Managing Contact Relationships

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Identify the Contact Roles You Need to Maintain

In Pams, a shared contact represents a person or organization you need to use consistently across customer sales, Principal Relationship Management, and purchasing work. Before you create or change a relationship, decide which commercial role that contact performs. This prevents the same person or organization from being entered several times under slightly different names.

Pams distinguishes these three roles:

Relationship role	Pams label you may see	Use the relationship when the contact is involved in
Customer	**Client** or **Is Client**	Customer inquiries, offers, Sales Jobs, Orders, Delivery Notes, AR Invoices, and incoming Payments
Principal	**Principal** or **Is Principal**	Work connected to a represented Principal, including offers, orders, Principal Invoices, commissions, and Principal Payments
Supplier	**Sub-supplier** or **Is Sub-supplier**	Purchasing and procurement work, including RFQs, Purchase Jobs, POs, goods receipt, and AP Invoices

Use one shared contact whenever the same party appears across connected work. For example, the person who receives an Offer may also be the person you contact during delivery coordination or payment follow-up. Select the same shared contact instead of creating a separate copy for each Sales Job, Invoice, or Payment.

A single organization may legitimately have more than one relationship. A company can be a **Client** for one sales Sales Job and a **Sub-supplier** for a different purchasing activity. A represented manufacturer may be a **Principal** and may also take part in supply-related work. In these cases, maintain each required relationship deliberately.

The relationship role is important because it identifies how the contact is used in commercial work. It does not replace the company account itself. Maintain company details through Managing Company Accounts, then use **Contacts** to keep the people and relationship roles connected to that company work.

[SCREENSHOT: Contact details showing the Client, Principal, and Sub-supplier relationship labels]

Review Shared Contacts Before Creating Relationships

1. Open **Contacts** in Pams. This is the shared area for contact information used by customer, Principal, and Sub-supplier relationships.
2. Use the available search to look for the person or organization before creating anything new. Search using the information you have available, such as **Contact Name**, **Full Name**, **Email**, **Phone**, or **Mobile**. Check close name matches carefully, especially when companies use abbreviations or when a contact's name may be written in more than one format.
3. Open the matching contact and review the details already maintained. Check the displayed relationship information for **Client**, **Principal**, and **Sub-supplier**. Also review identifying information such as **Position**, **Department**, **Email**, and **Mobile** where those details are available. This helps you confirm that you are looking at the right person rather than another contact with a similar name.
4. Compare the contact with the commercial work where you need to use it. Confirm whether the contact is already connected to the relevant **Client**, **Principal**, or **Sub-supplier** relationship. If the correct relationship already exists, use that shared contact rather than adding another version of the same party.
5. If you find more than one possible match, identify which contact is already used by the related Sales Jobs, purchasing work, or financial documents. Retaining the contact already connected to ongoing commercial work keeps communication history and relationship information together.

Reviewing first is especially important when a team shares customer and Principal information. A duplicate contact can cause different people to select different entries for the same party, making follow-up and commercial coordination harder.

[SCREENSHOT: Contacts screen with search results and an existing contact opened for review]

Add Customer, Principal, and Supplier Relationships

1. In **Contacts**, open the shared contact you want to use. If the contact does not yet exist, create the contact entry and enter the available identification details, such as **Contact Name** or **Full Name**, **Email**, **Phone**, **Mobile**, **Position**, and **Department**.

Use the name and contact details that your team recognizes in day-to-day commercial communication.

2. Select the relationship role required for the contact. Use the role shown in Pams:
    - Select **Client** or **Is Client** for a customer relationship.
    - Select **Principal** or **Is Principal** for a represented Principal relationship.
    - Select **Sub-supplier** or **Is Sub-supplier** for a supplier relationship.
3. Add every role that genuinely applies. Do not create separate contact entries just because the same organization has more than one commercial role. For example, if one organization is involved as both a **Principal** and a **Sub-supplier**, maintain those two relationships on the same shared contact where Pams allows both roles.
4. Check the relationship selections before saving. Make sure you have not marked a contact as a **Principal** when the person actually represents a **Client**, or as a **Sub-supplier** when the relationship belongs to a customer account.
5. Click **Save** to keep the relationship available for future commercial work. Use **Save and Close** when you have finished maintaining the contact and want to return to the Contacts list.

A clear relationship setup means colleagues can select the same customer, Principal, or Sub-supplier contact throughout connected work. This is particularly useful when an Sales Job moves from an Inquiry and Offer into a Orders, delivery, invoicing, or payment follow-up.

[SCREENSHOT: Contact form with Client, Principal, and Sub-supplier role selections highlighted]

Connect Shared Contacts to Commercial Work

1. Open the commercial work where you need to identify the people or organizations involved. Depending on the work you are handling, this may be a **Sales Job**, an **Offer**, a **Orders**, an **RFQ**, a **Purchase Job**, a **PO**, an **Invoice**, or a **Payment**.
2. Find the relationship field shown on that form. Look for the relevant Pams label, such as **Client**, **Principal**, or **Sub-supplier**. Select the party that matches the commercial role in the work you are completing.
3. For customer sales work, choose the shared **Client** contact or relationship that represents the customer side of the deal. Confirm that it is the intended customer

before you continue with commercial details such as pricing, delivery dates, invoicing, or payment information.

4. Where the work involves a represented manufacturer, select the appropriate shared **Principal** relationship. This is important for work that later contributes to Principal sales results, Principal Invoices, Principal Payments, or Commission Invoices.

5. For procurement work, select the correct shared **Sub-supplier** relationship. Use the same relationship consistently when working through RFQs, Offers, POs, receiving, and AP Invoice activities related to that supplier.

6. Before you click **Save**, read the selected names again. Check that each name comes from the shared contact you reviewed in **Contacts**, rather than a similarly named duplicate. If the commercial form includes more than one party, confirm each role separately; the **Client**, **Principal**, and **Sub-supplier** must each point to the intended relationship.

Selecting shared contacts at the commercial-work level helps sales, purchasing, and finance teams work from the same relationship information throughout the process.

[SCREENSHOT: Commercial work form showing Client, Principal, and Sub-supplier selections]

Keep Contact Relationships Current Across Connected Work

1. Return to **Contacts** when a customer, Principal, or Sub-supplier relationship changes. Update the shared contact rather than creating a new entry merely because a person changes department, position, email address, phone number, or role in the commercial relationship.

2. Review the contact's current relationship selections. Check whether **Client**, **Principal**, or **Sub-supplier** still accurately describes how the person or organization participates in your work. If a new role is required, add that role before using the contact in new commercial work.

3. Check the connected work that is still active. Review relevant **Sales Jobs**, **Offers**, **Orders**, **RFQs**, **POs**, **Invoices**, or **Payments** to understand where the relationship is being used. Focus first on work that is ongoing, awaiting action, or due soon.

4. Use the same shared contact again for recurring relationships. For example, when the same customer contact appears in several Sales Jobs, select that existing

Client relationship each time. When a Principal contact is involved in multiple deals, use the existing **Principal** relationship for those deals.

5. Save any relationship updates with **Save**. If you update information while reviewing a specific contact and are finished, select **Save and Close**.

Take extra care when an organization changes role. A former **Sub-supplier** may become a **Client**, or an organization may participate as both a **Principal** and a **Sub-supplier**. Review each active commercial relationship rather than assuming that one role change applies correctly to every Sales Job or purchasing activity.

Keeping shared relationships current gives your team one dependable source for customer, Principal, and supplier contact information while connected commercial work continues.

[SCREENSHOT: Shared contact showing multiple active relationship roles]

Resolve Missing, Duplicate, and Incorrect Contact Relationships

1. If you cannot select a customer, Principal, or supplier in commercial work, open **Contacts** and search for the shared contact first. If the contact exists but is not available for the relationship you need, check whether the appropriate role is selected: **Client**, **Principal**, or **Sub-supplier**.

2. If the shared contact is missing the required role, update the relationship selection and click **Save**. Return to the commercial work and select the contact again. Do not create another contact entry before checking whether the existing one can be used.

3. If more than one contact appears to represent the same party, identify the entry already used in connected commercial work. Compare **Contact Name**, **Full Name**, **Email**, **Phone**, **Mobile**, **Position**, and the current relationship roles. Use the established shared contact for new work whenever it is the correct party.

4. If the wrong party is selected on a Sales Job, Offer, PO, Invoice, or other commercial form, open that work and replace the incorrect **Client**, **Principal**, or **Sub-supplier** selection with the correct shared contact. Click **Save** after confirming the replacement.

5. When a role change affects active work, review every related commercial item. For example, if a party is no longer the correct **Sub-supplier** for an RFQ or PO, check

the related purchasing work. If a Principal relationship changes, check deals, Principal Invoices, and Principal Payments that use that relationship.

6. If you are unsure which duplicate is correct, avoid adding a third contact entry. Use the contact already connected to the most relevant ongoing commercial work, then verify its relationship labels and identifying details before making changes.

Resolving issues at the shared contact level reduces disconnected customer, Principal, and supplier information across Pams.

[SCREENSHOT: Duplicate contact search results with one established shared contact selected]

Overview

Contact relationships in Pams keep the people and organizations involved in commercial work connected through a shared **Contacts** area. Instead of maintaining separate customer, Principal, and supplier details on every Sales Job, Offer, PO, Invoice, or Payment, your team can select the same established contact relationship where it is needed.

The core relationship labels are **Client**, **Principal**, and **Sub-supplier**:

- Use **Client** for customer-facing sales work, including inquiries, offers, Orders, Delivery Notes, AR Invoices, and incoming Payments.
- Use **Principal** for represented manufacturers and other Principal Relationship Management work connected to sales results, commissions, Principal Invoices, and Principal Payments.
- Use **Sub-supplier** for supplier and purchasing work, including RFQs, Purchase Jobs, POs, goods receipt, and AP Invoices.

A contact can have more than one of these roles when the same organization participates in more than one part of your operation. For example, a hybrid business may work with one company as a **Principal** in one deal and as a **Sub-supplier** in another. Maintain the roles that reflect the actual commercial relationship, then select the correct one in the relevant work.

The most reliable approach is to search **Contacts** before creating a new entry, review existing relationship assignments, and reuse the established contact wherever possible. This keeps customer communication, Principal coordination, and supplier follow-up aligned across sales, purchasing, delivery, invoicing, and payment workflows.

[SCREENSHOT: Relationship flow from Contacts to sales, Principal, and purchasing work]

Prerequisites

Before you maintain contact relationships in Pams, have the following information available:

- The contact's correct **Contact Name** or **Full Name**. If possible, also have the person's **Email**, **Phone**, **Mobile**, **Position**, and **Department** so you can distinguish them from similar contacts in the shared **Contacts** list.
- A clear decision about the commercial role the contact needs. Identify whether the contact is a **Client**, **Principal**, **Sub-supplier**, or more than one of these. Base this on the person or organization's actual involvement in customer sales, Principal work, or purchasing work.
- The related company information. If you need to confirm the company before setting up the contact relationship, review Managing Company Accounts. Keep company account maintenance separate from the contact's **Client**, **Principal**, and **Sub-supplier** relationship selections.
- The commercial work where the relationship will be used. This may include a **Sales Job**, **Offer**, **Orders**, **RFQ**, **Purchase Job**, **PO**, **Invoice**, or **Payment**. Knowing where the contact will be selected helps you verify the correct role before saving it.
- Enough detail to recognize duplicates. Check whether an existing contact has the same name, email address, phone number, company relationship, or commercial role before creating another entry.

Use **Contacts** as the starting point whenever you need to add, confirm, or correct a shared relationship. After the correct customer, Principal, and supplier relationships are available, continue with Managing Product Records to maintain the products connected to your commercial work.