Managing Files And Documents

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Find Documents Attached to an Operational Record

Documents in Pams are attached to the business record they support. For example, an order confirmation belongs on the related **Orders**, a delivery document belongs on the related **Delivery Note** or **Shipping Order**, and a Offers or supporting file belongs on the related **Sales Job**, **Offer**, or **RFQ**. Start from the record rather than searching for the file separately.

1. Open the relevant record in Pams. This may be a **Orders**, **Delivery Note**, **Invoice**, **Payment**, **Task**, **Activity**, **Project**, **MRQ**, or purchasing record.
2. Look for the record's attachment area. Pams displays attached files together on the current record, commonly under an **Attachment** area or attachment control. Each listed item represents a document connected to that specific record.
3. Review the file names in the attachment list. Use the name and any displayed details to distinguish between files such as commercial offers, order confirmations, invoices, delivery notes, inspection documents, or other supporting evidence.
4. Select the document you need from the list. Before choosing an action, confirm that the file name matches the document you intend to review, export, or remove.

[SCREENSHOT: A Orders showing the Attachment area with several files listed and actions available beside each file.]

Keep the record context in mind while working with attachments. For example, a file attached to a **Orders** is available from that Orders; it is not automatically the attachment for a related **Invoice**, **Delivery Note**, or **Payment**.

If you reached a record while reviewing business results, use the record name, **Order Number**, **Invoice Number**, **Sales Job Number**, or other displayed reference to confirm that you have opened the correct item. For help using reporting views to identify records that need attention, see Using Dashboards and Reports.

Open and Review an Attached Document

Opening an attachment lets you review its contents without changing the current record or the attached file. This is useful when you need to check an order confirmation before a delivery, review an invoice before recording a payment, or verify a document attached to a **Task** or **Activity**.

1. Open the business record that contains the document. Confirm the record reference, such as the **Sales Job Number**, **Order Number**, **Invoice Number**, or **Payment Number**, before opening a file.
2. Find the file in the record's attachment list. Read the file name carefully, especially when several documents have similar names or relate to different revisions of an offer, order, or delivery.
3. Select the file name or choose the available **Open** action beside the file. Pams opens supported documents using the document viewer or your browser's normal file-opening behavior.
4. Review the document and return to the original Pams record when you are finished. Opening a file does not update the attachment, change its name, or alter the Orders, Invoice, Delivery Note, or other record where it is attached.

Some files may open in a separate browser tab or in an application on your device. In that case, keep the original Pams tab open so you can return to the attachment list after reviewing the file.

[SCREENSHOT: An attachment list on a Delivery Note with the selected document ready to open.]

If the document is part of a commercial workflow, compare what you see in the file with the relevant record details. For instance, review an attached delivery document alongside the **Delivery Date**, **Delivery Destination**, or **Items** shown on the **Delivery Note**. For an invoice attachment, compare the document with the **Invoice Amount**, **Client**, and **Due Date** shown on the **Invoice** record.

Export a Document to Your Device

Exporting, or downloading, creates a copy of an attached document on your device. Use this when you need to provide an order confirmation to a client, share a delivery document with a carrier, review an invoice outside Pams, or keep a permitted working copy for an operational task.

1. Open the record that contains the required attachment. Check the record reference first so you do not export a document from the wrong **Orders**, **Purchase**

Order, **Invoice**, **Shipping Order**, or **Project**.

2. Locate the document in the attachment list. Confirm the file name and any displayed attachment details before exporting it.
3. Choose the available **Export** or **Download** action for that file. The action applies to the selected attachment, not to the complete record.
4. Use your browser’s download prompt, if one appears, to save the file. If no prompt appears, check the usual download location on your device.
5. Keep the original file name and its ending when saving the copy. A clear original name helps you recognize whether the file is an offer, order, invoice, delivery note, inspection document, or other business document later.
6. Open the downloaded copy to confirm that it was saved correctly and can be viewed before you share it outside Pams.

Do not rely only on the downloaded copy when checking current record information. The attachment remains connected to the Pams record, where related details such as **Status**, **Client**, **Principal**, **Delivery Date**, **Invoice Amount**, or **Payment Milestone** can be reviewed.

If your browser opens the document instead of downloading it, use the browser’s available download option to save a copy. Return to the original Pams record afterward to continue working with its attachments.

Add Documents to the Correct Record

Attach each document to the record where colleagues expect to find it. For example, add a customer-facing order document to the relevant **Orders**, a delivery document to the relevant **Delivery Note**, an inspection file to the related receiving or inspection record, and supporting correspondence to the related **Task**, **Activity**, or **Project**.

1. Open the record that should contain the document. Before uploading, verify the record reference and key details such as **Client**, **Principal**, **Project Name**, **Order Number**, or **Invoice Number**.
2. Go to the record’s attachment area and choose the available option to add an attachment or upload a document. Pams may allow you to select a file from your device using options such as **From PC** or to add a file using an available cloud option.

3. Select the document you want to attach. Choose the correct file before confirming the upload, particularly when you keep several versions of offers, invoices, delivery notes, or supporting documents.
4. Wait for the upload to finish, then check the attachment list on the current record. Confirm that the new file appears with the expected file name.
5. Open the uploaded file, if needed, to make sure it is the correct document and that it can be reviewed from the record.

[SCREENSHOT: The Attachment area on an Invoice showing the option to add a file from a device and the uploaded file in the list.]

Use clear, business-relevant file names before uploading. A name that identifies the document type and its purpose makes it easier for the sales, purchasing, warehouse, and finance teams to find the right document later. Avoid attaching an invoice to an unrelated Orders or a delivery document to an unrelated Project simply because the records have similar names.

Keep Record Attachments Accurate

The attachment list on a Pams record should remain a reliable source of documents for the current business activity. Before using a Orders, Delivery Note, Invoice, Project, or Task as a document source, review its attached files and make sure each one belongs to that record.

1. Open the record and review every file in its attachment list. Look for duplicate uploads, documents attached to the wrong record, outdated versions, or files whose names do not match the current order, invoice, delivery, or project.
2. Open or export a file when you need to confirm its contents. Do not decide that a file is outdated based only on a similar-looking file name.
3. If an attachment is no longer relevant or was added to the wrong record, select the available action to remove that attachment from the current record.
4. Confirm the file name before removing it. Removing an attachment affects access to that document from the current Orders, Invoice, Delivery Note, Task, or other open record.
5. Keep separate documents as separate attachments. For example, retain an order confirmation, a delivery document, an invoice, and supporting evidence as individual files rather than replacing one unrelated attachment with another.

Where a newer version is needed, upload the new document with a clear name that distinguishes it from the earlier file. This helps colleagues reviewing the record understand which attachment they need to open.

Use the business record to guide your decision. A document connected to receiving belongs with the related **Goods Receipt Note** or inspection work, while a document supporting payment belongs with the related **Invoice** or **Payment**. Accurate attachments help each team member see the documents relevant to their own stage of the workflow.

Resolve Problems Opening, Exporting, or Updating Documents

When an attachment does not behave as expected, begin by checking the current Pams record and the file you selected. Most issues can be narrowed down by confirming the record reference, file name, and available actions in the attachment area.

1. If a document does not open, select the available **Export** or **Download** action first. Then open the downloaded copy using an application on your device that supports that file’s name ending.
2. If the export or download does not begin, check your browser for a download prompt or a blocked-download notification. Then return to the attachment list and try the **Export** or **Download** action again for the selected file.
3. If you cannot add an attachment, confirm that you can edit the current record. A **Orders**, **Invoice**, **Task**, **Project**, or other record may be restricted by its current **Status** or by your access permissions.
4. If you cannot remove an attachment, check that you are working on the correct record and that its current status allows changes. Do not upload a replacement file until you have confirmed whether the original attachment can be accessed.
5. If an expected document is missing, verify the record reference. Check the **Order Number**, **Invoice Number**, **Sales Job Number**, **Project Name**, or other displayed identifier before assuming that the document was not uploaded.
6. If the file is attached to a different record, open that record and review its attachment list. Only attach a new copy to the current record when it is genuinely needed for that record’s workflow.

[SCREENSHOT: An attachment list with a file selected and the available Open, Export, and removal actions visible.]

When requesting help from a colleague, provide the affected record type and its displayed reference, along with the file name you expected to find. This gives the colleague enough information to check the correct Pams record without guessing.

Overview

Pams keeps operational documents with the business records they support. Instead of separating an order confirmation from its order, or a delivery document from its delivery, you can open the related **Orders**, **Delivery Note**, **Shipping Order**, **Invoice**, **Payment**, **Task**, **Activity**, **Project**, **MRQ**, or purchasing record and review its attachments there.

This approach keeps documents close to the information needed to use them. For example:

- A file on a **Orders** can be reviewed alongside the **Client**, **Order Date**, **Delivery Date**, **Items**, and **Total Order Price**.
- A file on an **Invoice** can be checked with the **Invoice Amount**, **Due Date**, **Client**, and payment-related details.
- A document on a **Delivery Note** can be reviewed with the **Delivery Destination**, **Carrier**, **Shipment Date**, and delivered **Items**.
- A file on a **Project** or **Task** remains available to users working on the related project activity or assigned work.

Use the attachment area on a record to perform four main actions:

Action	What you do
Review	Open a selected attachment and read its contents.
Export	Download a copy of the selected file to your device.
Add	Upload a file to the business record where it belongs.
Remove	Remove a file from the current record when it is incorrect or no longer relevant.

The attachment area does not replace the underlying record details. Always use the record’s displayed **Status**, reference number, dates, and parties to confirm that you are reviewing the correct order, delivery, invoice, or project.

For help using dashboard and reporting information to identify records requiring follow-up, see Using Dashboards and Reports.

Prerequisites

Before opening, exporting, adding, or removing an attachment in Pams, make sure you have the correct business record and the appropriate access to work with it.

- Sign in to Pams and open the relevant operational record. Use the visible reference, such as **Sales Job Number**, **Order Number**, **Invoice Number**, **Payment Number**, **MRQ Number**, or **Project Name**, to confirm that it is the right record.
- Know where the document belongs in the workflow. For example, attach an order confirmation to the related **Orders**, a delivery document to the related **Delivery Note** or **Shipping Order**, and an invoice document to the related **Invoice**.
- If you are adding a document, have the file available on your device before you open the record. Check its file name so you can identify it correctly in the upload selection window.
- Use a clear file name before attaching a document. This is especially important for documents that may have several versions, such as offers, purchase documents, delivery notes, invoices, and inspection documents.
- Confirm that the record is editable if you need to add or remove a file. The available attachment actions can depend on the record's current **Status** and your access permissions.
- If you only need to review or export a document, open the record and select the correct file from its attachment list. You do not need to change the record details to open or download an existing attachment.
- If you cannot find the expected file, confirm the record reference before uploading another copy. The document may already be attached to the related **Orders**, **Project**, **Invoice**, **Delivery Note**, or another connected operational record.