PAMS V2

Contacts

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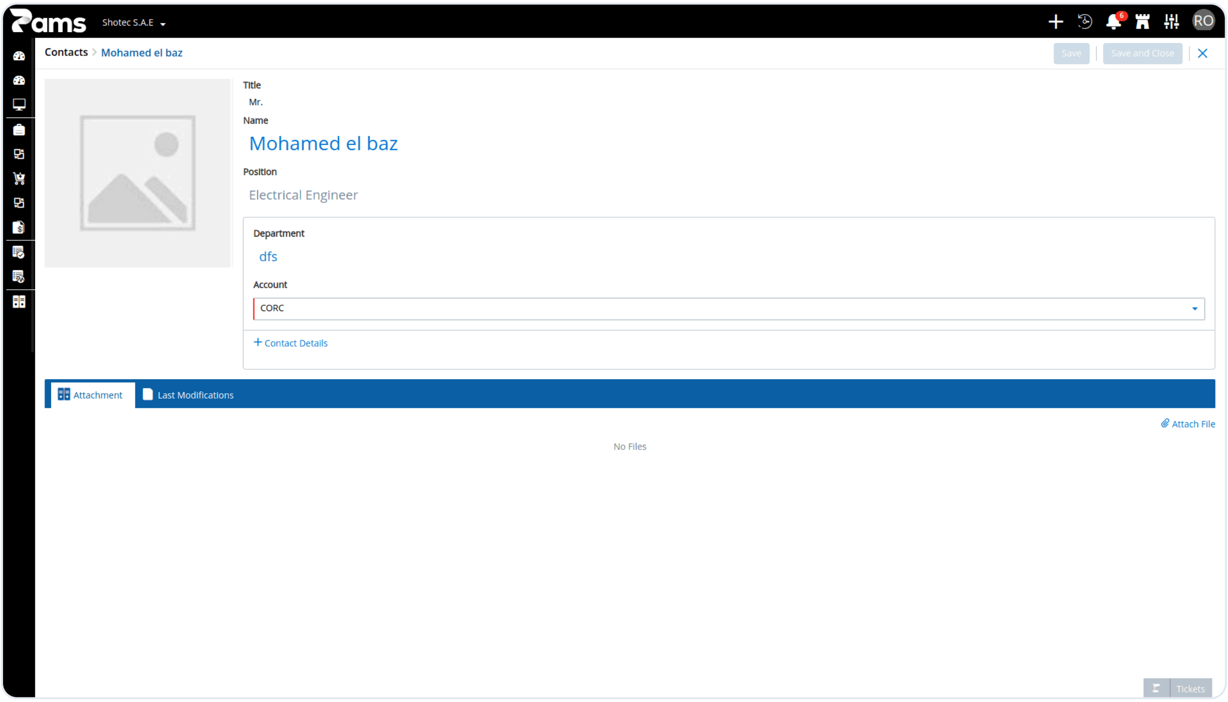
Contacts

Applications › contacts



contacts

Overview

The Contacts application stores the people associated with your commercial and operational work. Use a contact record to maintain the person's name, title, position, department, selected value, and related files in one place. Sales representatives, project managers, purchasing officers, warehouse managers, finance accountants, and accounts receivable or payments officers can update contact details when they need accurate information for daily work.

Workflow

1. Open the contact record that you need to review or update. Review the existing information before making changes, particularly when the contact is used by more than one business function.
2. Decide whether the contact details require revision.
   - To identify the person, complete or revise **Title** and **Name**.
   - To record the person's role, complete or revise **Position** and **Department**.
   - Use **Select...** where a selection is required on the record.

   Enter only the information that you can confirm. If a field is not relevant to the contact, leave it unchanged unless your internal process requires otherwise.

   > **Note:** Use the contact's full name in **Name** so that users in Sales, PM, Purchasing, Warehouse, and Finance can identify the same person consistently.

3. Decide whether supporting files are needed.
   - Use **Attach** to add a file to the contact record.
   - Review files associated with the record through **files[]**.
   - Use **files** when you need to work with the record's files from the available file control.

   Attach only documents that are relevant to the contact, such as information that helps users identify or work with that person.
4. Decide how to complete the update.
   - Select **Save** to retain your changes and continue working in the contact record.
   - Select **Save and Close** to retain your changes and close the record.
   - Select **Cancel** if you decide not to continue with the current changes.
   - Select **Close** when you have finished reviewing the record and do not need to continue working in it.
5. Decide whether the contact record should remain available.
   - Select **Delete** only when the record should be removed.
   - If you are unsure whether the record is still required by Sales jobs, RFQs, Direct orders, Buyouts, PM work, Warehouse activities, or Finance work, do not delete it. Review the record details first and retain it until the appropriate business decision has been made.

    - Confirm the action with **Ok** when a confirmation is presented.

6. Use **Tickets** only when you need to open the ticket-related action available from the contact record. The available screen does not specify the ticket workflow or outcome; complete any action only after confirming that it applies to the current contact.

Examples

A purchasing officer receives updated details for a supplier contact who will be involved in a Buyout for a Sales job.

1. Open the relevant contact record and verify that the person is the intended contact.
2. Update the contact information:
    - Set **Title** to `Ms.`
    - Set **Name** to `Leila Hassan`
    - Set **Position** to `Procurement Coordinator`
    - Set **Department** to `Purchasing`
    - Complete **Select...** with the appropriate available selection for the contact.
3. If the purchasing officer has a relevant supporting document, select **Attach** and add it to the contact record. Confirm that it is visible through **files[]** before completing the update.
4. Select **Save and Close**. The revised contact information is retained and the record is closed.

Tips

> **Tip:** Update **Position** and **Department** when a contact changes responsibilities. This helps users understand which person is appropriate for Sales jobs, RFQs, Buyouts, Warehouse coordination, or Finance follow-up.

> **Warning:** Do not select **Delete** merely because a contact is no longer active in your current work. Retaining the record may be necessary for earlier commercial, project, purchasing, stock, or finance records.

Troubleshooting

Symptom	Likely cause	Fix
Changes are not retained after leaving the record.	The record was closed or cancelled without saving.	Reopen the contact, make the required revisions, then select **Save** or **Save and Close**.
A document is not available with the contact.	The file was not attached to this contact record, or it was not checked through the file controls.	Use **Attach** to add the required document, then review **files[]** or **files** to confirm that it is associated with the record.
The contact is no longer needed, but deletion is uncertain.	The contact may still be relevant to operational or financial work.	Do not select **Delete** until you have confirmed that the contact should be removed. Keep the record and update its available details if necessary.

Related pages

- contacts — Overview
- contacts — Learning Path