PAMS FRESH GENERATION

Work procedure settings

September 10, 2026

Work procedure settings

Work procedure settings

Work procedure settings are branch-level rules for when work requires approval and when saved sales
records become non-editable. Use this page to review or change the rules that apply to sales jobs,
offers, orders, L/G requests, purchasing, and sales invoicing.

If you need to…	Go to
Check what each approval choice controls	Understand the settings
Open the settings for a company branch	Find and open the settings
Change a rule and keep working on the page	Change and save settings
Choose between saving in place and leaving the page	Change and save settings
Review previous changes	Review changes and continue
Continue with sales workflow rules	**Sales jobs lifecycle**
Continue with purchasing workflow rules	Purchase jobs procurement chain
Continue with L/G workflow rules	L/G lifecycle
Continue with invoicing workflow rules	Invoice lifecycle

The page is a reference surface for fields, workflow uses, and update actions. It does not create a
business record.

Before you start

Prerequisites

Have or know…	Why it matters here
Access to the Work procedure settings feature	The settings surface appears when the feature is included.
Permission to edit settings	**Save** and **Save and Close** are available for changed data only when edit permission applies.
The company branch whose rules you need to review	Each branch has its own settings panel.
The approval choice for each activity you are reviewing	The page has separate choices for sales, non-editable mode, L/G, purchasing, and invoicing work.
The person who confirms an L/G requirement or financial viability, where applicable	**User entitled to confirm** is required when its corresponding recommendation choice is **Yes**.

The two **User entitled to confirm** selectors are conditional. One follows the L/G requirement
recommendation; the other follows the L/G financial viability recommendation. The corresponding
User entitled to confirm field appears when that recommendation is **Yes** and carries a
required marker.

Find and open the settings

Work procedure settings are opened from the configuration area at the page route `/configuration/process-approvall`.

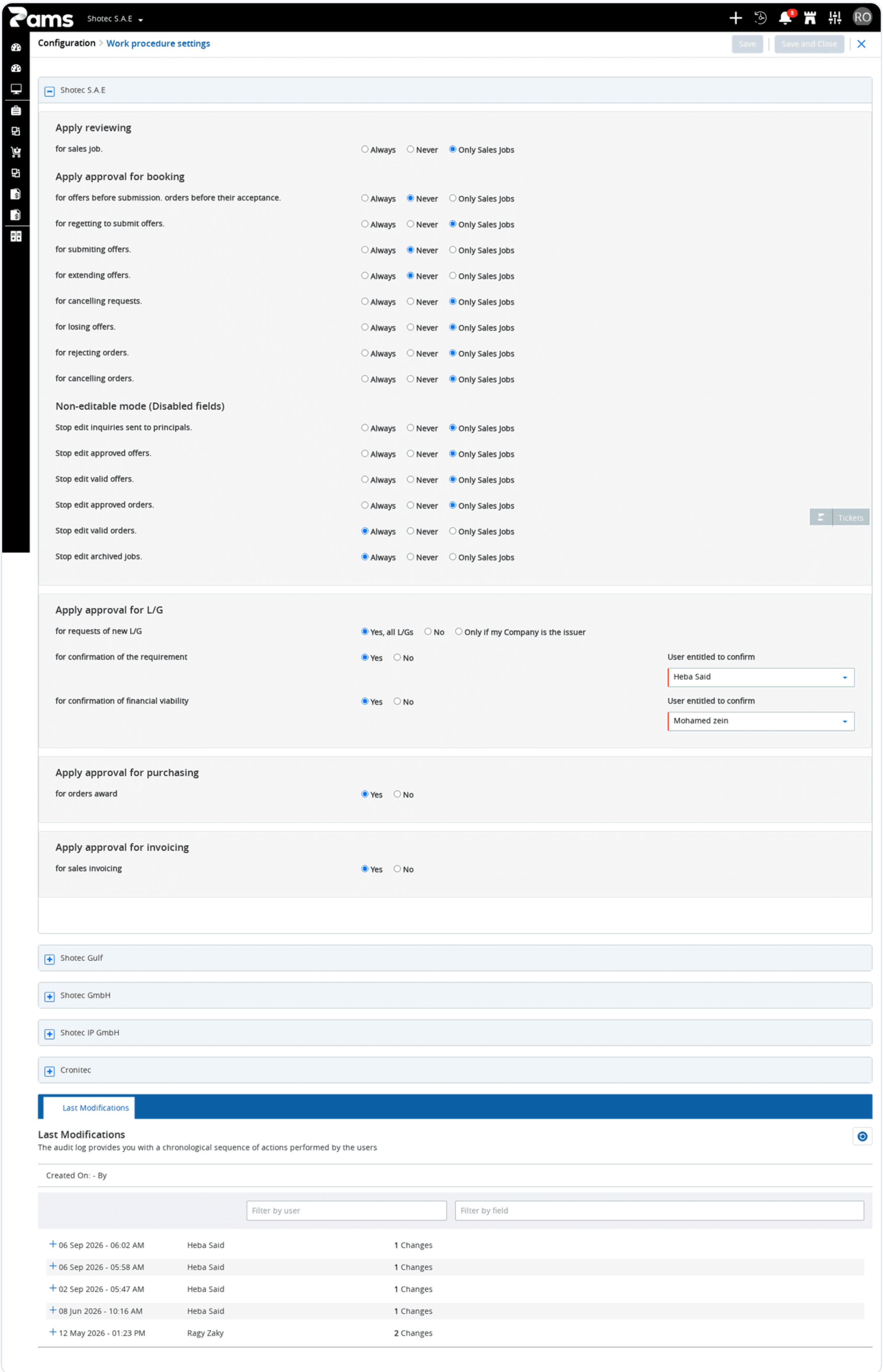
Prerequisites

- You have the access described in Before you start.
- You know which company branch you need to review.

Steps

1. Open **Work procedure settings** from the configuration area.
2. Select the company-branch heading or its expand control to open the branch panel.

   If no branch is already open, the page opens the logged-in user's branch when the approval list
   loads.


Pams
Shotec S.A.E
RO
Configuration > Work procedure settings
Save
Save and Close
Shotec S.A.E
Apply reviewing
for sales job.
Always Never Only Sales Jobs
Apply approval for booking
for offers before submission. orders before their acceptance.
for regetting to submit offers.
for submiting offers.
for extending offers.
for cancelling requests.
for losing offers.
for rejecting orders.
for cancelling orders.
Non-editable mode (Disabled fields)
Stop edit inquiries sent to principals.
Stop edit approved offers.
Stop edit valid offers.
Stop edit approved orders.
Stop edit valid orders.
Stop edit archived jobs.
Tickets
Apply approval for L/G
for requests of new L/G
Yes, all L/Gs No Only if my Company is the issuer
for confirmation of the requirement
Yes No
User entitled to confirm
Heba Said
for confirmation of financial viability
User entitled to confirm
Mohamed zein
Apply approval for purchasing
for orders award
Apply approval for invoicing
for sales invoicing
Shotec Gulf
Shotec GmbH
Shotec IP GmbH
Cronitec
Last Modifications
Last Modifications
The audit log provides you with a chronological sequence of actions performed by the users
Created On: - By
Filter by user
Filter by field
06 Sep 2026 - 06:02 AM Heba Said 1 Changes
06 Sep 2026 - 05:58 AM Heba Said 1 Changes
02 Sep 2026 - 05:47 AM Heba Said 1 Changes
08 Jun 2026 - 10:16 AM Heba Said 1 Changes
12 May 2026 - 01:23 PM Ragy Zaky 2 Changes

Result: The Work procedure settings screen is open at `/configuration/process-approvall`, with
the selected company-branch panel ready for review.

Understand the settings

Each company branch has settings that answer one question: should this activity use the approval
rule, and should the related saved sales record be protected from editing? The page groups the
choices by workflow use rather than by a business record.

The main settings groups are **Apply reviewing**, **Apply approval for booking**, and **Non-editable mode (Disabled fields)**. The page also contains **Apply approval for L/G**,
Apply approval for purchasing, and **Apply approval for invoicing**.

Approval and editing choices

Field	Available choices	Required marker
for sales job.	**Always**, **Never**, **Only Sales Jobs**	None shown
Booking approval before submission and acceptance	**Always**, **Never**, **Only Sales Jobs**	None shown
for regetting to submit offers.	**Always**, **Never**, **Only Sales Jobs**	None shown
for submiting offers.	**Always**, **Never**, **Only Sales Jobs**	None shown
for extending offers.	**Always**, **Never**, **Only Sales Jobs**	None shown
for cancelling requests.	**Always**, **Never**, **Only Sales Jobs**	None shown
for losing offers.	**Always**, **Never**, **Only Sales Jobs**	None shown
for rejecting orders.	**Always**, **Never**, **Only Sales Jobs**	None shown

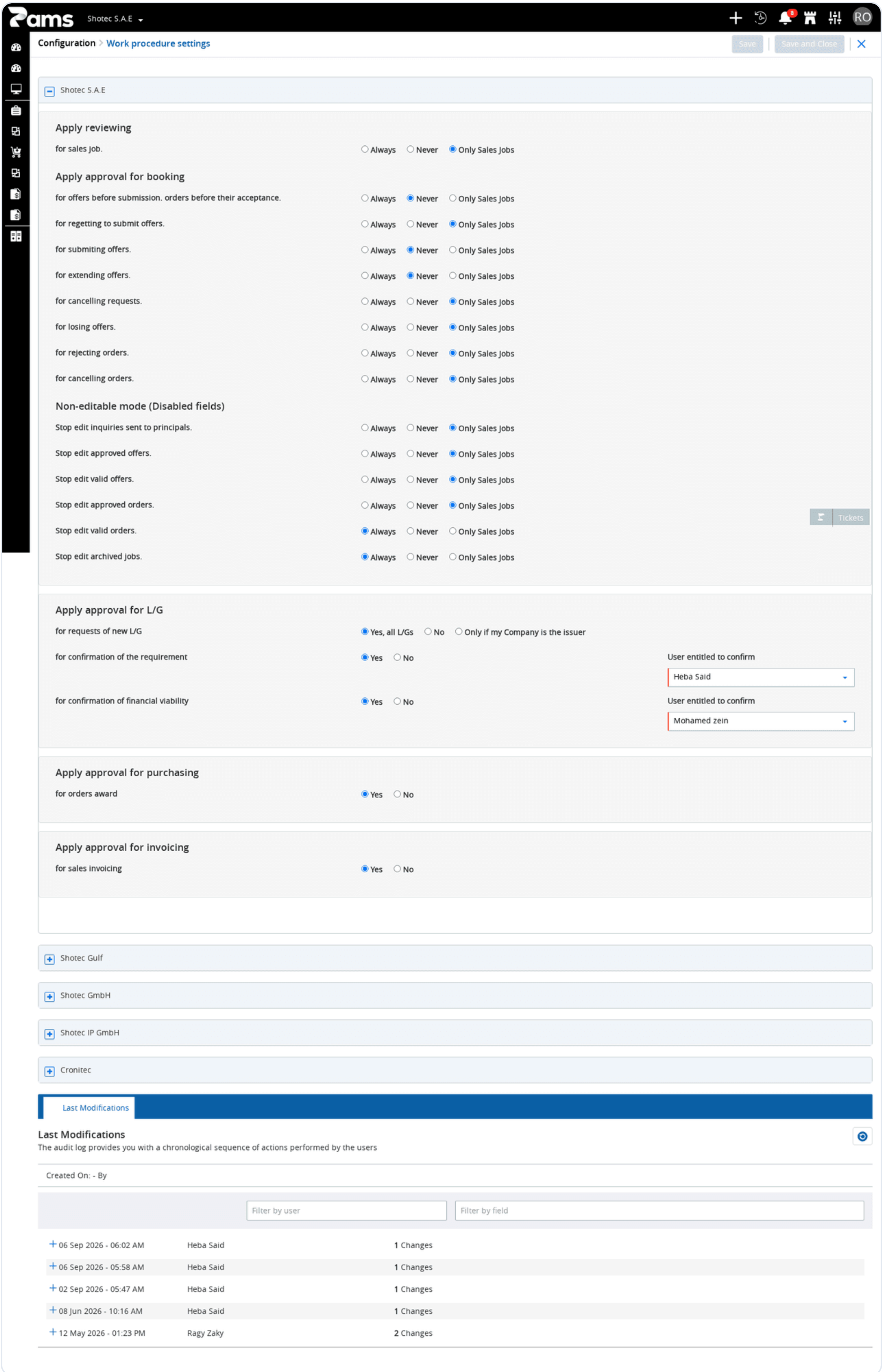
Field	Available choices	Required marker
for cancelling orders.	**Always**, **Never**, **Only Sales Jobs**	None shown
Stop edit inquiries sent to principals.	**Always**, **Never**, **Only Sales Jobs**	None shown
Stop edit approved offers.	**Always**, **Never**, **Only Sales Jobs**	None shown
Stop edit valid offers.	**Always**, **Never**, **Only Sales Jobs**	None shown
Stop edit approved orders.	**Always**, **Never**, **Only Sales Jobs**	None shown
Stop edit valid orders.	**Always**, **Never**, **Only Sales Jobs**	None shown
Stop edit archived jobs.	**Always**, **Never**, **Only Sales Jobs**	None shown

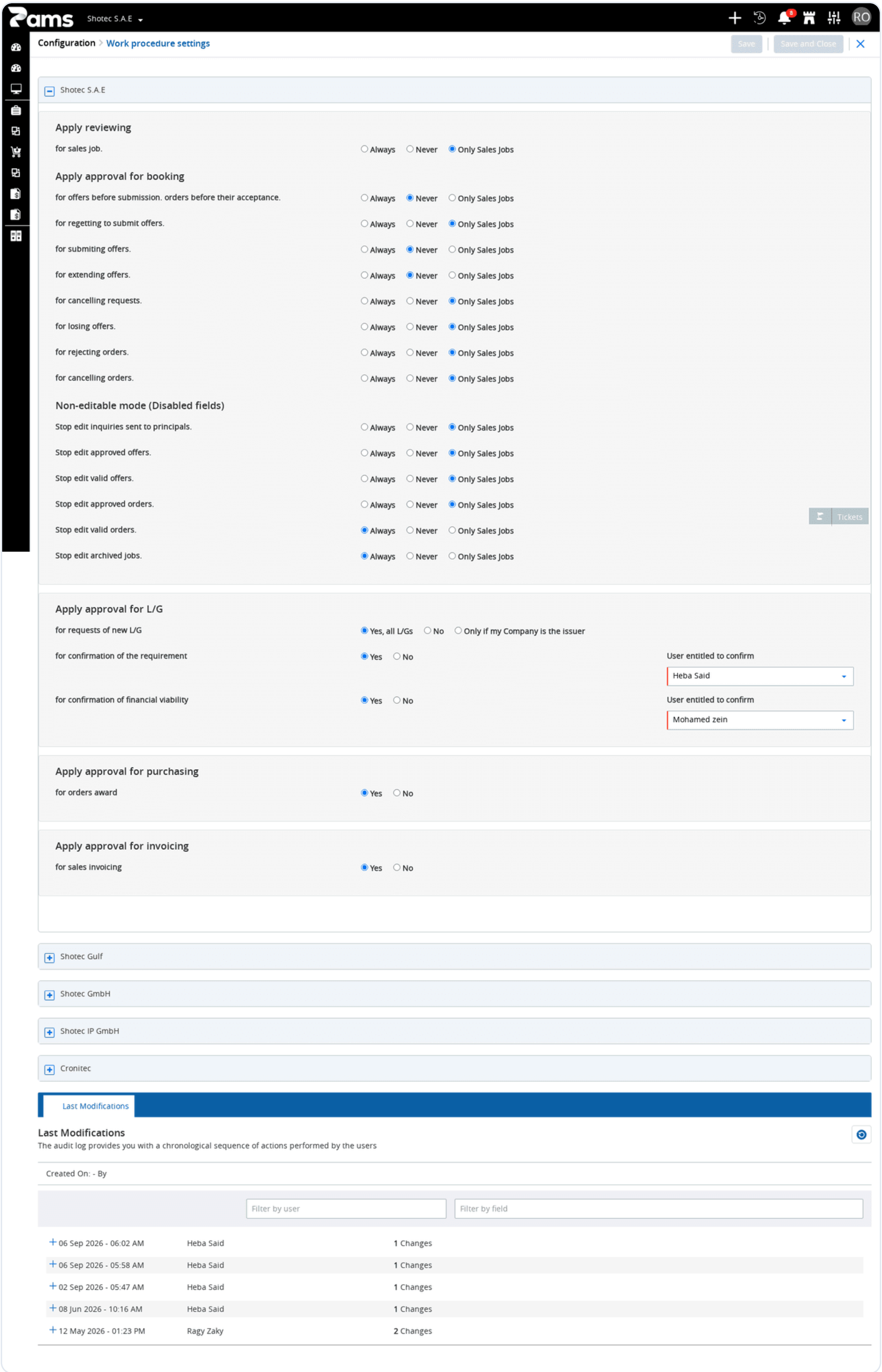
L/G, purchasing, and invoicing choices

Field	Available choices	Required marker
for requests of new L/G	**Yes, all L/Gs**, **No**, **Only if my Company is the issuer**	None shown
L/G requirement recommendation	**Yes**, **No**	None shown
User entitled to confirm for the L/G requirement	Searchable user selection	Required when the recommendation is **Yes**
L/G financial viability recommendation	**Yes**, **No**	None shown
User entitled to confirm for L/G financial viability	Searchable user selection	Required when the recommendation is **Yes**
Purchasing approval	**Yes**, **No**	None shown
Invoicing approval	**Yes**, **No**	None shown

The screen also includes **Last Modifications**. Its buttons are **Save**, **Save and Close**, and
an icon-only button titled **Refresh**.

This page has no grid columns and does not create, delete, import, or export business records.


Pams
Shotec S.A.E
RO
Configuration > Work procedure settings
Save
Save and Close
Shotec S.A.E
Apply reviewing
for sales job.
Always Never Only Sales Jobs
Apply approval for booking
for offers before submission. orders before their acceptance.
for regetting to submit offers.
for submiting offers.
for extending offers.
for cancelling requests.
for losing offers.
for rejecting orders.
for cancelling orders.
Non-editable mode (Disabled fields)
Stop edit inquiries sent to principals.
Stop edit approved offers.
Stop edit valid offers.
Stop edit approved orders.
Stop edit valid orders.
Stop edit archived jobs.
Tickets
Apply approval for L/G
for requests of new L/G
Yes, all L/Gs No Only if my Company is the issuer
for confirmation of the requirement
Yes No
User entitled to confirm
Heba Said
for confirmation of financial viability
User entitled to confirm
Mohamed zein
Apply approval for purchasing
for orders award
Apply approval for invoicing
for sales invoicing
Shotec Gulf
Shotec GmbH
Shotec IP GmbH
Cronitec
Last Modifications
Last Modifications
The audit log provides you with a chronological sequence of actions performed by the users
Created On: - By
Filter by user
Filter by field
06 Sep 2026 - 06:02 AM Heba Said 1 Changes
06 Sep 2026 - 05:58 AM Heba Said 1 Changes
02 Sep 2026 - 05:47 AM Heba Said 1 Changes
08 Jun 2026 - 10:16 AM Heba Said 1 Changes
12 May 2026 - 01:23 PM Ragy Zaky 2 Changes


Shotec S.A.E
RO
Configuration > Work procedure settings
Save
Save and Close
Shotec S.A.E
Apply reviewing
for sales job.
Always Never Only Sales Jobs
Apply approval for booking
for offers before submission. orders before their acceptance.
for regetting to submit offers.
for submiting offers.
for extending offers.
for cancelling requests.
for losing offers.
for rejecting orders.
for cancelling orders.
Non-editable mode (Disabled fields)
Stop edit inquiries sent to principals.
Stop edit approved offers.
Stop edit valid offers.
Stop edit approved orders.
Stop edit valid orders.
Stop edit archived jobs.
Tickets
Apply approval for L/G
for requests of new L/G
Yes, all L/Gs No Only if my Company is the issuer
for confirmation of the requirement
Yes No
User entitled to confirm
Heba Said
for confirmation of financial viability
Yes No
User entitled to confirm
Mohamed zein
Apply approval for purchasing
for orders award
Yes No
Apply approval for invoicing
for sales invoicing
Yes No
Shotec Gulf
Shotec GmbH
Shotec IP GmbH
Cronitec
Last Modifications
Last Modifications
The audit log provides you with a chronological sequence of actions performed by the users
Created On: - By
Filter by user
Filter by field
06 Sep 2026 - 06:02 AM Heba Said 1 Changes
06 Sep 2026 - 05:58 AM Heba Said 1 Changes
02 Sep 2026 - 05:47 AM Heba Said 1 Changes
08 Jun 2026 - 10:16 AM Heba Said 1 Changes
12 May 2026 - 01:23 PM Ragy Zaky 2 Changes

Change and save settings

Change one or more branch rules when needed.

Prerequisites

- You have edit permission.
- The required company-branch panel is open.
- You know the choices you want to apply.

Steps

1. Select the required choice in each field you need to change.
2. If an L/G recommendation is **Yes**, select a person in **User entitled to confirm**.
3. Choose one save path:

If you want to…	Select
Save the changed settings and continue on this page	**Save**
Save the changed settings and leave this page	**Save and Close**

Result: The settings are validated and posted. **Save** keeps the page available for further
work and refreshes the history; **Save and Close** leaves the page after the save succeeds. A
successful save displays `Your company work procedure settings has been saved successfully`.

Handle setting branches

The controls available to you depend on whether the feature is included, whether you can edit, and
which recommendation choices you select.

Prerequisites

- The Work procedure settings page is open.
- You know whether you are reviewing or changing a branch.

Steps

1. Use the applicable branch below.

If…	Then…
The feature is included	Review the settings surface and its branch panels.
The feature is not included	Use the subscription-upgrade surface and select **Back** to return.
You can edit and data has changed	Use **Save** or **Save and Close**.
You cannot edit	Select the control at the upper-right corner of the branch-panel header to leave through the read-only path.
The L/G requirement recommendation is **Yes**	Select a person in **User entitled to confirm**.
The L/G requirement recommendation is **No**	**User entitled to confirm** is not required.
The L/G financial viability recommendation is **Yes**	Select a person in **User entitled to confirm**.
The L/G financial viability recommendation is **No**	**User entitled to confirm** is not required.
When you have changed data and select the control at the upper-right corner of the branch-panel header	The unsaved-change popup offers **Don't Save** and **Save**.

When **for requests of new L/G** is changed to **No**, the two L/G recommendation choices are
cleared.

Result: The page presents the branch, permission, recommendation, and leaving path that applies
to your current settings.

When saving or loading goes wrong

Use the message text to identify which operation needs attention.

Message	When it appears	What to do
`This Field Is Required`	A required **User entitled to confirm** selection is missing after its recommendation is **Yes**.	Select a user in **User entitled to confirm**, then use the save procedure.
`An error occurred while processing your request`	Loading the approval settings does not complete successfully.	Return to `/configuration/process-approvall` and open the required branch again.

Message	When it appears	What to do
`Server Error`	Saving the settings returns a server error.	Review the selected values and use **Save** again.

Review changes and continue

Last Modifications is the audit history for the settings. It provides a chronological sequence
of user actions and displays dated change rows. The audit-log text reads: `The audit log provides you with a chronological sequence of actions performed by the users`.

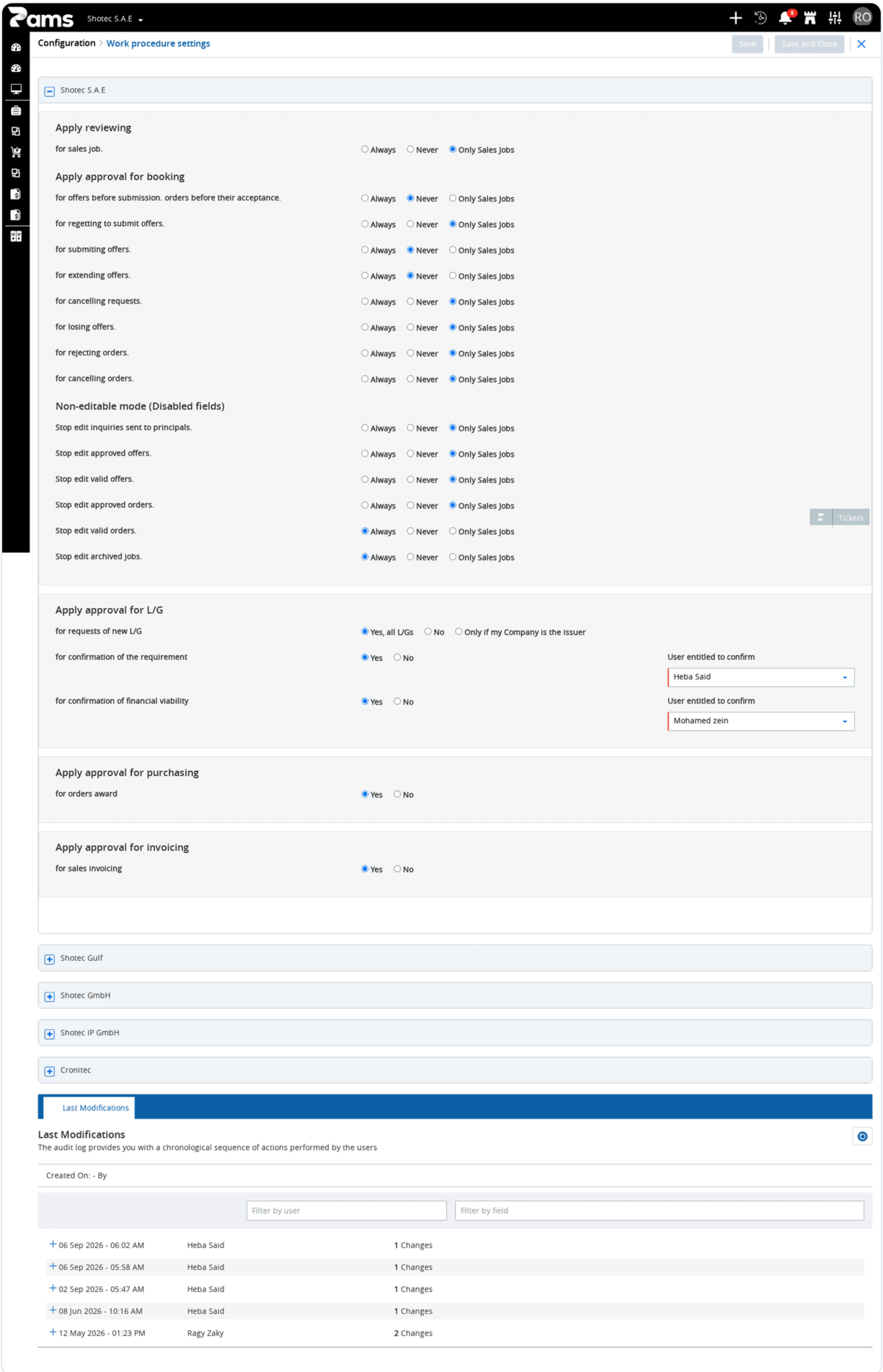
Prerequisites

- A company identifier is loaded.
- The settings screen is open.

Steps

1. Select **Last Modifications**.
2. Review the dated change rows.
3. Continue with the workflow that uses the rule you reviewed:

If you reviewed…	Continue with…
Sales approval or editing rules	**Sales jobs lifecycle**
Purchasing approval	Purchase jobs procurement chain
L/G approval or recommendations	L/G lifecycle
Sales-invoicing approval	Invoice lifecycle


Shotec S.A.E
Configuration > Work procedure settings
Save
Save and Close
Shotec S.A.E
Apply reviewing
for sales job. Always Never Only Sales Jobs
Apply approval for booking
for offers before submission. orders before their acceptance. Always Never Only Sales Jobs
for regetting to submit offers. Always Never Only Sales Jobs
for submiting offers. Always Never Only Sales Jobs
for extending offers. Always Never Only Sales Jobs
for cancelling requests. Always Never Only Sales Jobs
for losing offers. Always Never Only Sales Jobs
for rejecting orders. Always Never Only Sales Jobs
for cancelling orders. Always Never Only Sales Jobs
Non-editable mode (Disabled fields)
Stop edit inquiries sent to principals. Always Never Only Sales Jobs
Stop edit approved offers. Always Never Only Sales Jobs
Stop edit valid offers. Always Never Only Sales Jobs
Stop edit approved orders. Always Never Only Sales Jobs
Tickets
Stop edit valid orders. Always Never Only Sales Jobs
Stop edit archived jobs. Always Never Only Sales Jobs
Apply approval for L/G
for requests of new L/G Yes, all L/Gs No Only if my Company is the issuer
for confirmation of the requirement Yes No
User entitled to confirm
Heba Said
for confirmation of financial viability Yes No
User entitled to confirm
Mohamed zein
Apply approval for purchasing
for orders award Yes No
Apply approval for invoicing
for sales invoicing Yes No
Shotec Gulf
Shotec GmbH
Shotec IP GmbH
Cronitec
Last Modifications
Last Modifications
The audit log provides you with a chronological sequence of actions performed by the users
Created On: - By
Filter by user
Filter by field
06 Sep 2026 - 06:02 AM Heba Said 1 Changes
06 Sep 2026 - 05:58 AM Heba Said 1 Changes
02 Sep 2026 - 05:47 AM Heba Said 1 Changes
08 Jun 2026 - 10:16 AM Heba Said 1 Changes
12 May 2026 - 01:23 PM Ragy Zaky 2 Changes

Result: The audit history is open, and you can continue in the workflow whose approval rule
you reviewed.