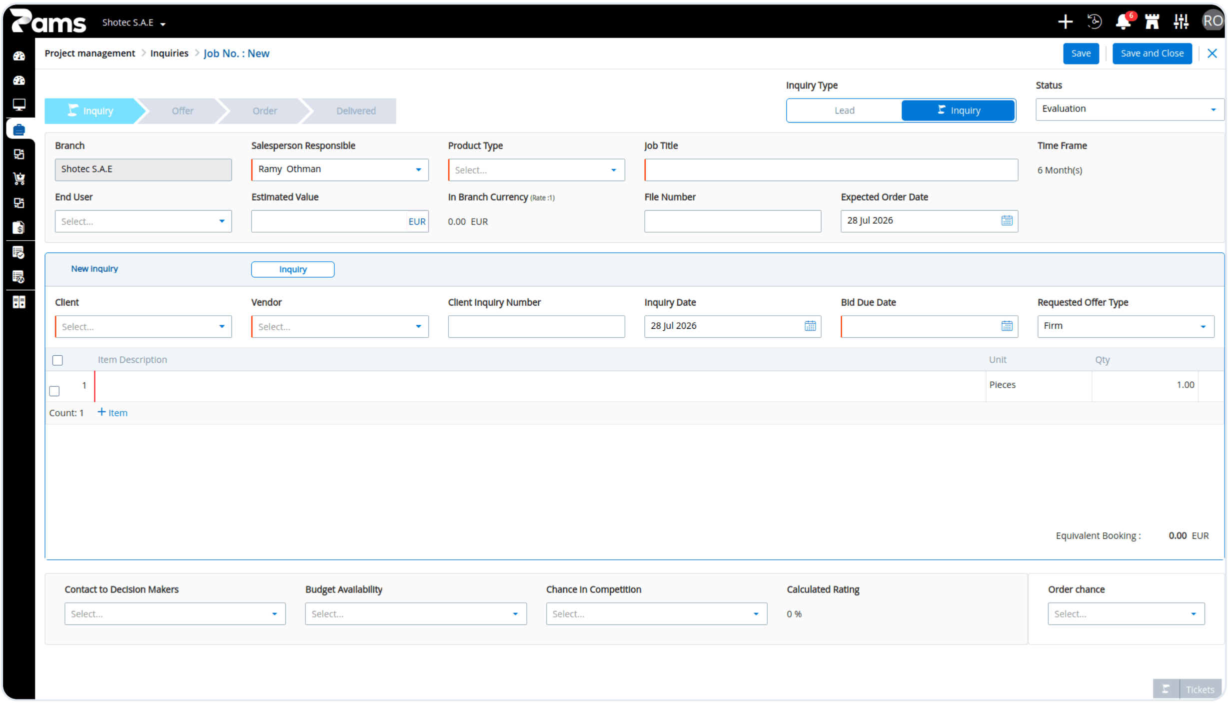
PAMS V2

Projects

July 29, 2026

Projects

Applications › Market › Projects



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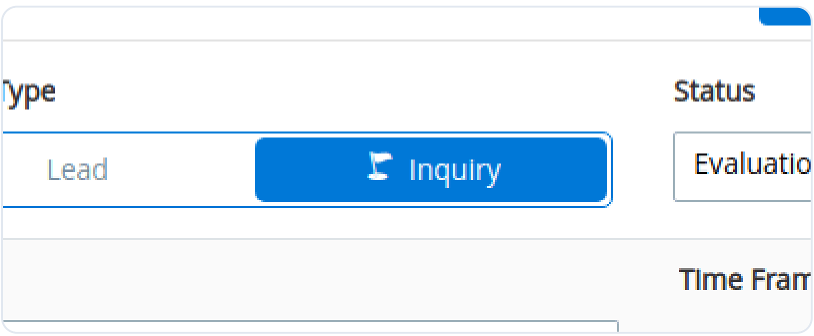
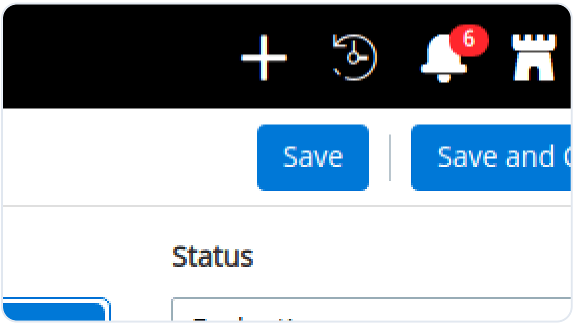
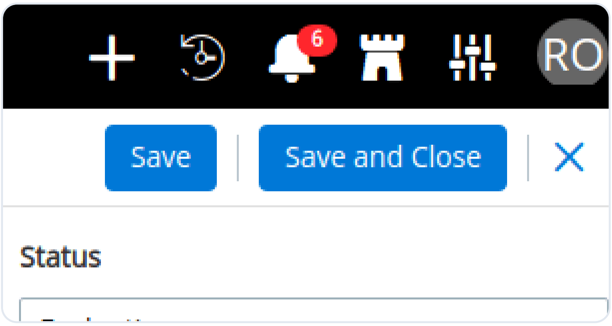






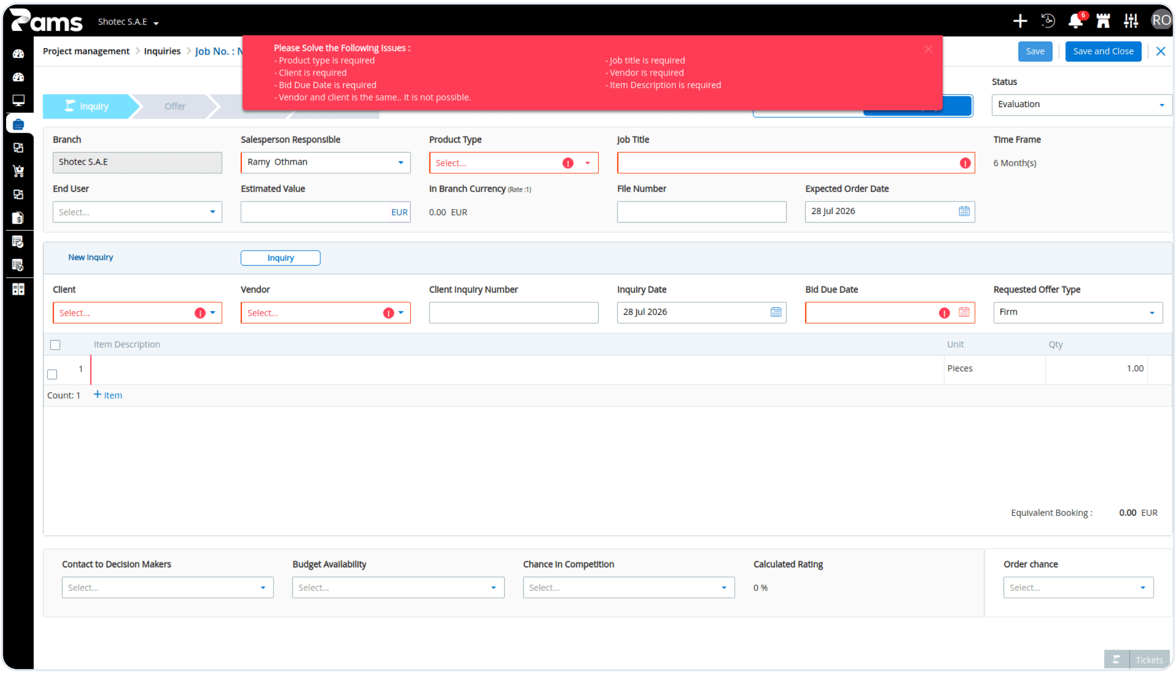
Overview

Use **Projects** to work with project records in the Market application. Sales representatives, account managers, project managers, purchasing officers, warehouse users, and finance users can use the available actions to select related information, attach supporting files, and open project-related Lead, Inquiry, or Tickets actions where required.

Open the page from **Market > Projects**. The screen displays project information through the available selection field and attached files area.

Workflow

1. Open **Projects** from **Market > Projects**.



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2. Decide whether you need to work with an existing selection or begin by choosing a value. Use **Select...** to choose the available record or option.
   - Select the required value.
   - Confirm the selection with **Ok**.
   - Choose **Cancel** if you do not want to apply the selection.

> **Note:** The screen provides a selection control but does not display a project status or stage. Confirm the selected information before saving.

3. Decide whether the project requires supporting documentation.
   - Select **Attach** to add files to the project.
   - Review the attached items in **files[]**.
   - Attach only files that are relevant to the project record, such as commercial documents, customer correspondence, or operational supporting material.
4. Decide whether the project should be related to sales activity.
   - Select **Lead** when you need to open the available lead action.
   - Select **Inquiry** when you need to open the available inquiry action.
   - Select **Tickets** when you need to access the available ticket action.

Use these actions only when they are applicable to the project work being performed. The Projects screen does not provide further fields or workflow states for these actions.

5. Decide whether to save the work and remain on the record or finish the current session.
    - Select **Save** to retain the selected information and attachments while remaining on the Projects screen.
    - Select **Save and Close** to retain the work and close the record.
    - Select **Cancel** if you do not want to continue with the current action.

    > **Tip:** Use **Save** after attaching files or changing a selection, especially before opening another related action such as **Lead**, **Inquiry**, or **Tickets**.

6. Decide whether the record should be removed.
    - Select **Delete** only when the project record should no longer be retained.
    - Do not use **Delete** as a replacement for cancelling an unsaved change; use **Cancel** when you only need to abandon the current action.

    > **Warning:** Deleting a project record can remove the record from the Projects list. Verify that the record is not required for ongoing sales, purchasing, PM, Warehouse, or Finance work before selecting **Delete**.

Examples

A project team is collecting documents for a customer job that requires sales follow-up.

1. Open **Market > Projects** and use **Select...** to choose the relevant project information.
2. Confirm the selection with **Ok**.
3. Select **Attach** and add a supporting file, for example `customer-commercial-offer.pdf`.
4. Verify that the file appears under **files[]**.
5. Select **Inquiry** if the team needs to work with the available inquiry action for the project.
6. Return to the project record and select **Save** to retain the selection and attachment.

7. When the review is complete, select **Save and Close**.

This process leaves the project record with the selected information and the supporting document available in its attached files list.

Tips

> **Tip:** Keep attachments relevant to the individual project so that Sales, PM, Purchasing, Warehouse, and Finance users can locate the correct supporting material.

> **Note:** Use **Ok** to confirm a selection made through **Select...**. Use **Cancel** when the selected value should not be applied.

> **Warning:** Before selecting **Delete**, check whether the record is being used for Lead, Inquiry, Tickets, or other operational follow-up.

Troubleshooting

Symptom	Likely cause	Fix
The required information is not shown on the project record.	A value has not been selected through **Select...**, or the selection was not confirmed.	Select **Select...**, choose the required value, and select **Ok**. Then select **Save**.
An attached document is not visible after leaving the record.	The attachment or record changes may not have been saved.	Use **Attach** to add the file, verify it appears in **files[]**, and select **Save** or **Save and Close**.
The wrong value was selected.	The selection was confirmed incorrectly.	Use **Select...** again, choose the correct value, select **Ok**, and save the record.
The user does not want to continue with the current action.	The user may be in the selection process or may have unsaved changes.	Select **Cancel** to stop the current action. Use **Delete** only when the project record itself should be removed.

Related pages

- Market — Overview

- accounts
- Market — Learning Path
- Principals
- All
- Sub Suppliers