Getting Help

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Getting Help

If you need help while using PAMS CRM, start with the guidance that best matches your question.

Find guidance in the documentation

Use the documentation to learn how to complete a task, understand a page, or check the next step in a process.

- For help with common problems, access, messages, and general questions, see Help & Troubleshooting.
- For quick answers to common questions, see FAQ.
- For guidance on a specific area, use the documentation menu or search for the page name, such as Sales Jobs, Purchase Orders, Invoices, or Warehouse Stock.

The instructions and options you see in PAMS CRM may differ from those shown in the documentation. Your available pages and actions depend on your role, branch access, and your company's enabled features.

Check the record and related work

Before requesting help, check whether the answer is already available in the related record:

- Review comments, files, tasks, and activities linked to the record.
- Check notifications for requests, updates, or reminders.
- Confirm that you are working in the correct branch.
- Review the record status, such as draft, approved, delivered, paid, or closed.
- Ask the person responsible for the account, sales job, order, warehouse movement, or invoice if they have already taken action.

For help finding recent work, see Recently Opened, Notifications, and My Desk.

Ask your manager or administrator

Contact your manager when you need clarification about a business process, approval, ownership, pricing, targets, or branch procedures.

Contact your PAMS CRM administrator when you need help with:

- Your user access, role, or branch access
- A page, button, or action that is not available to you
- Company details, shared lists, templates, or settings
- User accounts, teams, or security-related questions

Your administrator can confirm whether a feature is available for your role and arrange any required changes.

Submit a support ticket

Use Support Tickets when you need help that cannot be resolved through the documentation, your manager, or your administrator.

When creating a ticket, include:

- A clear description of what you need help with
- The name or number of the related record, if applicable
- The branch you are working in
- What you expected to happen and what happened instead
- The steps you took before the issue occurred
- Any relevant files or images

You can follow updates, add comments, attach further information, and reopen a ticket if the issue returns.