

Accounts

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Accounts > AL MAZROUI ENGINEERING

Display name

AL MAZROUI ENGINEERING

Full Name

AL MAZROUI ENGINEERING

Market Segment

Enter

Account Type

Engineering

VAT ID Number

Enter

Client

Principals

Sup-supplier

Active

Account Manager

Enter

Main Address

Shipping Address

Billing Address

+ Contact Information

Comments

Contact Persons

Registrations

Own projects

Contract Key Data

Last Modifications

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Normal text

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Tickets

Post

Search comments

Ramy Othman 04 Dec 2025 - 11:16 AM

test the time

Ramy Othman 11 Nov 2025 - 04:03 PM

Hello

Ramy Othman 11 Nov 2025 - 04:00 PM

Test

Ramy Othman 11 Nov 2025 - 03:58 PM

Testing

Overview

Generated from Pams V2 docs · July 29, 2026

warehouse managers, and finance officers can use an account record to maintain its identifying details, supporting information, comments, and attached files.

Use an account record when you need to review or update the organization details associated with commercial, project, purchasing, Warehouse, or Finance work. The available controls support entering information, formatting text, adding comments, selecting items, and saving the record.

Workflow

1. Open **Accounts** from the Market application area.

The screenshot shows the 'Accounts' form in the Pams application. The form is titled 'Accounts > AL MAZROUI ENGINEERING'. It includes fields for 'Display name' (AL MAZROUI ENGINEERING), 'Full Name' (AL MAZROUI ENGINEERING), 'Market Segment' (Enter), 'Account Type' (Engineering), 'VAT ID Number' (Enter), 'Account Manager' (Enter), and 'Main Address' (Shipping Address, Billing Address). There are checkboxes for 'Client', 'Principals', 'Active', and 'Sup-supplier'. A 'Contact information' section is also present. Below the form is a 'Comments' section with a search bar and a list of comments by Ramy Othman. The interface includes a sidebar with navigation icons and a top bar with user information and system status.

accounts

Review the account record before making changes. Use **Display Name** as the account's visible name and **Full Name** where the complete name is required.

Note: No account status or approval stage is available on this screen. The record remains available for revision until you save your changes.

2. Decide whether you are updating the account identity or its additional details.

- To update the account identity, enter or revise **Display Name** and **Full Name**.
- To record additional information shown on the account form, complete **Title**, ****Name ****, **Position**, and **Department** as applicable.
- Review **Selected items** when the record includes selected information.
- Use **Select...** and **Select** when you need to choose an available item for the record.

Keep names consistent with the terminology used by your Sales, PM, Purchasing, Warehouse, and Finance teams so that the account can be recognized in related business work.

3. Decide whether the account requires written notes or collaboration details.

The screenshot shows the Pams Accounts form for 'AL MAZROUI ENGINEERING'. The form is divided into several sections:

- Header:** 'Accounts / AL MAZROUI ENGINEERING' with 'Save' and 'Save and Close' buttons.
- Display Name:** 'AL MAZROUI ENGINEERING' (blue text).
- Full Name:** 'AL MAZROUI ENGINEERING' (blue text).
- Market Segment:** 'Enter' (text input).
- Account Type:** 'Engineering' (dropdown menu).
- VAT ID Number:** 'Enter' (text input).
- Client/Principals/Sup-supplier:** Checkboxes for 'Client', 'Principals', and 'Sup-supplier'. 'Active' is also a checkbox.
- Account Manager:** 'Enter' (text input).
- Addresses:** 'Main Address', 'Shipping Address', and 'Billing Address' (text inputs).
- Contact Information:** '+ Contact Information' (text input).
- Comments Section:** A blue bar with tabs: 'Comments', 'Contact Persons', 'Registrations', 'Own projects', 'Contract Key Data', and 'Last Modifications'. Below this is a rich text editor with a toolbar (bold, italic, underline, link, unlink, list, indent, outdent, text color, background color) and a 'Post' button.
- Search comments:** A search bar with a magnifying glass icon.
- Comments List:** A list of comments by 'Ramy Othman' with timestamps and text inputs for replies.
 - 04 Dec 2025 - 11:16 AM: 'test the time'
 - 11 Nov 2025 - 04:03 PM: 'Hello'
 - 11 Nov 2025 - 04:00 PM: 'Test'
 - 11 Nov 2025 - 03:58 PM: 'Testing'

accounts

Select **comments** to work with account comments. Use **Search comments** to locate text within the available comments before adding or reviewing information.

When entering text in the available text area, use the formatting controls only where they improve readability:

- **Bold** for emphasis.
- **Italic** for secondary emphasis.
- **Strikethrough** for text that should remain visible but no longer apply.
- **Underline** where required by your documentation practice.
- **Ordered List** for sequential points.
- **Bullet List** for non-sequential points.
- **Header** for a text heading.

Tip: Use comments for concise operational context, such as an account-specific purchasing or project follow-up. Keep key account names and formal identifying information in their dedicated fields.

4. Decide whether supporting files are needed.

Use **files[]** to include the files available for the account record. Before saving, confirm that the account name, written content, selections, and files relate to the same business relationship.

If you need to reverse a recent editing action before saving, select **Undo**. If you reverse an action unintentionally, select **Redo**.

Warning: Review changes before saving. The screen provides **Undo** and **Redo** for editing actions, but no separate account lifecycle state is shown for review or approval.

5. Choose how to finish the update.

- Select **Save** when you want to save the current account changes and continue working on the record.
- Select **Save and Close** when the account update is complete and you want to save it before closing the record.

The saved account can then be used as a maintained business-relationship record when working in areas such as Sales, PM, Purchasing, Warehouse, and Finance.

Examples

A sales representative needs to update an account after receiving revised contact information from a customer.

1. Open **Accounts** and locate the relevant account record.

The screenshot shows the 'Accounts' section in the Pams software. The account being viewed is 'AL MAZROUI ENGINEERING'. The form includes the following fields and sections:

- Display name:** AL MAZROUI ENGINEERING
- Full Name:** AL MAZROUI ENGINEERING
- Market Segment:** Enter
- Account Type:** Engineering
- VAT ID Number:** Enter
- Account Manager:** Enter
- Address Fields:** Main Address, Shipping Address, Billing Address
- Contact Information:** + Contact Information
- Comments Section:**
 - Search comments: [Search bar]
 - Comments list:
 - Ramy Othman (04 Dec 2025 - 11:16 AM): test the time
 - Ramy Othman (11 Nov 2025 - 04:03 PM): Hello
 - Ramy Othman (11 Nov 2025 - 04:00 PM): Test
 - Ramy Othman (11 Nov 2025 - 03:58 PM): Testing

accounts

2. Update **Display Name** with Northstar Building Supplies and enter Northstar Building Supplies Limited in **Full Name**.
3. Complete the available additional details:

Field	Example value
Title	Ms.
**Name **	Elena Ward
Position	Commercial Manager
Department	Sales

4. Select **comments** and add a short note stating that commercial correspondence should be directed to the Commercial Manager. Use **Header** only if the comment includes multiple clearly separated topics; otherwise, keep the note brief.
5. Use **files[]** to include the relevant supporting document, if one is available. Review the selected content through **Selected items** where applicable.
6. If a wording change is incorrect, select **Undo**. If the prior wording was correct, select **Redo**.
7. Select **Save and Close** to store the updated account and finish the task.

Tips

Tip: Use **Display Name** for the recognizable account name and **Full Name** for the complete business name when both are available.

Note: Use **Search comments** before adding a new comment to avoid repeating information already recorded on the account.

Warning: Select **Save** or **Save and Close** after editing. Formatting, comments, selected items, and account details should be reviewed together before you finish.

Troubleshooting

Symptom	Likely cause	Fix
The account name does not appear as expected.	Display Name or Full Name was not completed or was entered incorrectly.	Review both fields, correct the required name information, and select Save or Save and Close .
A recent change should not have been made.	An editing action was applied to the record content.	Select Undo before saving. Select Redo if you need to restore the reversed change.
An existing comment cannot be located.	The comment list contains multiple entries or the relevant wording is not visible.	Use Search comments with a distinctive word or phrase from the comment.
The account update is not retained after leaving	The record was closed without using a save action.	Reopen the account, re-enter the required changes, and select Save or

Symptom	Likely cause	Fix
the record.		Save and Close.

Related pages

- [Market — Overview](#)
- [All](#)
- [Market — Learning Path](#)
- [Principals](#)
- [Projects](#)
- [Sub Suppliers](#)