PAMS V2

Configure Contacts

August 18, 2026

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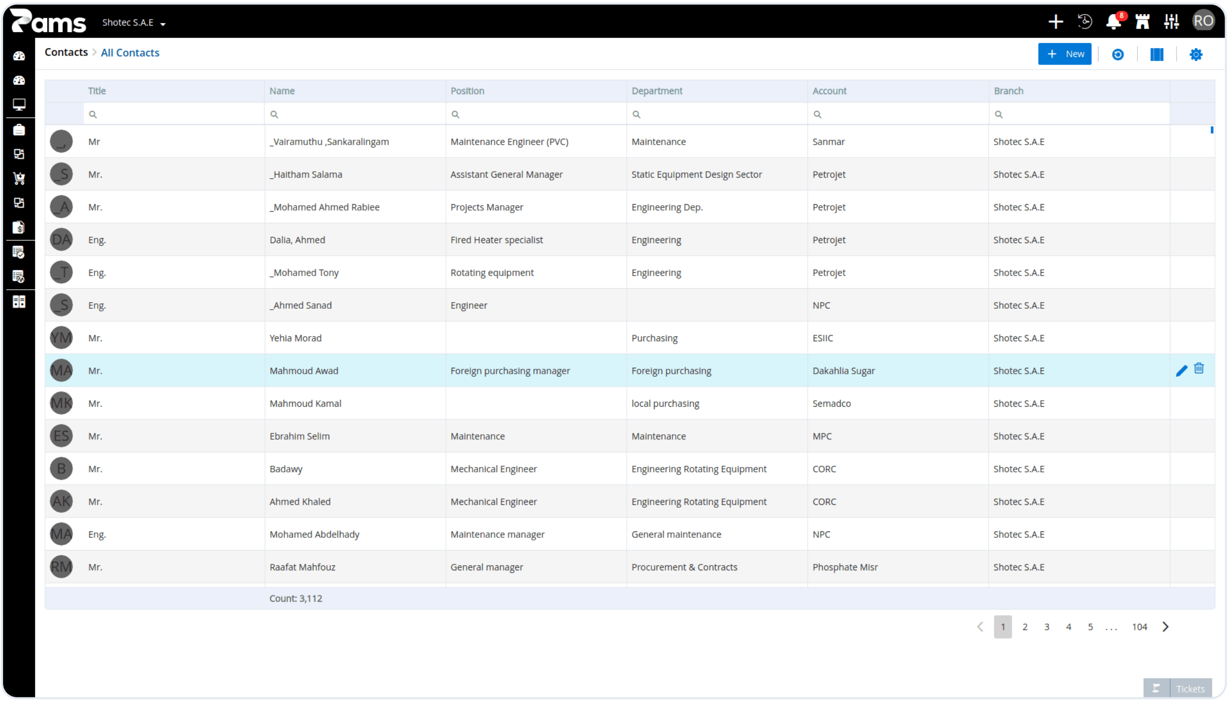
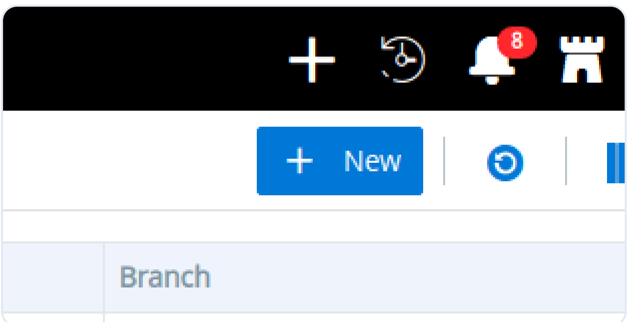
Administrator Guide › Data › Contact



Contacts — Data › Contacts



Overview

Use the **Contacts** workspace to maintain contact records used across business operations. Administrators can review the available contact list, locate an existing contact record, open it for editing, or begin a new contact record. Use this workspace when contact names, titles, positions, departments, accounts, or branches require administrative maintenance.

Before you start

Ensure that you can access the **Data** area and the **Contacts** workspace. You must also be able to use the **New** and **edit** actions to create or maintain contact records.

Steps

1. In the main navigation, select **Data**, and then select **Contacts**.
2. Review the contact list to identify the record that you want to configure. The list displays contact information including **Title, Name, Position, Department, Account**, and **Branch**.
3. To find an existing contact record, enter identifying text in the **Search box**. Use information such as the contact name, position, department, account, or branch to narrow the displayed list.
4. Select **edit** for the required contact record.
5. Update the contact record as required in the record editor.
6. To begin configuring a new contact record instead, return to the **Contacts** workspace and select **New**.

> **Tip:** Use the **Search box** before selecting **edit** when the contact list contains multiple records with similar names.

> **Note:** Review the **Account** and **Branch** columns when identifying a contact, particularly where the same contact name may be associated with different business relationships.

> **Warning:** Select **edit** only for the intended contact record to avoid changing another contact with a similar name.

Troubleshooting

- The required contact is not displayed → The list may contain many contact records → Enter relevant identifying text in the **Search box** to narrow the list.
- You cannot begin a new contact record → The **New** action is unavailable or inaccessible → Verify that you have access to the **Contacts** workspace and the **New** action.
- You cannot update an existing contact → The **edit** action is unavailable or inaccessible → Verify that you have access to edit contact records in the **Contacts** workspace.

Result

The **Contacts** workspace is available for locating existing contact records, initiating new contact configuration, and opening contact records for editing.

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