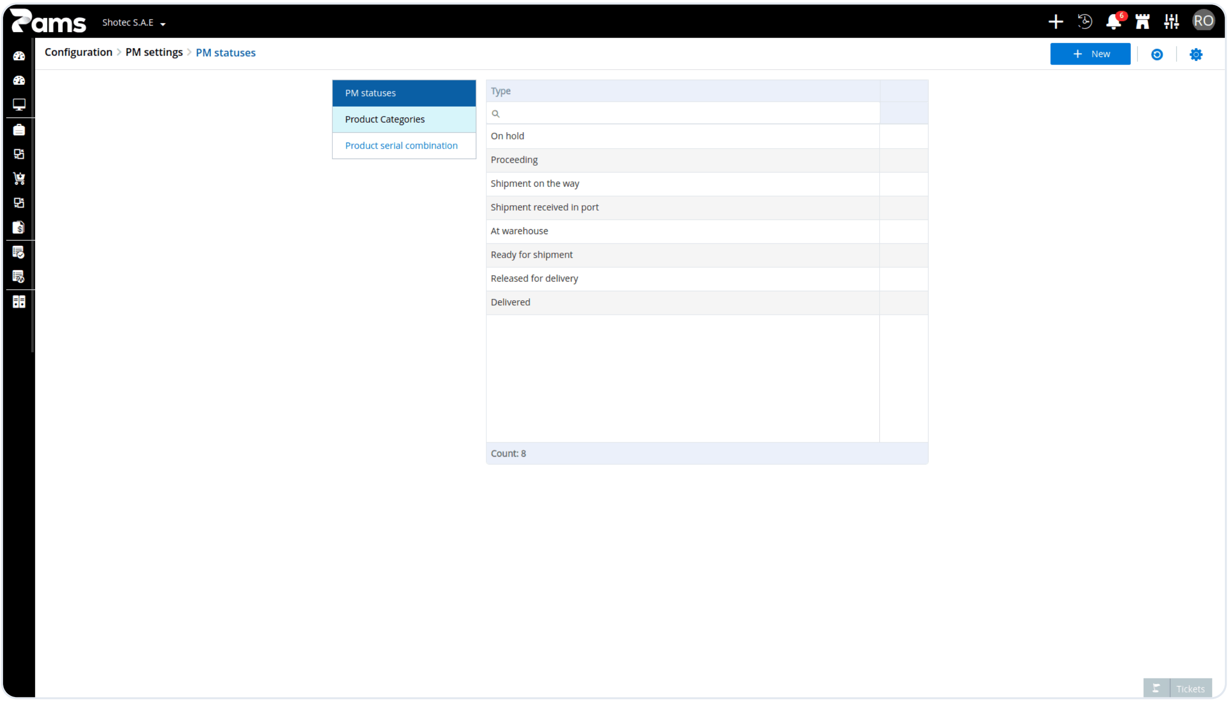
PM Statuses

July 29, 2026

PM Statuses

Applications › Configurations › PMSettings



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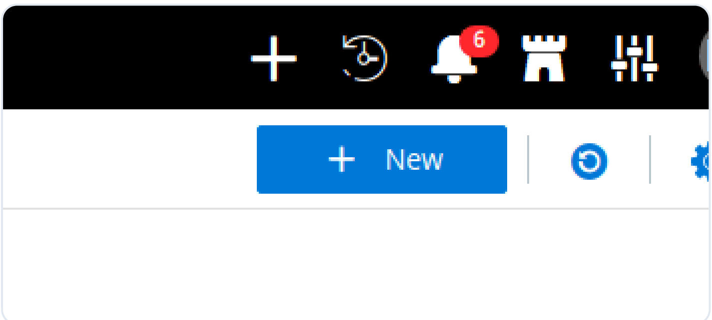


Overview

PM Statuses provides a central view of status records used in PM-related work. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance officers can use this view to locate existing statuses, review related settings, and work with available record actions.

Use PM Statuses when you need to find a status record, begin creating a new record, export the current list, or review the PM settings areas associated with product serial combinations and warehouse settings.

Settings

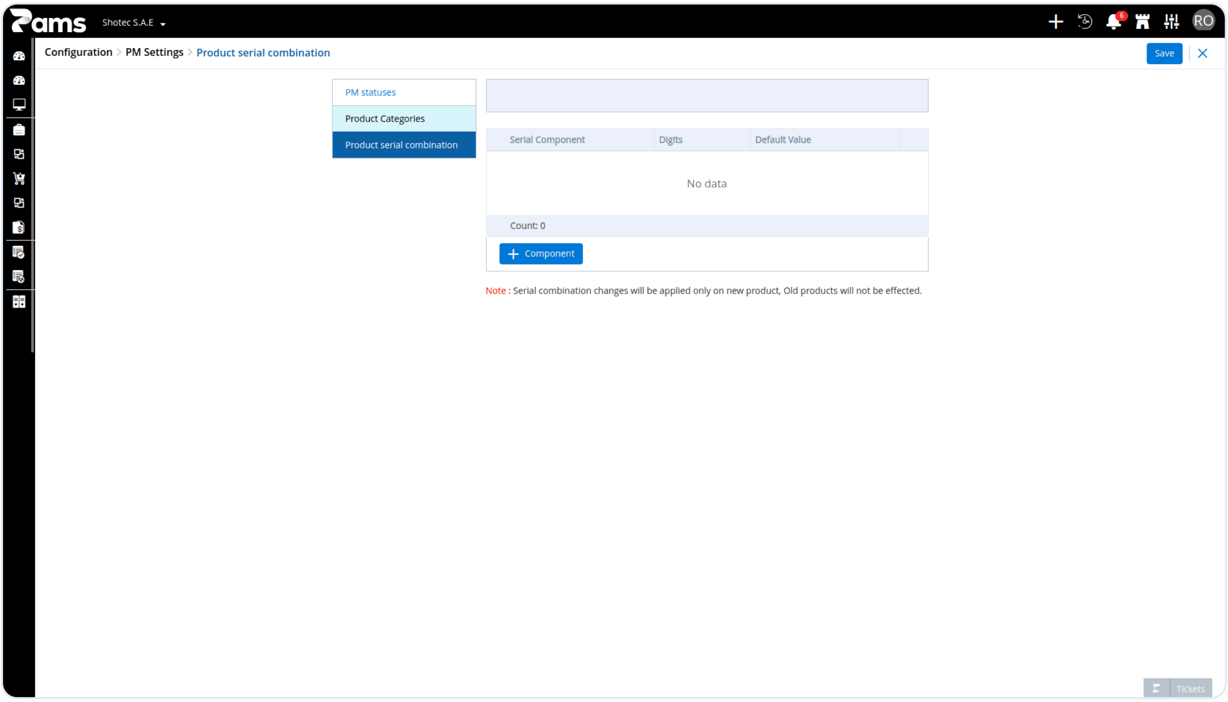
Open the PM Statuses view from **Configurations** > **PMSettings** > **PM statuses**. The available PM settings screen includes a search facility, a files collection, and tabs for related configuration areas.

Before working with status records, review the relevant PM settings tab for the operational area involved. The captured screen does not provide editable status-setting fields or documented status-transition rules; therefore, this page documents only the settings areas and actions available on the PM Statuses screen.

Setting or control	Purpose
Search	Locates records shown in the current PM Statuses view.
Apply filter	Applies the current search or filter selection.
Cancel	Cancels the current filtering action.
New	Starts creation of a new record.
Export	Exports the records currently available in the view.
Attach	Provides access to the files collection associated with the screen.
Tickets	Opens the available ticket-related action.
Update (icn-update)	Provides the available update action.
Settings (icn icn-settings)	Provides the available settings action.
Ok	Confirms the current action or dialog when available.

> **Note:** The screen identifies a files collection as `files[]`, but it does not specify file types, attachment limits, or document approval rules.

Product Serial Combination



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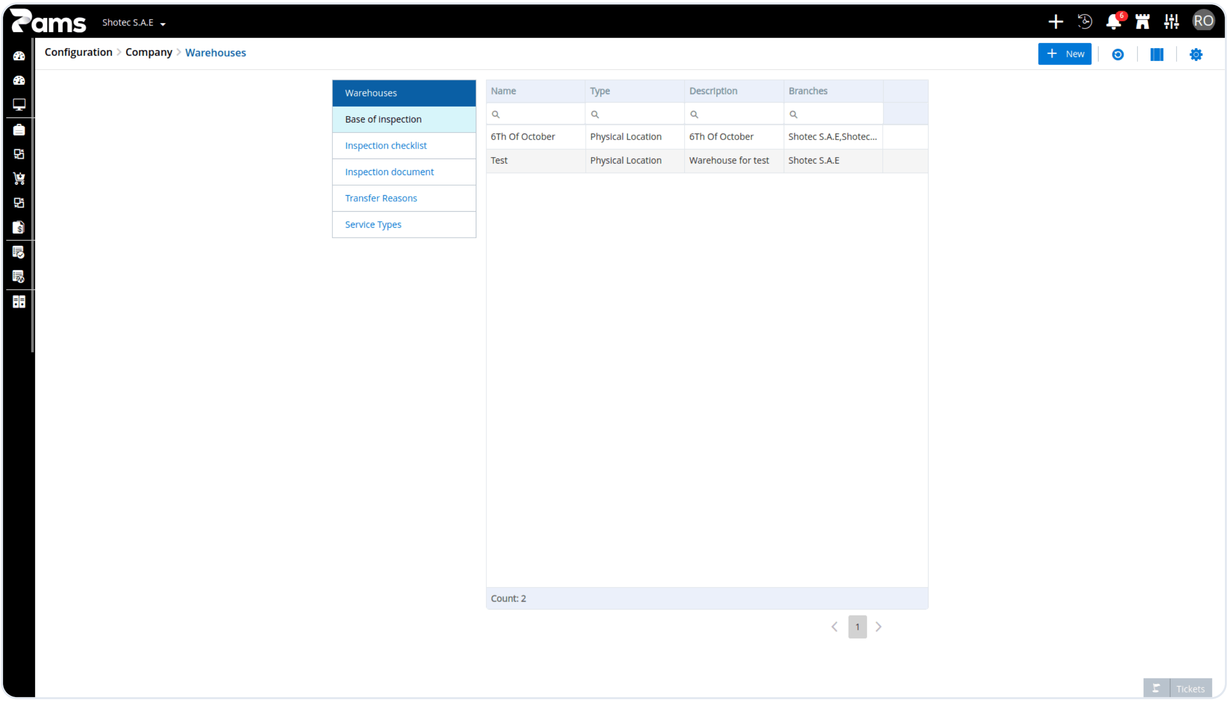
The **product serial combination** tab is a PM settings area associated with Product Serial Combination records. Use this tab when the PM status work you are reviewing relates to products tracked through serial-number combinations.

The captured screen does not identify individual columns, record fields, or an action that moves a PM status record into or out of this tab. Use **Search** and **Apply filter** to locate available records in the current view, and use **Cancel** if you decide not to apply the current filter.

Warehouse Settings



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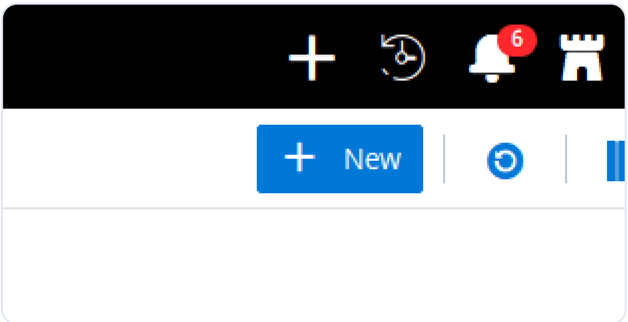

The **warehouse settings** tab is a PM settings area associated with Warehouse and Stock operations. Use this tab when reviewing PM status information in a warehouse-related context, such as records connected with stock handling or shipment activity.

The screen does not provide a documented control for moving records into or out of this tab. It shows the available search, export, attachment, ticket, and record-action controls for the PM settings view.

Workflow

1. Open the PM Statuses work area

1. From the application navigation, select **Configurations**.
2. Open **PMSettings**.
3. Select **PM statuses**.

You are now in the PM settings view for PM Statuses. Review the visible records before taking action. The list can include PM status entries used to indicate operational conditions, including records related to work being held, progressing, or shipped.

2. Decide whether to locate an existing status or start a new one

If you need an existing record, search for it before creating another status.

1. Enter the relevant word or phrase in **Search**.
2. Select **Apply filter** to apply the search criteria.
3. Review the filtered results.
4. If the filter is not required, select **Cancel** rather than continuing with the current filtering action.

Use a focused search term that reflects the business context, such as a delivery condition, warehouse activity, or project work condition. This helps prevent duplicate status records from being created when a suitable one already exists.

If no existing record meets the need, begin a new record:

1. Select **New**.
2. Complete the fields presented in the new-record form.
3. Confirm the record using the available confirmation control, such as **Ok**, when the form provides it.

The captured screens do not show the fields or final save action of the new-record form. Do not assume that a status has been created until the system returns it in the PM Statuses view or otherwise confirms the action.

3. Decide whether to maintain the current view or retain supporting files

After locating or creating the required status, decide whether you need to work with the current view, supporting files, or related ticket activity.

1. Select **Update (icn-update)** when you need to use the screen’s available update action.
2. Select **Attach** when you need to work with files associated with the PM settings screen.
3. Select **Tickets** when the status work requires the available ticket-related action.
4. Select **Settings (icn icn-settings)** when you need to access the settings action provided by the screen.

The available screen data does not define the results of the update, ticket, attachment, or settings actions. Review the resulting dialog or page before confirming a change.

4. Decide whether to export the current result set

Export records when you need an offline copy of the currently displayed PM Statuses information for review, reporting, or operational follow-up.

1. Apply **Search** and select **Apply filter** if you only need a subset of records.
2. Verify that the list contains the records you intend to include.
3. Select **Export**.

Export only after confirming the current search result. If you export before applying the intended filter, the exported output may reflect a broader list than expected.

> **Tip:** Filter the list before exporting so that the export reflects the exact PM status records needed for the task.

5. Review the applicable PM settings context

When the status is relevant to a product serial-tracking or warehouse process, review the corresponding tab before completing your work.

1. Select **product serial combination** for Product Serial Combination-related context.
2. Select **warehouse settings** for Warehouse-related context.
3. Use **Search** and **Apply filter** in the selected view when you need to narrow the displayed records.
4. Select **Cancel** if you do not want to continue with the filter.

No status lifecycle options or status-transition buttons are provided in the captured screen. The PM Statuses screen supports locating, beginning a new record, exporting, and using the available actions, but it does not document a status progression or approval flow.

Examples

A project manager needs to review the status used for a delivery-related project activity before following up with the Warehouse team.

1. The project manager opens **Configurations** > **PMSettings** > **PM statuses**.
2. In **Search**, the project manager enters `Shipment`.
3. The project manager selects **Apply filter** and reviews the matching PM status records.
4. The project manager selects the **warehouse settings** tab to review the Warehouse-related PM settings context.
5. After confirming that the visible record is the required delivery-related status, the project manager selects **Export** to create a copy of the filtered results for the project follow-up.
6. If supporting documentation is required, the project manager selects **Attach** and works with the available files collection.

This process avoids creating a duplicate status record and provides a focused export for the delivery follow-up.

Tips

> **Tip:** Search for an existing status before selecting **New**. This supports consistent status usage across Sales, PM, Purchasing, and Warehouse work.

> **Warning:** The captured PM Statuses screen does not show a status field, lifecycle options, or approval actions. Do not infer that an update, attachment, or ticket action changes a PM status.

Troubleshooting

Symptom	Likely cause	Fix
The required PM status does not appear in the list.	A search or filter may be limiting the visible records.	Review the value in **Search**, select **Cancel** if appropriate, and run the search again with a broader term.
The export does not contain the expected records.	The current filter may not have been applied before exporting.	Enter the required value in **Search**, select **Apply filter**, verify the displayed list, and then select **Export**.
You cannot confirm what will happen after selecting an action.	The screen data does not define the results of **Update (icn-update)**, **Tickets**, **Attach**, or **Settings (icn icn-settings)**.	Open the action and review the resulting dialog or page before selecting **Ok** or making further changes.

Symptom	Likely cause	Fix
You need to create a status but do not see the required fields on the PM Statuses list.	The fields are expected to appear after selecting **New**, but the creation form is not included in the captured screen data.	Select **New** and complete only the fields presented in the resulting form. Confirm the record only when the available form provides a confirmation action.

Related pages

- Product Categories
- Configurations — Overview
- Configurations — Learning Path
- Product Serial Combination
- 2 Factor Authentication
- Account Managers
- Branches
- Flags
- Frequent Currencies
- Products
- Custom Fields
- Dashboard Settings
- Dynamic Validation
- Banks
- Invoice Settings