

New branch

September 10, 2026

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A branch record stores company, financial, address, and contact information for one company

branch. Use this screen when you add a branch from company configuration.

If you need to...	Go to
Review fields and choices	Understand the branch information
Enter and save a branch	Complete and save branch information
Review saved-branch areas	Handle new and existing branch variations
Return to the branch list	Branches
Maintain a saved branch	Edit branch

Before you start

The form appears when the Branches subscription is included and the branch is loaded. Address

fields appear when the branch has an address. **Default** and **Last Modifications** require a saved branch ID.

Prerequisites

- Have access to company configuration.
- Have the branch name, financial-year start, reference currency, and local currency ready.
- Have the address and contact values ready when you need to enter them.
- Save the branch before using **Default** or **Last Modifications**.

Result: You know what to prepare before opening or saving the form.

Find and open the branch screen

The branch list is the entry point for creating a branch or opening an existing one.

Prerequisites

- You are in company configuration.

Steps

1. Open the branch list.
2. Choose the new-branch page to enter a branch.
3. Choose an existing branch to open its saved branch record.

Result: The new route opens the branch form; an existing row opens its saved record.

The screenshot shows the PAMS Branch form interface. The top navigation bar includes the PAMS logo, the user 'Shotec S.A.E.', and various system icons. The breadcrumb trail is 'Configuration > Company > Branches'. The form is divided into several sections: a top section for 'Display Name' (labeled 'Branch'), 'Full Name', 'Statement', and 'Image'; a middle section for 'Managing Director', 'Company Registration No.', and 'VAT ID Number'; a 'VatRate' section with a percentage input; a 'Financial Year Start' section with 'Day' and 'Month' dropdowns; a 'Reference Currency' and 'Local currency' section with 'Currency' dropdowns; and a bottom section for 'Street', 'Zip Code', 'Country', 'State', and 'City'. A '+ Contact Information' link is at the bottom left. The bottom right corner has a 'Tickets' button.

Understand the branch information

The form presents company, financial, address, and contact information.

Area	Fields and controls
Company	Display Name, Full Name, Statement, Managing Director, Company Registration No., VAT ID Number

Area	Fields and controls
Financial	VatRate, Financial Year Start, Reference Currency, Local currency
Address	Street, Zip Code, Country, State, City
Contacts	Contact Information, Phone, Fax, Mobile, Email, Website, Online Support
Save	Save, Save and Close

Field	Type and rule
Display Name	Text; required only where your company configures it
Full Name, Statement, Managing Director, Company Registration No., VAT ID Number	Text; optional
VatRate	Number from 0 through 100
Financial Year Start	Day 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, or 31; month January, February, March, April, May, June, July, August, September, October, November, or December; required only where your company configures it
Reference Currency, Local currency	Selectors; required
Street, State, City	Text; shown when the address is present
Zip Code	Number; shown when the address is present
Country	List of choices; shown when the address is present

The **Financial Year Start** control offers day values 1 through 31 and month values January through December .

The day choices are 1 through 31 . The month choices are January , February , March ,

April , May , June , July , August , September , October , November , and December .

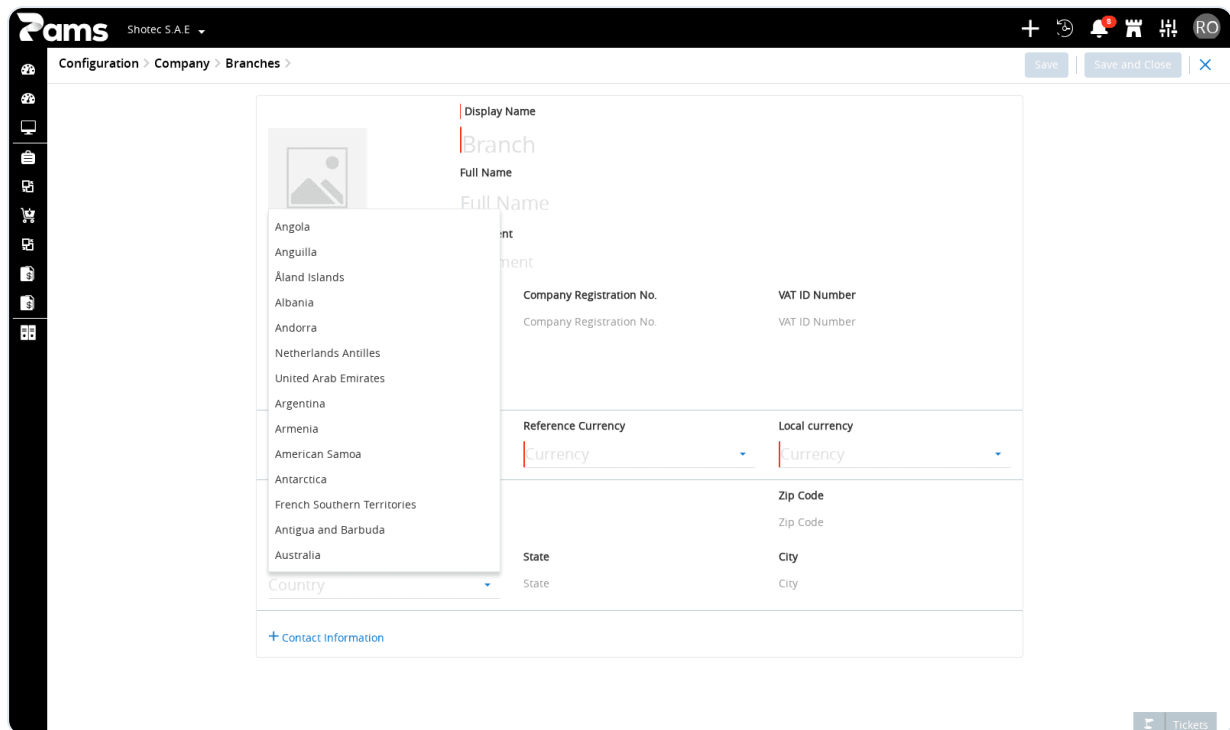
The live currency choices are United Arab Emirates Dirham , Kwait Dinar , Euro Member Countries ,

United Kingdom Pound , China Yuan Renminbi , United States Dollar , Egypt Pound , Qatari Riyal ,

and Saudi Arabian Rial for both currency selectors.

The live **Country** list contains 244 labels, including

Angola , Anguilla , Åland Islands , Albania , Andorra , United Arab Emirates , Australia , Canada , China , Egypt , France , Germany , India , Italy , Japan , Kuwait , Mexico , Netherlands , Norway , Poland , Qatar , Saudi Arabia , Singapore , Spain , Sweden , Switzerland , Thailand , Turkey , United Kingdom , United States of America , and Zimbabwe .



Phone, fax, and mobile contact values accept up to 20 characters. After you select a contact type, a field bearing that contact type's label appears for you to enter its value.

Result: You can identify each branch field, its rule, and the choices available before entering information.

Complete and save branch information

Use this procedure to enter the branch details and submit the form.

Prerequisites

- You are on the new-branch page.
- You have the information in the field tables.

Steps

1. Enter the branch name in **Display Name**.
2. Enter the full company name in **Full Name**.
3. Enter the statement in **Statement**.
4. Enter the managing director in **Managing Director**.
5. Enter the registration number in **Company Registration No.**.
6. Enter the VAT number in **VAT ID Number**.
7. Enter a value from 0 through 100 in **VatRate**, when applicable.
8. In **Financial Year Start**, choose a day from 1 , 2 , 3 , 4 , 5 , 6 , 7 , 8 , 9 , 10 , 11 , 12 , 13 , 14 , 15 , 16 , 17 , 18 , 19 , 20 , 21 , 22 , 23 , 24 , 25 , 26 , 27 , 28 , 29 , 30 , or 31 .
9. In **Financial Year Start**, choose a month from January , February , March , April , May , June , July , August , September , October , November , Or December .
10. Choose a value in **Reference Currency**.
11. Choose a value in **Local currency**.
12. Enter the street in **Street**.
13. Enter the postal number in **Zip Code**.
14. Choose the country in **Country**.
15. Enter the state or province in **State**.
16. Enter the city in **City**.
17. Select **Contact Information**.
18. Select one contact type:

Contact type	Select
Phone	Phone
Fax	Fax
Mobile	Mobile
Email	Email
Website	Website
Online Support	Online Support

19. Enter the contact value in the field that appears.

For each additional contact type, repeat the contact-selection and entry actions above.

Choose one save action:

If you need to...	Select
Save and remain on the record	Save
Save and leave the form	Save and Close
Correct a validation message	Select the field named in the message, enter a corrected value, and select Save again

Result: A successful save displays **Branch saved Successfully** ; a new branch then uses its saved branch record.

The screenshot shows the PAMS configuration interface for a new branch. The breadcrumb navigation is "Configuration > Company > Branches". The form contains the following fields:

- Display Name:** Branch
- Full Name:** Full Name
- Statement:** Statement
- Managing Director:** Managing Director
- Company Registration No.:** Company Registration No.
- VAT ID Number:** VAT ID Number
- VatRate:** VatRate %
- Financial Year Start:** Day Month
- Reference Currency:** currency
- Local currency:** currency
- Street:** Street
- Zip Code:** Zip Code
- Country:** Country
- State:** State
- City:** City

At the bottom, there is a link to "+ Contact Information".

Handle new and existing branch variations

A new branch has the entry fields. A saved branch has an ID and can show follow-up areas.

If you need to...	Select
Review default-margin choices	Default after the branch is saved
Review modification history	Last Modifications after the branch is saved
Maintain the logo	Use the logo controls on Edit branch logo

The Registration tab, Reference Commission, Reference Margin, and margin currency list are not part of the new-branch surface. Icon-only close, logo, contact-delete, and popup controls are separate maintenance actions.

Result: You know which follow-up areas require a saved branch and where logo maintenance lives.

When validation or saving goes wrong

Message	Corrective action
Name is required	Enter Display Name .
Just '_' '-' And '.' Characters Accepted	Correct the restricted name characters.
required	Choose the missing day, month, or currency value.
Branch does not exist	Return to the branch list and open an available branch.
Logo Deleted Successfully	Continue editing or add a logo from the saved branch form.
Error: Server Error	Retry the logo action from the saved branch form.
Please insert degressive margin list	Enter the required list in the saved branch margin area.
Data saved Successfully	Continue from the saved branch margin area.
Error while saving data	Review the margin values and try the save action again.
Branch saved Successfully	Continue to the saved branch or return to the branch list.

Result: Match the message on screen to the corrective action in the table.

Continue from the branch record

After a successful save, continue on the saved branch record or return to the branch list.

Prerequisites

- The branch save has completed successfully.

Steps

1. Select **Default** for the default-margin area.
2. Select **Last Modifications** for the branch history.
3. Return to the branch list when you need another branch.

Result: You are maintaining the saved branch or choosing another branch from the list.