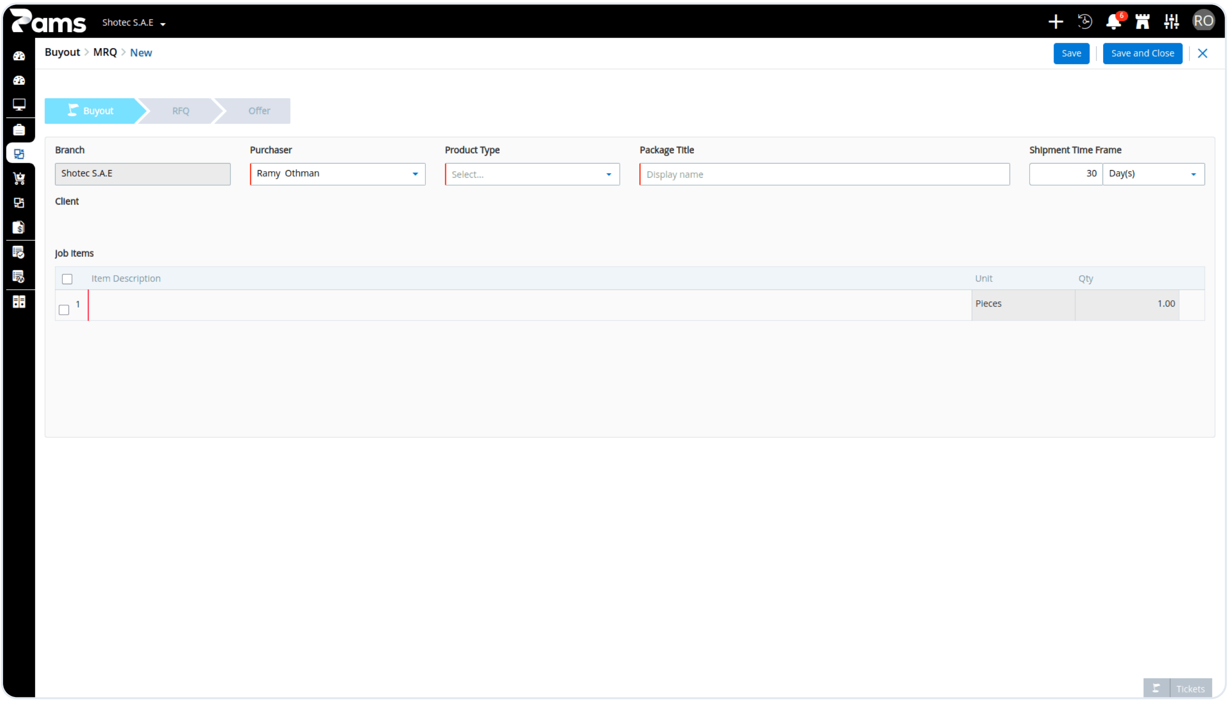
PAMS V2

Buyout To Order

July 29, 2026

Buyout To Order

Applications › projects management › Buyout To Order



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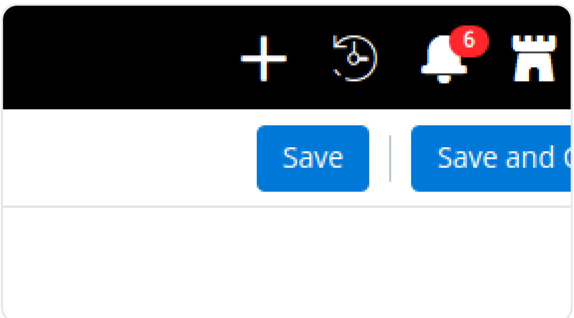
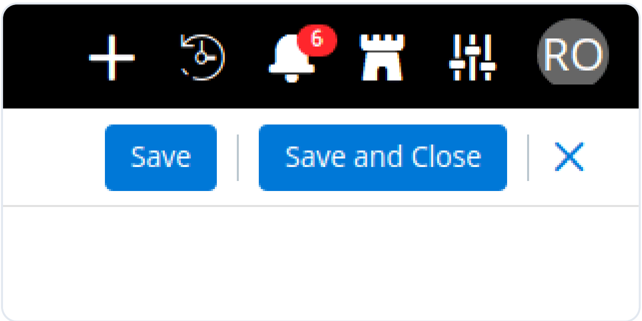




Overview

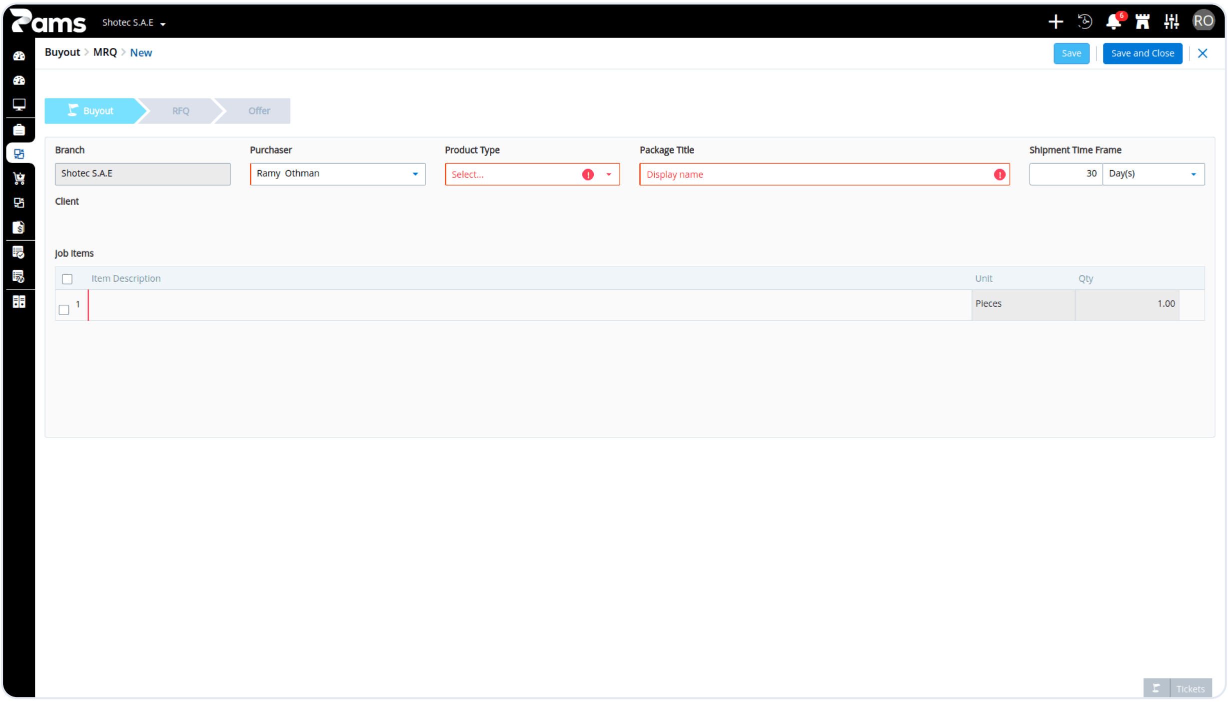
Buyout To Order is used to create and retain a Buyout-related record before it is saved for further project management activity. It is suitable for project managers, purchasing officers, and account managers who need to identify the record, select an available item or value, and retain supporting files.

Use this page when you need to record a Buyout To Order entry and keep its related documents available with the record. The available screen does not show approval statuses or order-confirmation stages; the completed outcome is a saved record with an identifying display name and, where required, attached files.

Workflow

1. Start the Buyout To Order record

Create or open a new Buyout To Order entry from the Buyout area. Review the available fields before saving so that the record can be identified and retrieved later.



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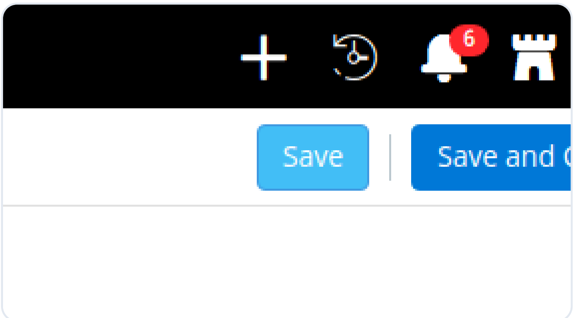
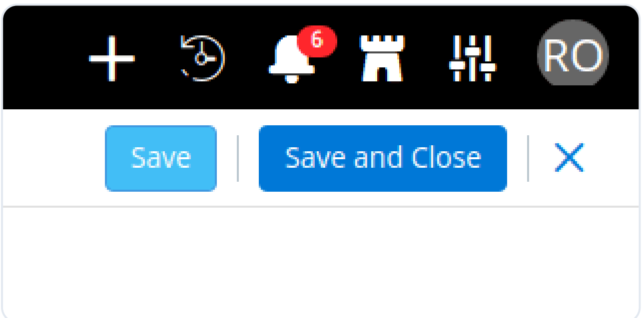


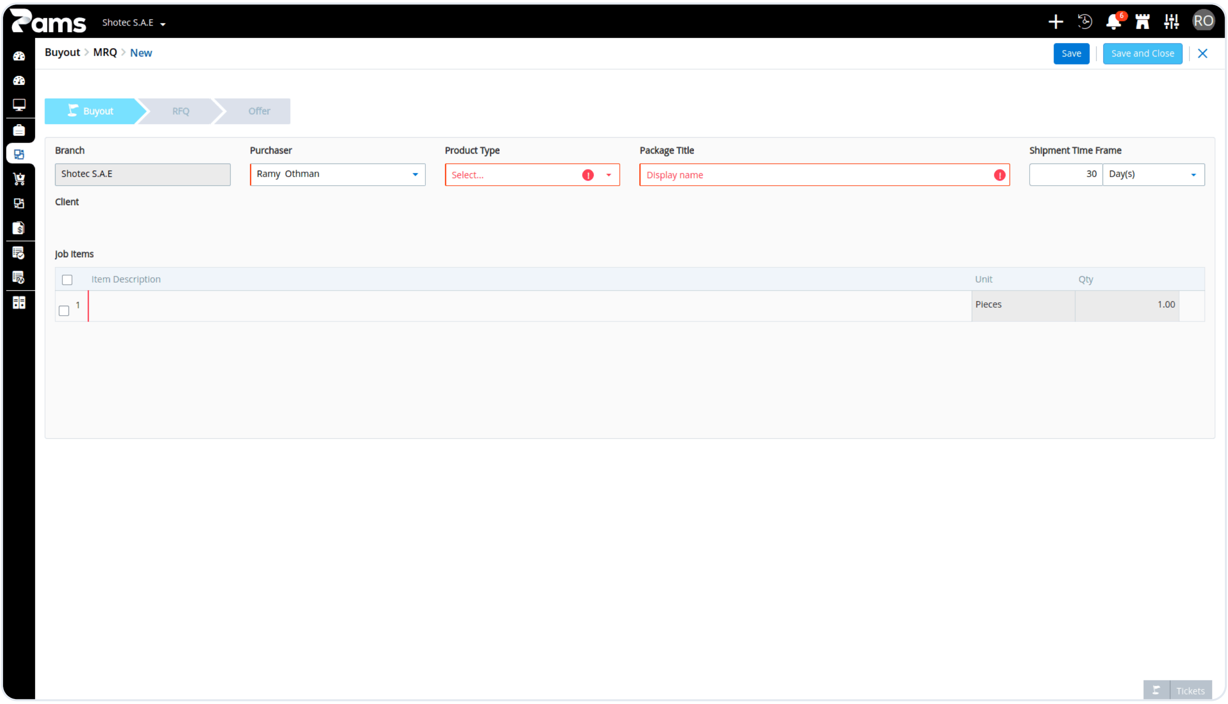


1. In **Select...**, choose the available value required for the Buyout To Order record.
2. If the selection window requires confirmation, select **Select**.
3. Enter a clear identifying value in **Display name**.
4. Review the selected value and display name before continuing.

> **Note:** The screen provides no status field or lifecycle stage. Saving the record is therefore the available completion point for this workflow.

2. Decide whether to attach supporting files before saving

When you have supporting supplier, job, commercial, or Buyout documents, add them to the record before completing it. Use attachments to keep the record and its source documents together.



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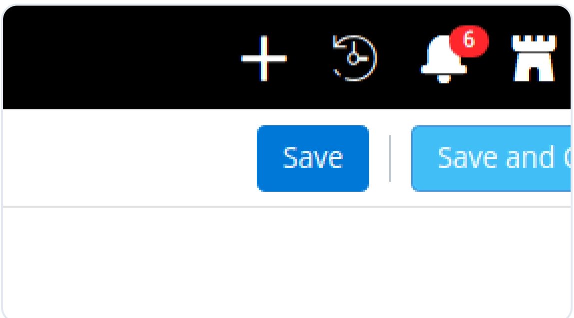
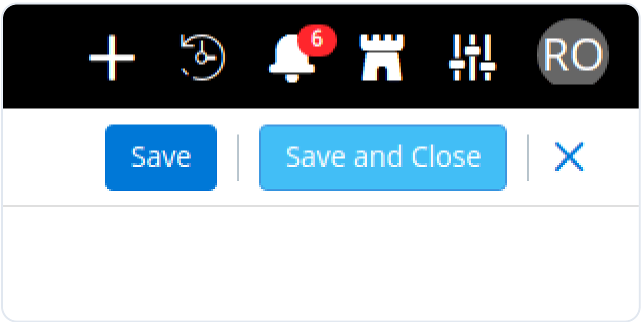




1. Select **Attach** to add a file.
2. Confirm that the selected file appears in **files[]**.
3. Add further files as required.
4. If an attachment-selection dialog opens, use **Ok** to confirm the selection.

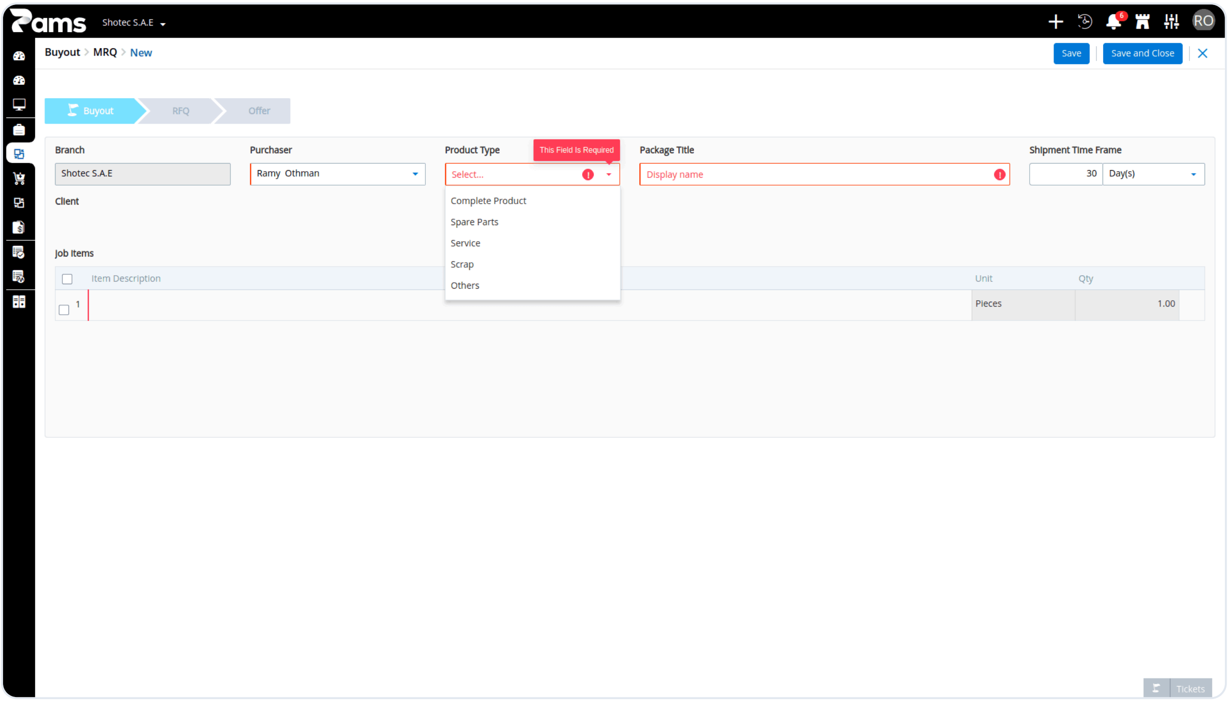
Choose whether the record is complete:

- If the record is ready to remain open on screen for review or further work, select **Save**.
- If the record is complete and you want to leave the form after saving, select **Save and Close**.

> **Tip:** Use a display name that identifies the related job, Buyout purpose, or supplier context. This makes the record easier to distinguish when several Buyout entries exist.

3. Save the completed record

Save only after you have checked the selected value, display name, and any required files. The screen provides two save decisions.



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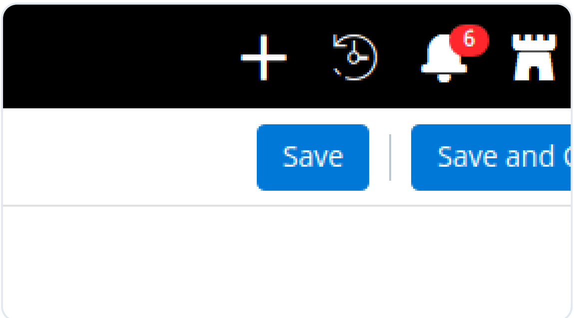

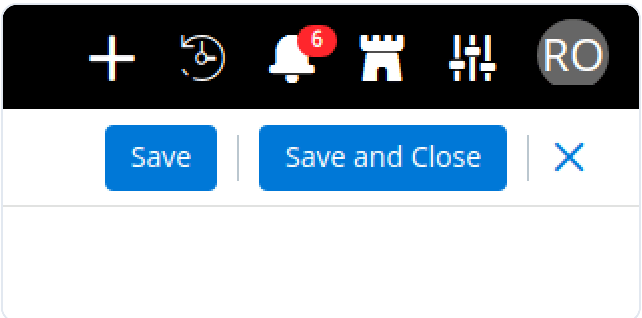

1. Select **Save** when you need to keep working on the same record after it is stored.
2. Select **Save and Close** when the record is complete and you do not need to remain on the form.
3. If a confirmation message is displayed, select **Ok**.

A saved record can then be retained as part of the Buyout information available to the project, purchasing, and operational teams.

4. Use available follow-up actions only when required

After reviewing or saving the record, use the available actions according to your operational need.

1. Select **Print** when you need to use the screen's available printing action.
2. Select **Tickets** when you need to access the available ticket-related action.
3. Select **Attach** when you need to add another file to **files[]**.
4. Select **Save** again after making any changes that must be retained.

> **Warning:** Do not leave the form after changing **Display name**, **Select...**, or **files[]** without selecting **Save** or **Save and Close**. Unsaved changes may not be retained.

Examples

A project manager is preparing a Buyout To Order record for a project requirement that must be supported by a supplier quotation.

1. Open a new Buyout To Order record.
2. In **Select...**, choose the available entry that corresponds to the required Buyout item. If the selection dialog appears, select **Select** to apply it.
3. In **Display name**, enter:

   `Job 24018 – HVAC Valve Buyout`

4. Select **Attach** and add the supplier offer file. Confirm that the file is listed in **files[]**. If requested, select **Ok**.
5. Review the record:
   - The selected value is present.
   - The display name clearly identifies the job and Buyout purpose.
   - The supporting supplier document is listed in **files[]**.
6. Select **Save and Close** to store the completed record and exit the form.

The result is a saved Buyout To Order record that can be identified by its display name and includes its supporting file.

Tips

> **Tip:** Use consistent display-name wording, such as job number followed by the Buyout description, to help PM and Purchasing teams identify related records quickly.

> **Note:** Add files through **Attach** and verify that they appear in **files[]** before saving. A file that has not appeared in the file list should not be assumed to be attached.

Troubleshooting

Symptom	Likely cause	Fix
The required selection is not shown on the record.	A value was chosen but not confirmed in the selection dialog.	Use **Select** after choosing the value. If a confirmation is shown, select **Ok**.
The Buyout To Order record is difficult to identify later.	**Display name** is blank or too general.	Enter a specific **Display name** that includes useful job or Buyout context, then select **Save**.
A supporting document is not visible on the record.	The file was not added or was not confirmed.	Select **Attach**, add the file, confirm it appears in **files[]**, and then select **Save** or **Save and Close**.
Changes disappear after leaving the form.	The record was closed without using a save action.	Reopen the record, make the changes again, and select **Save** or **Save and Close**.

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