

Create and retain a Projects Management direct order

August 8, 2026

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Use the New Direct Order record to select an appropriate value, attach relevant files, and save the draft either open or closed.

Before you start

- A new direct-order record has been started in Projects Management.
- Confirm that the selected value is appropriate before saving.

Steps

1. **Select...** on [New Direct Order](#) — Provides a selection for the direct-order record.

The screenshot shows the 'New Direct Order' form in the PAMS V2 application. A 'Leaving Page' dialog box is displayed in the center, asking 'Do you want to save your changes?' with 'Don't Save' and 'Save' buttons. The form is titled 'Sales Jobs > Orders > Job No.: New'. It includes fields for Branch (Shotec S.A.E.), Salesperson Responsible (Rammy Othman), End User (Select...), and File Number. Below these are sections for Client and Vendor information, including Client Order No., Vendor Order No., Order Date (06 Aug 2026), and Order Activation Date (06 Aug 2026). There are also fields for Delivery Time, Forecasted Delivery Date, Shipping Address, Delivery Term, Payment Method, and Payment Period. A 'Partial Delivery' checkbox is checked. At the bottom, there is a table with columns: Item Description, Unit, Qty, Unit Price, Discount (%), Item Price, and Currency. The table contains one row with '1' in the Qty column and 'EUR' in the Currency column. The bottom right corner shows 'Total Price: 0.00 EUR', 'Backlog: 0.00 EUR', and 'Equivalent Booking: Tickets'.

2. **Attach** on [New Direct Order](#) — Adds a file to the direct order.
3. **files[]** on [New Direct Order](#) — Reviews files associated with the record.
4. **Ok** on [New Direct Order](#) — Accepts an attachment confirmation when displayed.
5. **Cancel** on [New Direct Order](#) — Stops an attachment confirmation without confirming the action.
6. **Save** on [New Direct Order](#) — Retains the record and keeps the screen open for further work.
7. **Save and Close** on [New Direct Order](#) — Retains the record and closes the current screen.

Result

Retains the record and closes the current screen. Confirm this on [New Direct Order](#).

Screens involved

Projects Management > New Direct Order · Client : Vendor : Order / Draft