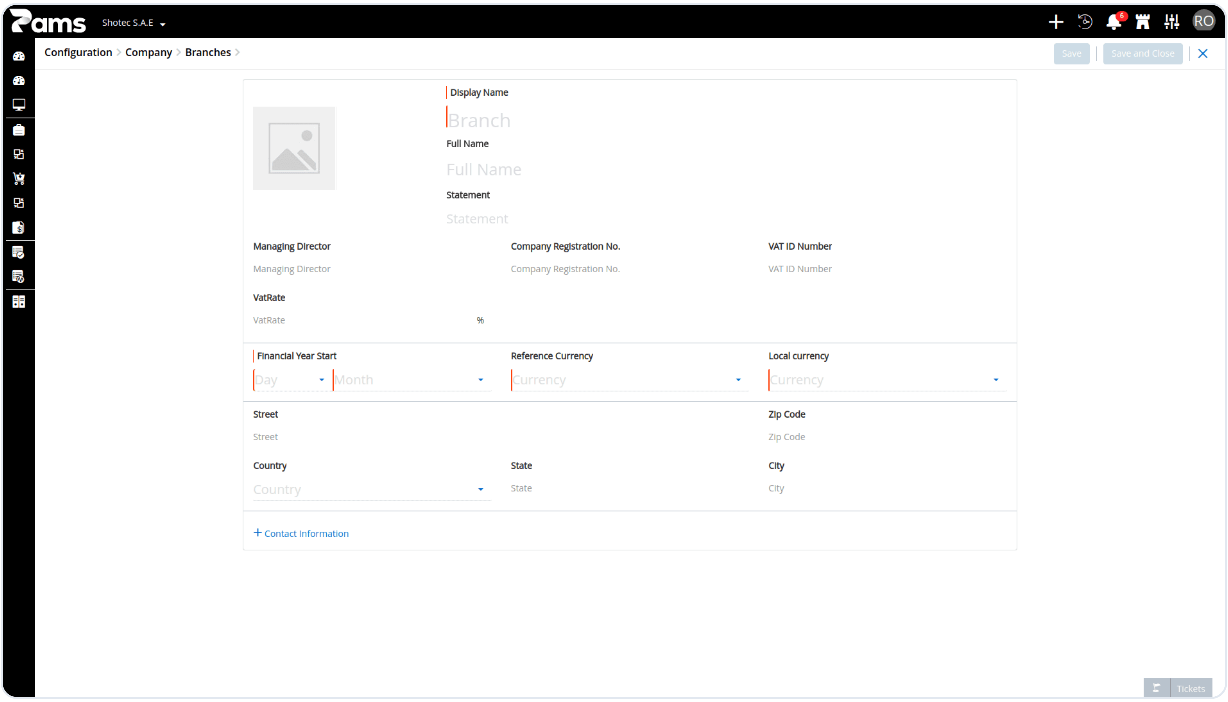
PAMS V2

Branches

July 29, 2026

Branches

Applications › Configurations › Company



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Overview

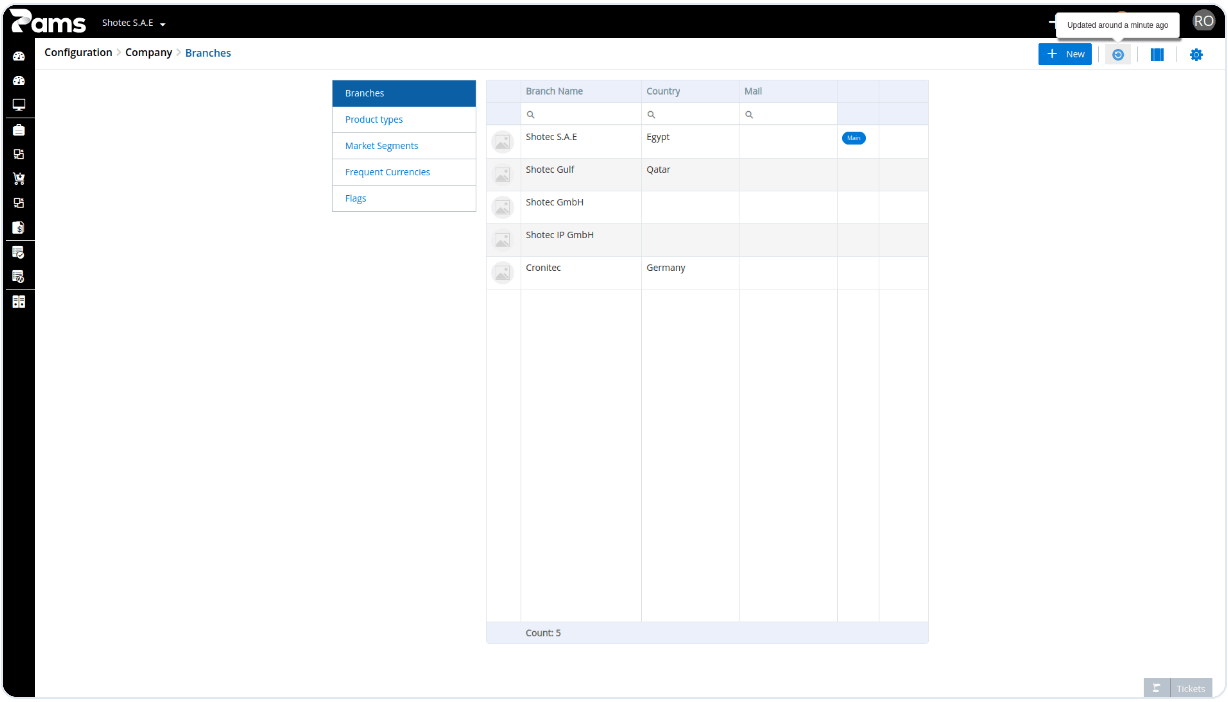
Branches are company records used to identify the business locations represented in the system. Sales representatives, project managers, purchasing officers, warehouse managers, and finance users can use the Branches directory to maintain the legal, tax, currency, and address details for each branch.

Use this feature when a new company branch must be recorded or when an existing branch’s registered details need to be reviewed or updated.

Settings

Before creating branch records, confirm that the information required for the branch is available, especially its legal registration, VAT details, currency, and postal address. The available screens do not show a separate enablement setting for branches; the branch record itself is the configuration record.

Open **Configurations** > **Company** > **Branches**. The Company screen displays the existing branch directory, including the visible **Branch Name**, **Country**, and **Mail** columns.



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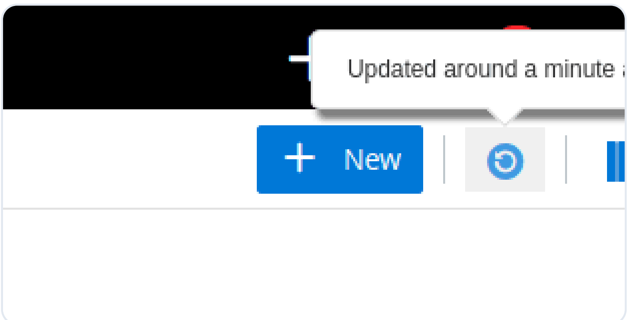


You can use **Search** to locate a branch in the directory. If the displayed columns do not provide the information needed for your review, use **Columns Chooser** to adjust the visible list columns.

Field	Use
Branch	Enter the branch identifier or name used to distinguish the branch.

Field	Use
Full Name	Enter the branch’s full name.
Statement	Enter the required statement information for the branch.
Managing Director	Enter the managing director’s name.
Company Registration No.	Enter the company registration number.
VAT ID Number	Enter the VAT identification number.
VatRate	Enter the VAT rate.
Day	Enter the relevant day value.
Month	Enter the relevant month value.
Currency	Select or enter the branch currency.
Street	Enter the street address.
Zip Code	Enter the postal or ZIP code.
Country	Select or enter the country.
State	Enter or select the state.
City	Enter or select the city.
files[]	Use the attachments area for files associated with the branch record.

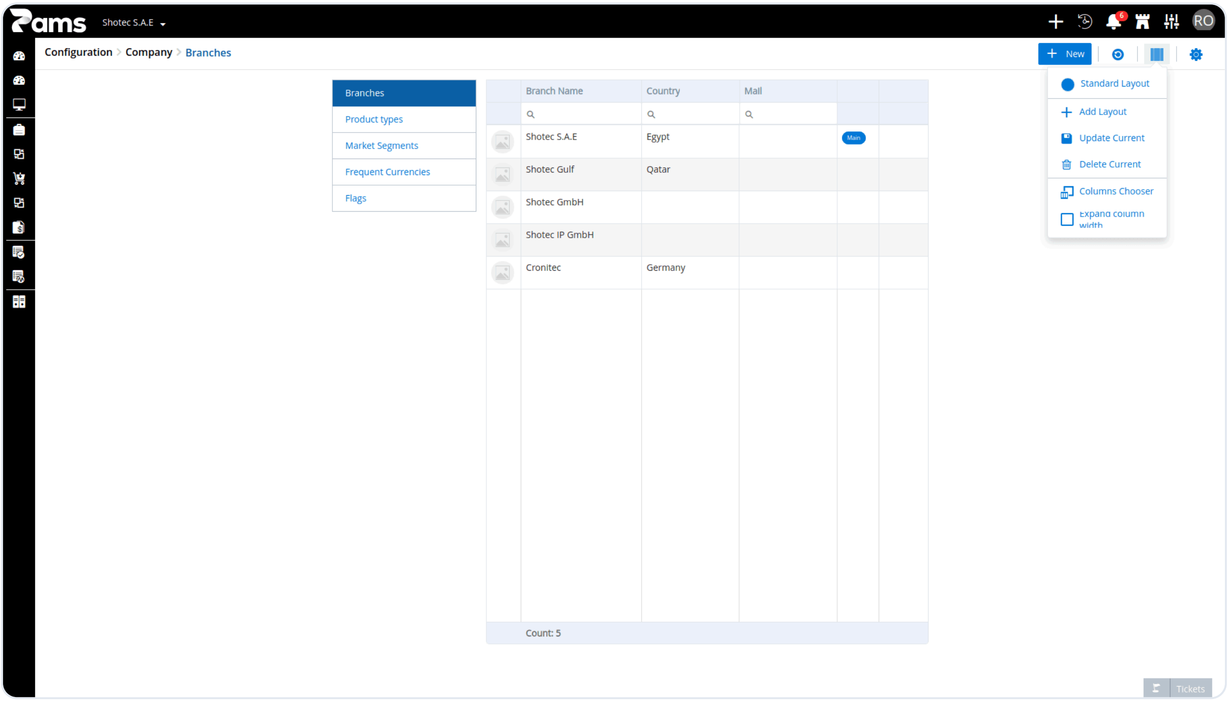
> **Tip**
> Enter the legal name, registration number, and VAT identification number carefully. These fields identify the branch in company records and should match the branch’s approved information.

Workflow

Review the branch directory and decide whether to create or maintain a record

1. Navigate to **Configurations** > **Company** > **Branches** and review the branch directory.
2. Use **Search** to check whether the branch already appears in the list. Review the visible **Branch Name**, **Country**, and **Mail** columns to distinguish records.
3. Decide how to proceed:

- If the branch is not listed, select **New** to start a new branch record.
- If you need to review an existing record, open the relevant branch from the Branches area and review its stored details before making changes.



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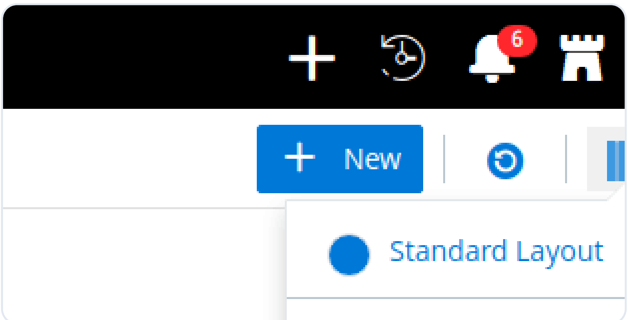


> **Note**
> Search before creating a record. This helps prevent multiple branch records being entered for the same business location.

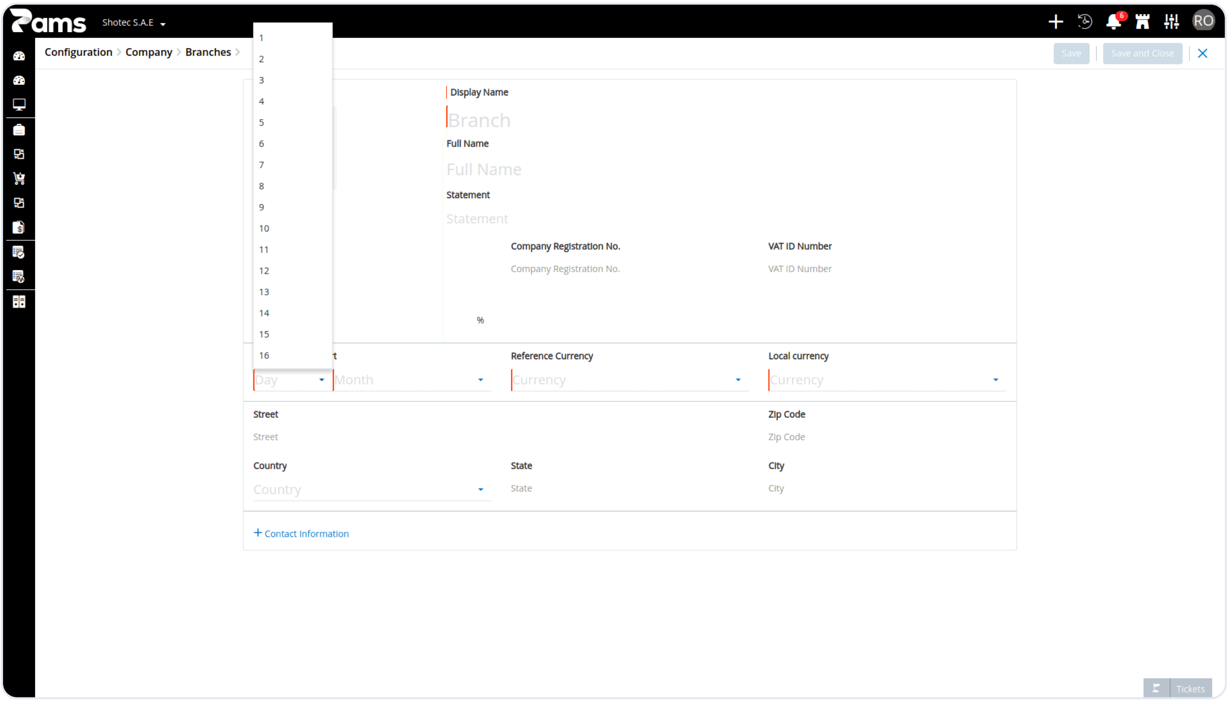
Create the branch record and decide whether it is ready to save

4. Select **New**. Complete the Branches form with the available branch information:
   - Enter **Branch** and **Full Name**.

- Enter **Managing Director**, **Company Registration No.**, **VAT ID Number**, and **VatRate** where applicable.
- Complete **Currency**, **Street**, **Zip Code**, **Country**, **State**, and **City**.
- Complete **Statement**, **Day**, and **Month** when these values are required for the branch.

5. If supporting documentation must accompany the record, use **Attach** and add the relevant files in **files[]**.
6. Before saving, decide whether the information is complete:

    - If information is incomplete or needs correction, revise the entries on the form. Select **Close** if you do not want to continue with the record.
    - If the branch details are complete and you want to remain on the record, select **Save**.
    - If the branch details are complete and you want to finish entry, select **Save and Close**.



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Maintain or remove a branch record

7. When reviewing a branch record, compare the branch name, legal details, VAT information, currency, and address with the current approved information.
8. If a value requires correction, update the relevant field and select **Save** to retain the changes, or **Save and Close** to retain the changes and leave the form.

9. If the branch record should be removed, select **Delete** and confirm the deletion using **Ok** when prompted.

> **Warning**
> Use **Delete** only after confirming that the selected record is the intended branch. Deletion removes the branch record from the Branches directory.

Examples

A company opens a new branch in Qatar and needs the branch to appear in the company directory.

1. The finance accountant opens **Configurations** > **Company** > **Branches** and uses **Search** to confirm that the branch does not already exist.
2. The accountant selects **New**.
3. On the Branches form, the accountant enters:
   - **Branch**: `Doha`
   - **Full Name**: `Shotec Gulf W.L.L.`
   - **Managing Director**: `Ahmed Hassan`
   - **Company Registration No.**: `CR-458921`
   - **VAT ID Number**: `VAT-QA-100245`
   - **VatRate**: `5`
   - **Currency**: `QAR`
   - **Street**: `West Bay`
   - **Zip Code**: `00000`
   - **Country**: `Qatar`
   - **City**: `Doha`
4. The accountant uses **Attach** to add the branch registration document, if required.
5. After reviewing the entered values, the accountant selects **Save and Close**.
6. The accountant returns to the Branches directory and uses **Search** to locate `Doha`, confirming that the branch is now listed with its country and mail information.

Tips

> **Tip**
> Use a consistent naming approach in **Branch** and **Full Name** so that users can locate the correct branch easily in the directory.

> **Note**
> Use **Save** when you need to continue reviewing or completing the branch record. Use **Save and Close** when the branch entry is complete.

> **Warning**
> Do not rely only on the branch name when reviewing records. Check the registered details and address fields before updating or deleting a branch.

Troubleshooting

Symptom	Likely cause	Fix
The required branch cannot be found in the directory.	The list is not filtered to the correct record, or the branch has not been created.	Use **Search** with the branch name. If no result is returned, select **New** and create the branch record.
The branch does not show the information needed in the list.	The relevant column is not currently visible.	Select **Columns Chooser** and adjust the displayed columns, then review the branch again.
The branch information was entered but the record is still not available in the directory.	The form may have been closed without being saved.	Reopen or create the branch record, complete the required information, and select **Save** or **Save and Close**.
A branch was selected for deletion by mistake.	The wrong record may have been opened before selecting **Delete**.	Select **Close** before confirming where possible, then use **Search** to locate and review the intended branch record.

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