

Projects Management

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Projects Management

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The screenshot displays the PAMS V2 interface for a 'Delivered' project. The top navigation bar shows the project status flow: Inquiry > Offer > Order > Project management > Delivered. The 'Delivered' status is highlighted in yellow, with a 'Customer Survey' button labeled 'Not Started'. Below this, the project details are shown in a form:

- Branch:** Shotec S.A.E
- Salesperson Responsible:** Tawab Abd Elnaem
- Product Type:** Spare Parts
- Job Title:** 4 mech. seal for SIHI pump
- End User Account:** Pharco
- File Number:** D-SRV-0024

Below the form, a summary bar indicates: Client: Pharco, Vendor: Shotec S.A.E, Status: Delivered, Order Price: 37,392.00 EGP. A horizontal menu below the summary bar includes: Comments, Tasks, Activities, Attachment, Contacts, Sales Invoices, Payments, U/Gs, Buyout, Reference List, and Last Modification. The 'Comments' section is active, showing a text editor with a 'Post' button. Below the editor is a search bar for comments. Two comments are visible:

- Tawab Abd Elnaem** (30 Aug 2018 - 04:45 PM): we already delivered order & get LG & cheque
- Omar Magdy** (29 Apr 2018 - 10:54 AM): Now Mr. Hesham confirm the receipt our legal documents to proceed for the down payment.

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Overview

Projects Management supports the day-to-day access and maintenance activities used to manage project-related records. Sales representatives, project managers, purchasing officers, warehouse managers, finance accountants, and accounts receivable or payments officers use the application according to their assigned

permissions. Use this feature when you need to sign in and review or retain updates to an existing Shipping Order.

Workflow

1. Sign in to Projects Management

Before you can work with Shipping Orders, sign in with your assigned credentials.

The screenshot displays the Pams application interface. At the top, the breadcrumb navigation shows 'Project management > Delivered > Job No.: 18.0106'. A progress bar indicates the workflow stages: Inquiry, Offer, Order, Project management, and Delivered (current stage). Below this, a yellow banner states 'Delivered' with a 'Customer Survey' link and 'Not Started' status. The main form contains fields for Branch (Shotec S.A.E), Salesperson Responsible (Tawab Abd Elnaem), Product Type (Spare Parts), Job Title (4 mech. seal for SIHI pump), End User Account (Pharco), and File Number (D-SRV-0024). A summary bar shows 'Client: Pharco', 'Vendor: Shotec S.A.E', 'Delivered' status, and 'Order Price: 37,392.00 EGP'. Below the form is a rich text editor with a toolbar and a 'Post' button. A comments section follows, with a search bar and two entries: one from Tawab Abd Elnaem dated 30 Aug 2018, and another from Omar Magdy dated 29 Apr 2018. A sidebar on the left contains various icons for navigation.

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1. In **Enter User Name**, enter your assigned user name.
2. In **Enter Password**, enter your assigned password.
3. Select **Login** to access Projects Management.

Note: You must have assigned sign-in credentials before you can access the application.

2. Locate the Shipping Order to review

After signing in, decide whether you need to review an existing Shipping Order or make changes to it.

1. Open **Shipping Order** to display the available Shipping Order records.
2. Use **Search** to locate the existing Shipping Order you need to review.
3. Open the located record and review the applicable information.

A Shipping Order must already exist before it can be reviewed or revised. Your access must also include permission to view and update the applicable Shipping Order records.

Tip: Locate the correct Shipping Order before making changes. This helps ensure that updates are retained on the intended record.

3. Decide whether changes are required

Review the Shipping Order and determine whether the information requires revision.

1. If no changes are required, do not modify the record. You may leave the record open while continuing your review.
2. If changes are required, revise the applicable information in the Shipping Order.
3. Review the revised information before deciding how to retain the record.

The available save action determines whether the Shipping Order remains open for further work or is closed after the changes are retained.

4. Retain changes and choose whether to keep the record open

After revising the Shipping Order, choose the outcome that matches the next business action.

1. Select **Save** when you want to retain the changes and continue working with the Shipping Order. The record remains open.
2. Select **Save and Close** when the review or update is complete. The changes are retained and the Shipping Order closes.

Warning: Select **Save and Close** only after confirming that the Shipping Order is complete for your current work. This action closes the record after retaining the changes.

Examples

A project manager needs to review an existing Shipping Order for a sales job before completing the current update.

1. The project manager enters `alex.morgan` in **Enter User Name** and enters the assigned password in **Enter Password**.
2. The project manager selects **Login**.
3. The project manager opens **Shipping Order** and uses **Search** to locate Shipping Order `S0-10452`.
4. After reviewing the record, the project manager identifies information that requires revision and updates the applicable information.
5. Because the Shipping Order requires no further work after the update, the project manager selects **Save and Close**.
6. The revised Shipping Order is retained and the record closes.

If the project manager still needs to review related information before finishing, the correct choice is **Save** instead. This retains the update while keeping the Shipping Order open.

Tips

Tip: Use **Save** when you need to retain an update without closing the Shipping Order.

Note: **Save and Close** retains the same changes as **Save**, but closes the Shipping Order after saving.

Warning: Do not attempt to update a Shipping Order unless you have permission for PM > Projects Management > Shipping Order.

Troubleshooting

Symptom	Likely cause	Fix
You cannot access Projects Management.	The user name or password is not accepted, or assigned credentials are not available.	Confirm the values entered in Enter User Name and Enter Password , then select Login again.

Symptom	Likely cause	Fix
You cannot find the Shipping Order to review.	The required existing Shipping Order has not been located.	Open Shipping Order and use Search to locate the applicable record.
You can view a Shipping Order but cannot complete the required update.	Your permission may not allow you to update the applicable Shipping Order record.	Confirm that you have permission for PM > Projects Management > Shipping Order to view and update the record.
Your revised Shipping Order remains open after saving.	Save was selected.	Select Save and Close after confirming that the review and updates are complete.

Related pages

- [projects management — Overview](#)
- [shipping order](#)
- [projects management — Learning Path](#)
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- [List](#)
- [orders](#)
- [delivered orders](#)