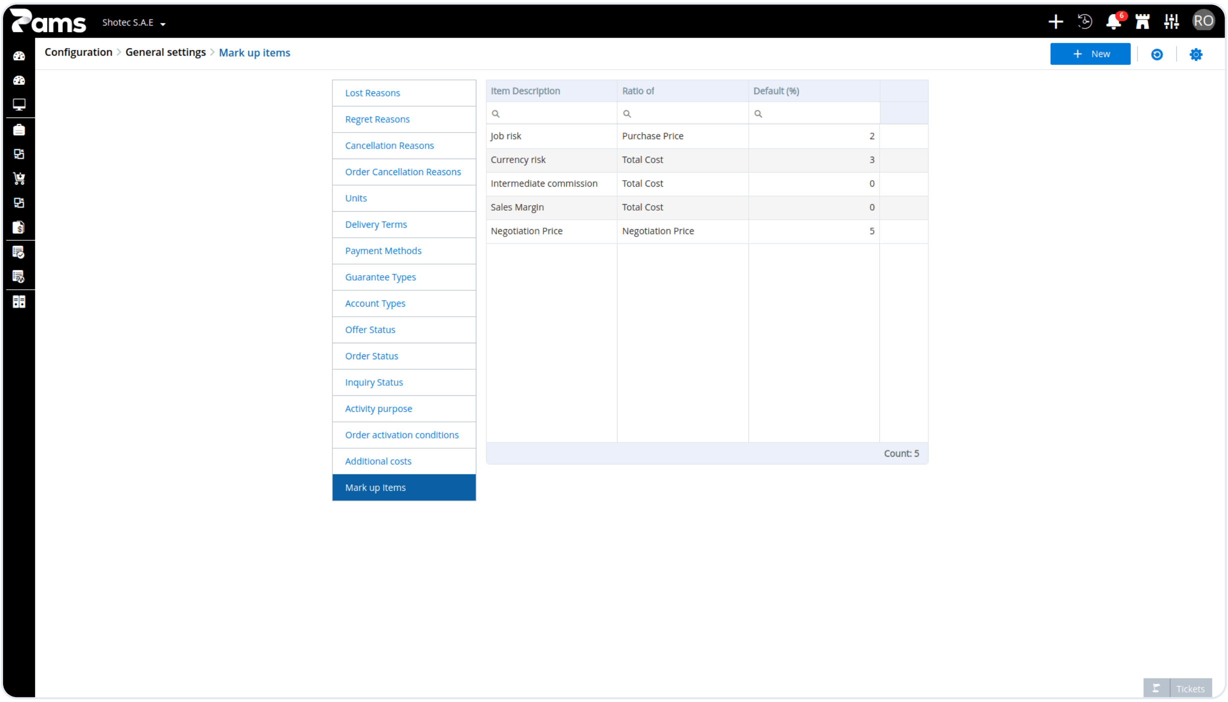
PAMS V2

Margin Items

July 29, 2026

Margin Items

Applications › Configurations › General Settings



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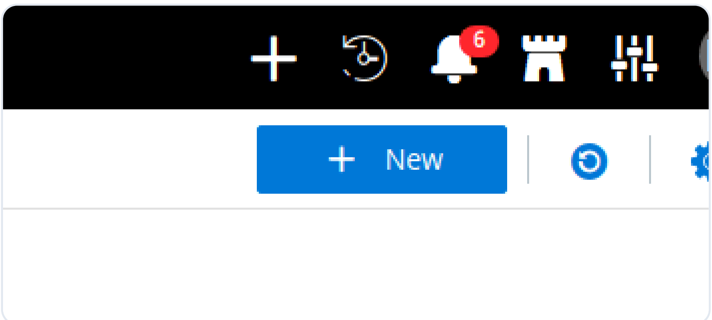


Overview

Margin Items are maintained in **Applications > Configurations > General Settings > Margin Items**. Use this area to review and maintain the margin-related items and supporting lists used by Sales, Account Management, Purchasing, PM, and Finance teams when assessing commercial risk, costs, and profitability.

The page also groups related configuration records into tabs, including account types, delivery terms, guarantee types, inquiry and order statuses, payment methods, and units. Select the appropriate tab before creating or reviewing a record.

Settings

Open **Margin Items** from **Configurations > General Settings > Margin Items**. Before creating a new item, determine which tab contains the type of record that you need to maintain.

The available tabs organize configuration records as follows:

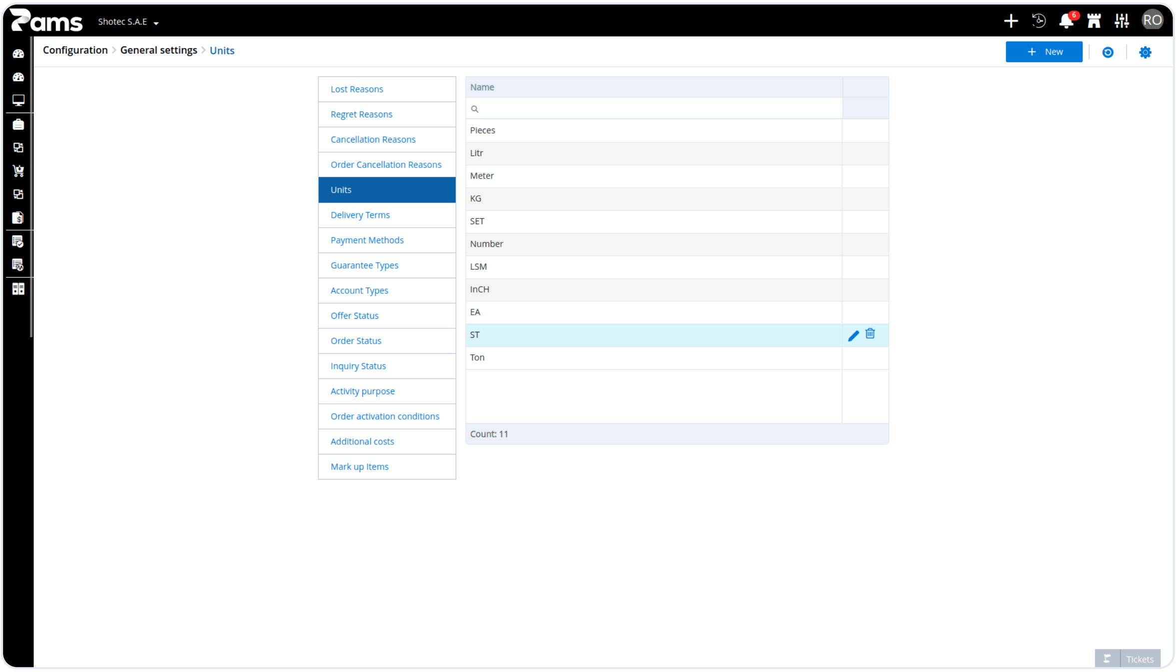
Tab	Use
Account types	Maintain account-type records.
Delivery terms	Maintain delivery-term records.
Guarantee types	Maintain guarantee-type records used for L/G and related commercial processes.
Inquiry status	Maintain inquiry-status records.
Offer status	Maintain offer-status records.
Order status	Maintain order-status records.
Payment methods	Maintain payment-method records.
Units	Maintain unit records.

> **Note:** The tabs are separate configuration areas. Review the selected tab carefully before using **New** so that you create the record in the intended category.

Use **Search** to locate an existing record before creating another one. This helps prevent duplicate descriptions, ratios, or default entries.

Workflow

1. Open **Margin Items** from **Configurations > General Settings > Margin Items** and review the current records. Use **Search** to find an existing item by the information displayed in the list, such as its item description, ratio, or default percentage.



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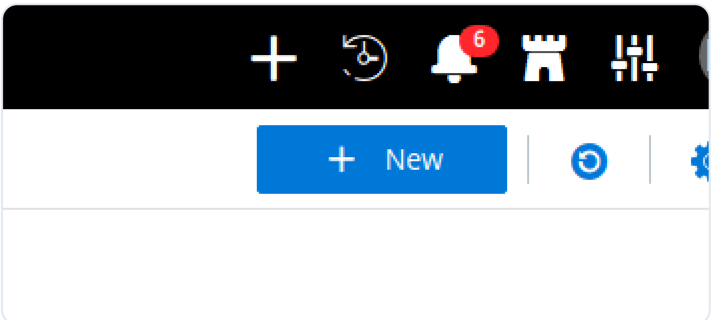


2. Decide whether to update an existing record or create a new one.
   - To create a new record in the selected category, select **New**.
   - To revise the displayed information, select **Update (icn-update)**.
   - To change available page-level options, select **Settings (icn icn-settings)** only when you are authorized to maintain those settings.

   If you do not want to continue with the current action, select **Cancel**.

3. When creating or revising a record, enter or adjust the information available in the opened form. Use the record description and applicable ratio or default percentage

consistently so that users can recognize the item when reviewing sales costs, purchase costs, and Job Profitability.

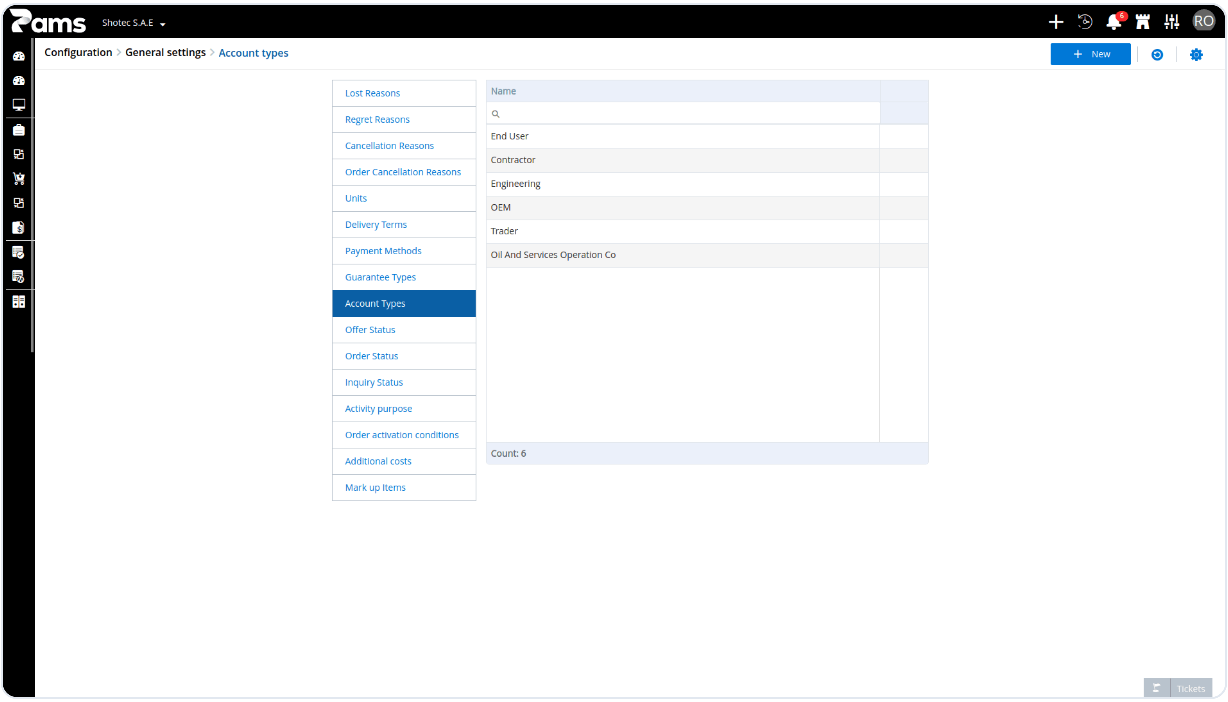
4. Decide whether supporting documentation is required.
    - Select **Attach** to add a file.
    - Use **files[]** to review attached files where available.
    - Select **Tickets** only when a related ticket is required for the record.

> **Tip:** Attach supporting evidence when the item is based on a commercial risk, supplier condition, or approved financial assumption. This makes later review easier for Sales, Purchasing, and Finance.

5. Complete the action by selecting **Ok**. If you need to narrow the displayed list after saving or reviewing records, use **Apply filter**. To download the current displayed data for review, select **Export**.

6. Review the final list and confirm that the item appears in the correct tab. If the item is not visible, clear or revise the search and filter criteria, then select **Apply filter** again.

Account types



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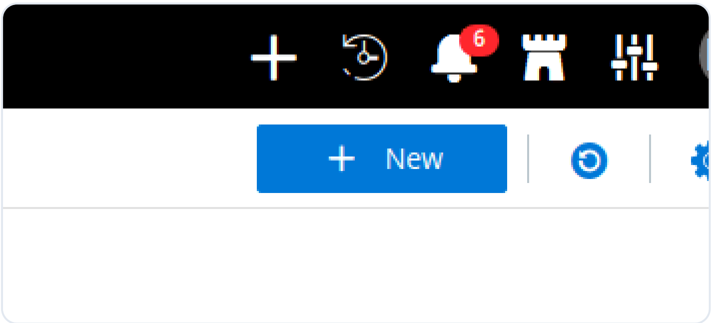
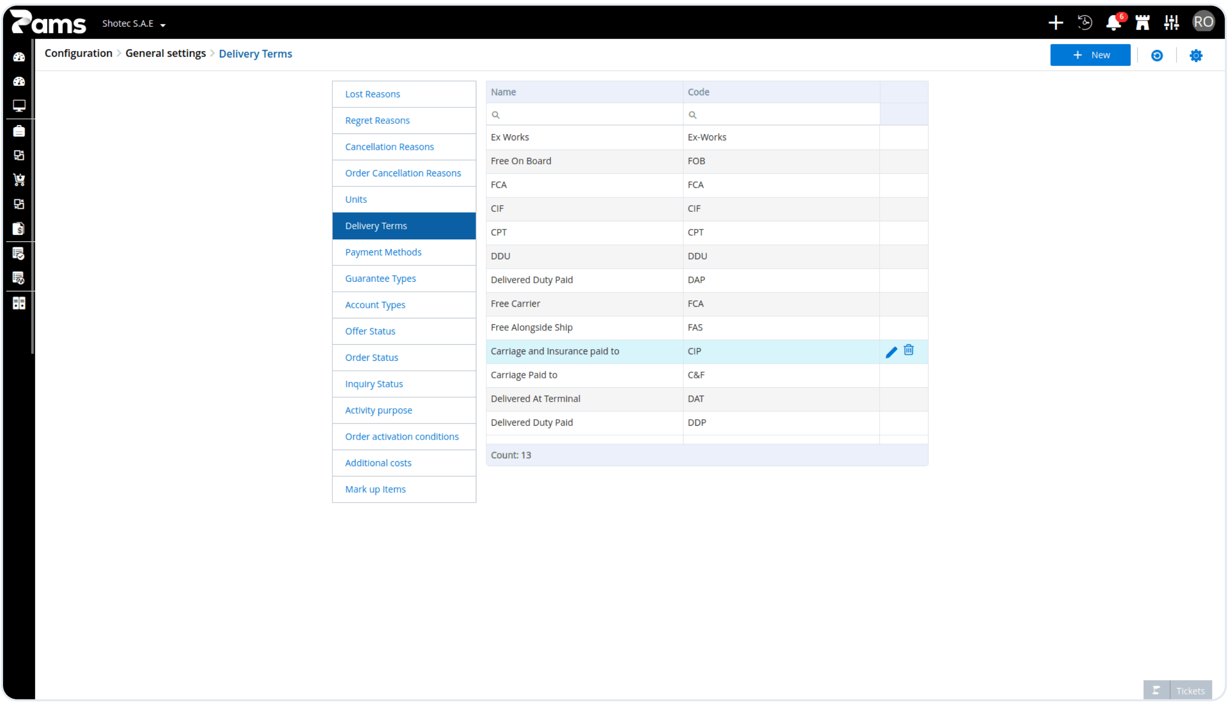


The **account types** tab holds account-type configuration records. Use this tab when reviewing or maintaining the classifications that support Accounts and related commercial records.

Search for an existing account type before selecting **New**. Where list information is displayed, use the available description, ratio, and default percentage information to distinguish records. No control is provided for moving a record from this tab to another tab; maintain the record in the appropriate tab from the start.

Delivery terms



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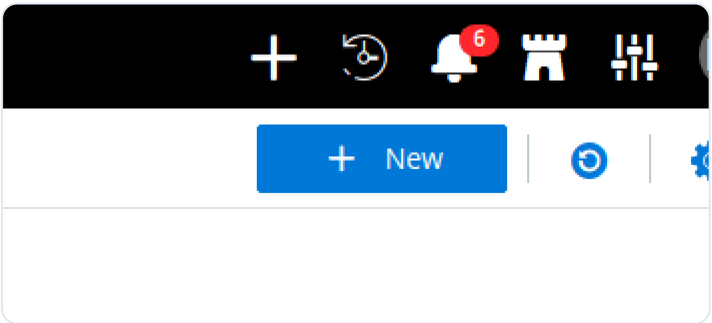
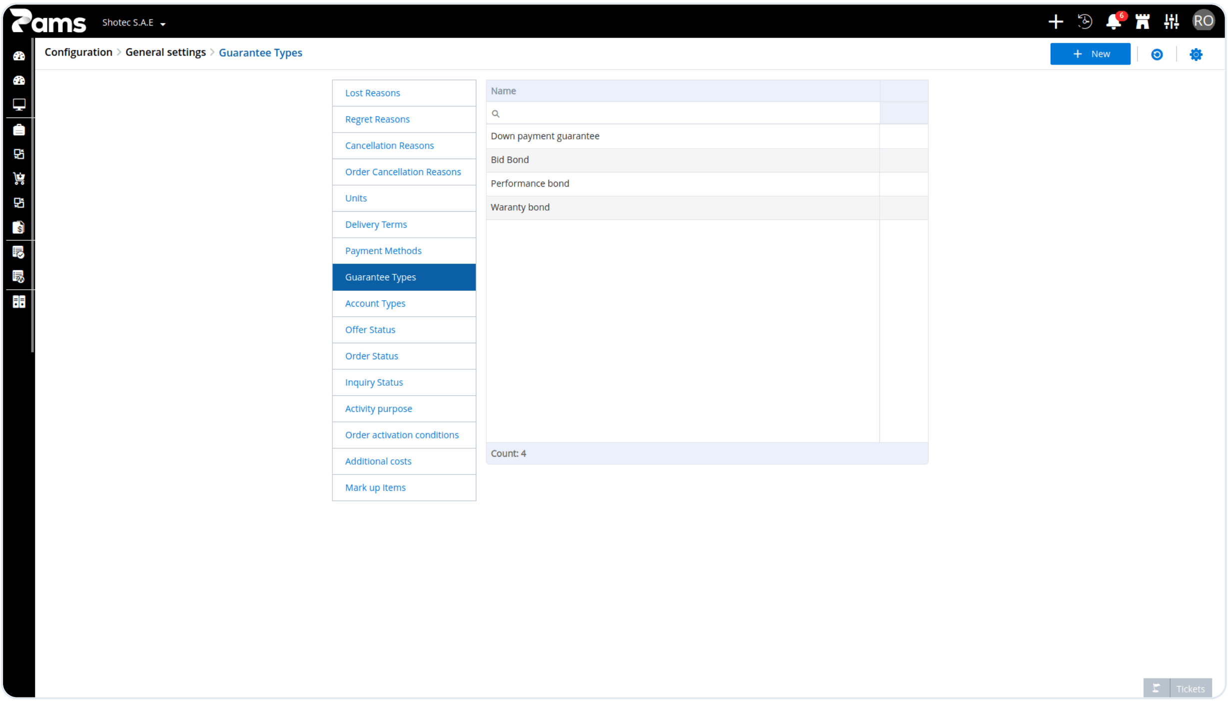


The **delivery terms** tab holds delivery-term records used in commercial and operational processes. Use it to review the terms that users may need when working with sales, purchasing, Warehouse, or project-related activity.

Use **Search** and **Apply filter** to locate the required record, then use **New** or **Update (icn-update)** as needed. The available controls do not indicate a transfer process between delivery terms and other tab categories.

Guarantee types



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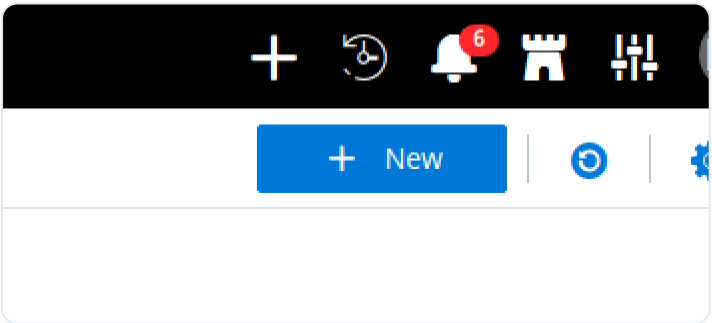
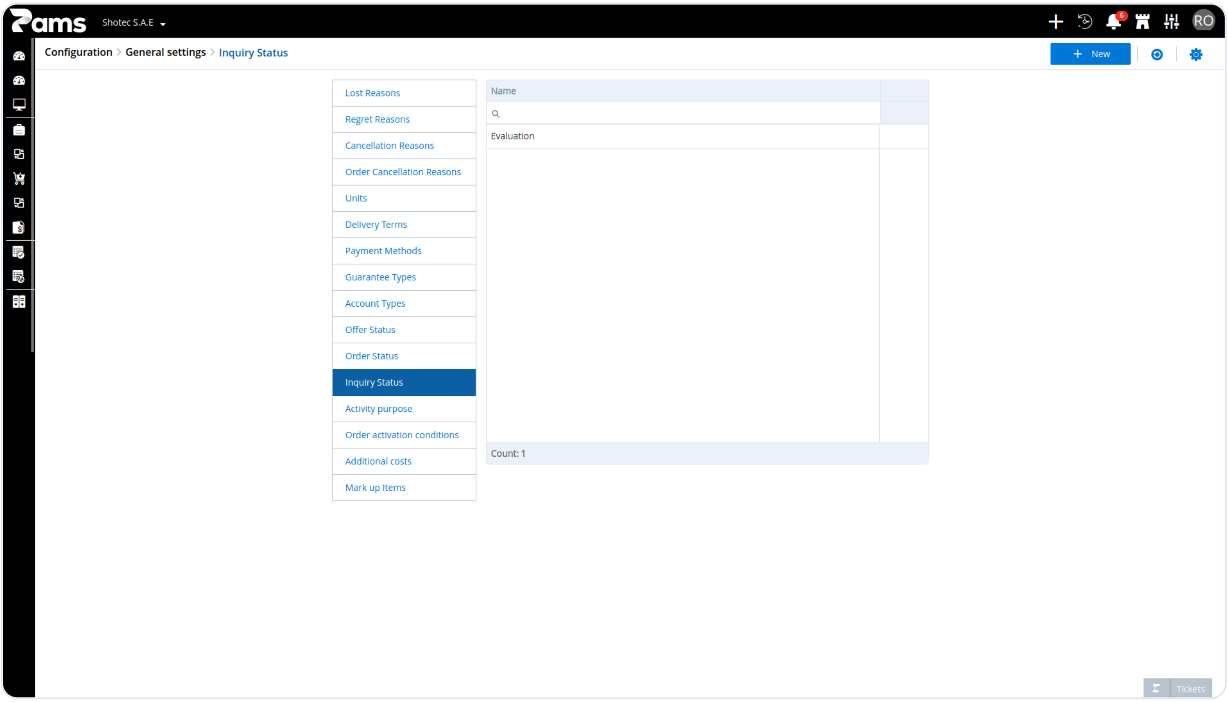


The **guarantee types** tab holds guarantee-type records. These records support the classification of guarantees used in commercial and finance operations, including L/G-related work.

Create or revise the applicable guarantee type through **New** or **Update (icn-update)**. Attach supporting files with **Attach** when documentation is required. The page does not provide a control for moving a guarantee-type record to another category.

Inquiry status



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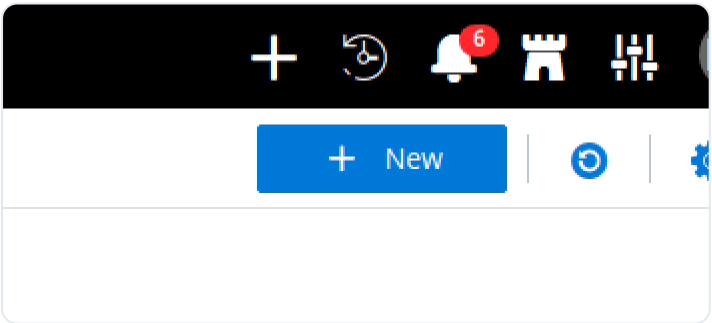
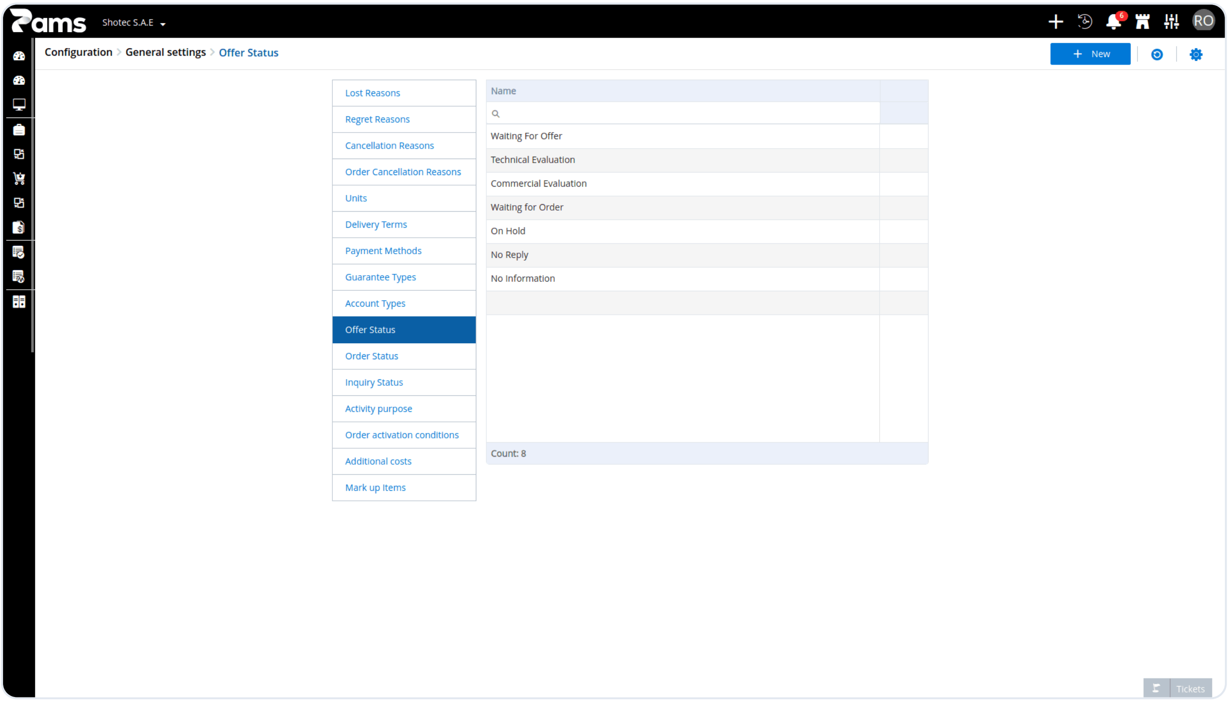


The **inquiry status** tab holds status records for inquiries. Use this area to review the available inquiry-status descriptions before they are used in related commercial activity.

Use **Search** to check whether the required status already exists. Select **New** to add a record or **Update (icn-update)** to amend an existing one, then select **Ok** to complete the action. No status-transition button is listed on this screen.

Offer status



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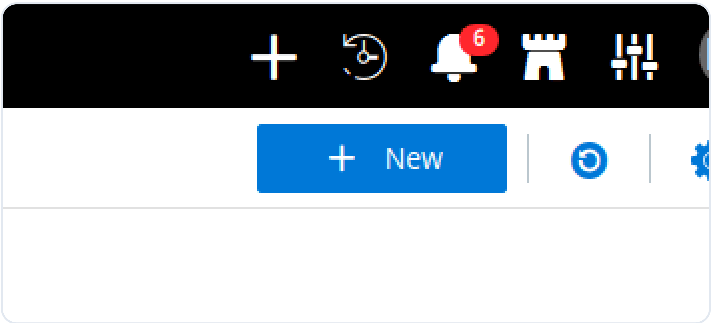
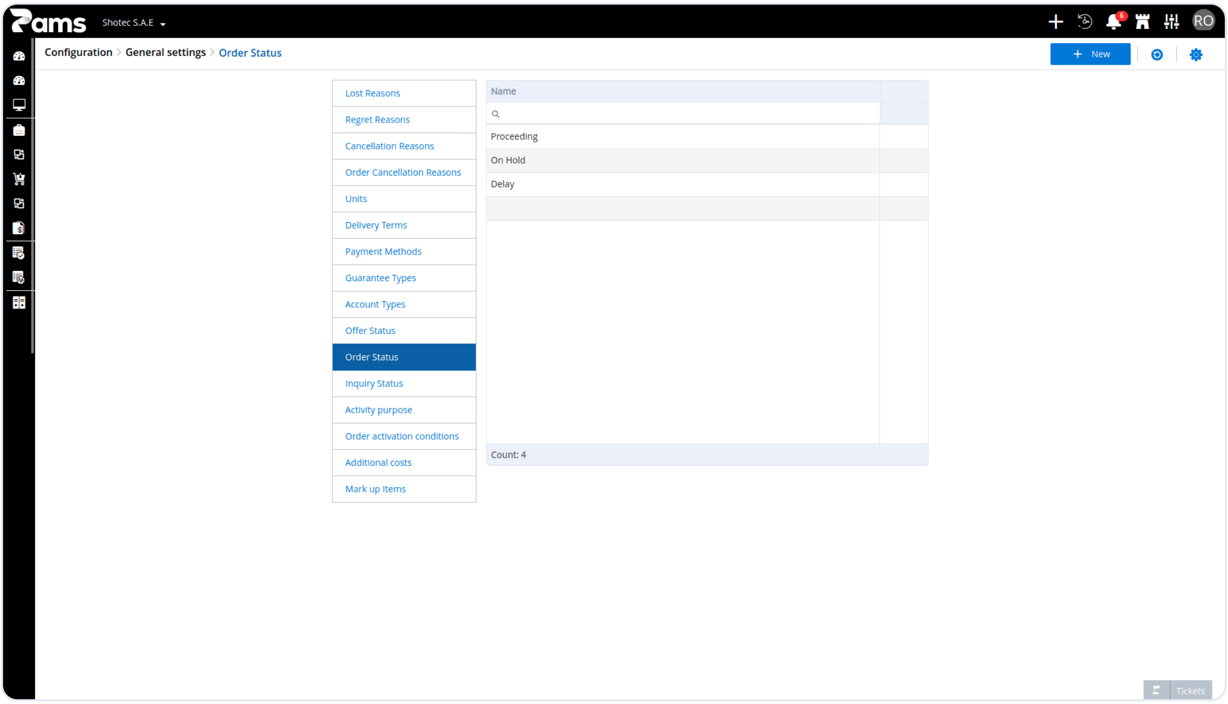


The **offer status** tab holds status records for offers. Use this tab to maintain the descriptions that identify offer status in the applicable sales workflow.

Review the existing list before adding a new status. If an existing record requires correction, use **Update (icn-update)** rather than creating a duplicate. The screen provides no control that moves a record between offer-status values.

Order status



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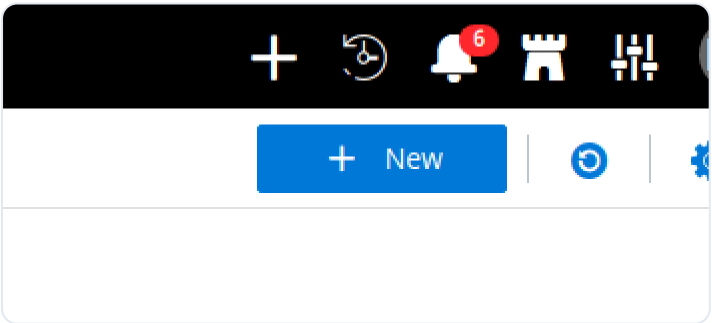
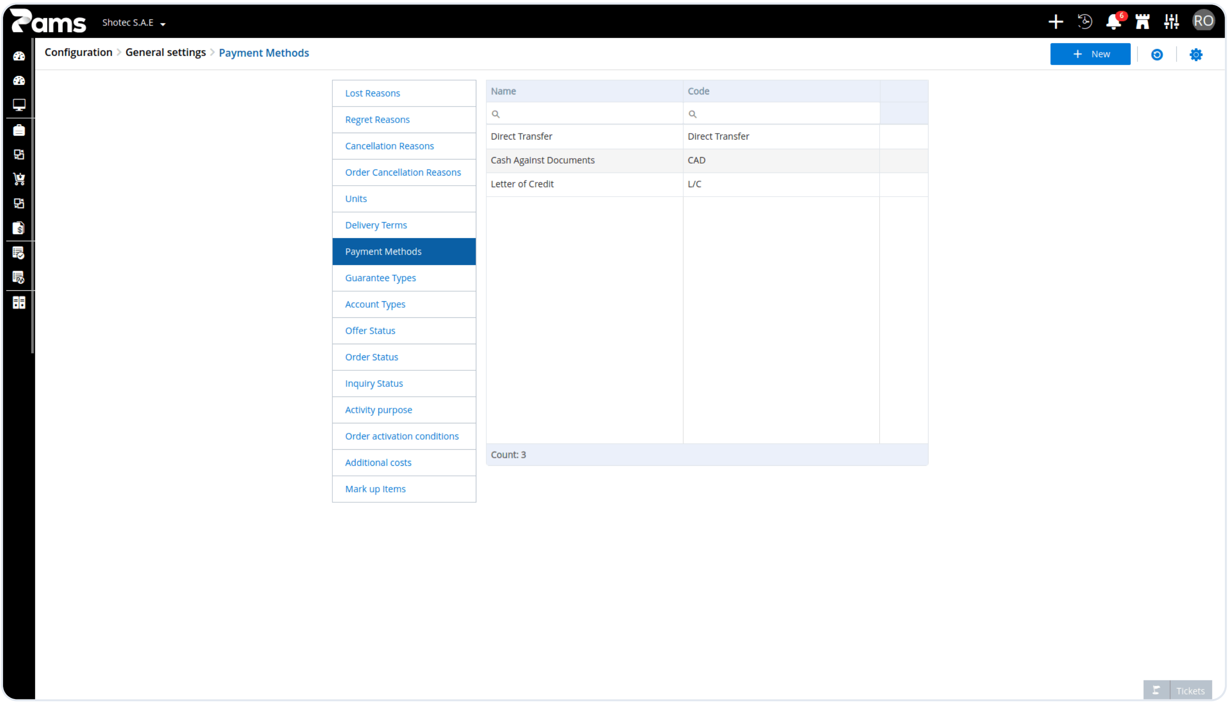


The **order status** tab holds status records for orders. These records support the classification of order activity, including Direct orders where applicable.

Use **New** to add a missing order-status record and **Update (icn-update)** to revise an existing record. Select **Ok** to confirm the action, or **Cancel** to abandon it. The available controls do not identify an order-status progression or transition process.

Payment methods



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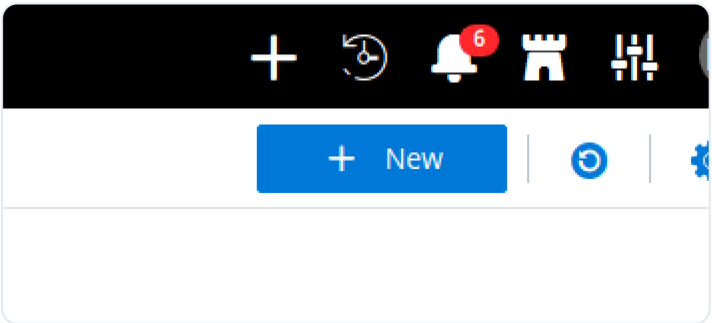

The **payment methods** tab holds payment-method records. Finance officers and commercial users can use this tab to review and maintain the payment-method descriptions available to the business.

Locate records through **Search**, then use **New** or **Update (icn-update)** to maintain them. Use **Export** when the visible list is needed for review outside the application. No control is provided for transferring a payment method to another tab.

Units

The **units** tab holds unit records. Use this tab when maintaining the units used to describe relevant commercial, purchasing, warehouse, or inventory quantities.

Check for an existing unit before creating one. Use **New** to add a record, **Update (icn-update)** to revise a selected record, and **Ok** to complete the change. The page does not provide a record-movement action between unit records and other configuration tabs.

Examples

A Sales representative needs to record a new margin assumption for a commercial risk used during job review.

1. Open **Margin Items** and use **Search** to check whether a similar item already exists.
2. Review the displayed item descriptions and ratios. If the required item is already present, select **Update (icn-update)** and revise the available record information instead of creating a duplicate.
3. If no suitable item exists, select **New**.
4. Enter the available description and applicable ratio or default percentage in the creation form. For example, use a clear description such as “Import cost risk” and apply the approved percentage used by the business.

5. If the assumption is supported by a commercial approval or risk document, select **Attach** and add the relevant file.
6. Select **Ok** to complete the record.
7. Use **Apply filter** to refresh the reviewed list if necessary, then confirm that the item is visible in the intended configuration area.
8. Select **Export** if the updated list is needed for a Job Profitability or management review.

Tips

> **Tip:** Use clear, consistent descriptions so that Sales, Purchasing, PM, and Finance users can identify the correct margin item during job and profitability reviews.

> **Warning:** Do not create a new record until you have searched the selected tab. Similar descriptions or duplicate default percentages can make commercial reporting harder to interpret.

> **Note:** Use **Cancel** rather than **Ok** when you decide not to retain the current creation or update action.

Troubleshooting

Symptom	Likely cause	Fix
The required record is not visible.	A search term or filter is limiting the list, or the wrong tab is selected.	Check the selected tab, revise **Search**, and select **Apply filter**.
A new record was created in the wrong category.	**New** was selected before choosing the appropriate tab.	Return to the required tab and create or maintain the record there. The screen does not provide a listed move action between tabs.
An update should not be saved.	The record is still in the current action form.	Select **Cancel** before selecting **Ok**.
A review requires supporting evidence, but no	A file was not attached during record maintenance.	Use **Attach** and review available files through **files[]** where applicable.

Symptom	Likely cause	Fix
document is available with the record.		

Related pages

- Lost Reasons
- Order Activation Conditions
- Configurations — Learning Path
- Activity Purpose
- Inquiry Status
- Order Cancellation Reasons
- Regret Reasons
- Configurations — Overview
- 2 Factor Authentication
- Account Managers
- Branches
- Flags
- Frequent Currencies
- Products
- Custom Fields