Navigation Basics

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PAMS CRM is organized into work areas for sales, purchasing, warehouse work, finance, reports, and administration. Your menu options may look different from other users because access depends on your role, branch, and company features.

Start from the Main Menu

Use the main menu to move between work areas in PAMS CRM.

1. Select the menu icon.
2. Choose a main work area, such as **Sales**, **Procurement**, **Warehouse**, **Finance**, **Reports**, or **Settings**.
3. Select the list or page you need.

For example, sales users may follow paths such as:

- **Sales > Leads** to view and work with leads.
- **Sales > Inquiries** to create or review sales inquiries.
- **Sales > Offers** to prepare customer offers.
- **Sales > Sales Orders** to review confirmed orders.
- **Sales > Delivery** to follow delivery work.

Learn more in these guides:

- Creating and Tracking Leads
- Creating Sales Inquiries
- Preparing Customer Offers
- Confirming Sales Orders
- Coordinating Sales Deliveries

Expand a Menu Group

Some menu groups contain more options. Select the group name or arrow beside it to show the available pages.

For example, the **Warehouse** group may include receiving, inspections, storage, shipping, delivery notes, and stock lists. Select the page that matches the stage of work you are handling.

Choose the Correct Branch

If you have access to more than one company branch, check the current branch before creating or updating records.

The branch selector is available in the PAMS CRM header area. Select it to choose another branch when needed.

The selected branch can affect:

- Records you can see
- People and teams you can choose
- Warehouses and stock locations
- Financial figures and reports
- New records you create

If you cannot find an expected record, first check whether you are working in the correct branch.

Open Records from a List

Most PAMS CRM work begins in a list. A list displays records such as leads, offers, orders, invoices, products, or tasks.

To open a record:

1. Navigate to the relevant list from the menu.
2. Find the row for the record.
3. Select the record number, name, or row.

The record opens on its own page, where you can review details, related information, files, comments, and activities.

For example:

- Open **Sales > Inquiries** to find a sales inquiry.

- Open **Sales > Offers** to find an offer.
- Open **Sales > Sales Orders** to find an order.
- Open **Warehouse > Delivery Notes** to find a delivery note.

For help working with inquiry lists, see Managing Inquiry Lists.

Use Search to Find Records

Use search when you know part of a record name, number, account name, or contact name.

1. Select the search field in PAMS CRM.
2. Enter a word, number, or name.
3. Review the matching results.
4. Select a result to open it.

Try using a short, specific part of the information you know. For example, enter an offer number, a client name, or a product name.

If search returns too many results, open the relevant list first and use its filters to narrow the results.

Move with Breadcrumbs

Breadcrumbs show where you are in PAMS CRM. They usually appear near the top of a page and show a path such as:

Sales > Offers > Offer details

Select an earlier item in the breadcrumb path to go back to that list or work area.

Breadcrumbs are helpful when you have opened several related records and want to return to the previous list without using the main menu.

Return to Recently Opened Records

Use **Recently Opened** to return to records you viewed recently.

This is useful when you need to switch between related work, such as a client, sales inquiry, offer, sales order, and invoice. Select a record from the recently opened list to return to it quickly.

Use Your Personal Work Area

My Desk provides a personal place to review your work. Depending on your access, it can include tasks, activities, calendars, lists, and dashboard information.

Use My Desk to:

- Check tasks assigned to you
- Review upcoming meetings, visits, and calls
- Return to records connected to your work
- Monitor your daily priorities

Follow Related Records

Many records in PAMS CRM are linked together. For example, a sales inquiry can lead to an offer, then a sales order, delivery, and invoice.

When viewing a record, look for related sections, tabs, or links to open connected records. This helps you follow the full history of a customer request without searching for each record separately.

For sales workflow guidance, see:

- Handling Lost Sales Records
- Managing Offer Follow-Up
- Managing Order Exceptions
- Creating Delivery Notes

If You Cannot Find a Menu Option

If a menu option, record, or action is missing:

1. Check that you selected the correct branch.
2. Check whether the menu group is expanded.
3. Use search or the relevant record list.
4. Ask your manager or PAMS CRM administrator whether your role includes access to that area.

Your access is set for your job responsibilities, so not every user sees every area of PAMS CRM.