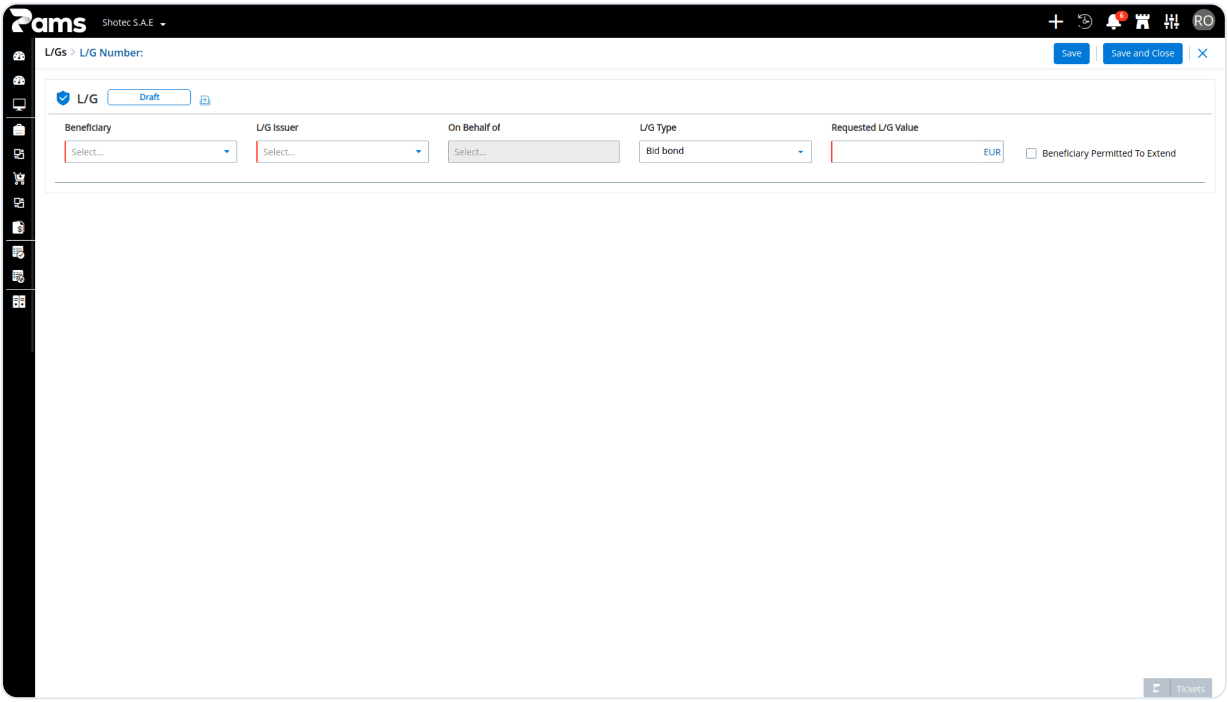
PAMS V2

Letters of Guarantees

July 31, 2026

Letters of Guarantees

Applications › Letters Of Guaranties



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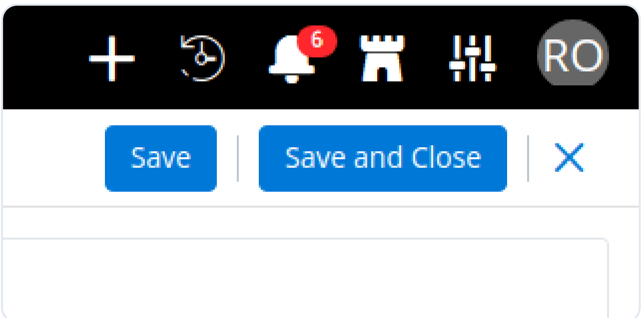


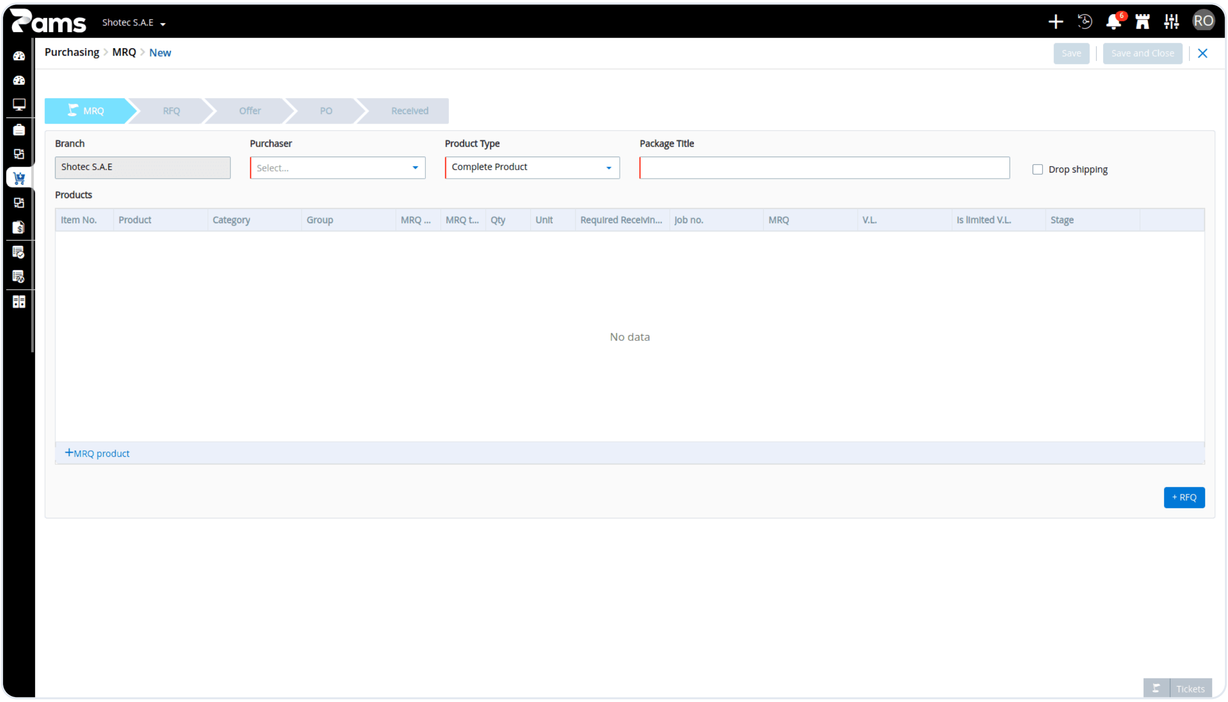
Overview

Letters of Guarantees (L/Gs) records provide a workspace for managing information and supporting files related to a Letter of Guarantee. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance officers can use this feature when a commercial or finance process requires an L/G record and related documentation.

Use an L/G record to make a selection, attach relevant files where needed, review the record across its Contact, Product, and RFQ stages, and save the completed entry.

Workflow

1. Open the Letters of Guarantees workspace by selecting **L/Gs** from the available application controls. Start a new record when you need to register or update an L/G entry.



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2. Decide whether the record requires a selection before it is saved.
    - Use **Select...** to choose an available item for the record.
    - Use **Select** when the selection control is displayed.
    - Review the selected item before continuing. If it is not correct, revise the selection before saving.

> **Note:** The available screen does not identify the purpose of the items shown in **Select...**. Select only the item that is appropriate for your organisation's L/G process.

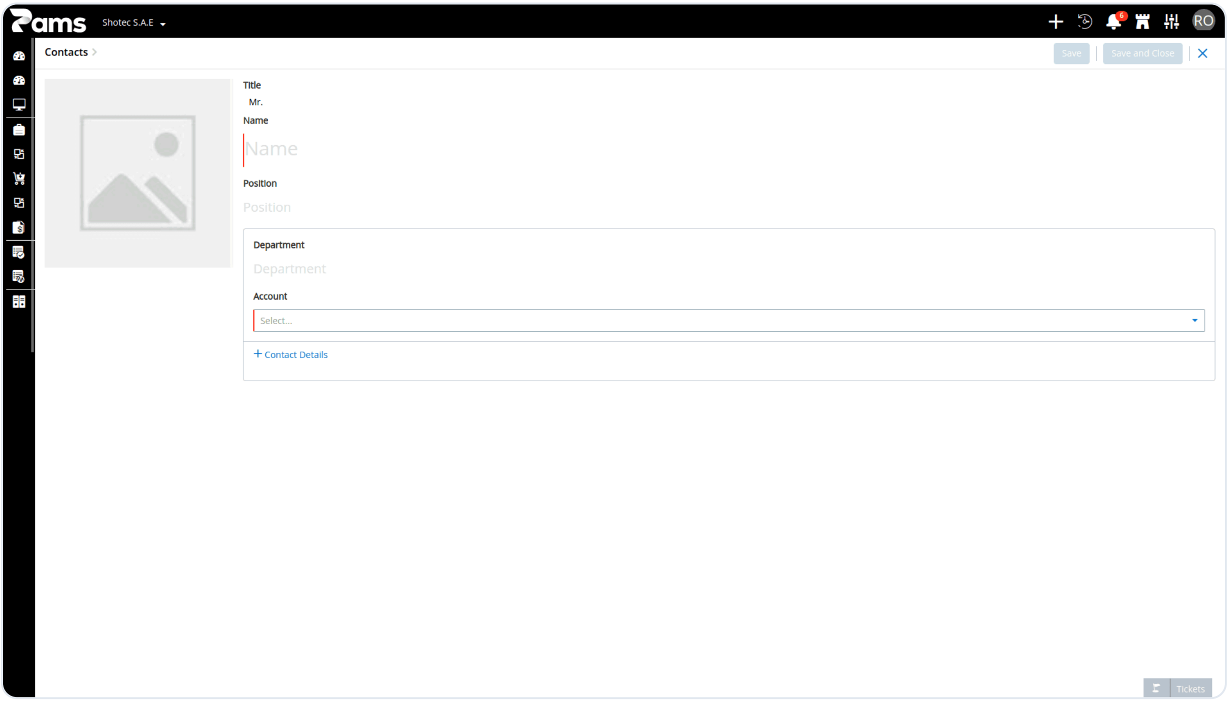
3. Decide whether supporting documentation must be retained with the L/G record.
   - If documents are required, use **Attach** to add them to **files[]**.
   - Use **Select** to choose the required file when prompted.
   - Select **Ok** to confirm the attachment action.
   - If no supporting document is required, leave **files[]** unchanged and continue with the record review.

> **Tip:** Attach the final approved document version where possible. This helps users reviewing the L/G record work from the same supporting file.

4. Review the record in the available stage tabs: Contact, Product, and RFQ. Use each tab to confirm that the L/G record has been reviewed in the appropriate area before you save it.
5. Decide how to complete the current work.
   - Select **Save** to save the record and keep it open for further review or updates.
   - Select **Save and Close** to save the record and close the current entry.
   - Use **Tickets** only when your internal process requires the available ticket action.

> **Warning:** Saving the record does not replace reviewing the information in each available tab. Confirm the Contact, Product, and RFQ information before you use **Save and Close**.

Contact



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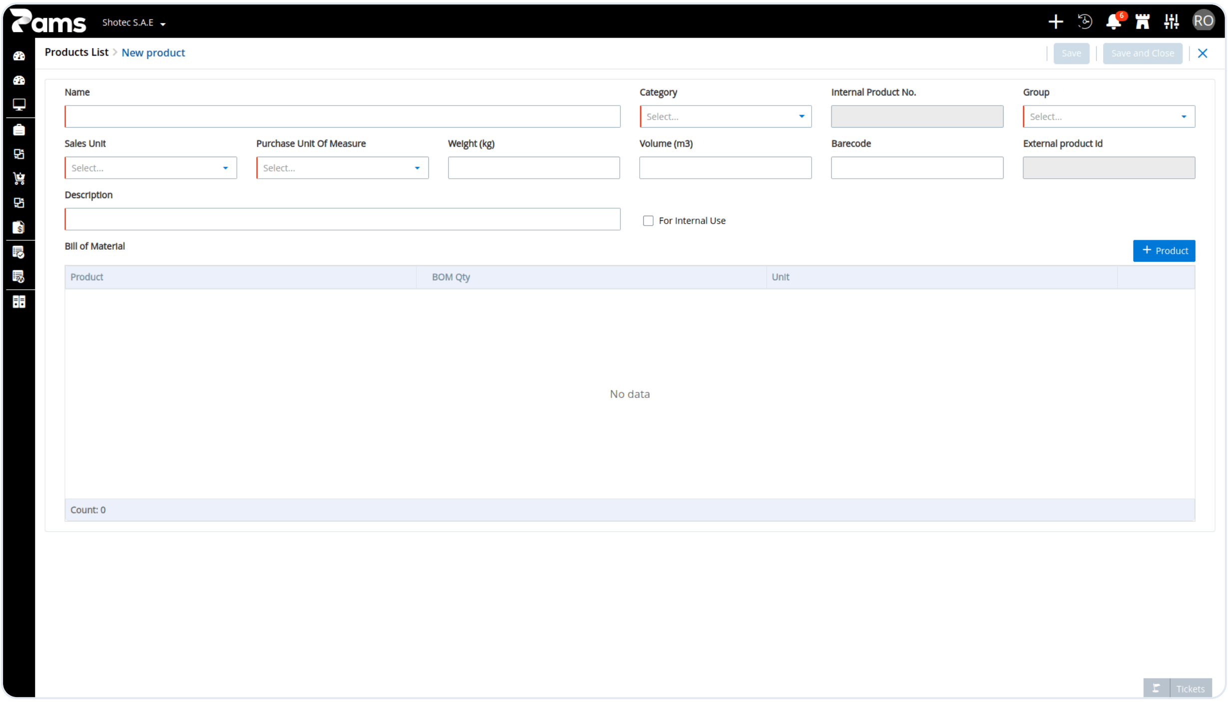
The Contact tab is the contact stage of the L/G record. Use this tab when reviewing the contact-related information held for the current Letter of Guarantee entry.

The available screen data does not identify a control that moves a record into or out of the Contact stage. Review the information presented in this tab and continue to the next relevant tab as required.

Product



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The Product tab is the product stage of the L/G record. Use it to review the product-related information associated with the current entry before completing the record.

No specific movement control is provided for this stage. The tab remains available for review while you work on the L/G record.

RFQ

The RFQ tab is the RFQ stage of the L/G record. Use this area when the Letter of Guarantee must be reviewed alongside RFQ-related information. An RFQ is a Request for Quotation used to obtain supplier pricing or commercial offers.

The available controls do not identify an action that moves the record into or out of the RFQ stage. Review the tab contents and save the L/G record when your review is complete.

Examples

A purchasing officer is preparing an L/G record for a job-related supplier commitment that has supporting documentation.

1. The purchasing officer opens **L/Gs** and starts the L/G entry.
2. The officer uses **Select...** and **Select** to choose the appropriate available item for the record.

3. The officer decides that the supplier-issued guarantee document must be retained with the entry. They select **Attach**, choose the document through **Select**, and confirm it with **Ok**. The file is retained in **files[]**.
4. The officer reviews the Contact tab to confirm the contact-stage information, then reviews the Product tab and RFQ tab for the applicable product and RFQ-stage information.
5. Because the record is complete and no further changes are needed, the officer selects **Save and Close**. The L/G entry and its attached supporting file are saved.

Tips

> **Tip:** Use **Save** when you expect to continue reviewing the L/G record in the same session. Use **Save and Close** only when the current work is complete.

> **Note:** Review all three available tabs—Contact, Product, and RFQ—before completing the record. Each tab represents a separate stage of the L/G entry.

> **Warning:** Confirm attached files with **Ok** after using **Attach**. Do not assume that selecting a file alone has completed the attachment action.

Troubleshooting

Symptom	Likely cause	Fix
The record remains open after saving.	**Save** was used instead of the closing action.	Select **Save and Close** after confirming that the record is complete.
A required document is not available in **files[]**.	The attachment action was not confirmed.	Use **Attach**, choose the file with **Select**, and select **Ok** to confirm the attachment.
The selected item is not appropriate for the L/G record.	The wrong item was chosen through **Select...**.	Revise the selection before saving the record.
Information appears to be missing during review.	The relevant stage tab has not been checked.	Review the Contact, Product, and RFQ tabs before saving or closing the record.

Related pages

- Letters Of Guaranties — Overview
- Letters Of Guaranties — Learning Path