User Guide Overview

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User Guide

Welcome to the PAMS CRM User Guide. Use this section to find guidance for your daily work, from managing sales and products to handling warehouse, finance, reporting, and user access.

Start with the area that matches what you need to do. Each module contains focused guides with step-by-step instructions.

Where to Start

- **New to PAMS CRM:** Begin with Application Navigation, Sign-In and Registration, and My Profile.
- **Managing customer opportunities:** Go to **Sales Pipeline** for leads, offers, sales jobs, and orders.
- **Working with products or contacts:** Visit **Contacts and Products**.
- **Planning your workday:** Use **Workspaces and Reporting** for My Desk, tasks, activities, calendars, and dashboards.
- **Managing stock and deliveries:** Start with **Warehouse Operations**.
- **Managing invoices and payments:** Open **Finance Operations**.
- **Managing access for colleagues:** See **User Access**.

Module Categories

Sales Pipeline (4 docs)

Manage sales opportunities from the first lead through offers, orders, delivery, loss, or cancellation. Use this area to keep sales jobs, quotations, and customer follow-up work organized.

Key guides: Sales Jobs, Leads and Offers, Customer Surveys.

Pricing and Offers (3 docs)

Prepare accurate quotations by reviewing costs, margins, negotiated prices, and sales prices. This area helps you build and maintain commercial offers.

Key guides: Cost Calculation Sheet, Leads and Offers.

Orders and Delivery (4 docs)

Create sales orders, monitor their delivery progress, and review delivered work. Use these guides when an offer becomes a confirmed customer order.

Key guides: Sales Orders, Sales Delivery and Order Lists, Delivery Notes.

Principal Management (3 docs)

Maintain principal accounts and the business information connected to them, including contracts and registrations. This area supports relationships with product suppliers and business partners.

Key guides: Principal Accounts, Contracts Data, Registrations Data.

Targets and Performance (3 docs)

Set commercial targets and review performance against bookings, sales, budgets, margins, and forecasts. Use these guides for planning and performance review.

Key guides: Booking Targets, Business Analysis Dashboard, Custom Dashboard.

Procurement Operations (4 docs)

Manage purchasing work from product requests and supplier inquiries through orders and received goods. This area helps purchasing teams track supplier offers, prices, approvals, and delivery progress.

Key guides: Procurement, Procurement Orders, Purchasing Jobs, Procurement PDF Documents.

Project Operations (4 docs)

Manage project-related records and the operational work linked to projects, sales jobs, product requirements, and production. Use this area to keep project work connected across PAMS CRM.

Key guides: Project Management, Job Bill of Materials, Material Requisitions, Production Orders.

Warehouse Operations (5 docs)

Track products from receipt through inspection, storage, shipment, transfer, return, and production. This area supports warehouse teams in maintaining accurate stock movement records.

Key guides: Warehouse Stock, Receiving Shipments, Warehouse Inspections, Shipping Orders, Goods Issue Notes.

Finance Operations (5 docs)

Create and track invoices, payments, costs, profitability, cash position, and financial commitments. Use these guides to follow the financial progress of customer and purchasing work.

Key guides: Invoices, Payments, Purchase Invoices, Job Costing, Job Profitability.

Commission Management (3 docs)

Manage commission-related business information, account responsibilities, and planning inputs. This area supports commission and bonus administration across branches and teams.

Key guides: Account Managers, Company Branches, Bonus Planning.

Contacts and Products (4 docs)

Maintain the people, companies, products, and product structures used throughout PAMS CRM. Start here when you need to add or update clients, suppliers, contacts, products, or product classifications.

Key guides: Accounts, Clients and Contacts, Products, Product Categories and Types.

Workspaces and Reporting (4 docs)

Organize daily work, follow tasks and activities, build personal dashboards, and review reports. This area is useful for users who need a clear view of priorities and business information.

Key guides: My Desk, Tasks, Activities, Reports Library.

User Access (3 docs)

Manage people and access in PAMS CRM, including user accounts, roles, teams, and security information. Use this area when setting up colleagues or reviewing what they can access.

Key guides: Users, Roles, Security.