

July 29, 2026

Shipping Order

Applications › projects management

shipping order

Overview

Shipping Order is used in Projects Management to locate, review, and retain changes to shipping-order records associated with project work. Project managers and other permitted users use the Shipping Order list to identify a record by information such as sheet number, order date, responsible PM, client order number, or job number. Use this feature when an existing Shipping Order requires review or revision and you need to save the record either for continued work or after completing the update.

Settings

Before working with Shipping Orders, confirm that you have permission to view and update the applicable records under PM > Projects Management > Shipping Order.

The Shipping Order list supports separate column layouts. Layout changes affect how the list is displayed; they do not change Shipping Order records.

1. Open **Projects Management**, then select **Shipping Order**.

Sheet no.	Order date	P.M Responsible	Client order no.	Job no.
SHO23.1000	16 Nov 2023	Sahar Mahmoud		j23.1435
SHO23.1001	23 Nov 2023	Sahar Mahmoud		j23.1798
SHO23.1002	26 Nov 2023	Sahar Mahmoud		j23.1361
SHO23.1003	18 Dec 2023	Sahar Mahmoud		j23.1267
SSH023.1000	18 Dec 2023	Sahar Muhamoud		sj23.2088
SHO23.1001	20 Dec 2023	Sahar Mahmoud		j23.1468
SHO23.1002	20 Dec 2023	Sahar Mahmoud		j23.1516
SHO23.1003	20 Dec 2023	Sahar Mahmoud		j23.1503
SHO23.1004	20 Dec 2023	Sahar Mahmoud		j23.1517
SHO23.1005	20 Dec 2023	Sahar Mahmoud		j23.1501
SHO23.1006	20 Dec 2023	Sahar Mahmoud		j23.1508
SHO23.1007	20 Dec 2023	Sahar Mahmoud		j23.1521
SHO23.1008	20 Dec 2023	Sahar Mahmoud		j23.1525
SHO23.1009	20 Dec 2023	Sahar Mahmoud		j23.1526
SHO23.1010	20 Dec 2023	Sahar Mahmoud		j23.1527
SHO23.1011	20 Dec 2023	Sahar Mahmoud		j23.1528
SHO23.1012	20 Dec 2023	Sahar Mahmoud		j23.1536
SHO23.1013	20 Dec 2023	Sahar Mahmoud		j23.1684
SHO23.1014	20 Dec 2023	Sahar Mahmoud		j23.1700
SHO23.1015	20 Dec 2023	Sahar Mahmoud		j23.1855

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2. Decide which list arrangement to use:
 - Select **Standard Layout** to use the standard column arrangement.
 - Select **Add Layout** to create a separate layout.
 - Enter a name in **Layout name** to identify the new layout.

- Select **Columns Chooser** to choose the columns displayed in the Shipping Order list.
- Select **Save** to save the new layout.
- Select **Update Current** to retain changes to the currently selected layout.
- Select **Cancel** to discard unsaved layout changes.
- Select **Delete Current** when you need to remove the current saved layout, then use **Delete** to complete the removal.

Note: A list layout controls the columns you see in Shipping Order. It does not revise the underlying Shipping Order information.

Workflow

Locate the Shipping Order

1. Open **Projects Management**, then select **Shipping Order** to display the Shipping Order list.

Sheet no.	Order date	PM Responsible	Client order no.	job no.
SHO23.1000	16 Nov 2023	Sahar Mahmoud		j23.1435
SHO23.1001	23 Nov 2023	Sahar Mahmoud		j23.1798
SHO23.1002	26 Nov 2023	Sahar Mahmoud		j23.1361
SHO23.1003	18 Dec 2023	Sahar Mahmoud		j23.1267
SSH023.1000	18 Dec 2023	Sahar Muhamoud		sj23.2088
SHO23.1001	20 Dec 2023	Sahar Mahmoud		j23.1468
SHO23.1002	20 Dec 2023	Sahar Mahmoud		j23.1516
SHO23.1003	20 Dec 2023	Sahar Mahmoud		j23.1503
SHO23.1004	20 Dec 2023	Sahar Mahmoud		j23.1517
SHO23.1005	20 Dec 2023	Sahar Mahmoud		j23.1501
SHO23.1006	20 Dec 2023	Sahar Mahmoud		j23.1508
SHO23.1007	20 Dec 2023	Sahar Mahmoud		j23.1521
SHO23.1008	20 Dec 2023	Sahar Mahmoud		j23.1525
SHO23.1009	20 Dec 2023	Sahar Mahmoud		j23.1526
SHO23.1010	20 Dec 2023	Sahar Mahmoud		j23.1527
SHO23.1011	20 Dec 2023	Sahar Mahmoud		j23.1528
SHO23.1012	20 Dec 2023	Sahar Mahmoud		j23.1536
SHO23.1013	20 Dec 2023	Sahar Mahmoud		j23.1684
SHO23.1014	20 Dec 2023	Sahar Mahmoud		j23.1700
SHO23.1015	20 Dec 2023	Sahar Mahmoud		j23.1855

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2. In **Search**, enter information that identifies the Shipping Order you need to review. Use the visible list columns, such as sheet number, order date, responsible PM,

client order number, or job number, to confirm that you have located the correct record.

3. Select the required Shipping Order from the results to open it for review.

Shipping Order [J23.1435](#)

Sales Job Number: J23.1435
Shipping ordered by: Sahar Mahmoud
Shipping ordered on: 16 Nov 2023
Client: AQF

Items

Product	Product Stage	Qty
Nitrogen valve material: AISI 316- 316 L Nitrogen valve size: 5/8" UNF		6.00 Pieces
Select Nitrogen valve	Delivered	6.00 Pieces
Elastomer (bladder) material: NBR for Type HSTX 0.35		2.00 Pieces
Select Elastomer bladder	Delivered	2.00 Pieces

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Tip: Confirm the job number and client order number before revising a record when more than one Shipping Order may relate to similar project work.

Review or revise the open Shipping Order

4. Review the selected items and the shipping-order information shown in the record.
Where applicable, use **Select** to choose items.

5. If the Shipping Order includes supporting material, select **Attach** and use **files[]** to add or review attached files. Select **Ok** when the attachment action is complete.
6. If changes are required, revise the applicable information in the open Shipping Order. You may use **Filter by user** or **Filter by field** when available to narrow the displayed information while reviewing the record.

Decide whether to keep the record open or close it

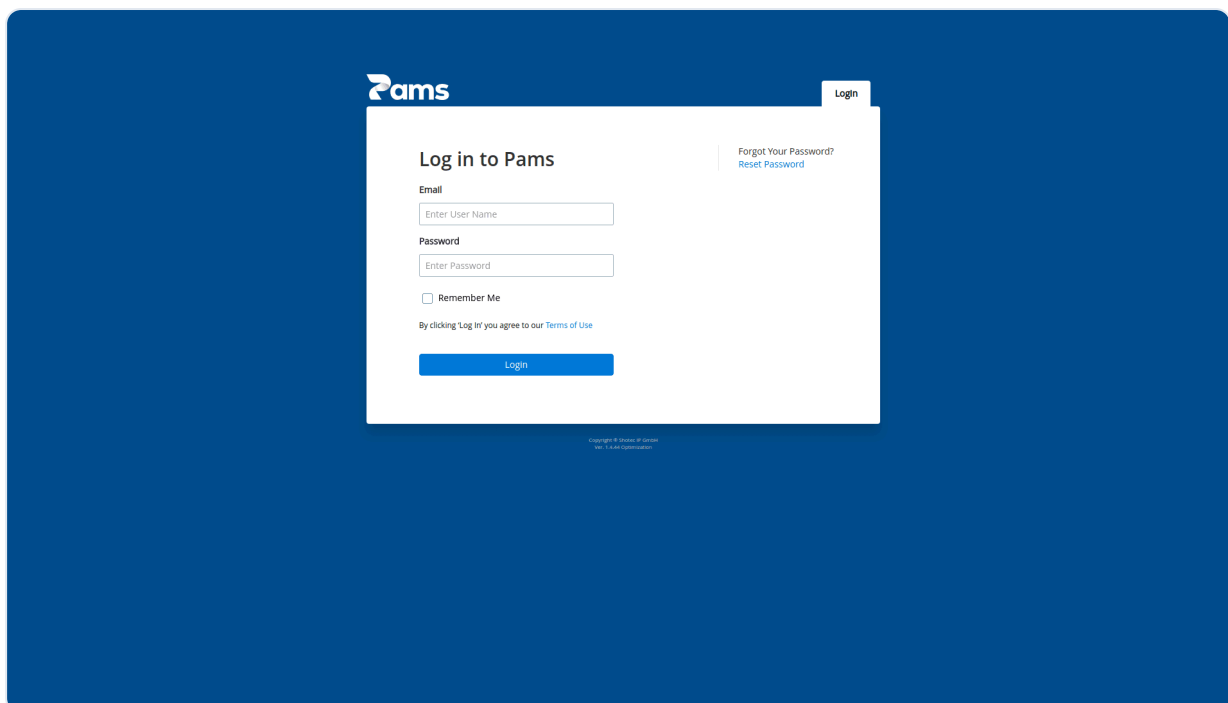
7. Choose how to retain the revised Shipping Order:
 - Select **Save** to retain the changes and keep the Shipping Order open. Use this option when you need to continue reviewing or revising the record.
 - Select **Save and Close** to retain the changes and close the Shipping Order. Use this option when the review and required revisions are complete.

Warning: Use **Save and Close** only after confirming that the selected items and revised information belong to the intended Shipping Order. Closing the record ends the current editing session.

Examples

A project manager needs to review the Shipping Order for job number **J23.1435** and retain a correction while keeping the record available for further review.

1. The project manager opens **Projects Management** and selects **Shipping Order**.



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2. In **Search**, the project manager searches for **J23.1435** . The results show Shipping Order records with columns including sheet number, order date, responsible PM, client order number, and job number.
3. The project manager selects the Shipping Order associated with the required job number and reviews the record.
4. In the selected items area, the project manager confirms the delivered product entry for the nitrogen valve. The displayed item shows a delivered quantity of **6.00** in **Pieces** .
5. The project manager revises the applicable Shipping Order information and selects **Save** rather than **Save and Close**, because a further project review is still required.
6. The changes are retained, and the Shipping Order remains open for continued work.

Tips

Tip: Use **Standard Layout** when you need to return the Shipping Order list to the standard column arrangement.

Note: Select **Cancel** while editing a layout if you do not want to retain the layout changes. This affects the list layout only, not Shipping Order records.

Warning: Use **Delete Current** only when the current saved layout is no longer needed. Removing a layout is separate from updating or deleting Shipping Order information.

Troubleshooting

Symptom	Likely cause	Fix
The required Shipping Order does not appear in the list.	The search criteria do not match the available record information.	Clear or revise Search , then search using a sheet number, job number, client order number, or other visible list information.
Changes are not retained after leaving the record.	The Shipping Order was revised but neither Save nor Save and Close was selected.	Reopen the Shipping Order, make the required revisions, and select Save or Save and Close .
The Shipping Order cannot be viewed or updated.	You may not have permission for PM > Projects Management > Shipping Order, or the record may not be applicable to your access.	Confirm that you have permission to view and update the applicable Shipping Order records.
The Shipping Order list does not show the required columns.	A different list layout is active.	Select Standard Layout , or use Columns Chooser to configure and save the required layout.

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