PAMS FRESH GENERATION

Project management workspace

September 10, 2026

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Project management is the area where you follow a project's bill of materials, ordering, stock, and delivery work. A bill of materials (BOM) is the product structure checked before
PAMS permits direct order delivery. An MRQ is a material requisition record for a request title,
receiving date, requested products, and additional requirements.

PAMS places this work in one connected project flow: BOMs and MRQs lead into purchasing and
warehouse work, which continues through stock and delivery.

If you need to…	Go to
Choose the project-management work list	Find project work
Read the columns and toolbar on the list	Read the project-management list
Understand the fields on a project record	Open and orient a project record
Create or locate a shipping order	Shipping orders
Create or locate an assembly order	Assembly orders
Follow purchasing, stock, or delivery work	Purchase job work lists or Warehouse fulfillment flow
Follow the sales-job stages that feed project work	Sales jobs lifecycle

Before you start

Prerequisites

- Know which project work you need to locate: BOM preparation, purchasing, stock, completed work,
  or running and completed jobs.
- Have the project record's current stage in mind. The page changes its fields and actions by
  stage.
- Have the information needed for the record in front of you. The record can require a
  salesperson, product type, job title, client, vendor, or inquiry deadline depending on its stage.
- Expect the list columns and some record fields to follow your company's saved setup.

The project record can include configurable fields. The list columns follow the selected list
layout, so work from the headers visible on your screen.

Find project work

Project-management work is grouped into lists by where the work is in the project flow. Use the
list that matches the work you need to inspect rather than opening a record from an unrelated
stage.

Steps

1. Open **Projects Management** from the application menu.
2. Select the tab that matches the work you need to inspect.

If you need to…	Select
Review all project-management work	**All**
Prepare a bill of materials	**BOM Preparation**
Review current material requisitions	**Current MRQs**
Review purchasing work	**In Purchasing**
Review stock work	**In Stock**
Review completed work	**Delivered**

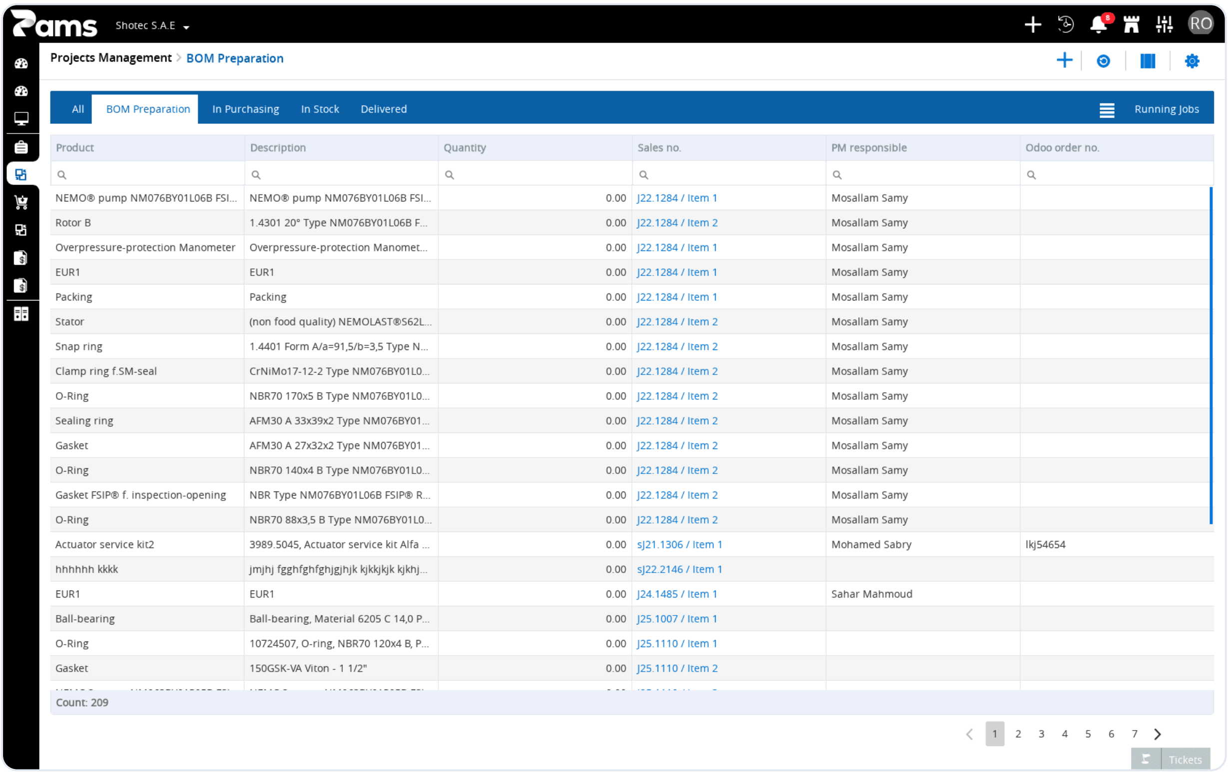
If you need to…	Select
Review running jobs	**Running Jobs**
Review completed jobs	**Delivered Jobs**

3. Select the project row to open its project-management record.
4. Select a linked number when you need the related record instead of the project record.

When **In Purchasing** is selected, use the available purchasing-list filters.

Number on the list	Opens
Sales job number	The related sales job
MRQ request number	The related material requisition
MRQ job number	The related purchasing job
Received shipment number	The related receipt
Inspection number	The related inspection

Result: The selected project-management list or related record opens. Orders and completed
orders open the project-management record with the Comments view selected.



Read the project-management list

The project-management list is a work table: each row combines product and quantity information
with the sales and project-management references needed to follow the work.

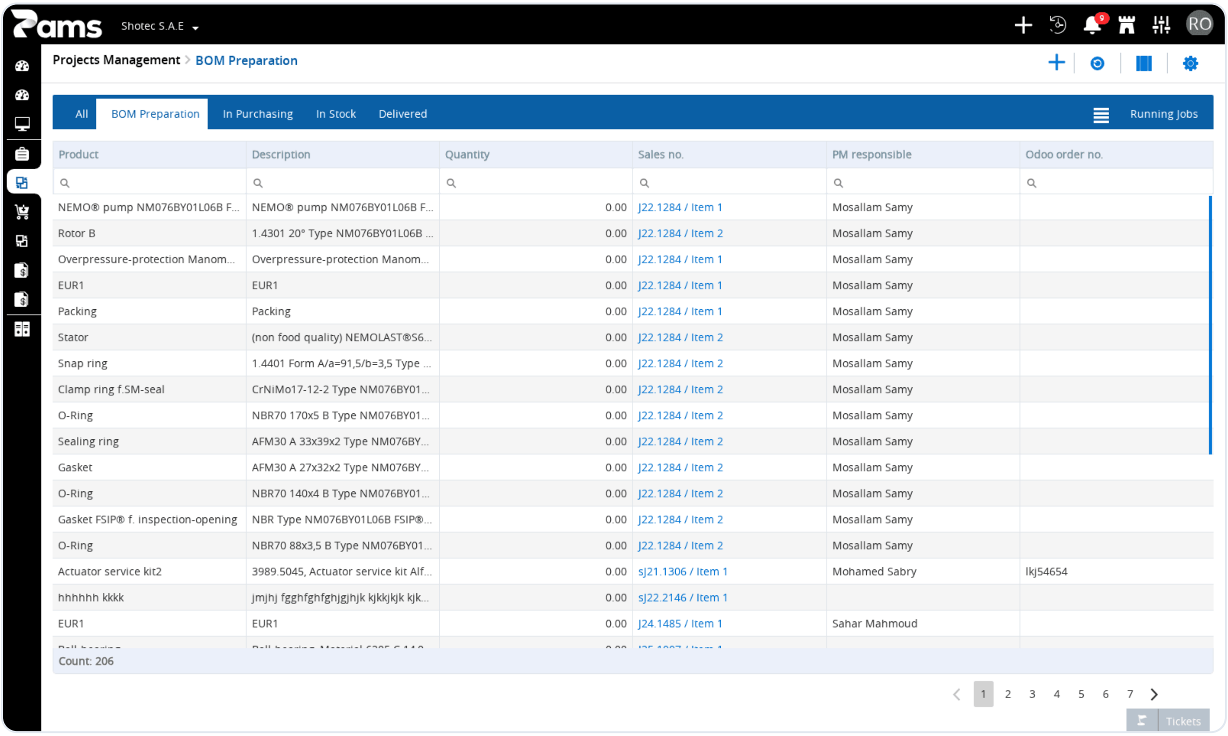
Steps

1. Read **Product** to identify the product on the row.
2. Read **Description** to distinguish the row's product details.
3. Read the product amount shown on the row.
4. Read the sales reference column to identify the related sales item.
5. Read **PM responsible** to identify the project-management person responsible.
6. Read **Odoo order no.** to identify the connected Odoo order number when one is shown.
7. Select the toolbar command that matches what you need.

If you need to…	Select
Reload the list	**Refresh**
Work with the list layout	**Table Layout**
Open list settings	**Settings**

The list shown here includes product, description, sales-reference, responsibility, and order-number
columns. The columns shown in your list follow the selected layout, so use the headers visible on
your screen when reading a row.

Result: The project-management rows and their visible references are on screen, with the
list toolbar available above them.



Open and orient a project record

A project record brings the project's stage, responsibility, product information, dates, and
item details together so you can follow the work beyond the list.

Steps

1. Select a project row from the project-management list.
2. Read **Status** to identify the record's current status.
3. Read **Branch** to identify the branch associated with the record.
4. Read **Salesperson Responsible** to identify the responsible salesperson.
5. Read **Product Type** to identify the product type.
6. Read **Job Title** to identify the job's title.
7. Read **End User** when the field is shown.
8. Read **Estimated Value** when the field is shown.
9. Read **File Number** when the field is shown.
10. Read **Expected Order Date** when the field is shown.
11. Read **Client** and **Vendor**, together with the inquiry due-date field, when the record is an inquiry.
12. Read the item grid's available description, unit, and quantity values.

13. In the stage controls row, select the control for the action you need.

If you need to…	Select
Open potential work	**Potentials**
Open inquiry work	**Inquiry**
Open offer work	**Offer**
Convert to an order	**Convert To Order**
Return to inquiry	**Back to Inquiry**
Open order work	**Order**
Return to offer	**Back to Offer**
Open project-management work	**Project management**
Open completed work	**Delivered**

When **Save** or **Delete** appears on the record, use the dedicated record pages for detailed
saving, conversion, delivery, or deletion instructions.

Result: The project record is open, its current stage is visible, and the fields and item columns available at that stage are on screen.

Handle stage and setup differences

The project record changes what you see as the work moves through its stages. **Status** has
three stage-dependent placements: potential through cancelled potential, later offer stages,
and later order stages. **Salesperson Responsible** is required for a new record or when no
salesperson is assigned. **Estimated Value** appears while the job is at potential or earlier,
and **Expected Order Date** appears before Order except for unknown and `-1` stages.

Inquiry information such as **Client** and **Vendor**, together with the inquiry due-date field, appears for opened
inquiries and the specified potential-to-cancelled-potential ranges. **End User**, **Estimated**

Value, and **File Number** can be configurable fields, so their required behavior follows company configuration.

Steps

1. Select **Status**.
2. Choose an option from the list beneath the field.
3. Select **Product Type**.
4. Choose an option from the list beneath the field.

Result: The record displays the selected **Status** and **Product Type**.

The project record validates before save. A field with a required marker must be completed before
the relevant save action can continue.

When the work does not proceed

Use the exact message on screen to decide whether to correct a field, complete a required item,
or move to the page that owns an embedded panel.

What you see	What it means	What to do
`Check mandatory field(s)`	A required value is missing.	Return to the field carrying the required marker and complete it.
`This field is required`	The selected field has no value.	Enter or select the required value.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	The number is outside the accepted range.	Enter a value greater than 0 and no greater than `999,999.00`.
`Invalid input. Please enter a non-negative value`	The number is negative.	Enter zero or a positive value.
`One or more items has ZERO quantity`	An item row has zero quantity.	Correct the item quantity before saving.
`One or more items has no unit`	An item row has no unit.	Select a unit before saving.
`Your request was completed successfully`	The requested save or update completed.	Continue with the next project-management action.

What you see	What it means	What to do
`Custom fields saved successfully`	Configured custom fields were saved.	Continue with the record.
`Job updated successfully`	The job update completed.	Continue with the updated record.
`Job deleted successfully`	The job deletion completed.	Return to the relevant list.
`Job regretted successfully`	The job was regretted successfully.	Continue from the resulting job status.
`Job cancelled successfully`	The job cancellation completed.	Continue from the resulting job status.
`Job missed successfully`	The job was marked missed.	Continue from the resulting job status.
`Job reactivated successfully`	The job was reactivated.	Continue from the resulting job status.
`Converted to offer successfully`	The job moved to offer.	Continue the offer work.
`Converted to inquiry successfully`	The job moved to inquiry.	Continue the inquiry work.
`Converted To Regretted`	The job moved to regretted.	Continue from the resulting job status.
`Converted to cancelled`	The job moved to cancelled.	Continue from the resulting job status.
`Converted to lost`	The job moved to lost.	Continue from the resulting job status.
`An error occurred while processing your request`	The requested operation did not complete.	Review the fields and conditions for the action, then try again.
`Error saving custom fields`	Configured custom fields were not saved.	Review the custom fields and try again.
`Cannot be un-delivered — a due invoice already exists`	An existing due invoice prevents undoing delivery.	Continue from the invoice and delivery work.
`All offers must be in draft status to revert to inquiry`	At least one offer is not in draft status.	Return the offers to draft before reverting to inquiry.
`An account with this name already exists`	The account name is already in use.	Use the existing account or choose another name.

What you see	What it means	What to do
`A project with this name already exists`	The project name is already in use.	Use the existing project or choose another name.
`Please save opened inquiry first`	An opened inquiry has unsaved work.	Save the opened inquiry before continuing.
`All inquiries must be in draft stage to revert to potential`	An inquiry is not in draft stage.	Return all relevant inquiries to draft before reverting to potential.

The following messages belong to embedded pages rather than this workspace: `Forbidden characters detected. Please remove them and try again.`, `Error loading accounts`, `Error {{errorMsg}}`, `Please enter action for each milstone`, `Please save opened cost sheet first`, `There is a maximum discount that exceeds the negotiation margin.`, `Error: Vendor not saved yet`, `Error: Client not saved yet`, `This Field Is Required`, `You already have a contact with this name`, `Just '_'‘-''.' And '&' Characters Accepted`, `Sales order is archived`, `Booked quantity for this job is greater than the required BOM quantity`, `You cannot edit or delete the product after the purchase package is created`, `Cannot be deleted. Product is in purchasing`, `You cannot edit the product after the PO is created`, `This product is already included in BOM`, `The first variant cannot be deleted`, `An error occurred while connecting to your CRM system.`, `Please select one product`, `Package must have at least one item`, `You cannot save without adding at least one product`, `One of products has no quantity`, `Action not allowed`, `Check validation`, `No remaining items. All items have been selected`, `This action is only allowed if you belong to that branch`, `Please enter at least one email`, `Inquiry must have at least one item`, `Offer must have at least one item`, `Order must have at least one item`, `Please select one or more items to create a RFQ.`, `Serial you have entered already exist and belong to same manufacturer`, `There is error in serial you have entered`, `Minimum: At least one serial`, `You don’t have permission`, `LG still needs confirmation`, `LG has one or more extensions or deductions and cannot be reverted to the requested stage`, `Please choose a date after the current expiry date`, `There is a pending increase you can edit`, `Required Receiving Date`, `Required Receiving After`, `Required Offer Type`, `Required Bid Due Date`, `One topic and at least one note is required`, and `There is no topic to print`.

Class	Message	Owning page	Source
Error	`Forbidden characters detected. Please remove them and try again.`	Project list	`Frontend/src/assets/i18n/en.json:124`
Error	`Error {{errorMsg}}`	Project record	`Frontend/src/assets/i18n/en.json:167`
Error	`You already have a contact with this name`	Contacts	`Frontend/src/assets/i18n/en.json:135`
Error	`Booked quantity for this job is greater than the required BOM quantity`	Bill of materials	`Frontend/src/assets/i18n/en.json:1616`
Error	`You cannot edit or delete the product after the purchase package is created`	Bill of materials	`Frontend/src/assets/i18n/en.json:1620`
Error	`You cannot edit the product after the PO is created`	Bill of materials	`Frontend/src/assets/i18n/en.json:1619`
Error	`The first variant cannot be deleted`	Products	`Frontend/src/assets/i18n/en.json:259`
Error	`You cannot save without adding at least one product`	Material requisition	`Frontend/src/assets/i18n/en.json:2251`
Error	`Check validation`	Principal invoice	`Frontend/src/assets/i18n/en.json:147`
Error	`This action is only allowed if you belong to that branch`	Purchasing details	`Frontend/src/assets/i18n/en.json:205`
Error	`Inquiry must have at least one item`	Purchasing details	`Frontend/src/assets/i18n/en.json:178`
Error	`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	Purchasing details	`Frontend/src/assets/i18n/en.json:184`

Class	Message	Owning page	Source
Error	`Please select one or more items to create a RFQ.`	Purchasing details	`Frontend/src/assets/i18n/en.json:2143`
Error	`There is error in serial you have entered`	Reference list	`Frontend/src/assets/i18n/en.json:265`
Error	`LG still needs confirmation`	Letters of guarantees	`Frontend/src/assets/i18n/en.json:199`
Error	`LG has one or more extensions or deductions and cannot be reverted to the requested stage`	Letters of guarantees	`Frontend/src/assets/i18n/en.json:198`
Error	`There is a pending increase you can edit`	Letters of guarantees	`Frontend/src/assets/i18n/en.json:926`
Validation	`Required Offer Type`	Purchasing details	`Frontend/src/assets/i18n/en.json:1130`
Error	`There is no topic to print`	Activities	`Frontend/src/assets/i18n/en.json:208`

Out of scope on this workspace

The following message belongs to the purchasing details page rather than this workspace:

Message	Owning page
`Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted`	Purchasing details

Create a shipping order

Use this procedure when you need to record selected items for shipment.

Prerequisites

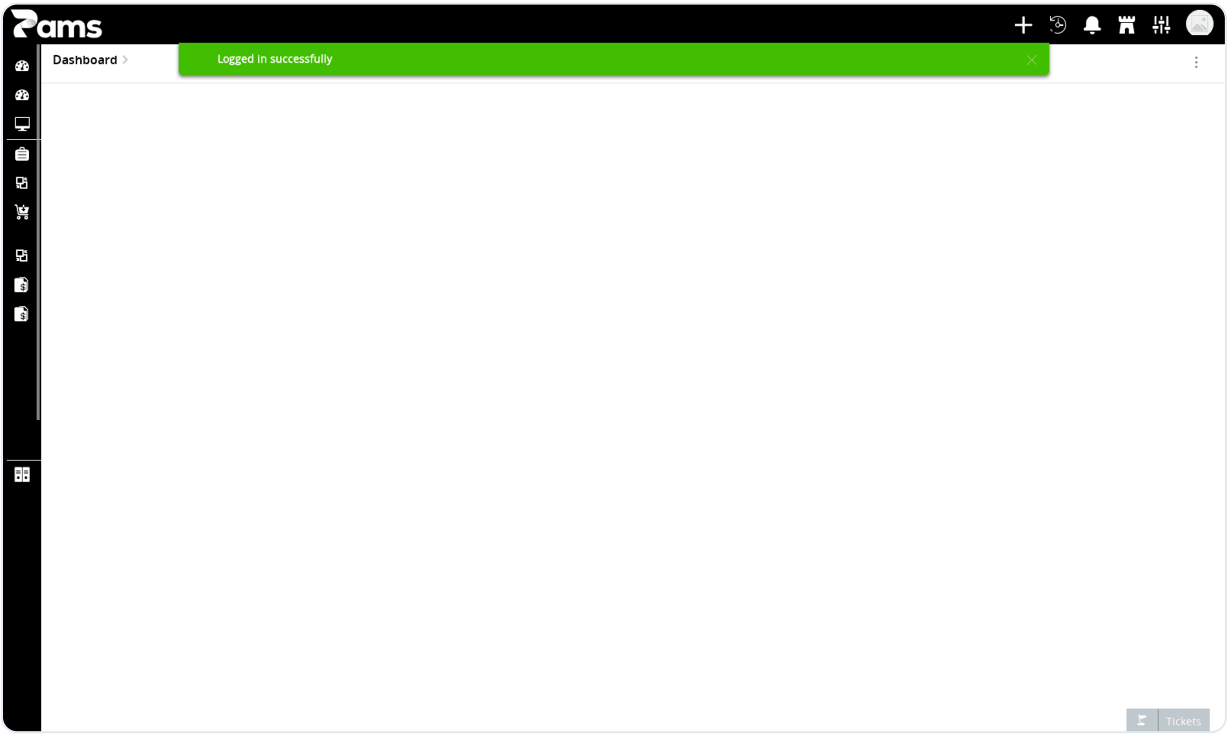
- Have a sales job number and at least one item to ship.

Steps

1. Open **Shipping Order** from the Projects Management new-record menu.
2. Enter or select **Sales Job Number**.
3. Select the items in the item-selection dialog.
4. Select **OK**.
5. Select **Save and Close**.

Result:

The shipping order is saved in **Requested shipments**, and PAMS displays `Your request was completed successfully`.



Create an assembly order

Use this procedure when you need to record an assembly order and its products.

Prerequisites

- Have a warehouse, sales order, sales item, and at least one product.

Steps

1. Open **Assembly Order** from the Projects Management new-record menu.
2. Select the required warehouse, sales order, and sales item values.
3. Select **Product** on the unsaved order.
4. Select products in the **Products** popup.

5. Select **OK**.
6. Select **Save and Close**.

Result:

The assembly order is saved. If no product is selected, PAMS displays `You cannot save without adding at least one product`.

Continue the project flow

Project-management work continues through dedicated pages according to the work you need to do.

After you need to…	Continue with
Follow the sales-job stage flow	Sales jobs lifecycle
Locate sales-job work	Find sales-job work
Work with purchasing lists	Purchase job work lists
Create or locate a shipping order	Shipping orders
Create or locate an assembly order	Assembly orders
Follow stock and delivery fulfillment	Warehouse fulfillment flow

The project-management list links sales jobs, material requisitions, purchasing jobs, receipts,
and inspections to their related records. Use those links when the next activity belongs to one
of those records rather than the project-management record.