What is PAMS CRM

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PAMS CRM helps your business manage commercial work from the first customer contact through to delivery, invoicing, payment, and profitability review.

It brings sales, purchasing, warehouse, finance, and management work together in one place. This helps teams keep related information connected, reduce manual follow-up, and see the current status of jobs, orders, stock, and payments.

What PAMS CRM helps you manage

In PAMS CRM, you can manage the full journey of a sale:

1. Record leads and customer inquiries.
2. Prepare offers and agree prices.
3. Confirm sales orders and plan delivery.
4. Purchase products or services from suppliers.
5. Receive, inspect, store, and issue stock.
6. Deliver products and create delivery documents.
7. Create invoices, record payments, and review costs and profit.

PAMS CRM also helps teams work together through tasks, activities, comments, files, notifications, calendars, and support tickets.

Main areas of PAMS CRM

Sales and customer relationships

Sales users can maintain client and contact details, record leads, prepare offers, manage sales orders, and follow up on delivery and customer feedback.

Useful guides include:

- Creating and Tracking Leads

- Creating Sales Inquiries
- Preparing Customer Offers
- Managing Offer Follow-Up
- Confirming Sales Orders
- Coordinating Sales Deliveries

Purchasing and suppliers

Purchasing users can request products, collect supplier prices, compare offers, create purchase orders, and follow goods through receiving.

PAMS CRM also stores information about principals and sub-suppliers, helping teams maintain clear supplier relationships and product information.

Warehouse and delivery

Warehouse users can receive shipments, inspect products, place stock in warehouse locations, prepare outgoing shipments, and record returns or transfers.

This gives teams a clearer view of what is incoming, under inspection, in stock, reserved, delivered, or returned. For delivery documents, see Creating Delivery Notes.

Finance and profitability

Finance users can create and track invoices, record incoming and outgoing payments, manage purchase invoices, and review costs.

PAMS CRM connects financial records with sales and purchasing work, making it easier to review job costs, margins, outstanding invoices, and profitability.

Dashboards, reports, and planning

Managers can use dashboards and reports to monitor sales activity, bookings, backlog, deliveries, invoices, payments, stock, and business performance.

PAMS CRM also includes tools for targets, cash planning, forecasts, and bonus planning. To learn about sales targets, see Managing Booking Targets.

Administration and shared settings

Authorized administrators can maintain company branches, warehouses, users, roles, teams, shared lists, document templates, and other business settings.

These settings help ensure that users see the information and actions relevant to their work.

Who uses PAMS CRM?

PAMS CRM supports different teams across the business:

- **Sales users** manage customer opportunities, offers, orders, and sales jobs.
- **Purchasing users** obtain products and services from suppliers.
- **Warehouse users** receive, inspect, store, move, and deliver stock.
- **Finance users** manage invoices, payments, costs, and profitability.
- **Managers** review performance and set targets.
- **System administrators** manage users, access, branches, and shared business information.

What you can see and do

What you see in PAMS CRM depends on your role, branch access, and your company's selected features. For example, a warehouse user may see stock and shipment work, while a sales user may focus on leads, offers, and customer accounts.

Your work can also be organized through your personal workspace, recent records, notifications, tasks, activities, and calendar. This helps you return to ongoing work and keep track of follow-up actions.

Getting started

Start by becoming familiar with the menus, your current branch, and your personal workspace. Then open the guides that match your role and daily responsibilities.

If you work in sales, you may begin with Creating and Tracking Leads. If you manage principal relationships, see Managing Principal Relationships.