or updates
- Recently opened records for quick access
- Your personal tasks, calendar items, and activities

Not all menu items are available to every user. For example, a sales user may see sales and client records, while a warehouse user may see receiving, stock, and delivery work.

Check Your Branch

If your company has more than one branch, make sure you are working in the correct branch before creating or updating records.

Your current branch is shown in the PAMS CRM navigation area. If you can access multiple branches, select the branch name and choose the branch you need.

Ask your manager or PAMS CRM administrator if you cannot see the expected branch.

Review Your Profile

After your first sign-in, review your personal details and make any updates requested by your company. Keep your email address and contact information current so you can receive notifications and reminders.

Your profile area may also show your assigned role, branch access, and other account details.

Next Steps

Start with the work area that matches your role:

- Sales users can begin with Creating and Tracking Leads or Creating Sales Inquiries.
- Managers can review Managing Booking Targets.
- Users working with principal accounts can review Managing Principal Relationships.

- Users preparing customer quotations can continue with Preparing Customer Offers.

If you are not sure where to begin, ask your manager which PAMS CRM area you should use first.