Managing Company Branches

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Confirming Access Before Managing Branches

Company branches are maintained by users with administration access. Before you begin, sign in to Pams with the account your organization uses to manage company configuration. If you can open **Configuration** and see **Branches** or **View Branches**, you can continue. If these options are not available, the account you are using does not have access to manage branch information.

Branch settings are part of your company configuration. Make sure the main company details have already been reviewed in Configuring Company Settings, especially where your organization uses shared contact details or branding across Pams.

Collect the branch information before opening the branch form. Having the details ready helps you enter a complete, recognizable branch record and avoids confusion when users select branches later.

Prepare the following details:

Detail	Why it matters
Branch name	Identifies the branch in the **Branches** list and throughout Pams.
Branch code or reference	Helps users distinguish branches with similar names.
Business address	Records the branch’s physical business location.
Contact details	Keeps the branch phone, email, and other available contact fields current.
Logo image	Gives the branch its own visual identity where Pams displays the branch logo.

Use a clear logo image that remains easy to recognize at a small size. Before uploading it, open the image on your computer and confirm that the company or branch name, symbol, and colors are visible. Avoid images that are blurred, heavily cropped, or contain unnecessary empty space around the logo.

[SCREENSHOT: Configuration area showing the Branches or View Branches option]

Viewing and Selecting Existing Branches

1. In Pams, open **Configuration** and select **Branches** or **View Branches**. The **Branches** list displays the company branches available to you.
2. Review the entries in the list before changing anything. Look for branch names that are similar, incomplete, or no longer match the branch’s current business identity. Use the branch code or reference, where shown, to tell branches apart when several locations have related names.
3. Select a branch from the **Branches** list to open its details. Review the information currently saved for that branch, including its name, branch code or reference, address, contact details, and logo or image. This review helps you decide whether the branch needs an update or whether a separate branch should be created.
4. Check whether the branch is shown as active in the list or in its details. Focus your updates on the branch that users should be able to identify and use in their daily work. If the list includes older branch entries, compare the names and identifiers carefully before editing so you do not change the wrong location.
5. If your Pams workspace provides a branch-selection control, confirm the current branch before making changes. The selected branch context can affect which branch information you are viewing. Compare the branch name shown in the selection control with the branch record you opened.
6. Return to the **Branches** list after reviewing a record. This makes it easier to compare the branch against the other available entries before you create a new branch or update an existing one.

[SCREENSHOT: Branches list with multiple branch names and one selected branch record]

Creating a New Company Branch

1. Open **Configuration > Branches** or **Configuration > View Branches**. Review the existing list first to make sure the branch has not already been added under a different name or reference.
2. Select the action in the **Branches** list used to add a branch. Pams opens a branch form where you can enter the new branch’s identity and contact information.
3. Enter the branch name. Use the name that users should recognize when working with branches in Pams. Choose a clear name that distinguishes this location from

the company’s other branches.

4. Enter the branch code or reference used by your organization. Keep this identifier recognizable and consistent with the way your team distinguishes branches in internal work. When branch names are alike, the code or reference gives users another way to identify the correct branch.
5. Complete the available address fields for the branch’s business location. Enter the street, city, country, state, postal code, and other address information shown on the form where applicable. Use the branch’s current business address rather than a general company address unless they are the same.
6. Complete the available contact fields, such as **Phone**, **Email**, and any other branch contact information displayed on the form. These details should represent the branch itself.
7. Add the branch logo if it is ready. You can also save the branch first and return later to upload or replace the image.
8. Click **Save**. Return to the **Branches** list and confirm that the new branch appears with the expected name and branch code or reference.

[SCREENSHOT: New Branch form showing branch name, branch reference, address, contact fields, logo area, and Save]

Updating a Branch’s Identity and Contact Details

1. Open **Configuration > Branches** or **Configuration > View Branches**, then locate the branch you need to update. Check both the branch name and branch code or reference before opening it, particularly when your company has several branches with similar names.
2. Select the branch from the **Branches** list to open its details. Review the existing information before editing. This lets you compare the saved name, address, and contact details with the information you intend to use.
3. Update the branch name when the branch’s public or operational name has changed. Keep the name clear enough for users to recognize in the **Branches** list. If the branch is commonly known by a shortened name, use the naming format your organization already uses for other branches.
4. Review the branch code or reference. Preserve a recognizable identifier so users can continue to distinguish the branch from other locations. Change it only when the branch’s reference has been formally updated.

5. Edit the available address information. Check each displayed field, including street, city, country, state, postal code, and destination information where Pams provides it. Enter the branch’s current business location consistently across the available address fields.

6. Update the displayed contact details, such as **Phone**, **Email**, and other available contact fields. Remove outdated information rather than leaving old contact details beside current ones.

7. Click **Save** after completing your changes. Reopen the branch record or refresh the details to confirm that Pams displays the updated values correctly.

8. Return to the **Branches** list and verify that the branch remains easy to identify by its updated name and branch code or reference.

[SCREENSHOT: Existing Branch details screen with editable identity, address, and contact fields]

Adding and Replacing a Branch Logo

1. Open **Configuration > Branches** or **Configuration > View Branches**, then select the branch whose branding you want to change. Confirm the branch name and branch code or reference before uploading an image.

2. Locate the logo or image area on the branch form. This area displays the current branch image when one has already been saved.

3. Select the upload option and choose the logo image file you prepared. Wait for the image preview to appear on the branch form. Use the preview to confirm that the correct logo was selected and that it is clear enough to recognize at the displayed size.

4. Check the image before saving. Make sure it belongs to the selected branch, not the main company or another branch. If the preview is incorrect, choose the upload option again and select the correct image.

5. Click **Save** to store the branch logo. Reopen the branch record after saving and confirm that the image preview is still displayed.

6. To replace an existing branch logo, return to the same logo or image area and upload the new image. Confirm that the preview changes to the replacement logo before you click **Save**. The newly selected image should be visible in the branch record after saving.

7. If the branch form provides an option to remove or clear the logo, use that option only when the branch should no longer have a separate visual identity. Save the branch record after clearing the image and confirm that the previous logo no longer appears in the preview.

[SCREENSHOT: Branch form showing the logo upload area with a visible image preview]

Verifying Branch Details and Branding

1. Return to **Branches** or **View Branches** after creating or editing a branch. Confirm that the branch name and branch code or reference are visible in the list and clearly distinguish the branch from the other company branches.

2. Open the branch again from the **Branches** list. Review the saved branch name, identifier, business address, and contact details field by field. Compare the information with the details you collected before starting, paying particular attention to similar branch names, shared addresses, and old contact information.

3. Check the logo or image preview on the branch form. Confirm that the displayed image belongs to the intended branch and is not an earlier version, another branch’s image, or the main company logo when a separate branch logo is required.

4. If Pams provides a branch-selection control in your workspace, select or view the intended branch context and confirm that it matches the branch record you reviewed. This helps prevent confusion when you work with several branches.

5. If a change does not appear, reopen or refresh the branch record and confirm that you clicked **Save** after making the change. Then return to the **Branches** list and select the record again. Check that you are viewing the intended branch rather than a different branch with a similar name.

6. Correct any incomplete or outdated information directly in the branch form, then click **Save** again. Repeat the review until the branch’s name, code or reference, contact details, address, and logo accurately represent that location.

[SCREENSHOT: Completed Branch record showing saved identity details, contact information, and branch logo]

Overview

Company branches let your organization maintain separate branch identities in Pams while keeping branch information clear for users who work across locations. Each entry in **Branches** represents one branch and can include its own name, branch code or reference, business address, contact details, and logo or image.

The branch name is the most visible way users identify a location in the **Branches** list. A consistent branch code or reference gives users an additional way to tell locations apart, especially when branches have similar names or operate in the same city or region. Enter both values carefully so users can select and recognize the correct branch without relying on informal naming.

Branch address and contact information should describe the individual branch, not simply repeat general company details unless that branch uses the same information. Keeping these fields current makes the branch record a reliable source of the business identity that your team expects to find in Pams.

A branch logo provides a separate visual identity for a location when Pams displays branch branding. The image preview in the branch form is the immediate place to confirm that the correct logo has been uploaded. Use a clear image and replace it when the branch's approved branding changes.

Branch management is different from maintaining company-wide settings. Company-level information is covered in Configuring Company Settings. Use the **Branches** list when you need to create, identify, review, or update individual company locations.

The information you enter here should remain easy to understand for every user who sees branch names, identifiers, contact details, and logos in Pams. Clear branch records reduce the risk of selecting or updating the wrong location.

Prerequisites

Before creating or updating a branch, make sure you have access to **Configuration** and can open **Branches** or **View Branches**. Branch management is restricted to users with administration access, so you must use an account that is permitted to maintain company configuration.

Have the branch details available before you open the form. Verify the information with the business team responsible for that location rather than relying on an old list or an outdated document. The branch record should reflect the current operational identity used by your organization.

Prepare these items:

- The approved branch name to display in Pams.
- The branch code or reference your organization uses to identify the location.
- The branch business address, including the available street, city, country, state, postal code, and destination details.
- Current branch contact information for the available **Phone**, **Email**, and other contact fields.
- A clear branch logo image if the branch needs separate branding.

Review the existing **Branches** list before adding a new entry. This is important when a branch may already exist under a shortened name, an earlier name, or a similar code or reference. Updating an existing entry keeps the branch list clear and avoids duplicate locations.

If you are replacing a logo, keep the approved replacement image ready before opening the branch form. Check that it belongs to the correct branch and that it remains recognizable in the image preview.

After branch identities are in place, continue with Managing Reference Data to maintain the shared lists and values used across Pams.