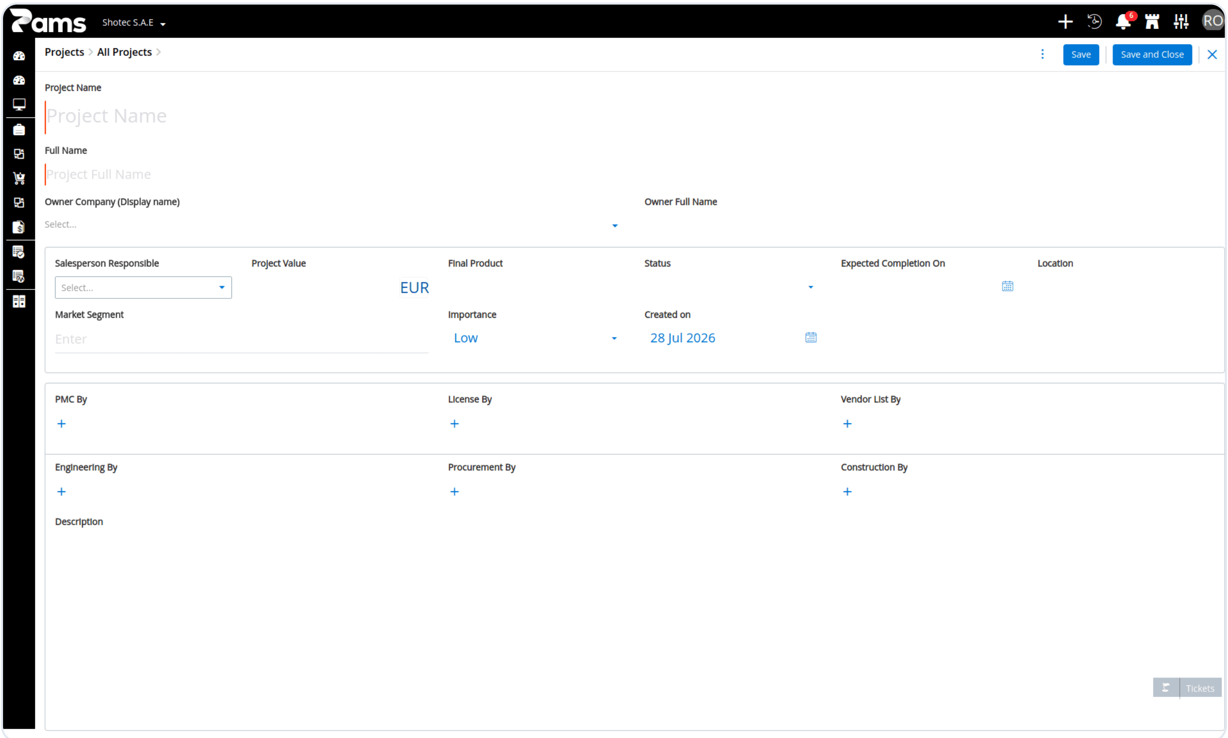
PAMS V2

Project

July 29, 2026

Project

Applications › Add new › Project



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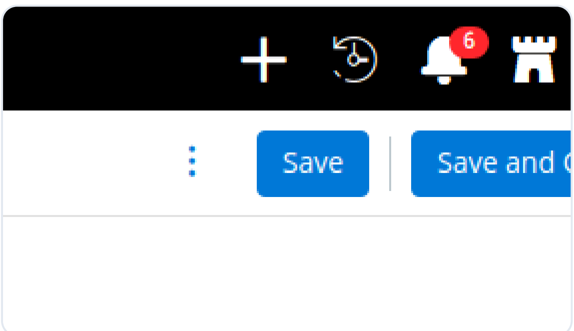


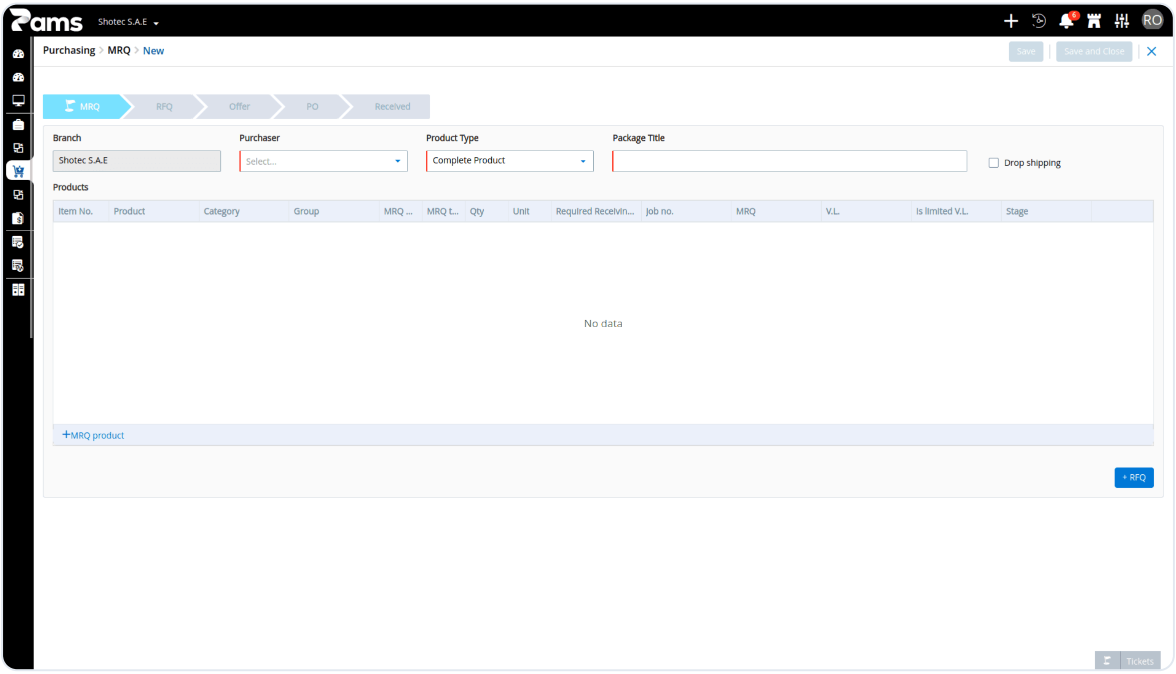
Overview

Use Projects to create and maintain a project record for work that may involve sales, purchasing, Warehouse activities, finance, PM, and Job Profitability review. Enter the project's identifying details, select related items where required, attach supporting files, and save the record for continued use.

This feature is intended for users who need a single project record before managing project-related RFQs, Tickets, documents, and operational activities.

Workflow

1. Open **Applications** > **Add new** > **Project** > **Project** to create a new project record.



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2. Identify the project. Enter a clear value in **Project Name** and, where a fuller description is required, complete **Project Full Name**.

   Use names that allow Sales, Purchasing, PM, and Finance users to distinguish the project from other jobs and Accounts.

   > **Tip:** Use a consistent Project Name format so that the project can be identified easily in All Projects, reports, and project-related work.

3. Decide whether you need to add items to the project.

   - To choose items, use **Select...** and then select the required entries.
   - Review the chosen entries in **Selected items**.
   - Use **Ok** to confirm the selection, or use **Close** or **Cancel** if you do not want to apply the current selection.

4. Complete the available project information as applicable:

   - Use **Title** to record the title shown for the project-related entry.
   - Enter **Employee Name** when an employee name is required.
   - Enter **Position** and **Department** when those details apply.
   - Use **Enter** where the screen requests an entered value.

   Do not add information that is not relevant to the project. Review the information before saving so that project users work from the correct record.

5. Decide whether supporting documents are needed.

   - Select **Attach** to add files to the project.
   - Use **files[]** to identify the file or files to attach.
   - Use **Save changes** to keep changes made to the attachment information.
   - Use **Delete** only when you need to remove the selected item or file from the current record.

   > **Note:** Attach documents that help users work on the project, such as customer documents, supplier information, or internal project material. Confirm that the correct file is selected before saving changes.

6. Decide how to save the project.

   - Select **Save** to save the project and remain on the Project screen.
   - Select **Save and Close** to save the project and close the record.
   - Select **Cancel** if you do not want to continue with unsaved changes.

   A saved project can then be opened again from **All Projects** when further information must be reviewed or updated.

7. Use project-related actions when they are required:

   - Select **Tickets** to work with ticket-related information available from the project.
   - Select the **rfq** tab to review the RFQ stage for the project.

RFQ

The **rfq** tab is the Project view for RFQ-related content. Use it when the project requires review of Request for quotation activity connected to the project, such as supplier pricing or commercial offers that support a Buyout or purchasing decision.

The available Project screen identifies this stage as **rfq**, but it does not provide a control that moves records into or out of this tab. Review the RFQ-stage information available for the project and return to the main Project record when you need to update project details or attachments.

Examples

A Project Manager is preparing a project for a customer job that will require supplier quotations.

1. Open **Applications** > **Add new** > **Project** > **Project**.
2. In **Project Name**, enter `Northside Office Fit-Out`. In **Project Full Name**, enter `Northside Office Fit-Out - Phase 1`.
3. Use **Select...** to choose the required items for the project. Confirm the selection with **Ok** and review the result in **Selected items**.
4. Enter the responsible person's details in **Employee Name**, and complete **Position** and **Department** where required for the project record.
5. Select **Attach** and add the project scope document through **files[]**. Use **Save changes** to retain the attachment.
6. Select **Save** to keep the project open for review. Confirm the project name, selected items, employee details, and attached document.
7. Open the **rfq** tab when supplier pricing or commercial offers need to be reviewed for the project.

Tips

> **Tip:** Complete **Project Name** before adding items or files. This makes it easier to verify that documents and selections are being added to the correct project.

> **Warning:** Select **Save** or **Save and Close** after making changes. Selecting

> **Cancel** does not preserve unsaved project updates.

> **Note:** Use **Delete** carefully. Ensure that the selected item or file is the one you intend to remove before confirming the action.

Troubleshooting

Symptom	Likely cause	Fix
The project does not appear after you leave the screen.	The record may not have been saved.	Reopen the Project screen, complete the required details, and select **Save** or **Save and Close**.
The wrong items appear in **Selected items**.	An incorrect selection was confirmed.	Use **Select...** to review the selection again, choose the correct entries, and confirm with **Ok**.
An attachment is missing from the project.	The file selection or attachment changes may not have been saved.	Select **Attach**, add the file using **files[]**, and select **Save changes**.
RFQ information is not visible in the expected place.	The RFQ-related content is viewed from the project's RFQ stage.	Open the **rfq** tab and review the RFQ-stage content for the project.

Related pages

- Add new — Overview
- Accounts
- Add new — Learning Path
- Contact
- Call
- Task
- Payment
- Product
- Direct Order
- RFQ
- Process