PAMS V2

Account Managers

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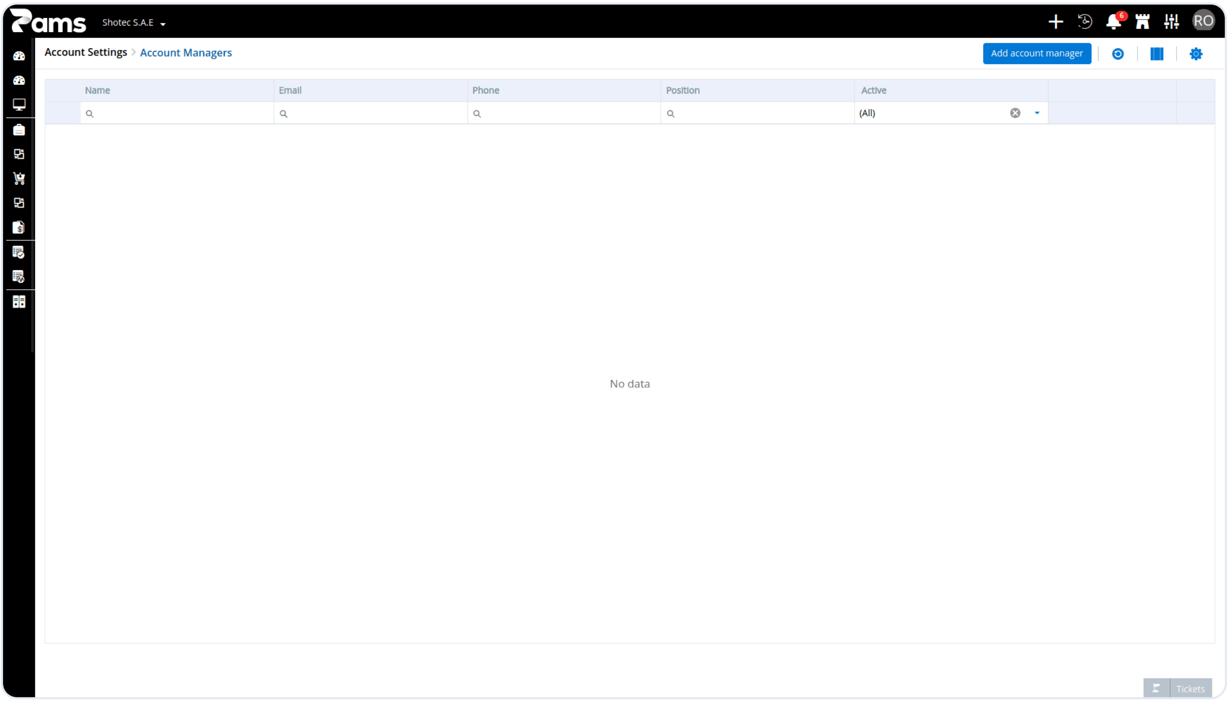
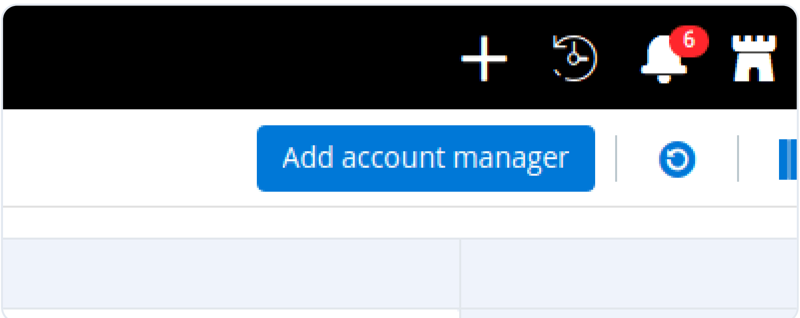
Account Managers

Applications › Configurations › Account Managers



Account Managers — Configurations › Account Managers



Overview

Use **Account Managers** to maintain the account-manager records displayed in the configuration list. Sales representatives, project managers, and finance users can review the available records, while authorized users can add, update, or delete them as required. Use this page when account-manager information must be created, corrected, or removed.

The list displays the available records with the columns **Name**, **Email**, **Phone**, **Position**, and **Active**.

Settings

Before maintaining records, open **Configurations > Account Managers**. The page includes sign-in fields and layout controls that affect how you access and view the Account Managers page.

Setting or control	Purpose
Enter User Name	Enter the user name requested by the page.
Enter Password	Enter the password requested by the page.
Login	Submit the entered user name and password.
Layout name	Enter a name for a layout.
Add Layout	Add a layout using the entered layout name.
Update Current	Update the currently selected layout.
Delete Current	Delete the currently selected layout.
Columns Chooser	Select the columns to display in the account-manager list.
Layout icon (icn icn-layoout)	Open the available layout-related controls.

> **Note:** Use a clear, recognizable value in **Layout name** so that the layout can be identified later when it is updated or deleted.

To adjust the list view:

1. Select **Layout icon (icn icn-layoout)** and enter a value in **Layout name** when you need to create a new layout.
2. Choose the appropriate action:
    - Select **Add Layout** to add the named layout.
    - Select **Update Current** to change the currently selected layout.

- Select **Delete Current** to remove the currently selected layout.

3. Select **Columns Chooser** to choose which available list columns you need to review, such as **Name**, **Email**, **Phone**, **Position**, and **Active**.

> **Tip:** Keep only the columns needed for your daily review. A focused list makes it easier to identify the correct account-manager record before updating or deleting it.

Workflow

1. Access the Account Managers list

1. Navigate to **Configurations > Account Managers**.
2. If the page requires sign-in information, enter **Enter User Name** and **Enter Password**, then select **Login**.
3. Review the account-manager list. Use the visible **Name**, **Email**, **Phone**, **Position**, and **Active** columns to identify the record you need.
4. When you need to narrow the displayed records, select **Filter icon (icn-filter)**. Use the available filter controls to focus the list before making a change.

2. Decide whether to create a new account manager or maintain an existing one

When the required person is not already displayed in the list, create a new record. When the person already exists, update that record instead of creating a duplicate.

1. To create a record, select **Add account manager**.
2. Complete the account-manager information presented by the page.
3. Select **Save** to keep the new record.
4. Select **Cancel** if you decide not to create the record. This leaves the record uncreated.

> **Warning:** Check the existing list before selecting **Add account manager**. Creating a new record when an existing record only needs correction can result in duplicate account-manager entries.

3. Decide whether to save changes or discard them

When you are editing or adding information, review the entered values before saving.

1. Select **Save** when the information is correct and you want to retain the change.
2. Select **Cancel** when you do not want to retain the current entry or edit.

The available actions do not provide a separate approval or status progression. A record remains available in the Account Managers list after it is saved, unless it is later deleted.

4. Decide whether an existing record needs to be updated or deleted

Use an update when details require correction. Use deletion only when the record should no longer remain in the list.

1. Locate the required account-manager record using the list columns or **Filter icon (icn-filter)**.
2. Select **Update icon (icn-update)** to update the selected record.
3. Review and amend the information shown by the page, then select **Save** to retain the changes. Select **Cancel** to discard the current edit.
4. Select **Delete** when the selected record must be removed from the Account Managers list.

Examples

A sales team needs to add a new account manager, Maria Bennett, so that her details can be maintained in the Account Managers list.

1. The sales representative opens **Configurations > Account Managers** and checks the **Name** and **Email** columns to confirm that Maria Bennett is not already listed.
2. The representative selects **Add account manager**.
3. The representative completes the account-manager information displayed by the page, including Maria Bennett’s name, business email address, phone number, and position.
4. The representative selects **Save**. Maria’s record is retained in the list and can be identified through the **Name**, **Email**, **Phone**, **Position**, and **Active** columns.

5. Later, Maria’s phone number changes. The representative filters or locates Maria’s record, selects **Update icon (icn-update)**, changes the displayed phone information, and selects **Save**.
6. If the record had been opened by mistake, the representative would select **Cancel** instead of **Save**, leaving the existing information unchanged.

Tips

> **Tip:** Use **Filter icon (icn-filter)** before updating or deleting a record when the list contains several account managers with similar names.

> **Note:** Use **Columns Chooser** to display the list information that helps your team distinguish records, such as **Email**, **Phone**, or **Position**.

> **Warning:** Select **Delete** only after confirming that the selected record is the correct one. The screen provides no separate record status or restoration action.

Troubleshooting

Symptom	Likely cause	Fix
You cannot locate an account manager in the list.	The list contains many records or the required identifying column is not currently visible.	Select **Filter icon (icn-filter)** to narrow the list, or use **Columns Chooser** to show **Name**, **Email**, **Phone**, **Position**, or **Active**.
Your new or edited information is not retained.	The entry was cancelled instead of saved.	Reopen the record or select **Add account manager**, complete the required information, and select **Save**.
The wrong list layout is displayed.	A different layout is currently active or the current layout requires adjustment.	Select **Layout icon (icn icn-layoout)**. Use **Update Current** to adjust the current layout, or enter a **Layout name** and select **Add Layout** to create another layout.
You need to remove a record from the list.	The account-manager record is no longer required.	Locate the correct record using the list columns or **Filter icon (icn-filter)**, then select **Delete**.

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