PAMS (V2 PIPELINE RUN)

Frequently Asked Questions

August 18, 2026

General

What is PAMS CRM used for?

PAMS CRM helps teams manage customer and supplier work from the first sales opportunity through purchasing, delivery, invoicing, payment, and profitability review. The menus and actions you see may vary based on your role, branch access, and your company's enabled features.

Why can I not see a menu, record, or action that another user can see?

Your available screens and actions depend on the access assigned to your user account, your role, and the branch you are working in. Ask your PAMS CRM administrator to confirm that you have the required access and the correct branch selected.

How do I find a record I opened recently?

Use **Recently Opened** to return to accounts, jobs, orders, invoices, and other records you worked with earlier. This is useful when you know you opened a record but do not want to search for it again.

How do I know which branch I am working in?

Check the branch shown in the PAMS CRM navigation area before creating or updating a record. Working in the correct branch helps make sure records, stock, and financial information are assigned to the right part of your company.

Why are records missing from a list?

First check the current filters, search text, grouping, and selected list view, as these can hide records that would otherwise appear. For inquiry lists, see Managing Inquiry Lists.

Account and Access

How do I update my name, contact details, or profile image?

Open your profile from the account options in PAMS CRM and update the information that applies to you. You can also review your password, uploaded documents, assigned roles, and trusted devices in Managing Your Profile.

How do I change my password?

Open your profile and use the password options available for your account. If you cannot sign in or do not remember your current password, use the password reset option on the sign-in page and review Managing Your Profile.

Why can I not save a record?

PAMS CRM may require information that has not yet been completed, such as a client, date, owner, or other required value. Review the highlighted fields, complete the missing details, and save again; your company may also have required-field rules configured for that record type.

Can I receive reminders for tasks and meetings?

Yes. Create tasks and activities with clear dates and times so PAMS CRM can show them in your calendar and notifications. Check your notifications regularly and open the related record to complete or update the work.

Sales and Customer Work

How do I avoid creating a duplicate lead?

Before adding a lead, search the lead list using the prospect, organization, contact, and expected requirement. If a similar record exists, open it and update it rather than creating another one; see Creating and Tracking Leads.

What should I do when a customer inquiry is no longer active?

Close the inquiry with the correct outcome instead of leaving it open. Mark it as lost or cancelled when the customer will not proceed, and follow the guidance in Creating Sales Inquiries.

Why is the client or contact incorrect on my offer?

Customer details on an offer usually come from the related inquiry. Return to the inquiry, correct the available customer information, save it, and then review the offer again as described in Preparing Customer Offers.

How can I tell whether a sales order can be changed?

Open the sales order and review its current status, delivery progress, and any issue notes or approvals. If a change is unavailable, check whether the order has reached a stage that restricts edits; see Managing Order Exceptions.

What should I do if I have been assigned a task?

Open the task from **My Desk**, your notifications, or the related record, then review its description, due date, and linked information. Update its progress as you work, add comments when useful, and mark it complete when finished.

Purchasing and Warehouse

What is a material requisition, and when should I use one?

A material requisition records a request for products needed for stock, internal work, or a sales job. Confirm the correct project or sales order before purchasing or issuing materials; see Managing Material Requisitions.

What should I check before creating a purchase order?

Compare the purchase order with the approved requirement, supplier information, product lines, quantities, prices, and delivery details. This helps prevent incorrect orders and missing information; see Creating Purchase Orders.

How do I record goods received from a supplier?

Create a receiving shipment from the relevant purchase order or source order, then enter the quantities actually received. Review the goods carefully before moving them through inspection and storage; see Receiving Purchased Goods.

Why can I not complete a delivery note?

Check that the delivery note has complete delivery lines and all required delivery details before trying again. If PAMS CRM still does not allow completion or goods issue, review the linked shipment and stock information using Creating Delivery Notes.

Can I move stock between warehouses or branches?

Yes, use a transfer order to record the movement of products, assembled goods, or packages between approved warehouse locations or branches. Make sure the source, destination, products, and quantities are correct before releasing the transfer.

Data, Configuration, and Reporting

Should I create a custom field for information my team needs?

Create a custom field only if an existing PAMS CRM field does not already capture the information clearly. Duplicate fields can lead to inconsistent information, so review the guidance in Configuring Custom Fields first.

Why is PAMS CRM asking for a field that is not available yet?

Your company may have set the field as required too early in the work process. Ask the person responsible for configuration to review the required-field rule and use Configuring Dynamic Validation for guidance.

Which records can require approval?

Depending on your company’s settings, approvals can apply to sales, purchasing, invoices, and letters of guarantee. Approval access and value limits are assigned to users, so contact your administrator if the expected approver cannot act; see Configuring Approval Processes.

How can I export a list for review?

Open the relevant list, apply only the filters and columns you need, then use the available export option. Before exporting, check that a saved filter, grouping, or search term is not excluding important records; for inquiries, see Managing Inquiry Lists.