

# About Pams V2

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*Welcome*

## Welcome to Pams V2

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Pams V2 is a project-based commercial operations system for managing work from the first sales opportunity through purchasing, delivery, finance, and job profitability. It provides a shared operational record for Sales jobs, projects, Buyouts, Stock movements, customer information, payments, costs, and quality-related processes.

Access the system at <https://shoteco2.pams.net>.

Pams V2 supports the work of Sales representatives, Account managers, Project managers, Purchasing officers, Warehouse managers, Finance officers, Accountants, and Quality control officers. Each user can work with the records and operational areas relevant to their responsibilities while maintaining a connected view of the commercial and project lifecycle.

## What Pams V2 Helps You Manage

The system helps teams to:

- Track a Sales job from commercial activity through delivery, invoicing, costs, and Job profitability.
- Create a Direct order when an order must be entered without a prior RFQ process.
- Manage RFQs and Buyouts to obtain supplier pricing, terms, goods, and services for jobs or projects.
- Plan and manage project work through PM-related records and activities.
- Maintain product, customer, contract, and contact information.
- Monitor Stock and Warehouse operations, including serial-related product configurations.

- Record finance, payment, cost, and financial information associated with operational work.
- Support ISO settings, customer satisfaction surveys, and other quality or process-management requirements.
- Maintain administrative, organizational, security, and reference data.

## Available Modules

| Module                         | Purpose                                                                                                                                        |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Dashboard                      | Provides an overview of operational information and access to key areas of the system.                                                         |
| Sales                          | Supports the management of Sales jobs and related commercial activity.                                                                         |
| Add new                        | Provides options for creating new operational records.                                                                                         |
| Market                         | Supports market-related commercial records and information.                                                                                    |
| Projects record                | Provides records used to manage projects.                                                                                                      |
| Projects-<br>Management record | Supports PM activities for planning and managing project work.                                                                                 |
| Purchasing                     | Supports purchasing activity associated with supplier requirements and Buyouts.                                                                |
| Procurement record             | Provides procurement-related records for obtaining goods or services.                                                                          |
| Purchase record                | Maintains records of purchasing transactions and related information.                                                                          |
| Warehouse                      | Supports Warehouse operations and the management of Stock held in operational locations.                                                       |
| Inventory                      | Provides inventory-related records for products and materials.                                                                                 |
| Job Cost                       | Supports the recording and review of costs associated with a Sales job or project. This information contributes to Job profitability analysis. |
| Finance                        | Supports finance-related operational records.                                                                                                  |
| Financial                      | Provides financial information associated with transactions, jobs, and projects.                                                               |
| Contract Data                  | Maintains contract-related information, including records that may require an L/G.                                                             |
| Contacts record                | Maintains customer, supplier, and other contact records used in commercial operations.                                                         |
| Activities                     | Supports the recording and management of work activities.                                                                                      |

| Module           | Purpose                                                                                      |
|------------------|----------------------------------------------------------------------------------------------|
| Tasks            | Supports the management of assigned operational tasks.                                       |
| Blogs record     | Provides blog-related records available in the application.                                  |
| Configurations   | Maintains configurable system and operational settings.                                      |
| Configuration    | Provides configuration records, including product and process-related setup where available. |
| Data             | Provides access to maintained reference and operational data.                                |
| Security         | Supports security-related administration and controls.                                       |
| Security Section | Provides additional security-related records or settings.                                    |

## Supporting Operational Information

Pams V2 connects commercial, project, purchasing, warehouse, and financial information so that each team can work from consistent records.

For example:

- A Sales representative or Account manager can follow a Sales job from the initial opportunity to commercial completion.
- A Project manager can use project and PM records to coordinate delivery-related work.
- A Purchasing officer can manage RFQs and Buyouts required for a job or project.
- A Warehouse manager can review Stock and Warehouse information, including product serial-related details such as a Serial combination or Product serial combination.
- A Finance officer or Accountant can review financial records, payments, costs, L/G information, and Job profitability.
- A Quality control officer can maintain quality-related information, including ISO settings and customer satisfaction survey records where applicable.

## Key Business Terms

| Term         | Meaning                                                                                         |
|--------------|-------------------------------------------------------------------------------------------------|
| Sales job    | A sales opportunity or job tracked from commercial activity through delivery and profitability. |
| Direct order | An order entered directly without using a prior RFQ process.                                    |

| Term                         | Meaning                                                                                                       |
|------------------------------|---------------------------------------------------------------------------------------------------------------|
| RFQ                          | Request for quotation; a request sent to obtain supplier pricing or terms.                                    |
| Buyout                       | Procurement activity for obtaining goods or services required for a job or project.                           |
| L/G                          | Letter of guarantee, typically a financial or contractual guarantee associated with a transaction or project. |
| Job profitability            | Analysis of revenue, costs, and margin for a specific job or project.                                         |
| Stock                        | Inventory quantities held for products or materials.                                                          |
| Warehouse                    | The operational location and processes used to store and manage inventory.                                    |
| Serial combination           | A configuration or grouping used to identify products by serial-related attributes.                           |
| Product serial combination   | A defined serial-number configuration for a product.                                                          |
| VL registrations             | A registration record type available in the application.                                                      |
| ISO settings                 | Configuration for ISO-related quality or process-management requirements.                                     |
| Customer satisfaction survey | A survey used to collect customer feedback.                                                                   |
| Targets and budgets          | Planned performance targets and financial budget amounts.                                                     |