PAMS (V2 PIPELINE RUN)

Your First Day with PAMS CRM

August 18, 2026

Welcome to PAMS CRM

PAMS CRM helps your team manage customer work from the first lead through sales, delivery, invoicing, and payment.

On your first day, focus on a few simple tasks that help you find your work, stay organized, and begin using the records that matter to your role.

The menus, records, and actions you see in PAMS CRM depend on your role, branch access, and your company's selected features. If you cannot find an option described here, ask your manager or PAMS CRM administrator.

Start with the basics

Check your branch

Before you begin work, check that you are working in the correct branch. Your current branch affects the records, customers, products, and work items available to you.

Use the branch selector in the main navigation area to confirm or change your branch, if you have access to more than one.

Explore the main navigation

Use the main menu to move between areas of PAMS CRM, such as:

- **My Desk** for your personal work area
- **Sales Jobs** for leads, inquiries, offers, and sales orders
- **Accounts** for clients, contacts, principals, and suppliers
- **Tasks** and **Activities** for follow-up work
- **Warehouse** for receiving, inspection, storage, and delivery work
- **Invoices** and **Payments** for finance work
- **Dashboards** and **Reports** for performance reviews

You do not need to learn every menu on your first day. Start with the areas that support your daily work.

Review your profile

Open your account options and review your personal details. You may be able to update your name, contact details, profile image, password, and trusted devices.

Keeping your profile current helps colleagues identify you when assigning tasks, activities, and account responsibilities.

Quick win 1: Use My Desk to see your work

My Desk is your personal starting point in PAMS CRM. It can bring together your tasks, activities, calendar items, lists, and dashboard information.

On your first visit:

1. Open **My Desk** from the main menu.
2. Look for tasks that are assigned to you.
3. Check upcoming meetings, calls, visits, or reminders.
4. Open an item to see its related customer, sales job, or other record.
5. Return to My Desk whenever you need to decide what to do next.

Use this area as your daily workspace rather than searching through multiple menus.

Quick win 2: Create a task and keep follow-up work visible

Tasks help you record work that needs to be completed, such as calling a client, checking a delivery date, or preparing information for a colleague.

To create a simple task:

1. Open **Tasks** or create a task from a related record.
2. Enter a clear subject, such as “Call client about offer.”
3. Choose an owner. Select yourself for personal work or assign a colleague when appropriate.
4. Set a due date.
5. Add notes that explain the next action.
6. Save the task.

When the work is finished, mark the task as complete. If more work is needed later, you can reopen it or create a follow-up task.

Tasks are especially useful when working with leads, offers, sales orders, deliveries, and invoices.

Quick win 3: Find or review a client account

Accounts hold important information about the organizations your company works with. Depending on your access, you may see clients, principals, and sub-suppliers.

To get familiar with an account:

1. Open **Accounts** from the main menu.
2. Search for a client or use the list filters to narrow the results.
3. Open the account record.
4. Review the available contact details, addresses, related people, files, comments, and linked commercial records.
5. Use the account record when you need context before calling, emailing, preparing an offer, or following up on an order.

If you need to create a new client, first check that the account does not already exist. This helps avoid duplicate records.

Quick win 4: Start or review sales work

If you work in sales, begin by reviewing your leads, inquiries, offers, or sales jobs. These records help you follow each customer opportunity from the first conversation to an order.

A useful first-day routine is:

1. Open your sales list.
2. Filter the list for records assigned to you or your team.
3. Check records with upcoming deadlines or follow-up dates.
4. Open one active record and review its customer, products, notes, tasks, and activity history.
5. Create a task or activity for the next customer action.

For step-by-step guidance, see:

- Creating and Tracking Leads

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

Quick win 5: Check notifications and recently opened records

Notifications help you stay aware of work that needs attention. You may receive notifications when someone assigns you a task, comments on a record, updates an activity, or asks for follow-up.

At the start and end of each day:

1. Open your notifications.
2. Read new items and open the related record when action is needed.
3. Mark completed or reviewed items as appropriate.
4. Use **Recently Opened** to return to records you worked on earlier.

Recently Opened is useful when you need to move quickly between a client, sales job, order, task, or invoice without searching again.

Build a simple daily routine

A good first-day routine can also become your regular routine:

1. Confirm your branch.
2. Open **My Desk**.
3. Review notifications, tasks, and calendar items.
4. Open your active customer or sales records.
5. Record the next action as a task or activity.
6. Check Recently Opened before finishing for the day.

This routine keeps follow-up work visible and helps your team see progress in the same records.

Where to go next

Choose the guide that best matches your role:

Sales users

- Creating and Tracking Leads
- Preparing Customer Offers
- Confirming Sales Orders
- Coordinating Sales Deliveries

Managers

- Managing Booking Targets
- Tracking Principal Sales Results
- Generating Principal Reports

Users working with principals

- Managing Principal Relationships
- Tracking Principal Sales Results

Need help?

If you are unsure which record to use, begin with the customer account, the related sales job, or My Desk. If an option is missing or you cannot access a record, contact your manager or PAMS CRM administrator.