Managing Project Workflows

August 18, 2026

Set Up a Project Record for Operational Work

Use a Project record as the central place for work that involves a Client, internal coordination, purchasing, and delivery. A clear Project record helps everyone work from the same Project Name, dates, responsibilities, and operational status instead of tracking the work in separate notes or messages.

[SCREENSHOT: The All Projects screen with a Project record showing Project Name, Client, PM Responsible, Start Date, Expected Completion On, Description, and Status.]

1. Open **Projects Management** and select **All Projects**.
2. Start a new Project and enter the **Project Name**. Use a name that makes the work easy to identify in lists, such as the Client name and the job or order reference.
3. Select the **Client** connected with the Project. This is important when the Project supports a customer Orders, Delivery Note, or other customer-facing work.
4. Choose the **PM Responsible** person who will coordinate the Project. This person should be able to follow progress, review open Tasks, and coordinate with the sales, purchasing, and delivery teams.
5. Enter the **Start Date** and **Expected Completion On** date. These dates give the team a shared time frame for preparing materials, completing Tasks, and arranging delivery.
6. Add a useful **Description** and select the appropriate **Status**. Include the operational scope, such as the products, services, delivery requirements, or internal work the Project covers.

After saving the Project, assign the work to the right people through Project Tasks using **Assign To**. Use **Task Progress** to distinguish work that is **Not Started**, underway, awaiting review, or **Done (completed)**. When you create related Orders, MRQs, POs, or Delivery Notes, look for the **Project** selection and choose this Project so the records stay connected.

Plan and Track Project Tasks

Project Tasks turn the Project record into a practical work plan. Create a separate Task for each item that needs ownership, such as preparing a BOM, following up on an MRQ, confirming a delivery date, or reviewing received products. Keep each Task focused so its assignee can clearly see what must be completed.

[SCREENSHOT: A Project Task board showing tasks in Not Started and Done (completed) stages, with assignees and due dates.]

1. Open the Project in **All Projects** and add a **Task** for the required work.
2. Enter a clear **Title**. Include the action and the item or outcome, rather than using a broad title such as “Project follow-up.”
3. Use **Assign To** to select the person responsible for completing the Task. Set the **Due Date** so pending work is visible before it affects the Project’s expected completion date.
4. Select the appropriate **Priority** and add the working details in the **Description** or **Note**. Include relevant product details, quantities, delivery expectations, or dependencies on another Task, MRQ, PO, or Delivery Note.
5. Update **Task Progress** as the work moves forward. Use the Project Task board to move work from **Not Started** through your team’s working stages and finally to **Done (completed)**.
6. When the Project uses time-based operational tracking, record planned effort and actual time in the time-tracking fields available on the Task. Keep these entries current so the Project Manager can compare expected effort with work completed.

Use **Follow** to keep key stakeholders informed about a Task. Add a **Comment** or **Note** when decisions, updates, or delays need to be visible to the Project team. For work that must not be missed, create a **Task Reminder** and review it alongside other Tasks and Activities.

Link Project Work to Orders

Linking a Project to the relevant Orders makes it easier to distinguish customer-approved work from internal preparation. The Orders provides the commercial commitment from the Client, while the Project organizes the operational work needed to deliver that commitment.

[SCREENSHOT: A Orders showing the Client, Items, Order Number, and Project selection.]

1. Open the relevant **Orders** from the sales workflow. If the order has not yet been created, complete the customer order process first using Confirming Orders.
2. Check the **Client** on the Orders. It should match the **Client** selected on the Project. Correct the mismatch before linking the records so customer work is not associated with the wrong Project.
3. Select the applicable **Project** on the Orders. If the Project is selected from a related field or section, choose the Project Name created in **All Projects**.
4. Review the Orders **Items**, quantities, delivery requirements, and commercial notes. Use these details to create or update the Project Tasks needed for preparation, purchasing, inspection, or delivery.
5. For a Task that supports a particular customer commitment, include the **Orders** number or the relevant item in the Task **Title**, **Description**, or **Note**. This gives the assignee a clear reference when completing the work.
6. Keep internal work separate from customer-approved work. For example, use separate Tasks for internal planning, supplier follow-up, or documentation that is required to support the Orders but is not itself a customer deliverable.

When reviewing the Project, use the linked Orders information to trace completed Tasks back to the Client's order. This connection also helps sales and project teams discuss delivery readiness using the same Orders, Project, and Task details.

Coordinate Project Purchases and Supplier Work

Projects that require products, subcontracted services, or additional materials should use the purchasing workflow to keep supplier activity connected to the right operational work. Start with an **MRQ** when materials need to be requested, then continue through RFQs, supplier Offers, and POs as required.

[SCREENSHOT: An MRQ or PO showing the Project selection, Sub-supplier, Items, Quantity, and Status.]

1. Review the Project Tasks and identify the materials, products, or services needed to complete the work. Record each requirement clearly before sending it to purchasing.

2. Create an **MRQ** for required materials. Add the relevant **Items**, **Quantity**, required receiving date, and any description needed by the purchasing team. For detailed MRQ guidance, use Managing Material Requisitions.
3. Select the correct **Project** on the MRQ, RFQ, or **PO**. This link is essential for keeping Project purchases, supplier commitments, and received products associated with the same operational work.
4. When creating a PO, select the appropriate **Sub-supplier** and review the Items, quantities, delivery terms, and expected receiving information. In the **Note** or **Description**, reference the Project Task or Project requirement that the supplier's delivery supports.
5. Monitor the PO **Status** as it moves through **Draft**, approval, ordering, and receipt-related stages. Do not mark a dependent Project Task as **Done (completed)** while the required material or supplier deliverable is still outstanding.
6. Update the Task when the supplier confirms delivery, changes the expected receiving date, or supplies only part of the required quantity. Add a **Comment** or **Note** so the Project Manager and purchasing team can see why the Task remains open.

Use the connected Project, MRQ, RFQ, and PO records when reviewing procurement delays. This gives the Project team a direct view of which supplier actions may affect the Project's **Expected Completion On** date.

Coordinate Customer Deliveries from the Project

A Project reaches its customer-facing outcome when its required products, services, and supporting work are ready for delivery. Use the Orders and Delivery Note together with Project Tasks to make sure that the Client receives the correct Items at the correct destination and time.

[SCREENSHOT: A Delivery Note showing the Client, Project-linked Items, Quantity, Delivery Destination, Delivery Date, and delivery status.]

1. Open the linked **Orders** and review its **Items**, quantities, and delivery commitments. Confirm which products, services, or deliverables belong to the Project before arranging delivery.
2. Open or create the related **Delivery Note**. Select the same **Client** and **Project** used on the Orders so delivery information remains connected to the Project record.

3. Check each delivery detail carefully: the Items, **Quantity**, **Delivery Destination**, shipping or delivery address, and **Delivery Date**. Use the Orders as the source for customer-approved requirements.
4. Review the Project Tasks before the delivery is marked as delivered. Confirm that preparation, purchasing, assembly, inspection, or documentation Tasks needed for the delivery are **Done (completed)**.
5. If the delivery includes only part of the Orders, record the delivered quantities accurately and keep the remaining work visible in the relevant Tasks. Do not close the Project solely because a partial delivery has been completed.
6. Update the Delivery Note when products are shipped, delivered, or not yet delivered. Use the delivery status together with the Project's Tasks to show the current position to sales, warehouse, and Project teams.

When delivery status changes, review the Project **Expected Completion On** date and open Tasks. A delivered item may complete one Project requirement, while other Tasks—such as final documentation, installation support, or remaining quantities—may still need attention. For delivery-specific procedures, see Creating Delivery Notes.

Resolve Missing Links and Stalled Project Records

A Project workflow can stall when a related record is not connected correctly, a required Task remains open, or a product has not progressed through purchasing and delivery. Resolve the missing connection at the relevant Orders, MRQ, PO, or Delivery Note rather than relying only on a Task comment.

[SCREENSHOT: A Project record with open Tasks and related Orders, PO, and Delivery Note references being reviewed.]

1. If you cannot select a Project on a Orders, MRQ, PO, or Delivery Note, return to **All Projects** and check that the Project is active and saved. Also confirm that you have access to the Project and are working in the correct Project record.
2. If a Task does not show the expected Orders reference, open the Orders and verify that the correct **Project** is selected. Then update the Task **Title**, **Description**, or **Note** with the correct Orders number or customer item reference.
3. If purchasing activity is missing from the Project context, open the related MRQ or PO and confirm that it was assigned to the same **Project**. A record linked only to

the Client or Sub-supplier will not give the Project team a clear Project-level purchasing reference.

4. If a Project Task cannot move to **Done (completed)**, review its dependencies. Check whether the required PO is still awaiting progress, whether received products are available, or whether another Task must be completed first.
5. If a Delivery Note cannot be completed, compare its Items and quantities with the Orders, then review the Project's open Tasks and the delivery status. Confirm that the required products are ready and that the Delivery Destination and delivery date are correct.
6. Add a **Comment** or **Note** to the affected Task when a delay is identified. State what is pending—such as an MRQ, PO, received products, or delivery update—and assign follow-up work using **Assign To** and a **Due Date**.

Keeping these links accurate gives the Project Manager a reliable view of what is blocking progress and which team member needs to act.

Overview

In Pams, **Projects Management** brings together the operational work that supports a Client commitment. A Project record gives the team one place to record the **Project Name**, **Client**, **PM Responsible**, **Start Date**, **Expected Completion On**, **Status**, and working description. The Project then becomes the shared reference used when sales, purchasing, and delivery activities relate to the same job.

Project Tasks provide the day-to-day control. Each Task can have a **Title**, **Assign To** person, **Due Date**, **Priority**, **Description**, **Note**, and **Task Progress**. The Project team can use **Not Started** and **Done (completed)**, along with its own working stages, to identify work that is waiting, in progress, or complete. **Follow**, **Comments**, and **Task Reminders** help keep the right people aware of pending actions.

The Project workflow connects to customer and supplier records at key points:

- A **Orders** identifies the Client commitment and the approved Items that the Project must support.
- An **MRQ**, **RFQ**, or **PO** records the materials, products, or services required from a Sub-supplier.
- A **Delivery Note** records the Items, Quantity, Delivery Destination, and Delivery Date for customer delivery.

- Project Tasks show whether the preparation, purchasing, inspection, or coordination work is complete before delivery proceeds.

Use a Project when work crosses more than one team or requires close coordination between sales, purchasing, warehouse, and delivery activities. Keep the Project reference consistent across connected records so that open work, purchase commitments, and customer deliveries can be reviewed together.

Prerequisites

Before starting Project work in Pams, make sure the records and information required for the Project are available. A Project can be created early in the process, but linking it to the correct Client, Orders, purchasing records, and delivery records depends on using the same information consistently.

Prepare the following before creating or coordinating a Project:

- Access to **Projects Management** and **All Projects**. You need to be able to create or open the Project and update its Tasks.
- A saved **Client** record when the Project supports customer work. The Client selected on the Project should match the Client on the related **Orders** and **Delivery Note**.
- A named **PM Responsible** person who can coordinate the Project and follow up on outstanding Tasks.
- A realistic **Start Date** and **Expected Completion On** date. Use dates that reflect purchasing lead time, product availability, inspection requirements, and delivery commitments.
- Clear operational requirements, including the expected Items, quantities, supplier needs, delivery destination, and any documents or activities required before delivery.
- A related **Orders** when the Project is based on a confirmed customer commitment. If the order is still being prepared, keep the Project Tasks focused on the work that can proceed before order confirmation.
- Product and supplier information when purchasing is required. This supports the MRQ, RFQ, and PO workflow.
- Team members who can be selected through **Assign To** for Project Tasks, purchasing follow-up, and delivery coordination.

For Projects that require materials or purchased components, continue with Managing Bills of Material to define the BOM before raising MRQs and POs.