What Can You Do with PAMS CRM?

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PAMS CRM helps you manage customer relationships, sales, purchasing, warehouse work, finance, and business performance in one place. The screens and actions available to you depend on your role, branch access, and your company’s subscription.

Get Started and Organize Your Work

Use PAMS CRM to keep your daily work, follow-up, and shared information organized.

- Sign in, manage your personal details, update your password, and maintain your profile documents.
- Move between business areas, switch branch context where permitted, and return to recently opened records.
- Use My Desk to view your tasks, activities, calendar, lists, and personal dashboard.
- Create tasks and subtasks, assign work to colleagues, set due dates, and track completion.
- Plan calls, meetings, visits, and emails, with reminders and links to related records.
- Share files, add comments, tag related records, and follow notifications.
- Submit and track support tickets when you need help.

Manage Accounts and Business Relationships

Maintain clear records for the customers, suppliers, and contacts your company works with.

- Create and update client, principal, and sub-supplier accounts.
- Maintain contact details, addresses, photos, documents, and account relationships.
- Assign account managers and keep ownership information up to date.

- Record contracts, registrations, warranties, serial numbers, and delivered-product references.
- Manage principal relationships and review related commercial activity through Managing Principal Relationships.
- Review principal sales performance through Tracking Principal Sales Results and prepare branded reports with Generating Principal Reports.

Develop Sales Opportunities

Follow sales work from an early lead through quotation, order, delivery, or closure.

- Create leads, record customer needs, assign responsibility, and track progress with Creating and Tracking Leads.
- Create sales inquiries and manage inquiry details using Creating Sales Inquiries.
- Review and organize inquiry lists with Managing Inquiry Lists.
- Prepare customer offers with products, quantities, prices, margins, and commercial terms through Preparing Customer Offers.
- Follow up on offers, record outcomes, and plan next actions with Managing Offer Follow-Up.
- Record lost opportunities and reasons using Handling Lost Sales Records.

Price, Confirm, and Deliver Sales

Turn approved customer offers into controlled sales work.

- Use the pricing tool to calculate costs, margins, negotiated prices, and sales prices with Using the Pricing Tool.
- Build product and job requirements, reserve stock, and review planned purchasing needs.
- Confirm sales orders, manage order items, and check delivery conditions through Confirming Sales Orders.
- Review delivery progress and coordinate sales deliveries with Coordinating Sales Deliveries.
- Create and complete delivery notes using Creating Delivery Notes.
- Track cancellations, exceptions, and other order changes with Managing Order Exceptions.

Purchase Products and Services

Manage the work needed to obtain products and services from suppliers.

- Create material requests for stock, internal use, projects, and sales jobs.
- Group requested items into purchasing packages and ask suppliers for quotations.
- Compare supplier offers, prices, taxes, delivery dates, and payment milestones.
- Create purchase orders and follow ordered, delivered, and outstanding quantities.
- Print, download, and share purchasing inquiry and order documents.
- Review buyouts and purchasing jobs from request through receipt.

Receive, Store, and Move Stock

Control warehouse work from incoming goods to delivery, transfer, return, or production.

- Monitor available stock, incoming products, inspection status, and warehouse locations.
- Create receiving shipments and record quantities received from purchase orders.
- Inspect received products, accept or reject items, and release accepted products to stock.
- Store products in warehouse locations and keep storage records up to date.
- Prepare shipping orders, issue goods from stock, and manage returns.
- Move products between warehouses or branches, or use them in assembly, production, and external service work.

Manage Invoices, Payments, and Profitability

Keep track of billing, supplier costs, payments, and the financial results of each job.

- Create, approve, print, send, and track customer invoices.
- Add invoice deductions and follow invoices that are upcoming, due, overdue, paid, or considered paid.
- Record incoming payments and allocate them to one or more invoices.
- Create and review purchase invoices, outgoing payments, and supplier-related costs.
- Record direct job costs and allocate costs to orders, products, and sales work.
- Review job profitability for active, delivered, and paid jobs.

Monitor Performance and Plan Ahead

Use dashboards, reports, and planning tools to understand business performance.

- Review bookings, orders, offers, deliveries, invoices, payments, and backlog.
- Monitor sales activity, pipeline, customer visits, tasks, and approaching bid deadlines.
- Compare results by branch, customer, supplier, salesperson, team, product type, or location.
- Set and review booking, sales, budget, margin, and forecast targets with Managing Booking Targets.
- Review cash position, expected cash flow, working capital, and financial forecasts.
- Create personal dashboard views and report pages for the information you need most.

Manage Company Settings and Access

Authorized administrators can maintain the shared information and access rules used across PAMS CRM.

- Maintain branches, branch contacts, bank details, logos, warehouses, and storage areas.
- Manage products, categories, product types, units, currencies, delivery terms, and payment methods.
- Create users, assign roles, manage teams, and review access information.
- Maintain document templates, shared lists, and company addresses.
- Review record history and sales activity history when checking changes.
- Manage subscription plans and review subscription invoices.