PAMS (V2 PIPELINE RUN)

Who Uses PAMS CRM

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PAMS CRM supports people across the full commercial and operational process. What you can see and do depends on your role, branch access, and the features available to your company.

Most people work mainly in the areas related to their day-to-day responsibilities, while sharing records, tasks, activities, files, comments, and notifications with colleagues.

Sales User

Sales Users develop business opportunities and manage client-facing work from the first lead through to delivery.

They typically:

- Maintain client and contact information
- Create leads, inquiries, offers, and sales orders
- Prepare pricing, margins, and quotations
- Follow up on offers and customer decisions
- Coordinate delivery requirements with warehouse and purchasing teams
- Track sales jobs, customer surveys, and account relationships

The modules they use most are **Accounts**, **Clients and Contacts**, **Sales Jobs**, **Leads and Offers**, **Sales Orders**, **Cost Calculation Sheet**, **Job Bill of Materials**, and **Sales Delivery and Order Lists**.

Start with Creating and Tracking Leads, Creating Sales Inquiries, Preparing Customer Offers, and Confirming Sales Orders.

Purchasing User

Purchasing Users obtain products and services from suppliers. They turn approved requirements into supplier inquiries, compare offers, place orders, and follow delivery progress.

They typically:

- Review material requirements and planned product needs
- Request supplier quotations
- Compare supplier prices, delivery dates, and terms
- Create and follow procurement and purchase orders
- Work with suppliers, principals, and sub-suppliers
- Coordinate incoming goods with warehouse and finance teams

The modules they use most are **Material Requisitions**, **Procurement**, **Procurement Inquiries and Offers**, **Procurement Orders**, **Purchasing Jobs**, **Purchasing Inquiries and Offers**, **Purchase Orders**, **Buyouts to Procurement**, and **Latest Purchased Products**.

Warehouse User

Warehouse Users manage the physical movement and condition of stock. They make sure products are received, inspected, stored, issued, delivered, transferred, or returned correctly.

They typically:

- Receive goods against source orders
- Inspect incoming products and record accepted or rejected quantities
- Place approved goods into warehouse locations
- Prepare products for customer delivery
- Issue goods for shipment, production, transfer, or external service
- Record returns and monitor stock availability

The modules they use most are **Warehouse Stock**, **Receiving Shipments**, **Warehouse Inspections**, **Quality Control**, **Warehouse Storage**, **Shipping Orders**, **Delivery Notes**, **Goods Issue Notes**, **Return Notes**, **Transfer Orders**, **Production Orders**, and **Assembly Orders**.

For sales-delivery work, see Coordinating Sales Deliveries and Creating Delivery Notes.

Finance User

Finance Users manage billing, incoming and outgoing payments, supplier costs, guarantees, and job financial results.

They typically:

- Create and approve sales and purchase invoices
- Record customer payments and allocate them to invoices
- Review supplier invoices, payables, and outgoing payments
- Record job costs and review profitability
- Track letters of guarantee
- Update cash position and forecasted cash flow

The modules they use most are **Invoices**, **Payments**, **Purchase Invoices**, **Payables**, **Outgoing Payments**, **Job Costing**, **Job Profitability**, **Principal Invoices**, **Letters of Guarantees**, **Cash Position**, and **Forecasted Cash Flow**.

Manager

Managers oversee branch, team, commercial, and financial performance. They use PAMS CRM to review progress, identify priorities, and set targets.

They typically:

- Monitor sales pipeline, bookings, backlog, deliveries, invoices, and payments
- Review team and branch performance
- Follow important tasks, visits, deadlines, and exceptions
- Set booking, sales, margin, and budget targets
- Review forecasts, profitability, stock, and cash information
- Use reports to compare clients, suppliers, teams, and product areas

The modules they use most are **My Desk**, **Short Review Dashboard**, **Business Analysis Dashboard**, **Custom Dashboard**, **MRM Booking and Backlog**, **MRM Financial Dashboard**, **MRM Sales and Stock Dashboard**, **Reports Library**, **Job Profitability**, **Booking Targets**, and **Bonus Planning**.

See Managing Booking Targets, Tracking Principal Sales Results, and Generating Principal Reports.

System Administrator

System Administrators are authorized users who maintain shared company information, user access, and working rules in PAMS CRM.

They typically:

- Create and manage users, roles, teams, and branch access
- Maintain company branches, contacts, bank details, and logos
- Set up warehouses, product information, currencies, payment methods, and delivery terms
- Maintain shared lists used across sales, purchasing, and warehouse work
- Manage document templates, subscription features, and security information
- Review audit history when changes need to be checked

The modules they use most are **Users**, **Roles**, **Teams**, **Security**, **Company Branches**, **Warehouse Configuration**, **Commercial Configuration**, **Sales Configuration**, **Products**, **Product Categories and Types**, **Custom Fields and Layouts**, **Document Templates**, **Subscription Plans**, and **Audit History**.

Shared Tools for All Users

Many roles use the same everyday tools in PAMS CRM:

- **Application Navigation** to move between areas and select the right branch
- **My Profile** to update personal details and sign-in settings
- **My Desk** for personal lists, tasks, activities, calendars, and dashboards
- **Tasks** and **Activities** to organize and follow up on work
- **Notifications** and **Recently Opened** to return to important records
- **Files and Libraries** and **Comments and Record Tags** to share information with colleagues
- **Support Tickets** to request help or report an issue

Your role may include more than one of these responsibilities. For example, a branch manager may also work with sales jobs, invoices, and reports.