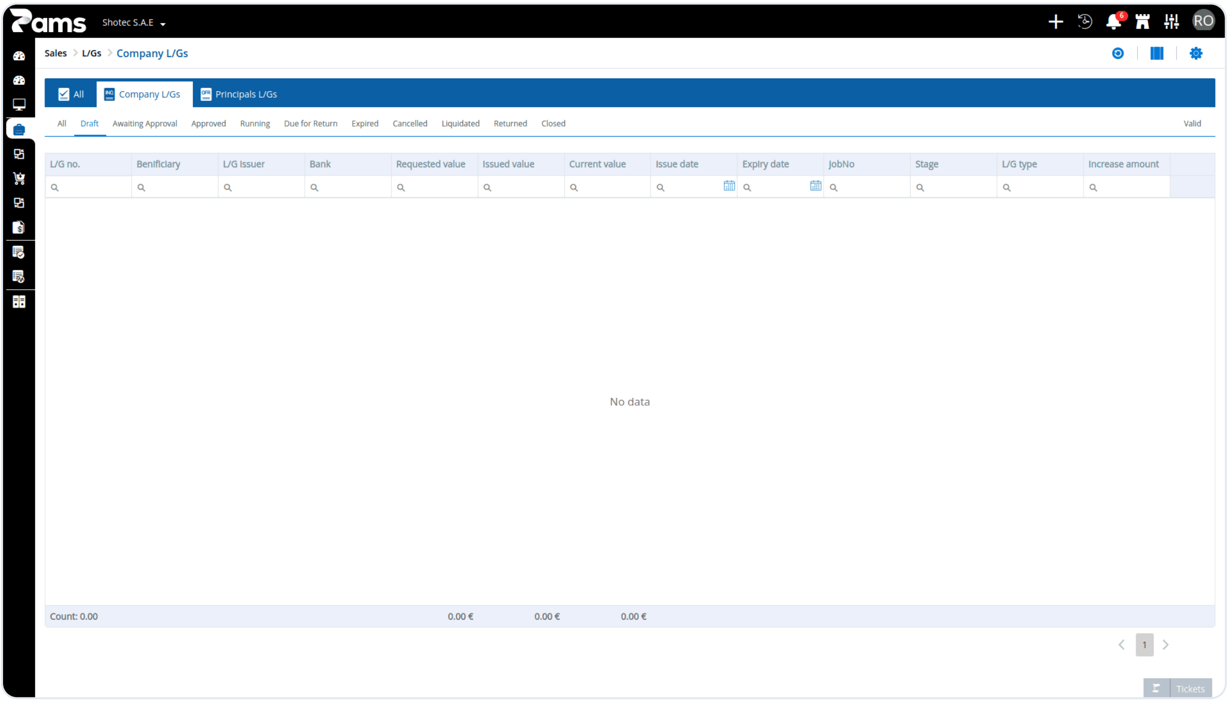
PAMS V2

Company Letters of Guarantee

August 2, 2026

Company Letters of Guarantee

Applications › Sales › Letters Of Guaranties



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Overview

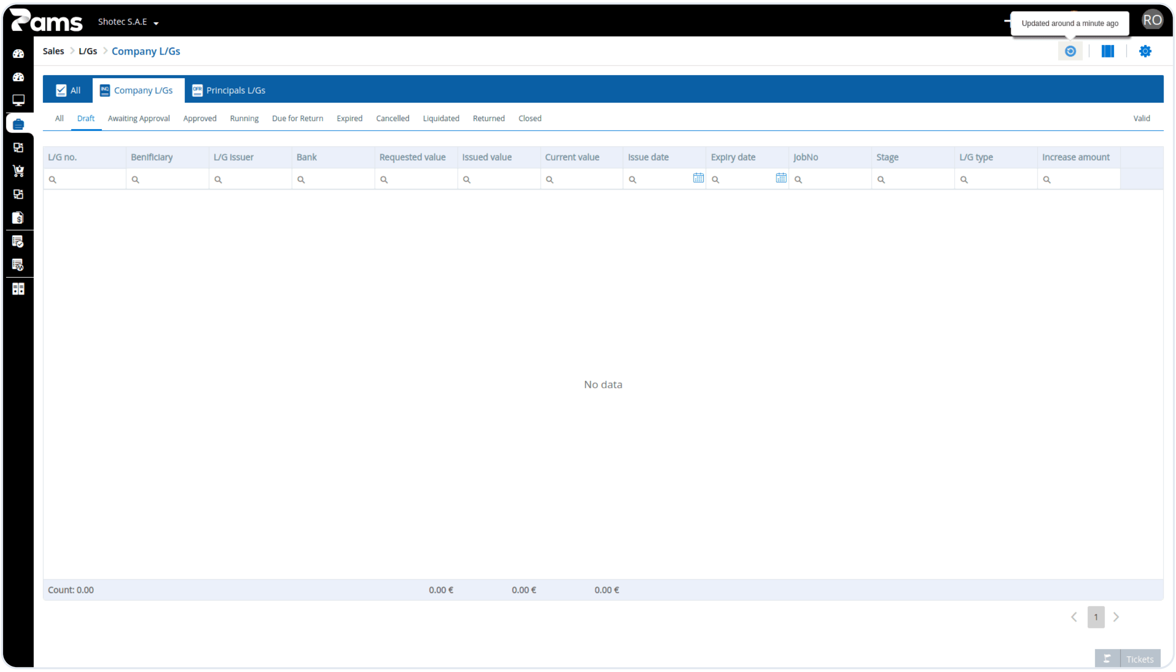
Use the Company Letters of Guarantee screen to review company L/G records and principal L/G records in one place. Sales representatives, Account Managers, finance officers, purchasing officers, and project managers can use the available list views to monitor L/G information, including the L/G number, beneficiary, issuing bank, requested value, issued value, and currency.

The screen is intended for reviewing and organizing existing L/G information. The available controls support layout management, list-column selection, updating the displayed information, and exporting the current list.

Settings

Before reviewing or exporting L/G information, set up a suitable list layout for your role. The screen provides layout controls, but it does not show company or L/G master-data settings.

1. To use the default list arrangement, select **Standard Layout**.



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2. To create a personal arrangement of the visible information, select **Add Layout**. Enter a value in **Layout name**, then select **Save**.
3. To change the columns displayed in the current list, select **Columns Chooser**. Choose the columns required for your review, such as L/G number, beneficiary, L/G issuer, bank, requested value, issued value, and currency.
4. Decide whether to retain or discard layout changes:
   - Select **Update Current** to save changes to the active layout.
   - Select **Cancel** to leave the current action without saving.
   - Select **Delete Current** to remove the active layout.
   - Select **Delete** when prompted to confirm deletion.

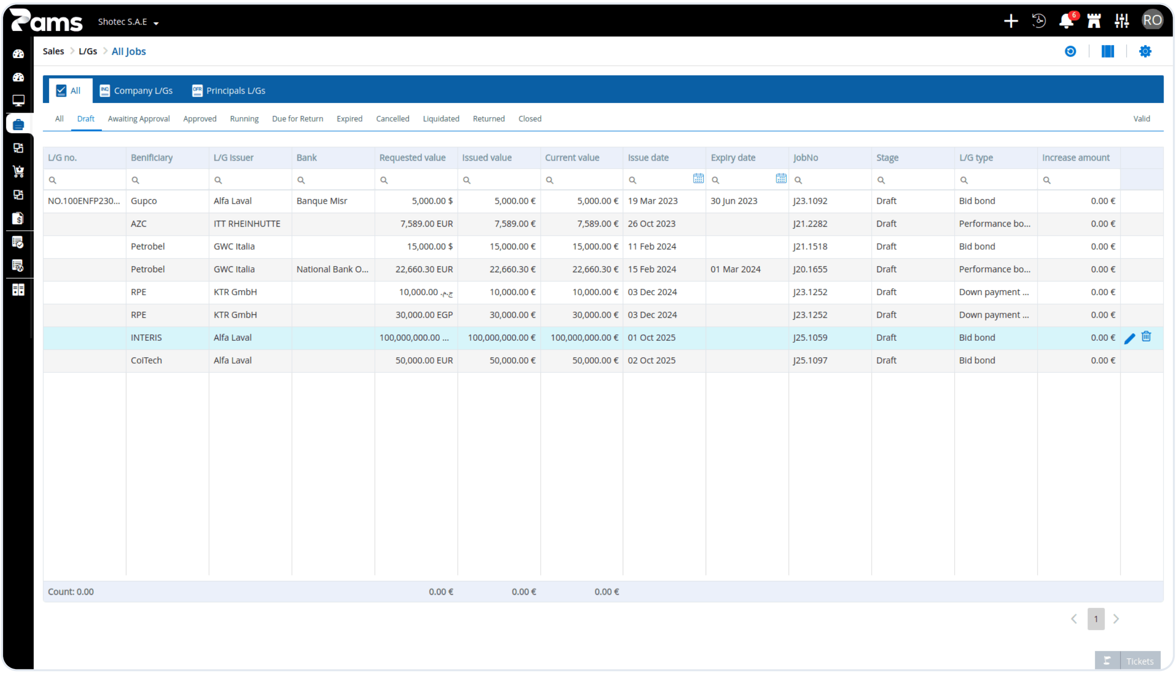
> **Note:** The available layout controls organize the list view only. The screen does not provide fields or actions for creating, approving, issuing, or closing an L/G

record.

Tip: Use a clear **Layout name** that identifies the business purpose, such as “Finance L/G Review” or “Sales L/G Follow-up”.

Workflow

1. Start from the business workspace and open **Sales**, then select **Company L/Gs** to review company letters of guarantee.



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2. Decide which L/G population you need to review:
   - Select **All** when you need the combined L/G list available on the screen.
   - Select **principals lgs** when you need to review L/G records associated with principals.
3. Search for the required record or group of records using **Search**. Review the list columns shown in your active layout, including L/G number, beneficiary, L/G issuer, bank, requested value, issued value, and currency.
4. If the displayed data needs to be refreshed, select **Update (icn-update)**. Recheck the list after the update before relying on values for customer, bank, purchasing, or project follow-up.

5. Decide whether the current screen layout provides enough information:
    - If the required information is visible, continue reviewing the list.
    - If important list information is missing, select **Columns Chooser** and adjust the displayed columns.
    - If you need a reusable view for future reviews, select **Add Layout**, complete **Layout name**, and select **Save**.
    - If you have adjusted an existing layout, select **Update Current** to retain the changes.
6. When you need to share the reviewed list or use it outside the platform, select **Export**. Export only after confirming that the correct tab, search criteria, and columns are displayed.

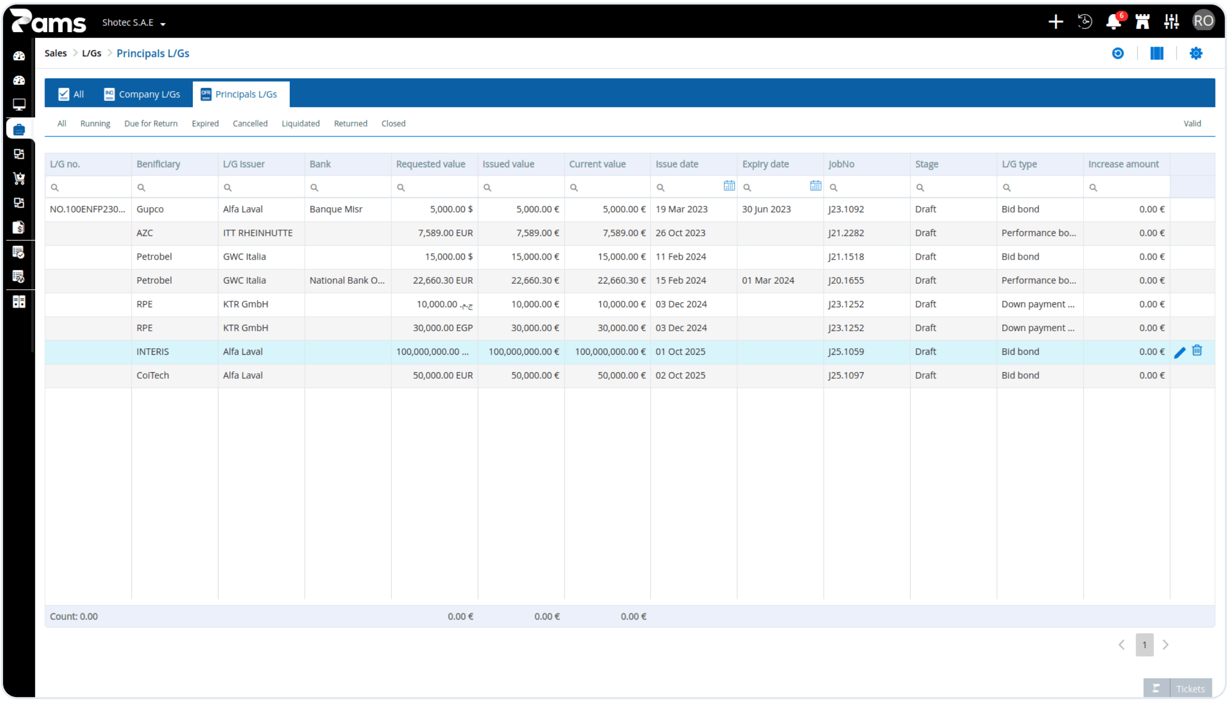
> **Warning:** Export reflects the current view. Confirm the selected tab and visible columns before selecting **Export**, particularly when reviewing requested and issued values.

All

The **All** tab contains the L/G records available in the company list. Use this tab for a broad review of L/G information across the displayed records. The list is designed to show L/G reference information and financial values, including the L/G number, beneficiary, L/G issuer, bank, requested value, issued value, and currency.

Use **Search** to narrow the list and use **Columns Chooser** to focus on the fields needed for the current review. The available screen controls do not identify an action that moves an L/G record into or out of this tab.

Principals L/Gs



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The **principals lgs** tab contains L/G records for principals. Use this tab when your review concerns principal-related L/G activity rather than the full company list. Review the displayed L/G number, beneficiary, issuing information, bank, requested value, issued value, and currency in the context of the selected list layout.

Use **Search** to locate relevant principal L/G records, then update the visible columns or export the current list if required. The available controls do not identify an action that moves records into or out of this tab.

Examples

A finance officer needs to prepare a review of principal-related letters of guarantee for a bank follow-up meeting.

1. The finance officer opens **Sales** and selects **Company L/Gs**.
2. The officer selects **principals lgs** to focus the review on principal L/G records.
3. In **Search**, the officer enters the beneficiary name or bank name relevant to the meeting.
4. The officer selects **Columns Chooser** and ensures that L/G number, beneficiary, L/G issuer, bank, requested value, issued value, and currency are visible.
5. The officer creates a reusable view by selecting **Add Layout**, entering `Principal L/G Bank Review` in **Layout name**, and selecting **Save**.

6. The officer selects **Update (icn-update)** to refresh the displayed list.
7. After checking that the search result and financial-value columns are correct, the officer selects **Export** and uses the exported list for the meeting.

Tips

> **Tip:** Keep separate layouts for different operational reviews, such as sales follow-up, finance review, or project-related L/G monitoring.

> **Note:** Requested value and issued value are separate displayed amounts. Review both values before reporting on the current L/G position.

> **Warning:** Do not delete a layout unless it is no longer required. Select **Delete Current** only after confirming that the active layout is the one you intend to remove.

Troubleshooting

Symptom	Likely cause	Fix
The required L/G record is not visible.	The wrong tab is selected or the search criteria are too restrictive.	Select **All** or **principals lgs** as appropriate, then revise or clear **Search**.
Important information is missing from the list.	The active layout does not include the required columns.	Select **Columns Chooser**, display the required columns, and select **Update Current** if the revised layout should be retained.
Layout changes are lost after leaving the screen.	The layout was not saved or updated.	For a new layout, enter **Layout name** and select **Save**. For an existing layout, select **Update Current**.
The exported file does not contain the expected records or columns.	The export was created from the wrong tab, search result, or layout.	Return to the correct tab, verify **Search** and the visible columns, then select **Export** again.

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