PAMS V2

Contacts

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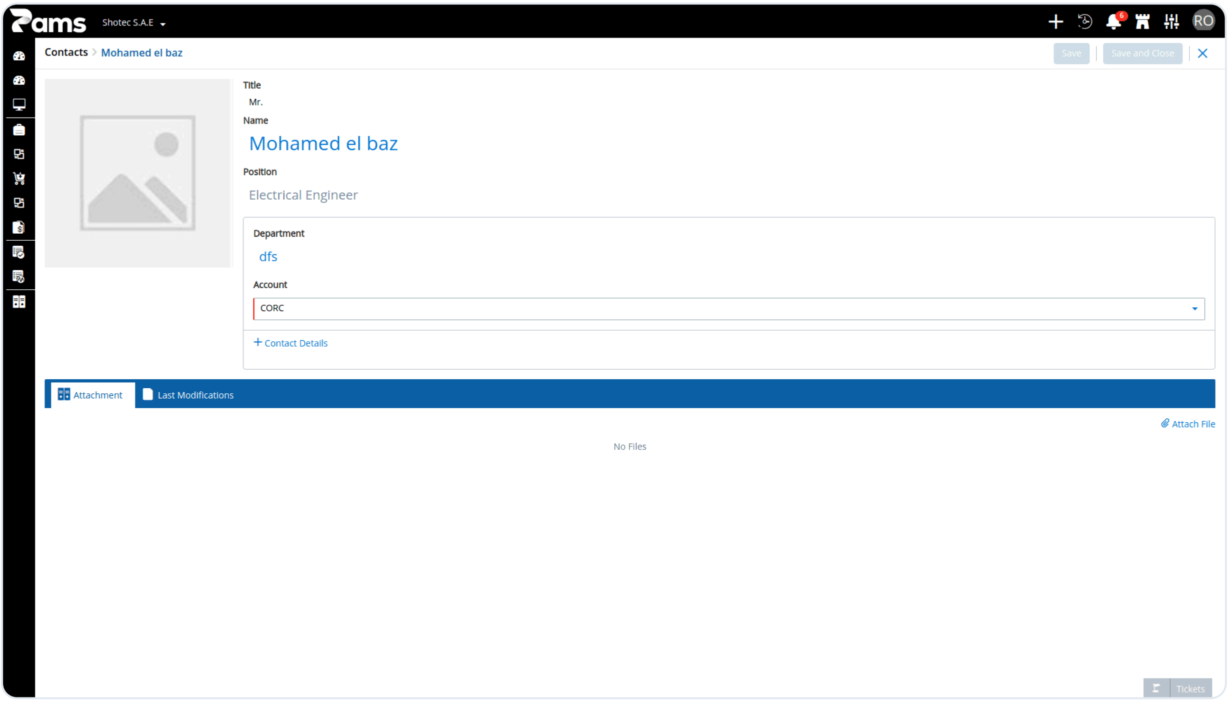
Contacts

Applications › contacts



contacts

Overview

Use Contacts to maintain the people associated with your customer, supplier, and other business Accounts. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and inventory controllers can record a contact's name, title, position, department, and supporting files. Create or update a contact whenever a person becomes a relevant point of contact for Sales jobs, Projects, Buyouts, Warehouse activity, or other business operations.

Workflow

1. Open the Contacts screen and begin entering the contact details.

   Complete the available contact fields:

   - **Title**: Enter the person's title.
   - **Name**: Enter the contact's name.
   - **Position**: Enter the contact's job position.
   - **Department**: Enter the department in which the person works.
   - **Select...**: Choose the applicable available value, where required.

   > **Tip:** Enter the contact's name and organisational details consistently. This helps users identify the correct person when working with Accounts, Sales jobs, Projects, purchasing activity, or Warehouse operations.

2. Decide whether supporting documents are needed for the contact.

   - To add supporting material, select **Attach** or **files**, then add the required file.
   - Use **files** to review the files currently associated with the contact.
   - If no document is needed, continue with the contact details.

   Attach only documents that are relevant to the person or their business relationship, such as contact-related correspondence or reference material.

3. Decide whether to keep editing or finish the contact record.

   - Select **Save** to save the entered details and remain on the contact record for further review or changes.
   - Select **Save and Close** to save the record and close it when no further editing is required.
   - Select **Cancel** to abandon the current unsaved changes.

   > **Note:** Use **Save** before opening another action if you want the information entered on the contact record to be retained.

4. Review or update an existing contact when business information changes.

   Update **Title**, **Name**, **Position**, **Department**, **Select...**, or attached files as required. Then select **Save** to retain the changes, or **Save and Close** to retain the changes and leave the record.

5. Decide whether the contact record should be removed.

Select **Delete** only when the contact record should no longer be kept. Use **Cancel** if you decide not to proceed with the current changes, or **Close** when you have finished viewing the current screen.

> **Warning:** Review the contact carefully before selecting **Delete**. The screen provides a Delete action, so use it only for records that should be removed rather than updated.

6. Use related actions when they are relevant to your current work.

   Select **Tickets** when you need to work with the ticket-related action available from the contact screen. Select **Ok** when the screen presents it to confirm the current action.

Examples

A purchasing officer receives a new supplier contact for a Buyout requirement and needs to record the person for future communication.

1. Open the Contacts screen.
2. Enter the following information:
   - **Title**: Ms.
   - **Name**: Elena Morris
   - **Position**: Procurement Coordinator
   - **Department**: Purchasing
   - **Select...**: Choose the appropriate available value for the contact.
3. Select **Attach** and add a relevant supplier contact document, if one is available.
4. Select **Save** to retain the contact while checking the entered information. Confirm that the name, position, and department are correct.
5. Select **Save and Close** when the record is complete.

The contact is now recorded with the supplied business details and any attached supporting file.

Tips

> **Tip:** Use a meaningful **Position** and **Department** value so colleagues can identify the correct contact for Sales, PM, Purchasing, Warehouse, or Finance-related communication.

> **Note:** Use **Save** when you intend to continue working on the record. Use **Save and Close** when the entry is complete.

> **Warning:** Selecting **Cancel** does not save the information currently being entered. Save the record before leaving if the details must be retained.

Troubleshooting

Symptom	Likely cause	Fix
The newly entered contact details are not available after leaving the screen.	The record was closed or cancelled without being saved.	Re-enter the details and select **Save** or **Save and Close**.
A contact has incorrect job or organisational information.	The **Title**, **Position**, or **Department** value is outdated or was entered incorrectly.	Open the contact, update the relevant field, and select **Save**.
A supporting document is not associated with the contact.	The file was not added through the available attachment actions.	Select **Attach** or **files**, add the required document, and select **Save**.
A contact was selected for removal by mistake.	**Delete** was chosen instead of updating the record.	Review the record before deletion and use **Save** to retain corrections whenever the contact should remain available.

Related pages

- contacts — Overview
- contacts — Learning Path