

Create an L/G

September 11, 2026

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What an L/G is

An L/G is a letter-of-guarantee request that you record, save, and continue as a saved L/G record. Use this page to start a request or open one that already exists.

If you need to...	Go to
Start a new request	Find a new or saved L/G
Understand the basic fields	Understand the create form
Save the request	Enter and save the basic request
Resolve a problem	When saving or locating goes wrong
Continue after saving	After the L/G is saved
Move an L/G through its stages	L/G lifecycle
Review finance-route lists and records	L/G finance view

Before you start

You need an authenticated PAMS session and access to the L/G feature. The create route uses authentication and a leave-page guard. The page also needs the L/G details record to load, and your company configuration determines which basic fields carry a required marker.

Have or know...	Why it matters
A signed-in PAMS session with L/G access	The create and edit routes require authentication and feature access.

Have or know...	Why it matters
The request's beneficiary and issuer	These are the first two account choices on the form.
The L/G type and requested value	These complete the request's basic description.
Whether the beneficiary may extend the guarantee	This controls Beneficiary Permitted To Extend .
Your company's required-field settings	Required markers can differ between companies.

Find a new or saved L/G

The finance **Bank Guaranties** entry opens the company L/G list. The list includes the **Company LGs** view for company records.

Prerequisites

- You are signed in and have L/G access.
- To create a request, you can open the new L/G route.
- To open an existing record, the company L/G list contains its row.

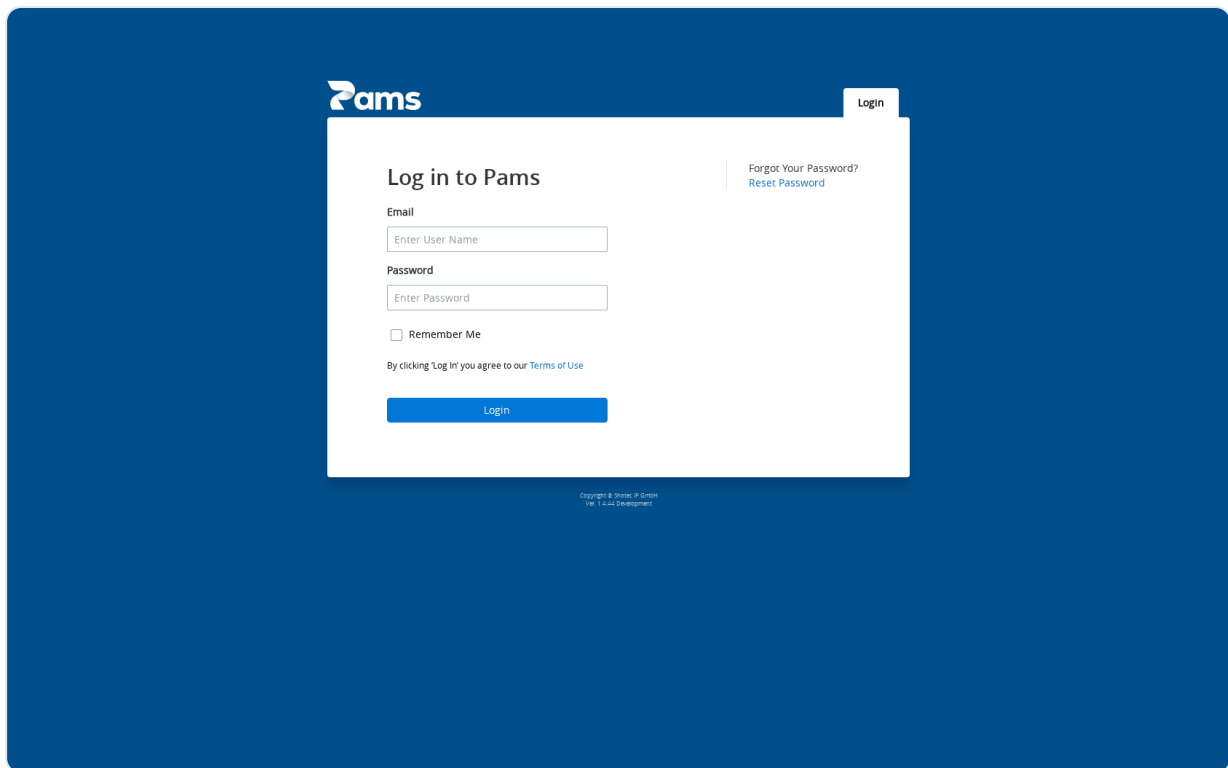
Steps

1. Open **Bank Guaranties** to reach the company L/G list.
2. Select **Company LGs** when the company list is not already selected.
3. Choose the route for your task:

If you need to...	Open...
Start a new request	<code>/letters-of-guaranties/new</code> or <code>/finance/letters-of-guaranties/new</code>
Open a saved company record	<code>/letters-of-guaranties/edit/:id</code>
Open a saved finance-route record	<code>/finance/letters-of-guaranties/edit/:id</code>

The headers and row values available for locating a record come from the list layout. Work from the headers visible in your list.

Result: You are on the basic create form or on the saved L/G record you selected.



Understand the create form

The create form collects the basic information that identifies the request before later record work becomes available.

Field	Control and entry
Beneficiary	Select the company that receives the guarantee.
LG Issuer	Select the issuer for the request.
On Behalf of	Select the principal represented by the issuer when enabled.
LG Type	Select the type of guarantee request.
Requested LG Value	Enter the requested currency amount.
Beneficiary Permitted To Extend	Select the checkbox when the beneficiary may extend the guarantee.

The form displayed **Beneficiary**, **LG Issuer**, **On Behalf of**, **LG Type**, and **Requested LG Value**. **Beneficiary** and **LG Issuer** accepted account selections, and **Requested LG Value** accepted a number. The form also displayed **Beneficiary Permitted To Extend**.

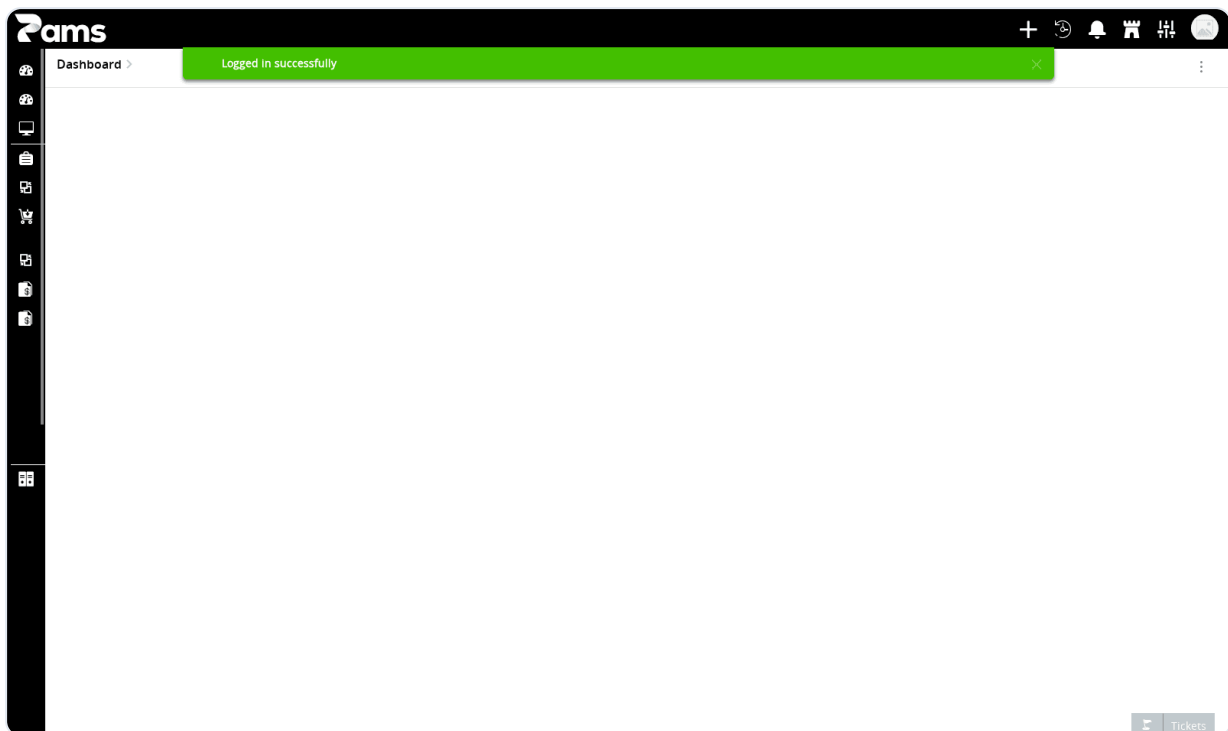
In the displayed form, **Beneficiary**, **LG Issuer**, and **Requested LG Value** carried required markers. **On Behalf of** and **LG Type** did not. Your company's mandatory-

field

configuration controls these markers, so complete every field marked as required on your screen.

Select the appropriate value shown in each list.

After the first save, the record can carry **Bank**, **LG Number**, **Activation Date**, **Issue Value**, **Cash Cover**, and **Expiry Date** in its later data area. Its record tabs become available after the record has an ID.



Enter and save the basic request

Use this procedure to record the initial request and choose whether to remain on the saved record.

Prerequisites

- You are on the editable create form.
- You have the beneficiary, issuer, L/G type, requested value, and extension decision.
- You know which fields your company configuration marks as required.

Steps

1. In **Beneficiary**, select the company that receives the guarantee.

2. In **LG Issuer**, select the issuer for the request.
3. If **On Behalf of** is enabled, select the principal represented by the issuer.
4. In **LG Type**, select the type of guarantee request.
5. In **Requested LG Value**, enter the requested currency amount.
6. Select **Beneficiary Permitted To Extend** when the beneficiary may extend the guarantee.
7. Complete every field carrying a required marker on your form.
8. Choose how to save the request:

If you need to...	Select...
Save the request and remain on its record	Save
Save the request and leave the page	Save and Close

9. If the form displays **This Field Is Required** , complete the field beside that message.
10. Select **Save** or **Save and Close** again.
11. After the save completes, read **Your request was completed successfully** .

Save validates the basic-data group before calling the save action. For a new record, the requested amount is copied into the issued and current amounts. **Save and Close** leaves the page after a successful save; **Save** keeps the record page open.

Result: The basic request is saved, and you either remain on the saved L/G record or leave the page according to your selection.

Handle route and configuration differences

The details form serves a new request, a saved record, and embedded views. The available fields and actions change with the route, company settings, issuer role, subscription, and whether the record already has an ID.

Prerequisites

- You know which route opened the form.
- You can see whether the form is editable and which fields carry required markers.

Steps

1. Check that the L/G feature is available before entering data.
2. Check the required markers on the six basic fields before selecting **Save**.
3. Check whether **On Behalf of** is enabled before choosing a principal.
4. If you are working on a saved record, use its record ID to continue with the record tabs and later data areas.
5. If the form is embedded in another screen, continue with the controls available in that form rather than expecting the standalone save area.

The standalone save area shows **Save** and **Save and Close** when the feature is included

and editing is allowed. **On Behalf of** is available for selection only when the issuer role permits it and the basic data is editable.

Result: You use the fields and actions available for the current route, role, company configuration, subscription, and saved-record state.

When saving or locating goes wrong

Use the message or page state you see to choose the next action.

What you see	What it means	What to do
This Field Is Required	A configured required field is empty.	Complete the field carrying the required marker, then select Save or Save and Close .
An error occurred while processing your request	The save request returned an error.	Check the form values and select the save action again.
Forbidden characters detected. Please remove them and try again.	A list filter contains forbidden characters.	Remove the forbidden characters from the list filter and run the search again.
You don't have permission	A stage action is not available to your account.	Open L/G lifecycle for the stage action's access conditions.
LG still needs confirmation	The approval action still needs the required confirmation.	Open L/G lifecycle and complete the confirmation step there.
LG has one or more extensions or deductions and cannot be reverted to the requested stage	The record has extension or deduction work that prevents the requested reversal.	Open L/G lifecycle for the stage rule.

What you see	What it means	What to do
Please choose a date after the current expiry date	An extension date does not follow the current expiry date.	Open L/G lifecycle and enter a later extension date.
There is a pending increase you can edit	A pending increase already exists.	Open L/G lifecycle and edit the pending increase.
Just '_''-''.' And '&' Characters Accepted	A library name or file name contains an unsupported character.	Open Libraries and files and correct the name.
The requested create route lands on /	The requested route did not open the form in that session.	Open Bank Guaranties and use the available create entry.
Beneficiary is not on screen	The create form has not opened.	Return to the create route before entering the basic request.
No controls or buttons are visible	The page is not the L/G form.	Return to the L/G entry and open the form again.

The list filter can show `Forbidden characters detected. Please remove them and try again.` when the filter contains forbidden characters. The save action displays `An error occurred while processing your request` when its request returns an error.

After the L/G is saved

Saving turns the new request into a saved L/G record. Continue stage work from that record, where later record areas and stage actions are available.

Prerequisites

- The basic request has been saved, or you have opened an existing L/G record.

Steps

- Choose the next work area:

If you need to...	Open...
Move the L/G through its stages	L/G lifecycle
Review finance-route lists or records	L/G finance view

Use the saved-record tabs

Prerequisites

- The L/G has an ID.
- You are on the saved L/G record.

Steps

1. Select the tab for the work you need:

If you need to...	Select...
Work with comments	Comments
Work with attached files	Attachment
Work with extensions	LG Extensions
Work with deductions	LG Deductions
Work with increases	LG Increase
Review modification history	Last Modifications

Result: You remain on the saved L/G record with the selected comments, attachment, extension, deduction, increase, or modification-history area available.