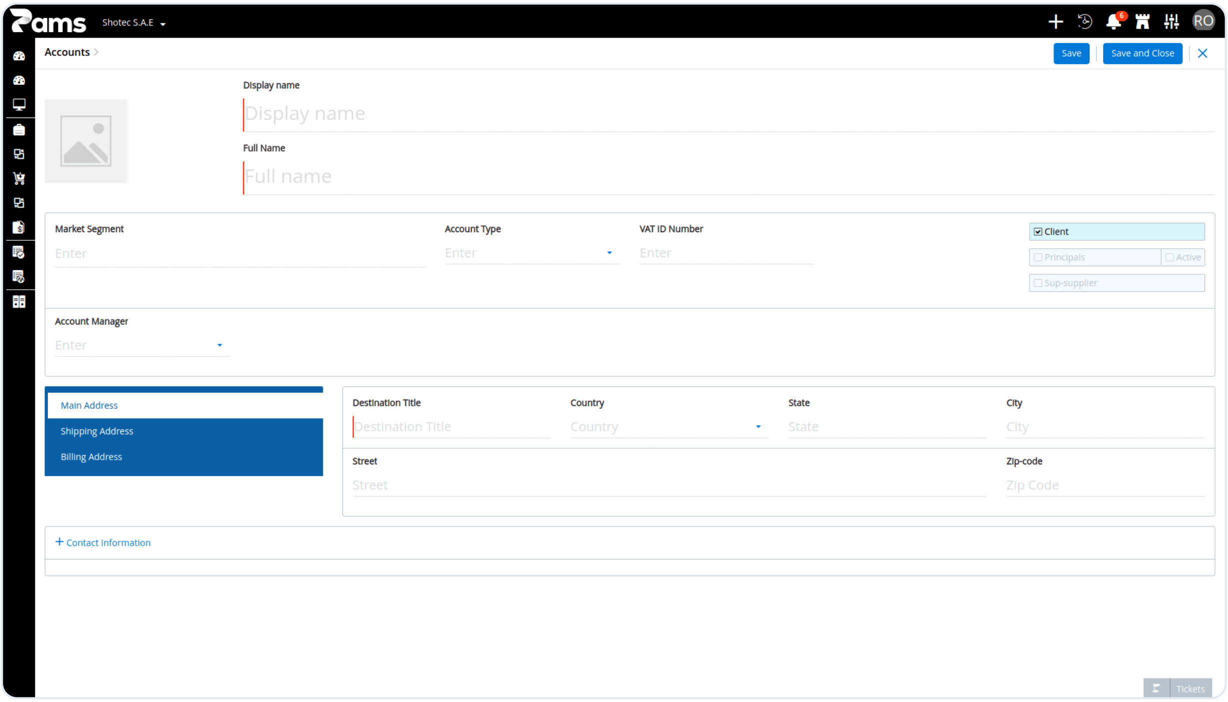
PAMS V2

Accounts

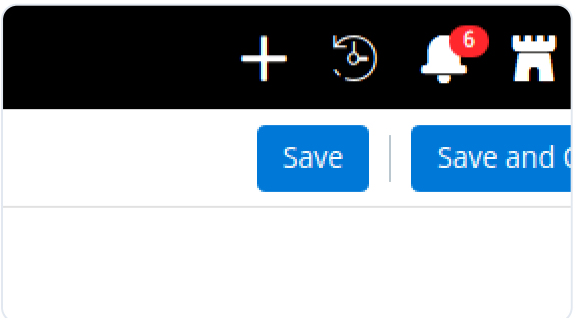
July 29, 2026

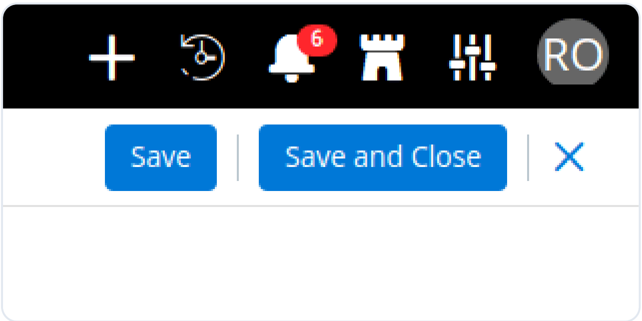
Accounts

Applications › Add new › Accounts



Accounts — Add new › Accounts › Accounts





Overview

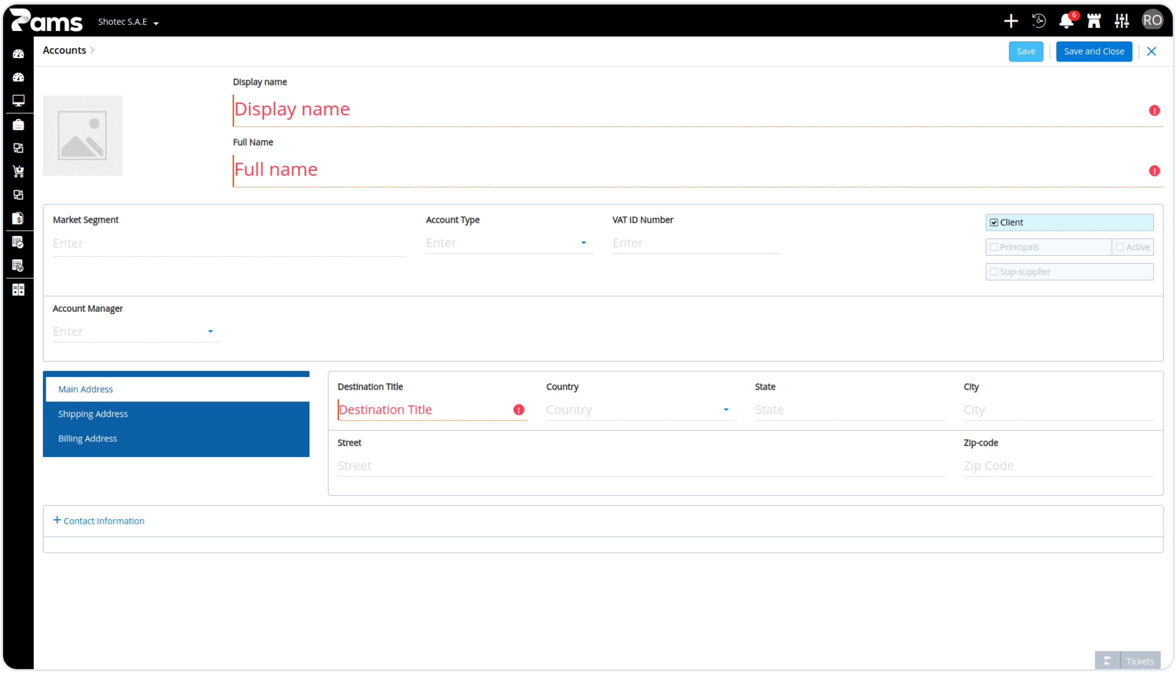
Accounts are the business-relationship records used to maintain customer, supplier, and other organisation details. Sales representatives, account managers, purchasing officers, project managers, warehouse users, and finance officers use Accounts when they need a consistent record of an organisation and its contact and address information.

Create an Account before you need to refer to that organisation in business activity. Keep the account name and destination details accurate so that teams use the same information across Sales, Purchasing, PM, Warehouse, and Finance work.

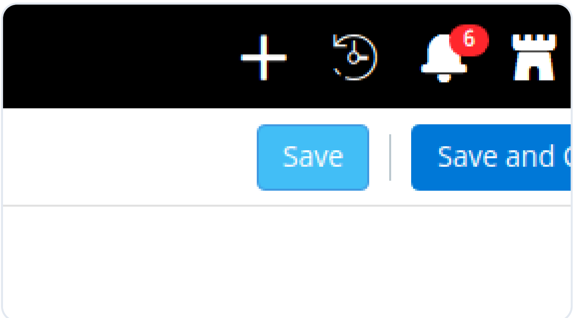
Workflow

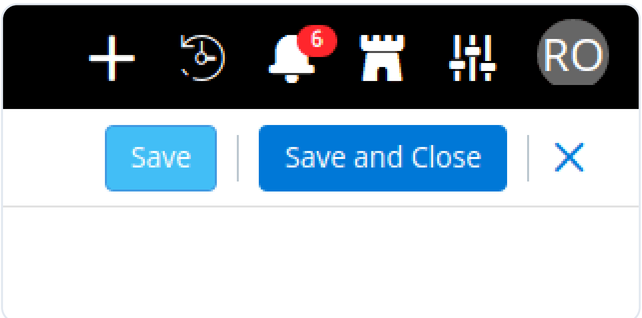
1. Start a new Account record

1. Open **Accounts** from **Add new**. The Accounts form opens with fields for the organisation name, destination address, selection details, files, and contact information.



Accounts — Add new › Accounts › Accounts



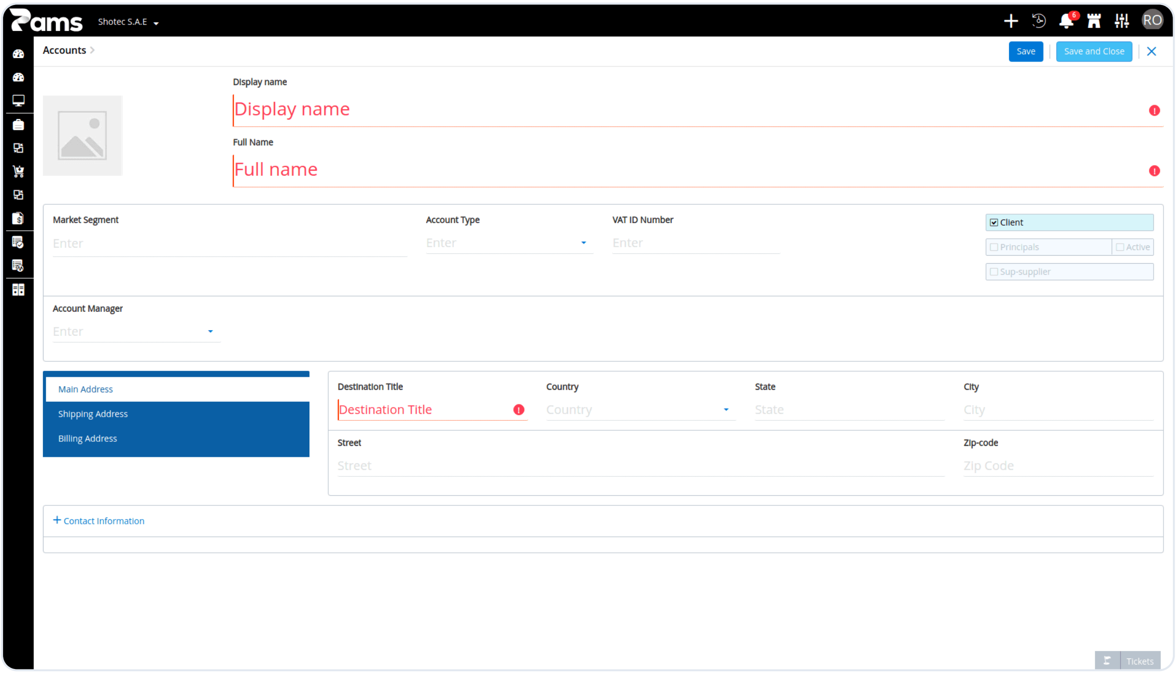


2. Enter a value in **Display name**. Use a clear name that users can recognise when referring to the Account.
3. Enter the organisation’s complete name in **Full name** when it differs from the display name or requires a more formal version.

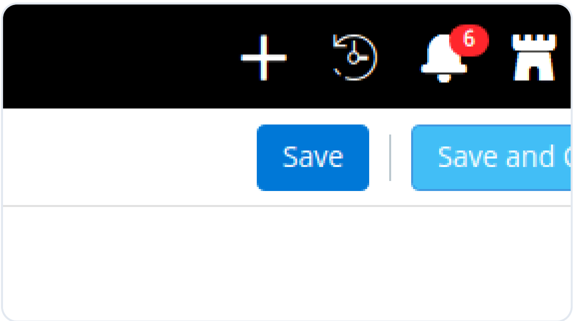
> **Tip:** Use a consistent display-name convention for Accounts. This helps Sales, Purchasing, and Finance users recognise the correct organisation when several Accounts have similar names.

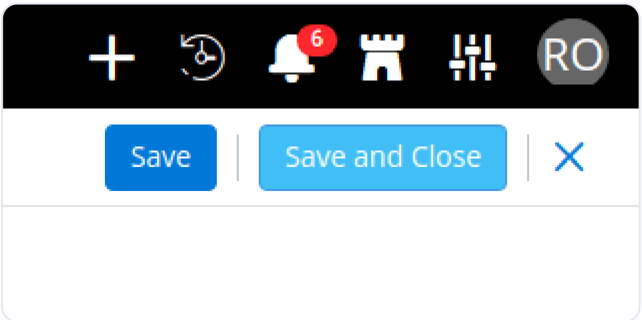
2. Complete the destination details

4. Review the destination area of the Account form and enter the available location details as required:
    - **Destination Title ** for the destination description.
    - **Country ** for the country.
    - **State ** for the state or regional area.
    - **City ** for the city.
    - **Street ** for the street address.
    - **Zip Code ** for the postal or ZIP code.



Accounts — Add new › Accounts › Accounts



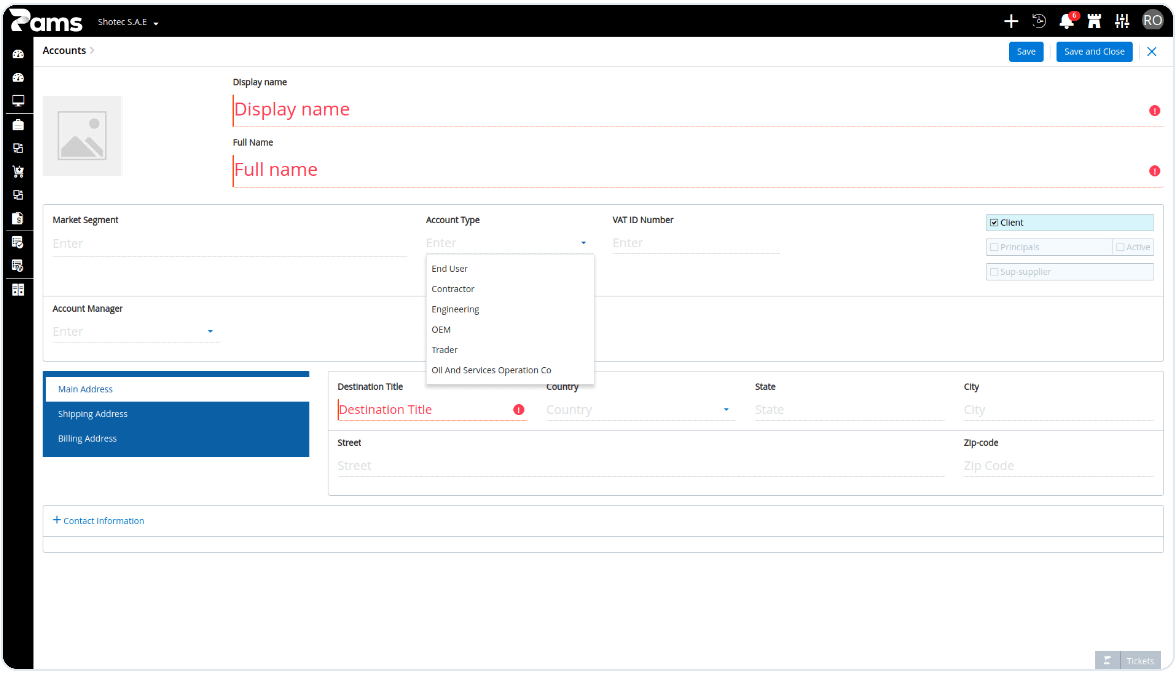


5. Decide whether the destination information is complete:
   - If it is complete, continue to the selection and contact details.
   - If it is incomplete, leave the Account open and obtain the missing information before saving. Avoid entering assumptions in address fields.

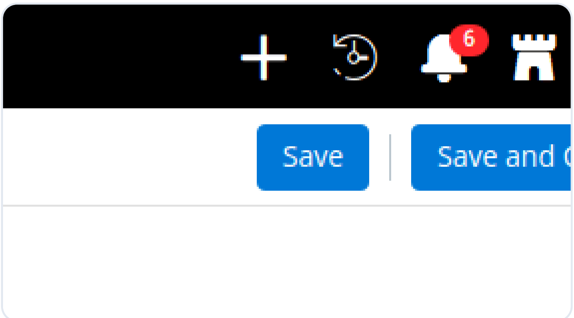
> **Note:** The form provides separate fields for country, state, city, street, and ZIP code. Enter each part in its corresponding field rather than combining the full address into one field.

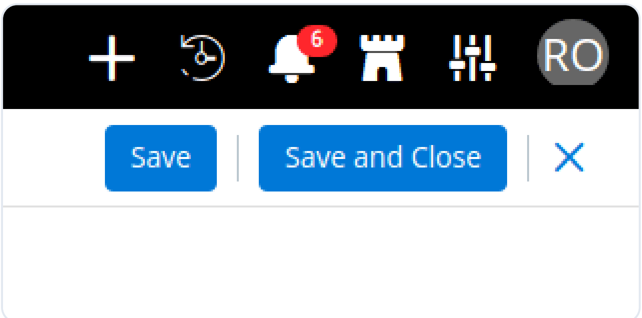
3. Select related items when required

6. Use **Select...** or **Select** when you need to choose items for the Account. Review the selected values shown in **Selected items**.



Accounts — Add new › Accounts › Accounts





7. When the selection window is displayed, choose the required items and confirm the selection with **Ok**. If you do not want to apply the selection, choose **Cancel**.
8. Use **Enter** where it is available to provide the requested value on the form.

4. Add files and contact information

9. If supporting documents are required for the Account, use **Attach** and review the attached entries in **files[]**.
10. Complete the available contact-related fields where applicable:
    - **Title**
    - **Name **
    - **Position**
    - **Department**
11. Use **Tickets** when you need to open the ticket action available from the Account record.

> **Warning:** Do not use **Delete** to correct a simple typing error. Revise the fields and save the Account instead. Delete is intended for removing an Account record.

5. Decide how to finish the record

12. Review **Display name**, **Full name**, destination information, selected items, files, and contact details before saving.
13. Choose the outcome that matches your work:
    - Select **Save** to retain the Account and remain on the current record.
    - Select **Save and Close** to retain the Account and close the record.
    - Select **Cancel** if you decide not to continue without saving the current work.
    - Select **Delete** only when the Account should be removed.
14. If you remain on the record after saving, make any required corrections and select **Save** again to retain the revised information.

Examples

A purchasing officer needs an Account for a supplier that will provide materials for a Buyout.

1. Open **Accounts** from **Add new**.
2. In **Display name**, enter `Northbridge Materials`.
3. In **Full name**, enter `Northbridge Materials Supply Company`.

4. Complete the destination fields:
    - In **Destination Title **, enter `Main Delivery Address`.
    - In **Country **, enter `United Kingdom`.
    - In **State **, enter `Greater London`.
    - In **City **, enter `London`.
    - In **Street **, enter `15 Bridge Street`.
    - In **Zip Code **, enter `SE1 2AB`.
5. Where a related selection is required, use **Select...**, review **Selected items**, and choose **Ok** to confirm the selection.
6. Use **Attach** to add a supplier document where required. Confirm that the file is shown in **files[]**.
7. Enter the available contact information:
    - In **Title**, enter `Purchasing Contact`.
    - In **Name **, enter `Helen Carter`.
    - In **Position**, enter `Sales Coordinator`.
    - In **Department**, enter `Commercial`.
8. Select **Save and Close**. The Account information is retained and the form closes.

Tips

> **Tip:** Enter both **Display name** and **Full name** when users may know the organisation by a short trading name as well as its complete registered or formal name.

> **Note:** Use **Save** when you expect to add files, revise destination details, or complete contact information before leaving the Account form. Use **Save and Close** only when the record is ready to be closed.

> **Warning:** Selecting **Cancel** ends the current action without saving it. Select **Save** or **Save and Close** before leaving the form when the Account information must be retained.

Troubleshooting

Symptom	Likely cause	Fix
The Account details are no longer present after leaving the form.	The record was closed with **Cancel** instead of **Save** or **Save and Close**.	Reopen **Accounts**, enter the required information again, and select **Save** or **Save and Close**.
A selected value is not applied to the Account.	The selection was not confirmed.	Use **Select...** or **Select**, choose the required items, verify them in **Selected items**, and select **Ok**.
The Account remains open after saving.	**Save** was used instead of **Save and Close**.	Select **Save and Close** after confirming that all Account information is complete.
An Account contains an incorrect address or contact value.	An incorrect value was entered in one of the available fields.	Revise the applicable field, such as **City **, **Street **, **Name **, or **Department**, then select **Save**.

Related pages

- Contact
- Add new — Overview
- Add new — Learning Path
- Call
- Task
- Payment
- Product
- Project
- Direct Order
- RFQ
- Process