Understanding the Interface

August 18, 2026

Welcome to PAMS CRM

PAMS CRM brings your commercial, operational, and financial work into one place. The screens and options you see may vary based on your role, branch access, and your company's available features.

This guide introduces the main areas you will use to move around PAMS CRM.

Sidebar

The sidebar is the main menu, usually shown on the left side of PAMS CRM.

Use it to open the areas you need for your daily work, such as:

- **My Desk** for your personal workspace, tasks, activities, and calendar.
- **Sales** for leads, inquiries, offers, sales orders, and deliveries.
- **Procurement** for purchasing work, supplier inquiries, and purchase orders.
- **Warehouse** for receiving, inspections, stock, shipments, and transfers.
- **Finance** for invoices, payments, costs, and profitability.
- **Dashboards** and **Reports** for performance information.
- **Settings** for company, user, and shared information, if you have permission.

Opening menu sections

Some sidebar items contain more options. Select the item or arrow beside it to expand the section, then choose the page you want to open.

For example, a sales user may open the Sales section to work with leads and offers. To learn more, see Creating and Tracking Leads and Preparing Customer Offers.

Keeping the sidebar tidy

You may be able to collapse the sidebar when you need more room to view a list or record. Select the menu control at the top of the sidebar to hide or show menu names.

Header

The header is the bar across the top of PAMS CRM. It gives you quick access to common information and actions.

Depending on your access, the header may include:

- Your current branch
- Search
- Notifications
- Recently opened records
- Display options
- Your profile and account options

Branch selector

If you work with more than one branch, the current branch is shown in the header.

Select the branch name to choose another branch available to you. PAMS CRM then shows records and information for that branch, based on your access.

Always check the selected branch before creating or updating important records, such as an offer, purchase order, invoice, or warehouse movement.

Breadcrumbs

Breadcrumbs appear near the top of a page. They show where you are in PAMS CRM.

For example, you may see a path that starts with **Sales**, continues to **Offers**, and ends with the offer you are viewing.

Use breadcrumbs to:

- Confirm which area you are working in.
- Return to a previous list.
- Move back to a related page without using the sidebar.

Breadcrumbs are especially helpful when you have opened a record from a dashboard, notification, search result, or related record.

Search

Use search in the header to find information quickly.

You can search for records that you have permission to view, such as:

- Accounts and contacts
- Leads, inquiries, offers, and sales orders
- Products
- Purchase orders
- Invoices
- Tasks and activities

Enter a name, reference number, product name, or other known detail. Select a result to open it.

Search results depend on your role, branch access, and the information available to you in PAMS CRM. If you cannot find a record, check that you are in the correct branch and that you have access to it.

Notifications

The notification area in the header helps you stay informed about work that needs your attention.

Notifications may alert you when:

- A task has been assigned to you.
- Someone comments on or tags you in a record.
- An activity, meeting, or visit needs follow-up.
- A record has been updated or requires action.
- A support ticket has new information.

Select the notification icon to view your latest notifications. Select a notification to open the related task, activity, or record.

Review notifications regularly so that important follow-up work is not missed.

Recently Opened Records

PAMS CRM may show a list of records you opened recently. This is useful when you need to return to a lead, offer, order, account, or invoice without searching again.

Use recently opened records to continue work where you left off.

Your Profile and Account Options

Your profile area is usually available from the top-right corner of PAMS CRM.

Select your name or profile image to access options such as:

- Viewing or updating your personal details
- Changing your password
- Managing your profile image
- Signing out of PAMS CRM

Only update details that belong to your own profile unless you are authorized to manage other users.

Lists and Records

Most work in PAMS CRM starts from a list or a record.

Lists

A list shows multiple records, such as all leads, offers, purchase orders, products, or invoices.

In a list, you can usually:

- Open a record by selecting it.
- Search within the list.
- Filter records to show only the information you need.
- Sort records by a heading, such as date, status, or owner.
- Adjust the columns you see.
- Create a new record if you have permission.

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

Records

A record contains the details for one item, such as one client, offer, sales order, shipment, or invoice.

Records may include separate sections or tabs for related information, including:

- Contact details
- Products or line items

- Files
- Comments
- Tasks and activities
- Addresses
- Status and history

Look for related sections when you need more context before making a change.

Your First Steps

As you begin using PAMS CRM:

1. Check that you are working in the correct branch.
2. Use the sidebar to open the area related to your work.
3. Use breadcrumbs to understand where you are.
4. Use search or recently opened records to return to information quickly.
5. Check notifications for new tasks and follow-up work.
6. Open your profile options when you need to update your own details.

Once you are comfortable moving around PAMS CRM, you can begin your sales work with Creating and Tracking Leads, Creating Sales Inquiries, or Confirming Sales Orders.