PAMS FRESH GENERATION

Accounts

September 11, 2026

Accounts

Accounts at a glance

An account is a record for the identity, classification, registrations, contacts, and related details you maintain together. Use **Accounts** to find an account category, open
an account record, and understand which related details belong to that record.

If you need to…	Go to
Find an account or choose an account category	Find an account
Understand the fields and tabs on a record	Understand the account record
Maintain registrations, contacts, projects, or contract details	Maintain related account details
Create or edit an account	Create an account
Work with registrations as reference data	Registration data
Work with contacts	Contacts
Work with projects	Projects
Work with attached files	Libraries and files
Maintain account managers	Account managers

Before you start

The Accounts surface changes with your subscription, saved-record state, account classification, permissions, company configuration, and enabled features.

Prerequisites

- Have access to the Accounts list and the account record you need to review.
- If you are reviewing contract details, open an existing principal account.

- Have permission to view contract data when you need the **Contract Key Data** tab.
- Use a saved account when you need contract details or related record surfaces.
- Expect **Display name** and **Full Name** to be required only where your company configures those fields as mandatory.

The list is replaced by the subscription-upgrade surface when the Accounts feature is not
included. The grid appears only when a list layout is selected. On a principal account, the registration form uses **Client**; on a non-principal account, it uses **Principal**.
The **Account Manager** field appears for client accounts. Contract fields require an existing account, the **Contract Key Data** tab, principal status, permission to view contract data, and the contract feature.

Find an account

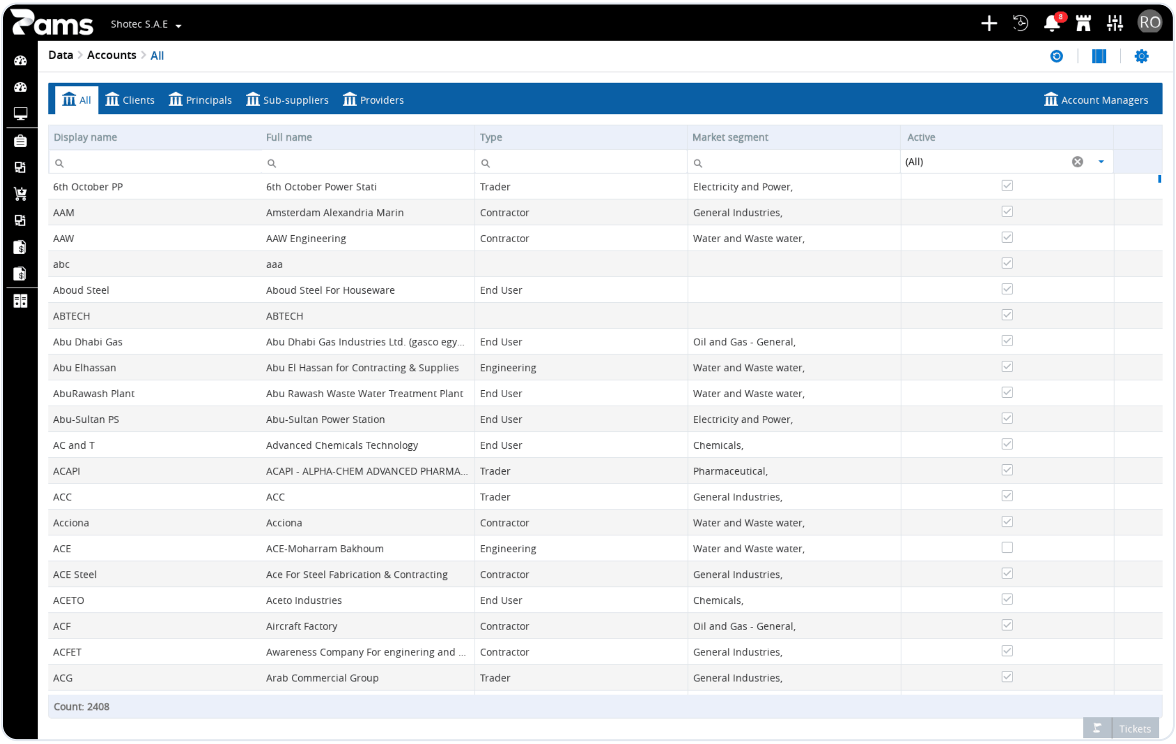
The Accounts list is the starting point for choosing an account category and opening a record. The list currently draws **Display name**, **Full name**, **Type**, **Market segment**, and **Active** from the selected list layout.

Prerequisites

- Have access to the Accounts list.
- Know whether you need all accounts, clients, principals, sub-suppliers, providers, or
  account managers.

Steps

1. Open the Accounts list.



2. Select the list that matches the work you need to do.

If you need to…	Select
Review every account	**All**
Review client accounts	**Clients**
Review principal accounts	**Principals**
Review sub-supplier accounts	**Sub-suppliers**
Review provider accounts	Providers
Review account managers	**Account Managers**

Each choice opens its corresponding account list.

3. Read the visible headers **Display name**, **Full name**, **Type**, **Market segment**, and **Active** to identify the row you need.

   The headers come from your selected list layout, so use the headers visible in your list when the layout changes.

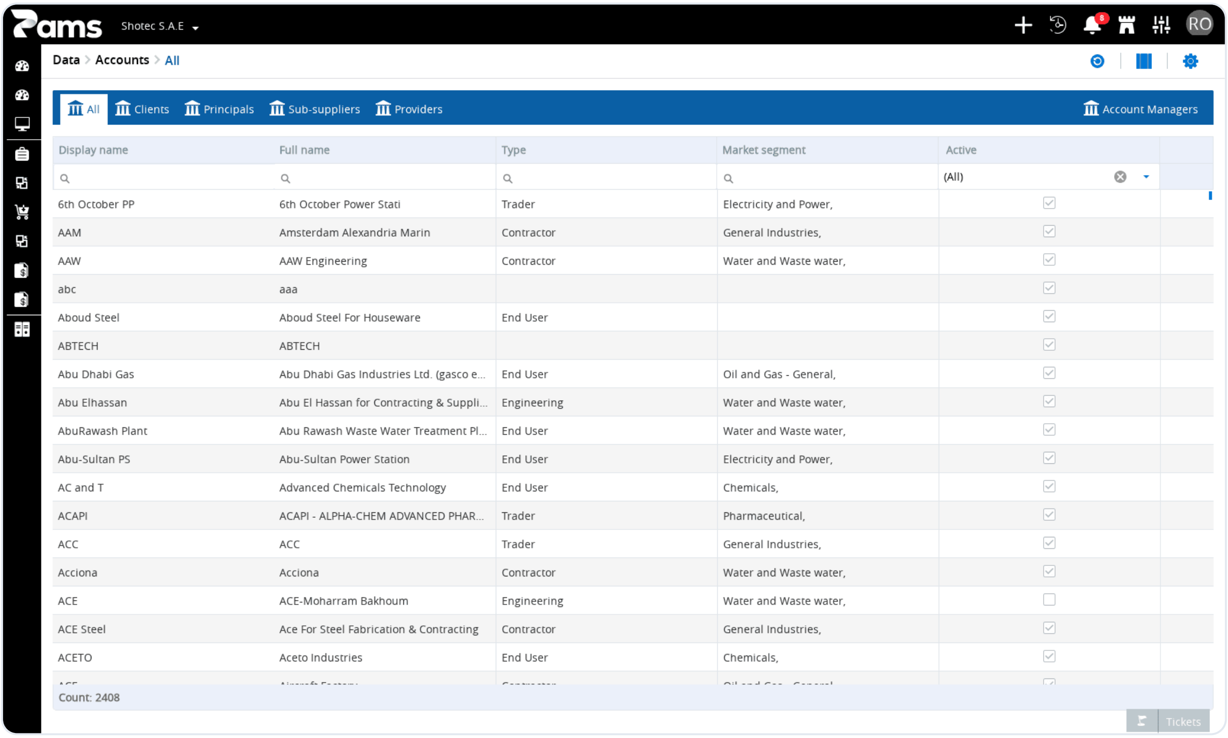
   The list displays a count.

4. Select an account row to open its record.

The edit link is available only for a record in the same branch and not for the company
supplier record. The delete menu requires delete permission and also excludes the company
supplier record.

5. Use **Refresh** or **Settings** when you need the corresponding list control.

   The **Account Managers** view instead displays the **Account manager** column and exposes **Settings**.



Display name	Full name	Type	Market segment	Active
6th October PP	6th October Power Stati	Trader	Electricity and Power,	
AAM	Amsterdam Alexandria Marin	Contractor	General Industries,	
AAW	AAW Engineering	Contractor	Water and Waste water,	
abc	aaa			
Aboud Steel	Aboud Steel For Houseware	End User		
ABTECH	ABTECH			
Abu Dhabi Gas	Abu Dhabi Gas Industries Ltd. (gasco e...	End User	Oil and Gas - General,	
Abu Elhassan	Abu El Hassan for Contracting & Suppli...	Engineering	Water and Waste water,	
AbuRawash Plant	Abu Rawash Waste Water Treatment Pl...	End User	Water and Waste water,	
Abu-Sultan PS	Abu-Sultan Power Station	End User	Electricity and Power,	
AC and T	Advanced Chemicals Technology	End User	Chemicals,	
ACAPI	ACAPI - ALPHA-CHEM ADVANCED PHAR...	Trader	Pharmaceutical,	
ACC	ACC	Trader	General Industries,	
Acciona	Acciona	Contractor	Water and Waste water,	
ACE	ACE-Moharram Bakhoum	Engineering	Water and Waste water,	
ACE Steel	Ace For Steel Fabrication & Contracting	Contractor	General Industries,	
ACETO	Aceto Industries	End User	Chemicals,	

Result: The selected account category is open, and the account record is available for review when you select a row.

Understand the account record

The record groups the account's identity, classification, registrations, contact persons, projects, contract data, comments, and modification history.

The main account fields are **Display name**, **Full Name**, **Market Segment**, **Account Type**, **VAT ID Number**, and **Account Manager**. **Account Manager** appears for a client
account. The account classification controls are **Client**, **Principals**,
Sup-supplier, and Other Account.

Account Type is a select field. Choose from these options:

- End User
- Contractor
- Engineering
- OEM
- Trader
- Oil And Services Operation Co.

VAT ID Number is a text field. **Account Manager** is a select field for client records.

Record area	Fields or tabs	Use it to…
Main account details	**Display name**, **Full Name**, **Market Segment**, **Account Type**, **VAT ID Number**, **Account Manager**	Identify and classify the account
Contract data	**Contract Key Data**; **Expiry Date**, **Cancellation Period**, **Product Type**	Review contract dates, cancellation information, and product type for an eligible principal account
Registrations	**Registrations**; **Client**, **Principal**, **Status**, **Registration Number**, **Registration date**	Add or review a registration
Contact persons	**Contact Persons**; **Name**, **Position**, **Department**; **Phone**, **Fax**, **Mobile**, **Email**, **Website**, **Online Support**, **Office**, **Pager**	Add or review people and contact information associated with the account
Related work	**Own projects**, **Comments**, **Attachment**, **Account Invoices**, **Last Modifications**	Open related projects, comments, attached files, invoices, or modification history

Use **Contact Persons** for people associated with the account. Its contact-information fields include **Office** and **Pager**. Use **Own projects** to review account projects and **Account Invoices** to review account invoices.

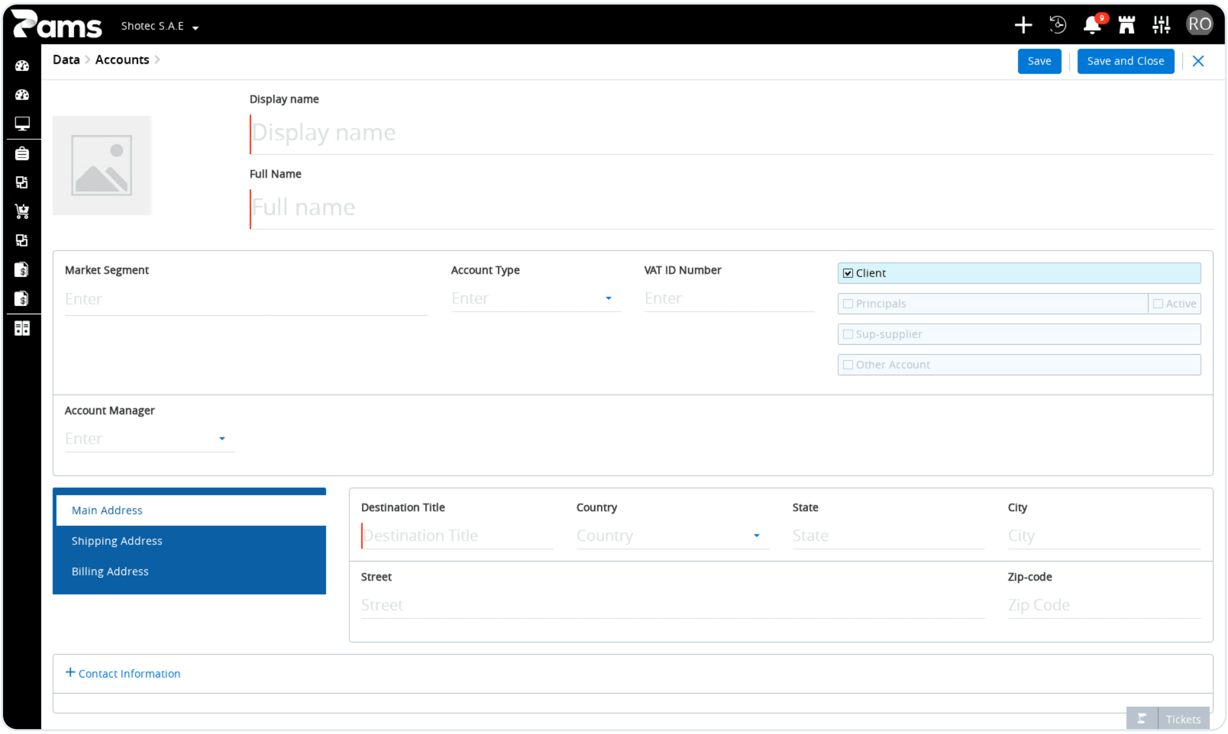
The **Client** registration field appears for principals, while **Principal** appears for non-principals. **Status** is required when adding a registration. **Registration Number** is
optional, and **Registration date** is optional but cannot be later than today.

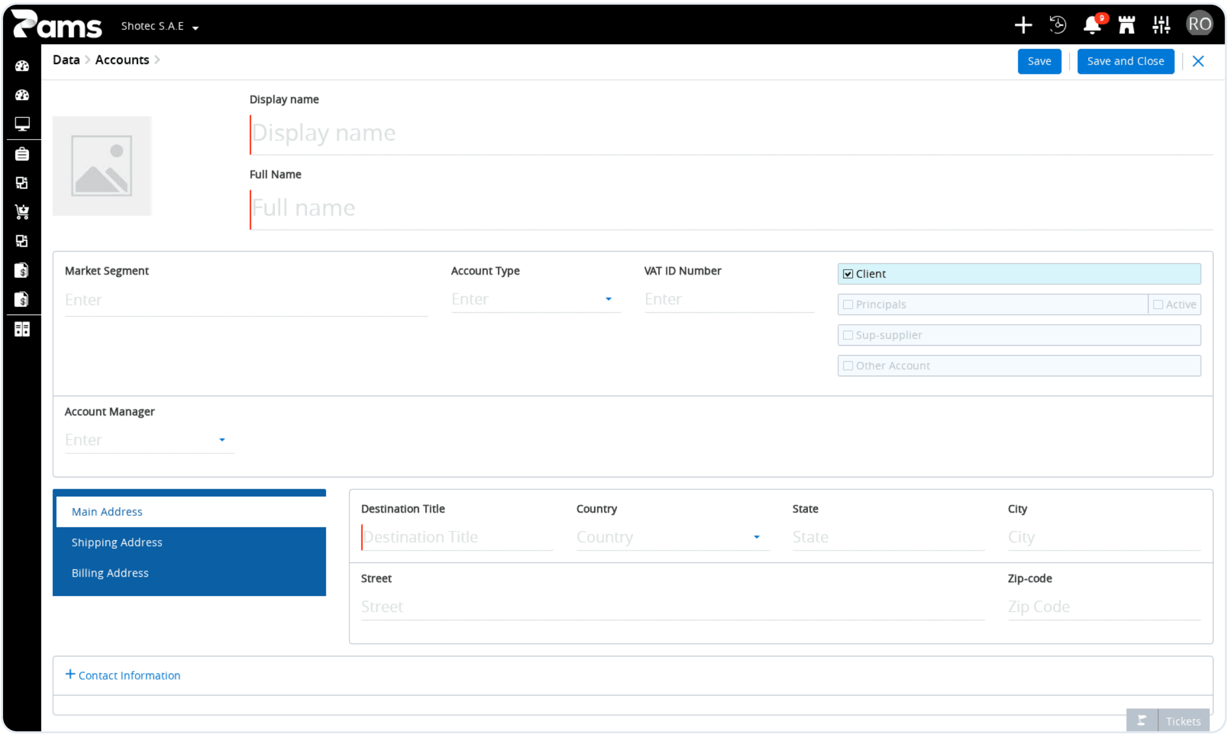
A new account form includes **Display name**, **Full Name**, **Market Segment**, and **Account Type**.
It also includes **VAT ID Number**, **Account Manager**, **Destination Title**, **Country**, **State**, **City**, **Street**, and **Zip-code**. Required markers appear on **Display name**,

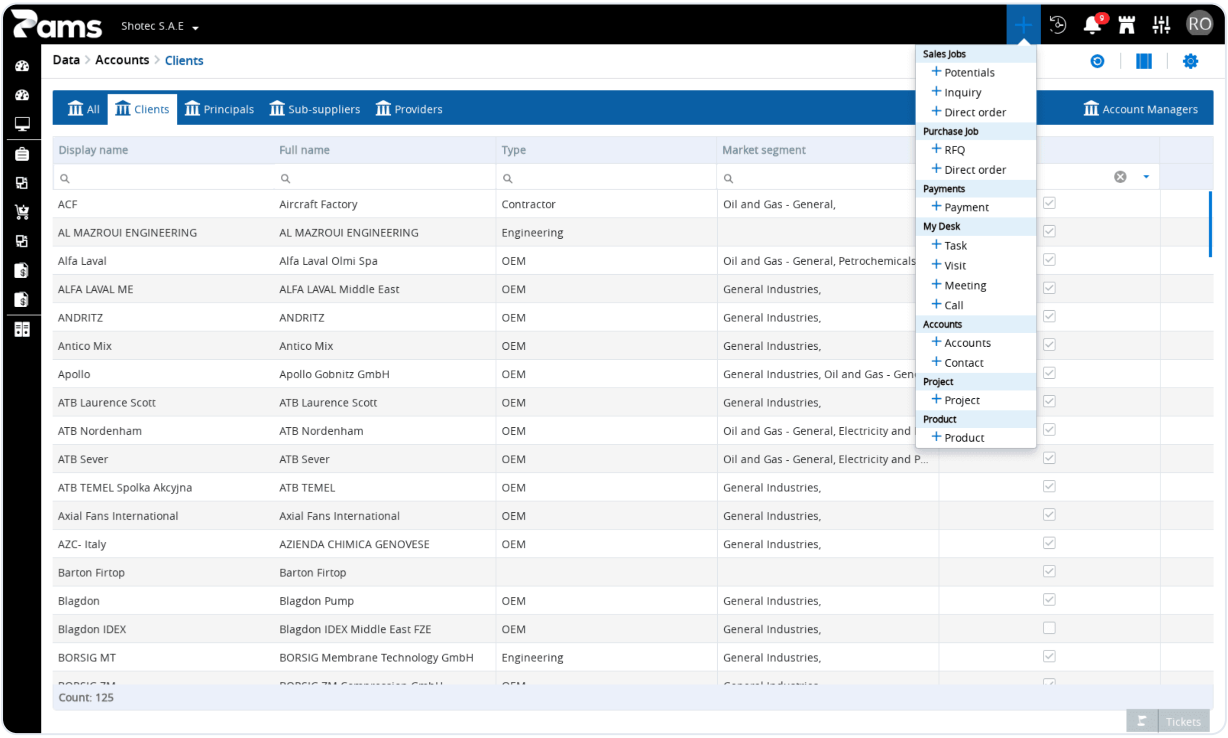
Full Name, and **Destination Title**. The form also displays **Client**, **Principals**, **Active**, **Sup-supplier**, Other Account, **Save**, and **Save and Close**.

The form also includes **Main Address**, **Shipping Address**, **Billing Address**, and **Contact Information**. **Tickets** is also displayed.

Select **Sup-supplier** to toggle the sub-supplier classification.







When you open a new account, **Display name** is visible. Use the visible field labels and
the record area to orient yourself before entering data.

Maintain related account details

Related account details are the registrations, contact persons, contract information, comments, projects, and history that support the main account record. Use these surfaces
after the account is saved and choose the tab that matches the detail you need.

Prerequisites

- Open the account record.
- Use an existing account for contract details.
- Use a principal account for **Client** registration details.
- Use a non-principal account for **Principal** registration details.

Steps

1. Select the related account surface you need.

If you need to…	Select
Review or add comments	**Comments**

If you need to…	Select
Review or add people	**Contact Persons**
Add or edit a registration	**Registrations**
Review the account's projects	**Own projects**
Review eligible contract information	**Contract Key Data**
Review account changes	**Last Modifications**
Review attached files	**Attachment**
Review account invoices	**Account Invoices**

2. In **Registrations**, enter the required relationship and status fields.

   Use **Client** for a principal account and **Principal** for a non-principal account. **Status** is required when you add a registration. **Registration Number** is optional, and **Registration date** is optional but cannot be later than today.

3. Select **Ok** to add or edit the registration.
4. In **Contact Persons**, enter **Name**, **Position**, and **Department** when you add or edit a person.
5. Select **Name** to add or edit the contact person.
6. In **Contract Key Data**, review **Expiry Date** and **Cancellation Period** when the account meets the contract conditions.

   Expiry Date cannot be earlier than today. **Cancellation Period** must be at least `1`.

Result: The selected account-related surface is open, and its available registration, contact-person, or contract fields are on screen.

Save an account and handle validation

Saving commits the account details after the mandatory-field and validation checks pass.
Use **Save** to remain in the record flow, or **Save and Close** to save and leave it.

Prerequisites

- Complete the account fields that your company marks as mandatory.
- Use values that satisfy the visible validation rules.

- Confirm that the account classification matches the related registration details.

Steps

1. Select **Save** after completing the account fields.

   If a required field or another validation check fails, the account is not saved. If the address has a destination, enter a destination title.

2. If the save reports a validation message, correct the named field and select **Save** again.

Message	What to correct
`This Field Is Required`	Complete the required field.
`Display Name field is mandatory`	Complete **Display name**.
`Full Name field is mandatory`	Complete **Full Name**.
`Destination Title field is mandatory`	Complete the destination title.
`Please Solve the Following Issues :`	Correct each listed validation issue.
`Display Name contains invalid characters. Only letters, numbers, "-", "_", and "." are allowed`	Correct **Display name**.
`Full Name contains invalid characters. Only letters, numbers, "-", "_", and "." are allowed`	Correct **Full Name**.

3. If the account name already exists, review the duplicate-name message before choosing
   a different name.

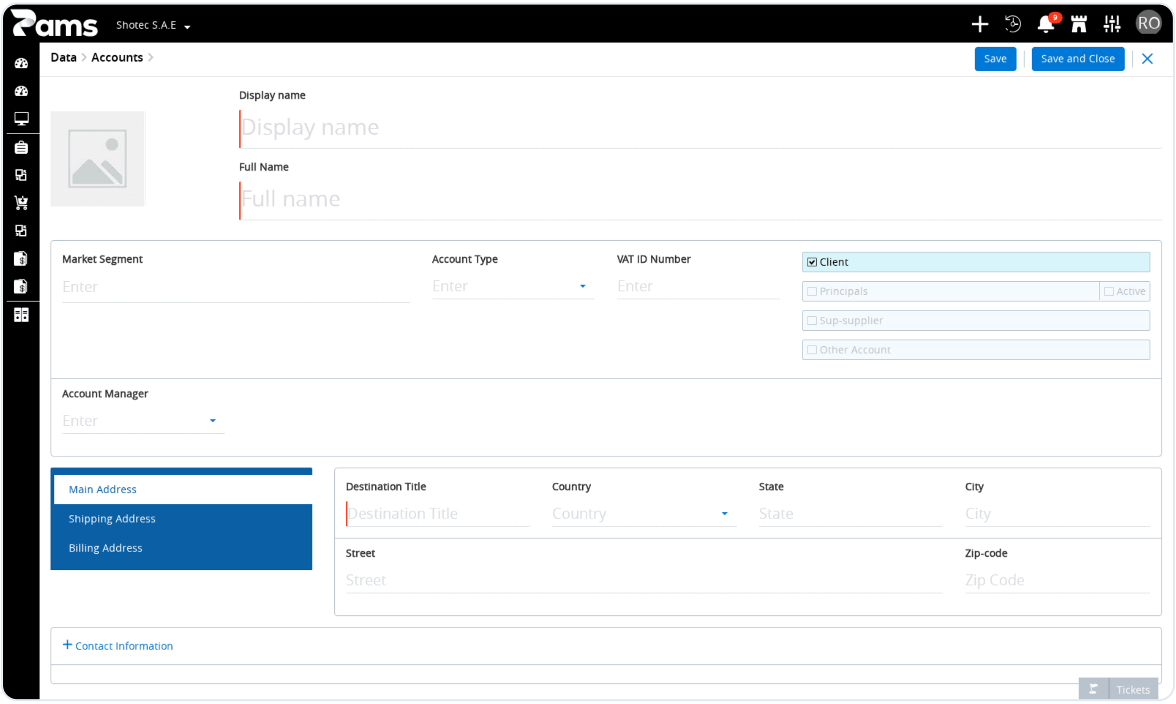
   The message is `An account with this name already exists`.

4. If saving returns a general error, review the message and correct the account data before selecting **Save** again.

Message	Reader-facing response
`Your request was completed successfully`	The save completed successfully.
`An error occurred while processing your request`	Review the account data and try **Save** again.

Message	Reader-facing response
`Error: This Client Name Already Exists`	Choose a different client name.
`Error: saving error`	Review the account data and try **Save** again.
`Please save account first..!!`	Save the account before using the related action.

5. Select **Save and Close** when you want to save the account and leave the record.



Result: The account save action has completed its validation path. A successful save displays `Your request was completed successfully` or `Data saved Successfully`.

Out of scope

The following messages belong to related flows rather than the Accounts save path:

Message	Owning flow
`Error: Vendor not saved yet`	Vendor/account relation flow
`Error: Client not saved yet`	Client/account relation flow
`Error loading accounts`	Sales job entry
`Forbidden characters detected. Please remove them and try again.`	File library

Message	Owning flow
`You already have a contact with this name`	Contact persons
`Just '_''‘-''.' And '&' Characters Accepted`	File library

Continue from Accounts

After you locate an account, continue with the page that owns the next job.

If you need to…	Go to
Create or edit the account	Create an account
Work with contacts	Contacts or Contact record
Work with projects	Projects
Work with registrations	Registration data
Work with attached files	Libraries and files
Maintain account managers	Account managers