Managing Company Accounts

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Finding the Company Account You Need to Maintain

Open **Contacts** and select **Accounts** to work with company account records in Pams. Start by locating the account for the company whose details need review or correction. Use the company's **Account Name** as the first point of comparison, but do not rely on the name alone. Similar names can belong to separate companies, branches, or related businesses.

1. Open the relevant entry from the **Accounts** list.
2. Review the account's **Account Name**, **Account Number**, and **Account Type**.
3. Check identifying details that help distinguish the company from similarly named accounts, such as **VAT ID Number**, **Website**, **Phone**, and **Email**.
4. Review the address information, including **Main Address/street**, **Main Address/city**, **Main Address/country**, and **Zip-Code** where available.
5. Check whether the account has an **Account Manager** assigned and whether it is marked **Active**.

Before changing anything, review the information already connected to the account. Customer history may include **Activities**, comments left on the account, and **Account Invoices**. These records provide useful context: they can show whether the company has been involved in sales work, invoicing, calls, meetings, or other ongoing communication.

For example, two accounts may have nearly identical names but different addresses, account numbers, or customer history. In that case, they may represent different companies and should remain separate. Conversely, an account with incomplete contact details and no independent history may be a duplicate of a more complete account.

[SCREENSHOT: The Accounts list showing several company accounts and an opened account record with Account Name, Account Type, address details, and Account Manager.]

Use this review to decide whether you need a normal update to one account or a careful duplicate-account review before combining records.

Updating Company Account Data

Update an existing account whenever the change applies to the same company. For example, use the existing account when a company changes its phone number, website, main address, billing address, or assigned **Account Manager**. Creating another account for a corrected detail can split the company's customer history across multiple records.

1. From **Contacts > Accounts**, open the company account you reviewed.
2. Select the details that are outdated, incomplete, or incorrect.
3. Update the relevant information, such as **Account Name**, **Account Type**, **VAT ID Number**, **Website**, **Phone**, or **Email**.
4. Review address fields carefully. Update the **Main Address** fields for the company's primary location, and update **Billing Address** fields only when billing information needs to differ.
5. Confirm the correct **Account Manager** is shown if account ownership has changed.
6. Click **Save**. Use **Save and Close** when you have finished reviewing the account.

After saving, reopen or review the account record to confirm that the new information appears correctly. Check the company name, address, and contact details as they will be used by colleagues who work with the account.

Updating the existing record keeps the account's connected customer history in one place. Review **Activities**, account comments, and **Account Invoices** after the update to make sure they are still available from the same account record. A correction to company details should not require moving or recreating prior work.

[SCREENSHOT: An account record with the Save and Save and Close actions visible after company and address details have been updated.]

Avoid changing identifying details merely to make one company resemble another. If the record may actually be a duplicate, review both accounts first using the process in the next section. This is especially important when the accounts have different **Account Number**, **VAT ID Number**, address information, or customer history.

Reviewing Duplicate Accounts Before You Merge Them

Treat a possible duplicate as a review task, not just a naming issue. Two entries can look alike because of abbreviations, spelling differences, or different address formats. Before combining them, confirm that both records truly represent the same company.

1. Open each company account from **Contacts > Accounts** in turn.
2. Compare the identifying information on both records, including **Account Name**, **Account Number**, **VAT ID Number**, **Website**, **Phone**, **Email**, and address details.
3. Review **Account Type** and the assigned **Account Manager** on each account. Differences may indicate that the accounts serve different business purposes.
4. Check the shared customer history associated with each account. Review visible **Activities**, comments, and **Account Invoices** so you understand what is connected to each record.
5. Identify the account that should remain after the merge. Choose the one with the most complete, current, and reliable company details.
6. Note any information held only on the duplicate account, such as a more complete **Billing Address**, a current phone number, or a useful account comment.

Use the company's **VAT ID Number**, **Account Number**, and address details to make the decision where possible. A similar company name by itself is not enough evidence to merge records. For example, two accounts may share a brand name while operating from different addresses and maintaining separate customer relationships.

The account you select to remain should be the record your team will use going forward. Make sure its **Account Name** is clear and its address and contact information are current before beginning the merge. If the intended surviving record is incomplete, update it first rather than relying on the merge to resolve missing details.

[SCREENSHOT: Two account records being compared, with Account Name, Account Number, VAT ID Number, addresses, and customer-history areas highlighted.]

Do not merge accounts when the records represent separate legal companies, branches that must be managed independently, or unrelated companies with similar names.

Merging Duplicate Company Accounts

Begin the duplicate-account merge only after you have completed the comparison of both account records. A merge is appropriate when the records represent the same company and the duplicate account does not need to remain independently maintained.

1. Return to the two company accounts you identified as duplicates in **Contacts > Accounts**.
2. Start the duplicate-account merge workflow available for those account records.
3. Select the account that will remain as the primary company account. Use the account you identified as the most complete and current record during your review.
4. Check the primary account's **Account Name**, **Account Number**, **VAT ID Number**, address information, and **Account Manager** one final time.
5. Confirm that the second account represents the same company and that its connected customer history belongs with the primary account.
6. Complete the merge only when you are satisfied that the primary account is the correct record to maintain going forward.

Do not treat a merge as a substitute for checking the data. Before confirming, make sure the surviving record contains the company details your colleagues need, including the right **Main Address**, **Billing Address**, **Phone**, **Email**, and **Website** where these are used.

Pay particular attention to customer history. Review the **Activities**, comments, and **Account Invoices** connected to the duplicate account before you confirm the merge. The purpose of combining duplicate accounts is to maintain one clear company record without losing the history that has already been recorded for that company.

After completing the merge, the duplicate account should no longer need separate maintenance. Use the surviving account as the company record for future work, corrections, and customer interactions.

[SCREENSHOT: The duplicate-account merge workflow showing the selected primary company account and the duplicate account being combined.]

If you are uncertain whether the records represent the same company, stop before confirming. It is safer to keep two accounts separate while you verify the company details than to combine separate customer histories incorrectly.

Confirming Customer History Is Preserved After a Merge

After a duplicate-account merge, reopen the surviving company account from **Contacts > Accounts**. Do not assume the review is complete until you have checked both the current account data and the customer history available from that record.

1. Open the primary company account that remained after the merge.

2. Confirm that the **Account Name**, **Account Number**, **Account Type**, **VAT ID Number**, and address information identify the correct company.
3. Review the **Main Address** and **Billing Address** fields, especially if the duplicate account contained more current address details.
4. Check visible **Activities** and account comments to confirm that the account's interaction history is available from the surviving record.
5. Review **Account Invoices** where applicable to confirm that invoice-related history can still be reached from the primary account.
6. Confirm that the duplicate account no longer needs to be updated separately and that your team should use the surviving account for future work.

Customer history is important because it gives sales and operations teams a complete view of prior contact, commercial work, and invoice-related activity for the company. When the history is available from one maintained account, colleagues do not need to check multiple records to understand the customer relationship.

[SCREENSHOT: A surviving account record after a merge, with company details at the top and Activities, comments, and Account Invoices available for review.]

If you notice outdated information on the surviving account, correct it using **Save** before treating the account as the team's single source for that company. Keep the company name and key identifiers clear enough that future users can recognize the account without creating another duplicate.

Resolving Account Update and Merge Issues

When account information is unclear, pause and review the records rather than making a quick correction or merge. The key question is whether the records represent one company with duplicated details or separate companies with similar names.

1. If two accounts have similar **Account Name** values but different **Account Number**, **VAT ID Number**, addresses, or customer histories, do not merge them immediately.
2. Open both records and compare their **Account Type**, **Account Manager**, **Main Address**, **Billing Address**, **Phone**, **Email**, and visible **Activities**.
3. If you confirm that the records are the same company but the intended primary account is incomplete, update the primary account first. Click **Save** before continuing with the merge workflow.

4. If expected customer history is not visible after a merge, reopen the surviving account and review its **Activities**, comments, and **Account Invoices**.
5. Confirm that the account selected as primary was the record intended to remain. Review the account details again to ensure the correct duplicate was combined.
6. If a duplicate-looking account represents a different company, leave it separate and maintain its details independently.

Do not use **Account Name** alone to resolve uncertainty. A company may use a shortened trading name, a different spelling, or a related name while still being a separate account. Likewise, different addresses may be valid when a company has distinct locations, so compare all available identifiers and the customer history before deciding.

If the history you expected is not available from the surviving account, avoid creating a replacement account to compensate. First verify the merged account, its identifying details, and the duplicate account you selected during the merge. Maintaining one accurate record is preferable to creating additional accounts that could split history again.

Use **Save and Close** only after the remaining account clearly represents the company and includes the current information your team needs.

Overview

Company accounts in Pams provide the shared company record used by teams working across client, principal, and sub-supplier relationships. Keeping account information accurate helps colleagues identify the correct company when they create or review sales, purchasing, project, and financial work.

A well-maintained account record brings together core company details, including:

- **Account Name**, **Account Number**, and **Account Type**
- **VAT ID Number**, **Website**, **Phone**, and **Email**
- **Main Address** and **Billing Address** details
- The assigned **Account Manager**
- Connected **Activities**, comments, and **Account Invoices**

Use normal updates when the company itself has changed details, such as a new address or phone number. This preserves the existing account and its customer history. Use a duplicate-account merge only when two account records genuinely represent the same company and should be maintained as one record.

The most important outcome is a single, accurate company account that your team can rely on. Before merging, compare company identifiers and review the history connected to both records. After merging, verify that the surviving record contains the right company details and that the customer history remains available.

[SCREENSHOT: A complete company account record showing company details, addresses, Account Manager, Activities, comments, and Account Invoices.]

Keeping accounts distinct when they represent different companies is equally important. Separate accounts make it possible to maintain separate customer histories, assignments, addresses, and financial records without confusion.

Prerequisites

Before updating or merging company accounts, make sure you have reviewed the relevant account records in **Contacts > Accounts**. The information below helps you decide whether you should update one record or combine duplicates.

- Have the company details needed to identify the account correctly, such as **Account Name**, **Account Number**, **VAT ID Number**, address, **Phone**, **Email**, or **Website**.
- Review the account's **Account Type** and **Account Manager** so you understand how the company is currently classified and managed.
- Check the account's **Main Address** and **Billing Address** details before changing company information.
- Review visible **Activities**, account comments, and **Account Invoices** before merging. These items help you understand the customer history already associated with each account.
- When reviewing potential duplicates, identify which account contains the most complete and current company information. This should normally be the primary account that remains after a merge.
- Do not merge records simply because their names are alike. Confirm that the records represent the same company by comparing available identifiers and customer history.
- If you cannot determine whether two accounts are the same company, keep them separate until the company details are clear.

For routine corrections, update the existing account and click **Save**. This keeps customer history connected to the company record your team already uses. For confirmed duplicates, review both records fully, select the correct primary account, complete the merge, and then reopen the surviving account to verify its details and shared history.

After company accounts are accurate and duplicates are resolved, continue with Managing Contact Relationships to maintain the people and relationship details connected to each company account.