PAMS V2

Your First Day with Pams V2

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Getting Started

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Pams V2 is available at:

`https://shoteco2.pams.net`

This introduction helps you sign in, open the core configuration workspace, review an existing record, and identify the next configuration screens to use. It is intended for Sales representatives, Account managers, Project managers, Purchasing officers, Warehouse managers, Inventory controllers, Finance officers, and Accountants who require access to company-wide operational settings.

What You Can Do Here

- Use **New** to start a new record on the current screen.
- Use **Save** to save a new or edited record.
- Use **Update Current** to update the record currently open.
- Use **Delete Current** to remove the record currently open.
- Use **Delete** to delete a selected record.
- Use **Cancel** to abandon an unsaved change.
- Use **Columns Chooser** to select the columns displayed in a record list.
- Use **Standard Layout** to apply the standard list layout.
- Use **Add Layout** to create an additional list layout.
- Use **Layout (icn icn-layoout)** to access layout-related options.

- Use **Settings (icn icn-settings)** to access screen settings.
- Use **Update (icn-update)** to update information where this control is available.

First Session Walkthrough

1. Open `https://shoteco2.pams.net` in a supported web browser.
2. Sign in using the credentials supplied by your system administrator.
3. Open **Configuration** and select **General settings**.
   For this area, General settings is the recommended starting workspace because it provides access to settings that may affect how records are presented and managed.
4. Review the available list and screen options. If the list is difficult to read, select **Columns Chooser** and choose the columns relevant to your work.
5. To return to the default list presentation, select **Standard Layout**. If you need a personal or task-specific arrangement, select **Add Layout**.
6. Open **Company** to review the company record available to your organisation. Select an existing record from the list to view its details. Do not change company information unless you are authorised to maintain it.
7. If changes are required and you have the appropriate responsibility:
   - Select **New** to create a record, or open an existing record.
   - Enter or amend the available information.
   - Select **Save** for a new record, or **Update Current** for the open record.
   - Select **Cancel** if you do not want to keep your changes.
8. Continue with the configuration screen that matches your immediate task:
   - **Targets and budgets** for planned goals and financial allocations.
   - **Serial combinations** for product serial combination records.
   - **Company** for company-level information.
   - **General settings** for general application settings and screen layouts.

Screen Guide

Screen	Use It For	Recommended Users
Company	Reviewing and maintaining company information where authorised.	Account manager, Finance officer, Accountant
Targets and budgets	Reviewing or maintaining planned targets and budget allocations where authorised.	Account manager, Project manager, Finance officer, Accountant
Serial combinations	Reviewing or maintaining product serial combination records.	Warehouse manager, Inventory controller
General settings	Reviewing available settings and managing list layouts.	All authorised users

Working with Lists and Layouts

Record lists may be configured to make frequently used information easier to locate.

Control	Purpose
Columns Chooser	Chooses which columns are displayed in the current list.
Standard Layout	Restores or applies the standard list layout.
Add Layout	Creates an additional layout for the current list.
Layout (icn icn-layoout)	Opens layout-related options.
Settings (icn icn-settings)	Opens settings-related options for the current screen.
Update (icn-update)	Updates information where the control is available.

Next Steps

After reviewing the Company record and General settings, proceed according to your role:

- Sales representatives and Account managers can continue to **Sales** for Sales jobs and customer-related work.
- Project managers can continue to **projects management** and **Job Profitability** for project monitoring and job profitability review.
- Purchasing officers can continue to **Purchasing** or **procurement** for Buyouts, Direct orders, and RFQs.
- Warehouse managers and Inventory controllers can continue to **Warehouse** or **Inventory** for Stock and serial-related work.

- Finance officers and Accountants can continue to **Finance** or **Financial** for financial processing and reporting.

Related pages

- **Finding Your Way Around**
- First Time Login
- Getting Started — Learning Path
- Branches
- Flags
- Frequent Currencies
- Market Segments
- Product Types
- Products