PAMS FRESH GENERATION

Contacts, L/Gs, and Last Modifications on a sales job

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A saved sales job is the record that carries the workflow stages and its related contacts, L/Gs,
and recorded changes. Contacts is where you associate a contact with this saved sales job and
maintain the contact information shown with that association. A job-related L/G is the guarantee
record that you review or move through its available request, approval, active, return, cancellation, extension, deduction, or increase actions. Last Modifications is the sales-job
history area for reviewing recorded changes and opening an individual Registration entry.

If you need to…	Go to
Open the saved sales job first	Open a saved sales job
See which fields and related-work tabs are available	Understand the related-work surface
Associate or maintain contact information	Associate a contact with the sales job
Review or request a job-related L/G	Review or request a job-related L/G
Review recorded changes	Review recorded job changes
Understand why a control is unavailable	Handle availability and stage branches
Correct a blocked action	When a related-work action goes wrong
Work with the surrounding sales-job record	Sales job record
Find a sales job from the work lists	Find sales job work

If you need to…	Go to
Work with contacts beyond this job	Contacts overview
Create a standalone contact	Create a contact
Maintain a contact record	Contact record
Follow the complete L/G lifecycle	L/G lifecycle
Create a new L/G	Create an L/G
Review finance-specific L/G information	L/G finance view

Before you start

Prerequisites

- Have a saved sales job. The **Contacts**, **LGs**, and **Last Modifications** tabs require a
job ID.
- Have the feature available for the area you need: Contacts, Letter of Guarantee, or Latest
Modifications.
- Use a role that can edit the intended record. Principal users do not receive these related-work
tabs.
- For contact attachments and contact history, open a contact with a contact-person ID outside a
popup.
- For L/G stage actions, have no unsaved L/G changes. The available action also depends on the
L/G's current stage and on the approval and editing permissions for that record.
- Have the contact details, L/G information, or history filters you want to use ready before you
open the related-work area.

The record's branch and feature access affect which controls are available. If a feature is not
available, the related-work tab is not a route to that work; use the owning page named in the
orientation table instead.

Open a saved sales job

Open the saved sales job before selecting a related-work area.

Prerequisites

- Know which saved sales job you need to open.
- Have access to the Sales jobs work lists or another link to the saved record.

Steps

1. Open the saved sales job at `/sales/edit/:id`.
2. Confirm that the record shows the workflow labels **Inquiry**, **Offer**, **Order**, **Project management**, and **Delivered**.
3. Continue to Understand the related-work surface.

Result: The saved sales-job record is open and its related-work areas are available for
selection when their conditions are met.

Understand the related-work surface

Use the related-work surface to work with job contacts, L/Gs, and recorded changes beside the
saved sales-job information.

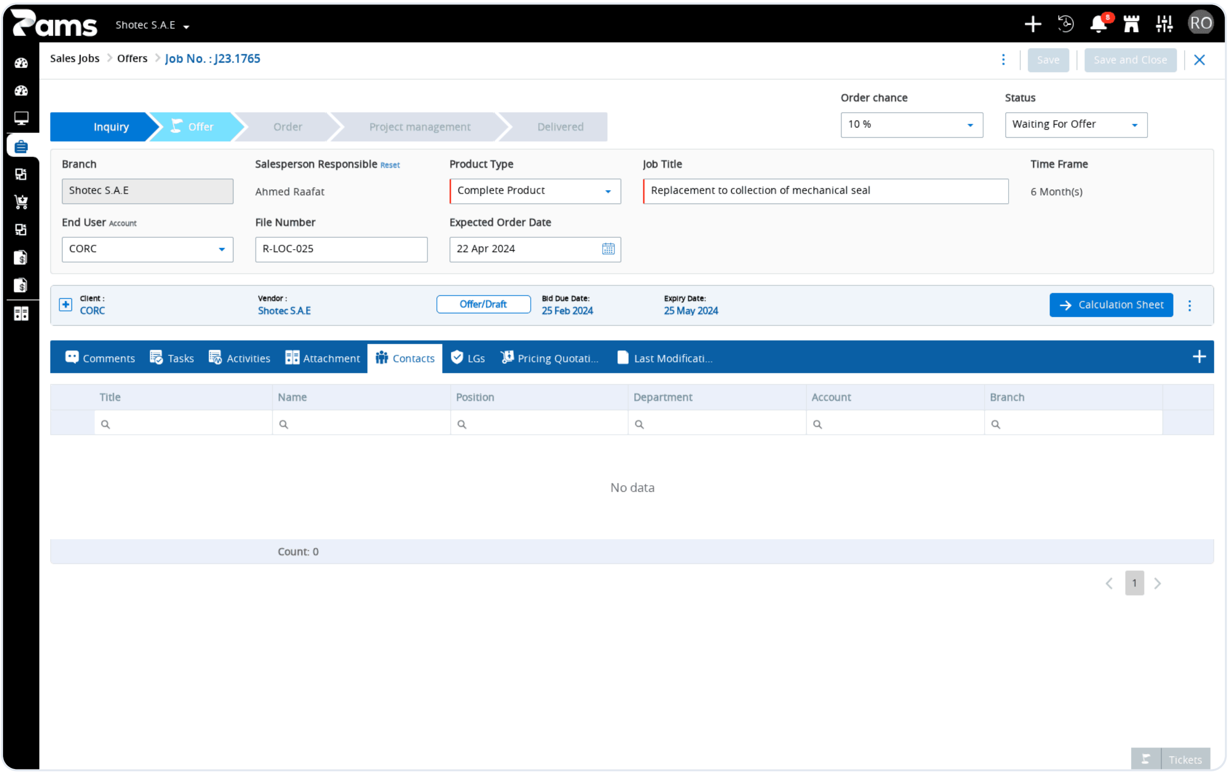
The record displays these fields in the main job area:

Field	What you see in this record
Order chance	A selection field without a required marker in this record
Status	A selection field without a required marker in this record
Branch	A text field without a required marker in this record
Product Type	A selection field with a required marker
Job Title	A text field with a required marker
End User Account	A selection field without a required marker in this record
File Number	A text field with a required marker
Expected Order Date	A date field without a required marker in this record

The available buttons are **Save**, **Save and Close**, and **Calculation Sheet**.

Related-work label	Area
Comments and **Tasks**	Discussion and follow-up
Activities	Job activities
Attachment	Attached files
Contacts	Job contacts
LGs	Job-related guarantees
Pricing Quotations	Pricing work
Last Modifications	Recorded job changes

The Contacts list displays the headers **Title**, **Name**, **Position**, **Department**, **Account**, and **Branch**. An empty list displays **No data** and **Count: 0**. Use the headers and fields available on your screen; L/G fields and list columns depend on your configuration.



Associate a contact with the sales job

Use Contacts to associate or maintain contact information on this saved sales job.

Prerequisites

- Open a saved sales job with the Contacts feature available.

- Work as a non-principal user.
- For contact-level attachments or history, use a contact with a contact-person ID outside a
  popup.

Steps

1. Select **Contacts**.
2. Review the Contacts list using the headers **Title**, **Name**, **Position**, **Department**, **Account**, and **Branch**.
3. Select the contact association or contact record you need to maintain.
4. Enter or review **Name**.
5. Enter or review **Position**.
6. Enter or review **Department**.
7. Select the control that matches the contact detail you need to add:

If you need to add…	Select
A phone 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 contact	**Comments**

8. Choose the related contact action:

If you need to…	Select
Work with contact attachments	**Attachment**
Review contact changes	**Last Modifications**
Upload a contact photo	**Upload**
Delete a contact photo	**Delete**

If the contact name is already in use, the screen can show `You already have a contact with this name`. Use the contact record that already carries the required information or change the name
before trying again.

Result: The saved sales job's Contacts area shows the contact information you selected or
maintained, subject to the available contact and feature access.

Review or request a job-related L/G

Use the job-related L/G record to review or move through its available request, approval, active,
return, cancellation, extension, deduction, or increase actions.

Prerequisites

- Open a saved sales job with the Letter of Guarantee feature available.
- Work as a non-principal user.
- Have no unsaved L/G changes before selecting a stage action.
- Have the permission required by the current L/G stage and approval route.

Steps

1. Select **LGs**.
2. Review the available L/G fields:

Field	Rule
Expiry Date	Required on the upgrade form and cannot be earlier than today
On Behalf of	Required only where your company configures it
LG Type	Required only where your company configures it
Requested Amount	Required only where your company configures it; its minimum is 0
Confirmation Of The LG Requirement	Required when the L/G is at or beyond Requested and sales recommendation is required
Confirmation Of The Financial Viability	Required when the L/G is at or beyond Requested and finance recommendation is required
Extension Period	Required only where your company configures it; its minimum is 1

Field	Rule
Expiration date	Required only where your company configures it and cannot precede the current L/G expiry date

3. Choose how to save the L/G:

If you need to…	Select
Save the L/G and keep the form open	**Save**
Save the L/G and close the form	**Save and Close**

4. Choose the available stage action:

If the current condition is…	Select
Approval is required and you cannot approve a Requested L/G	**Request approval**
Approval is required, you can approve, and the L/G is before Approved	**Approve**
The L/G is Requested without the approval process, or Approved with it	**Active**
The L/G is Running	**Due for Return**
The L/G is due for return or Expired	**Returned**
The L/G is Requested or Approved	**Cancel**
The L/G is a Running or Expired performance bond that is not already upgraded	**Extend As Warranty Bond**
The L/G is Running or later and you have editing access	**Enable Editing**
A new extension is allowed	**LG Extensions**
A new deduction is allowed	**LG Deductions**
A new increase is allowed	**LG Increase**

5. If an extension form opens, enter **Extension Period** and **Expiration date** before saving
   the extension.

The L/G operation can display `Your request was completed successfully` after a successful request.
If the operation is blocked, read the exact message before changing the record. The available

messages include `An error occurred while processing your request`, `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`, and `There is a pending increase you can edit`.

Result: The L/G remains on the saved sales job with the fields and stage action appropriate to
its current state.

Review recorded job changes

Use Last Modifications to review recorded changes and open an individual Registration entry.

Prerequisites

- Open a saved sales job with the Latest Modifications feature available.
- Work as a non-principal user.
- Have user or field criteria ready if you need to narrow the history.

Steps

1. Select **Last Modifications**.
2. Use **Action users** to narrow the history by user.
3. Use **Fields** to narrow the history by field.
4. Select **Registration** to open a recorded history entry when user logs are available.

Result: The history area shows the available recorded job changes and the Registration entry
you selected.

Handle availability and stage branches

The related-work controls change with access, record state, popup context, and L/G stage. Use the
following rules to choose the correct route.

Situation	What to use or expect
The job is not saved	The Contacts, LGs, and Last Modifications areas require the saved job ID

Situation	What to use or expect
The related feature is unavailable	Use the owning page from the orientation table
You are a principal user	These related-work tabs are unavailable
Contact attachment or history work is in a popup	The contact-person and outside-popup conditions are not met
An L/G has unsaved changes	Stage actions are unavailable until the changes are resolved
An L/G is at a different stage	Choose only the stage action listed for that stage
A field is company-configured	Treat it as required only where your company configures it
The list headers differ	Work from the headers visible in your list; L/G columns depend on the available setup
A field or control is listed as unavailable in this page	Use the owning page rather than looking for it in this related-work area

The Contacts list uses **Title**, **Name**, **Position**, **Department**, **Account**, and **Branch**. L/G list columns and L/G fields depend on the available setup.

When a related-work action goes wrong

Use the exact message shown on screen to choose the corrective action. Messages owned by another
work area are listed at the end with the page or stage that owns them.

What you see	What to do
`Forbidden characters detected. Please remove them and try again.`	Remove the unsupported characters and retry the contact-related entry.
`You already have a contact with this name`	Use the existing contact or change the name before retrying.
`Your request was completed successfully`	Continue with the saved L/G or close the completed action.
`An error occurred while processing your request`	Review the current record state and permissions before retrying.
`You don’t have permission`	Use a role with the required L/G permission.
`LG still needs confirmation`	Complete the required L/G confirmation before moving its stage.

What you see	What to do
`LG has one or more extensions or deductions and cannot be reverted to the requested stage`	Resolve the extension or deduction before reverting the stage.
`Please choose a date after the current expiry date`	Enter an extension date after the current expiry date.
`There is a pending increase you can edit`	Edit the pending increase instead of starting another one.
`Check mandatory field(s)`	Complete the required fields shown on the current form.
`There is a maximum discount that exceeds the negotiation margin.`	Review the related commercial values before saving.
`Action not allowed`	Review the current access and record conditions before retrying.

Messages from other panels or stages are quoted here so you can identify them if they appear while
working around this record. Their owning page or stage is shown in the last column.

Message	Owning page or stage
`Required Receiving Date`	Material requisition
`This field is required`	Sales job items
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Sales job items
`Invalid input. Please enter a non-negative value`	Sales job items
`Custom fields saved successfully`	Sales job record
`Job updated successfully`	Sales job record
`Job deleted successfully`	Sales job record
`Job regretted successfully`	Sales job lifecycle
`Job cancelled successfully`	Sales job lifecycle
`Job missed successfully`	Sales job lifecycle
`Job reactivated successfully`	Sales job lifecycle
`Converted to offer successfully`	Sales job lifecycle
`Converted to inquiry successfully`	Sales job lifecycle

Message	Owning page or stage
`Converted To Regretted`	Sales job lifecycle
`Converted to cancelled`	Sales job lifecycle
`Converted to lost`	Sales job lifecycle
`Error saving custom fields`	Sales job record
`Cannot be un-delivered – a due invoice already exists`	Delivery reversal
`All offers must be in draft status to revert to inquiry`	Offer-to-inquiry flow
`Error {{errorMsg}}`	Sales job record
`An account with this name already exists`	Account creation
`A project with this name already exists`	Project creation
`Please save opened inquiry first`	Inquiry editing
`All inquiries must be in draft stage to revert to potential`	Potential conversion
`Please enter action for each milstone`	Offer and order milestones
`Please save opened cost sheet first`	Sales job profitability
`Error: Vendor not saved yet`	Accounts
`Error: Client not saved yet`	Accounts
`This Field Is Required`	Accounts
`Just '_''-''.' And '&' Characters Accepted`	Files
`Sales order is archived`	Bill of materials
`Booked quantity for this job is greater than the required BOM quantity`	Bill of materials
`You cannot edit or delete the product after the purchase package is created`	Bill of materials
`Cannot be deleted. Product is in purchasing`	Bill of materials
`You cannot edit the product after the PO is created`	Bill of materials
`This product is already included in BOM`	Products
`The first variant cannot be deleted`	Products
`An error occurred while connecting to your CRM system.`	Products
`Please select one product`	Products

Message	Owning page or stage
`Required Receiving After`	Material requisition
`Package must have at least one item`	Material requisition
`You cannot save without adding at least one product`	Material requisition
`No remaining items. All items have been selected`	Material requisition
`This action is only allowed if you belong to that branch`	Branch-restricted activity or purchasing flow
`Please enter at least one email`	Purchasing inquiry
`Inquiry must have at least one item`	Purchasing inquiry
`Offer must have at least one item`	Purchasing inquiry
`Order must have at least one item`	Purchasing order
`Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted`	Sales job items
`Please select one or more items to create a RFQ.`	Purchasing inquiry
`Required Offer Type`	Purchasing inquiry
`Required Bid Due Date`	Purchasing inquiry
`Error loading accounts`	Sales jobs list
`Serial you have entered already exist and belong to same manufacturer`	Reference list
`There is error in serial you have entered`	Reference list
`Minimum: At least one serial`	Reference list
`One topic and at least one note is required`	Activities

No dialog, validation message, or confirmation message appeared during the read-only review.

Continue with the saved sales job

The saved sales job remains the continuing record after you review or maintain related work.

Use Sales job record for the surrounding workspace, Contacts overview for the broader contacts area, Contact record for contact-level maintenance,

L/G lifecycle for the complete L/G stage flow, Create an L/G
for a new guarantee, and L/G finance view for finance-specific review.

Result: You know which work remains with the saved sales job and which registered page owns the
next contact, L/G, or sales-job task.