Create a contact

September 10, 2026

Create a contact

Create a contact, add communication details, or find an existing contact.

Create and locate a contact

A contact is a person's identity, account relationship, communication channels, attached files,
and change history kept together in PAMS's shared contact database.

If you need to…	Go to
Start a new contact	Find a contact
Review the fields before entering information	Understand the contact information
Add phone, email, or other channels	Enter contact details
Save the contact	Save the contact
Open a saved contact	Contact record
Review the Contacts list	Contacts
Create the related account	Create an account
Work with attached files	Libraries and files

Before you start

Choose an entry point:

Entry point	Use it to…
Contacts list	View contacts, start a new contact, or select an existing contact.
New-contact form	Enter a new contact.
Saved contact	Open an existing contact.

The Contacts list shows **New** only when your account has permission to add contacts and the
Contacts feature is available to your subscription. The contact form shows **Save** and **Save and Close** only when you have permission to create or edit the contact, the form is not
read-only, and it contains a change.

The new-contact and edit-contact pages require you to be signed in. Leaving either page with
unsaved changes can trigger an unsaved-change warning.

Have the following information ready:

Have ready	Why it matters
The person's name	**Name** is required.
The related account	**Account** is required before the contact can be saved.
Any phone, fax, mobile, email, website, online-support, or comment information	These values become optional communication rows.

> **Note:** Enter the related account before you save the contact because **Account** is required.

Find a contact

The Contacts list is the place to start a new contact or open a saved contact from its row.

Prerequisites

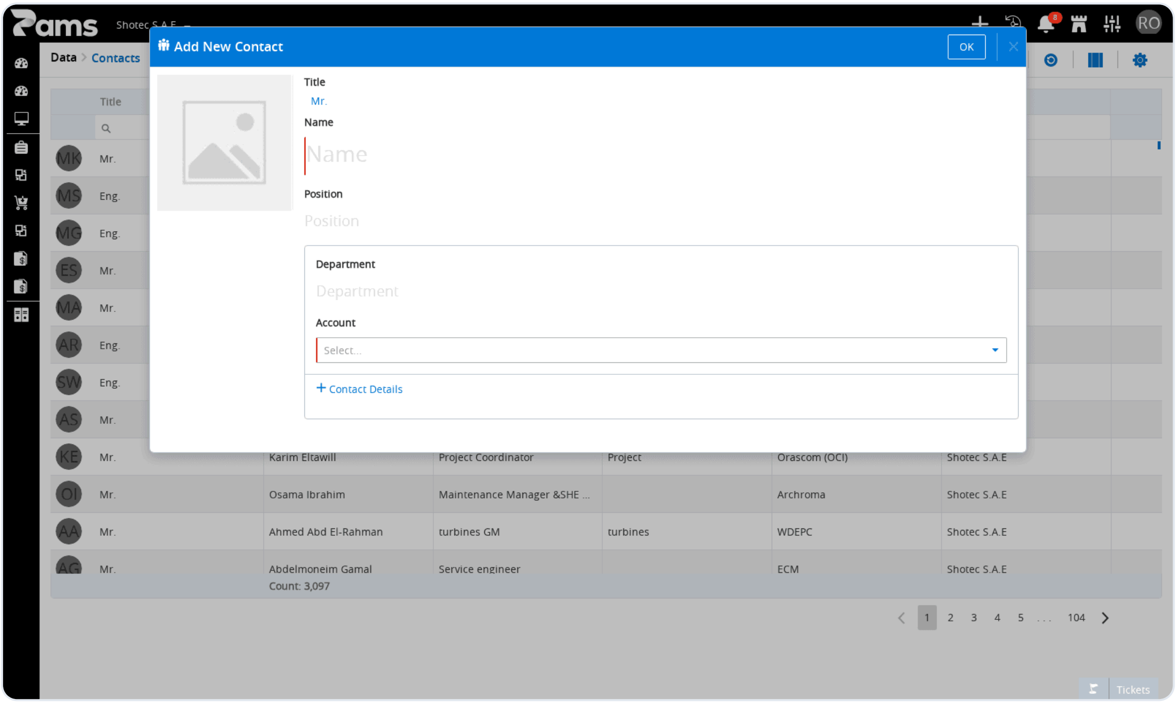
- You have access to the Contacts feature.
- You know whether you are creating a contact or opening one that already exists.

Steps

1. Open the Contacts list.
2. Choose the path that matches your task:

If you need to…	Action and next screen
Create a contact	Select **New**. The contact form opens in the **Add New Contact** popup.

If you need to…	Action and next screen
Open a saved contact	Select the contact's row. Continue in the contact record.



The Contacts list shows these columns:

Column	Use it to…
Title	Read the person's title.
Name	Identify the contact.
Position	Read the person's position.
Department	Read the person's department.
Account	Identify the related account.
Branch	Identify the branch.

Result: The new-contact form or the selected saved contact is open.

Understand the contact information

The contact form records the person's identity, the account relationship, and optional ways to
communicate with the person.

Field	What to enter	Required
Title	The person's title.	No
Name	The person's name.	Yes
Position	The person's position.	No
Department	The person's department.	No
Account	The related account.	Yes

For a new contact, **Name** uses an autocomplete control. For an existing contact, **Name** uses a text control.

Choose the related account in **Account**.

The form also contains **Contact Details**. Selecting a detail type adds a row for that channel; the row is not present before a detail type is selected.

Enter contact details

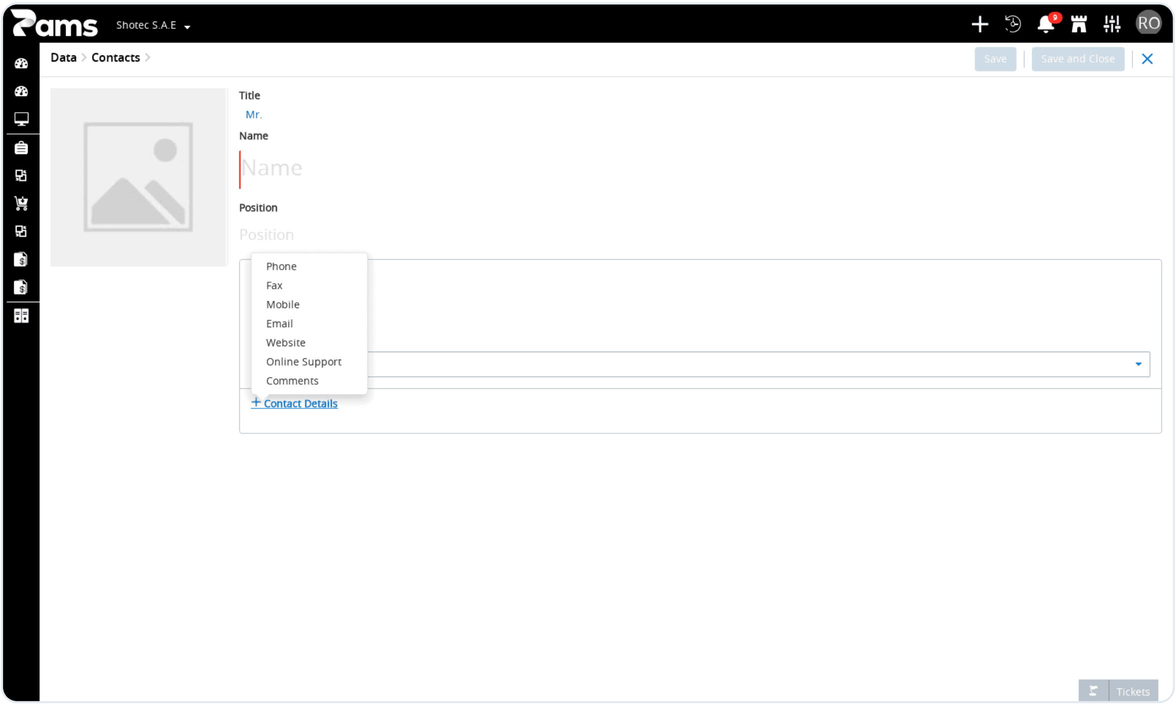
Enter the contact’s identity and communication details.

Prerequisites

- You have opened the contact form.
- You have the person's name and related account ready.

Steps

1. Enter the person's name in **Name**.
2. Select the related account in **Account**.
3. Enter any available values in **Title** and **Position**.
4. Select **Contact Details**.

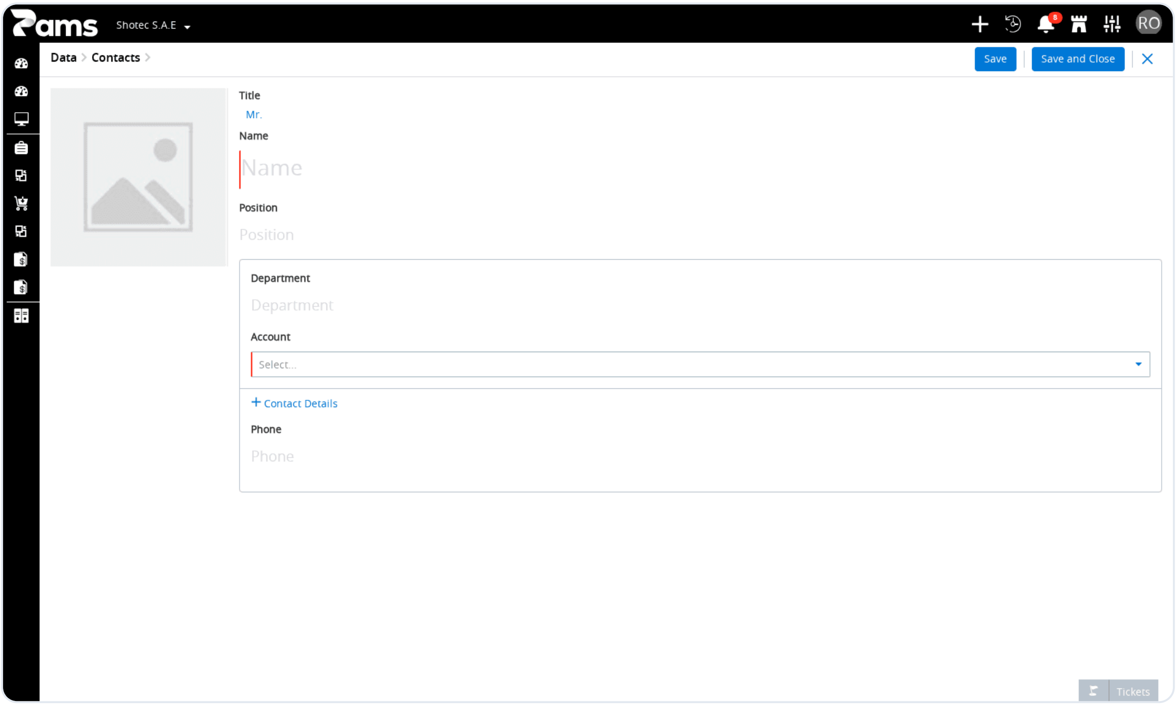


5. Select the detail type that you want to add:

If you need to add…	Select
A telephone number	**Phone**
A fax number	**Fax**
A mobile number	**Mobile**
An email address	**Email**
A website	**Website**
Online support information	**Online Support**
A note about the person	**Comments**

6. Enter the value in the new row.
   - **Phone**, **Fax**, and **Mobile** accept a maximum of 20 characters and filter key input.
   - If the email value is invalid, the field displays `Email is invalid`.

7. Repeat steps 5 and 6 for each additional contact channel.



Result: The contact form contains the person's identity, related account, and the contact-detail
rows you selected.

Save the contact

Save after entering the required identity and account information. The form checks its required
and pattern rules before saving.

Prerequisites

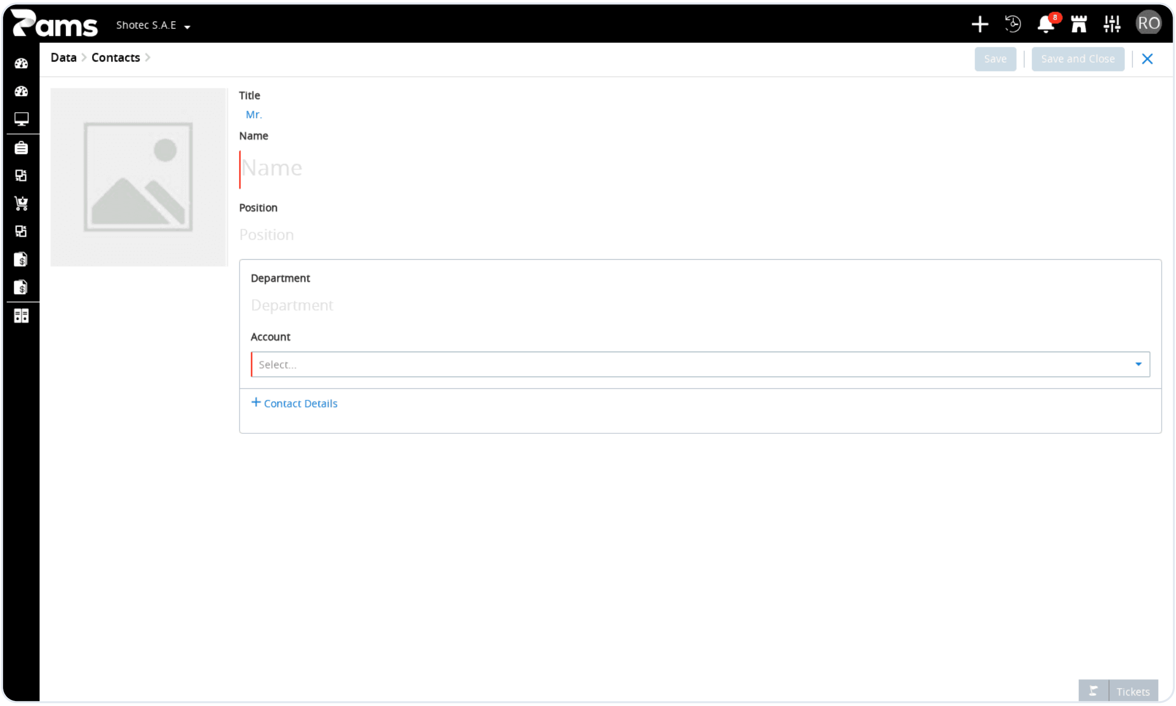
- **Name** contains a value.
- **Account** contains a related account.
- The form is editable and has a change.

Steps

1. Choose the save action that matches what you want to do:

If you want to…	Select
Save and continue working in the contact form	**Save**
Save and leave the contact form	**Save and Close**

2. Check for the success message `Contact saved successfully` after a successful non-popup save.



Result: After a successful non-popup save, `Contact saved successfully` appears.

Handle contact variations

The contact form can be opened as a full page, in a popup, or in read-only mode. The available
actions change with that context.

Prerequisites

- You have opened the contact form.
- You know which contact variation applies to your work.

Steps

1. Choose the situation that matches your work:

If you…	Do this
Need a related account	Choose the related account in **Account**.
Need a vendor relationship	Enter the vendor name in **Vendor Name**.
Are working in a read-only form	Review the contact without changing its fields.
Need attached files	Select **Attachment**.

If you…	Do this
Need change history	Select **Last Modifications**.
Need the person's name in a contact popup	Enter it in **Name**.
Need the related account in a contact popup	Choose it in **Account**.
Need a communication row in a contact popup	Select **Contact Details**.

2. In a popup, select **Ok** after the required values are present.

   The account popup displays `Name is required` when its required name field is empty. The vendor popup displays `This field is required` when **Vendor Name** is empty.

Result: The applicable contact variation is complete, or the existing contact's **Attachment** or **Last Modifications** screen is open.

When you save from a popup, the popup form is cleared after the saved contact is returned.

When contact saving goes wrong

Use the message you see to locate the correction.

Message	What it means	What to do
`This Field Is Required`	**Name** is empty.	Enter a name in **Name**.
`Account is Required`	**Account** is empty.	Select the related account in **Account**.
`Just '_''-''.' And '&' Characters Accepted`	The name contains a character outside the accepted pattern.	Edit **Name** and remove the unsupported character.
`Email is invalid`	The email value does not pass email validation.	Correct the value in the **Email** row.
`You already have a contact with this name`	A matching contact name was found during name checking.	Change **Name** or select the matching existing contact instead.
`Error: This Contact Name Already Exists`	The save response reports a duplicate contact name.	Change **Name** and save again.
`Error: Server Error`	The save response reports a server error.	Check the values, then select **Save** again.

The complete application message catalogue is maintained in General error messages.

After saving

After a successful save, continue with the saved contact in the Contacts list or open its contact record. Use Contacts to locate contacts and Contact record to inspect the saved record.

For an existing contact, **Attachment** opens attached-file work and **Last Modifications** opens the change-history work. Use Libraries and files for file operations.