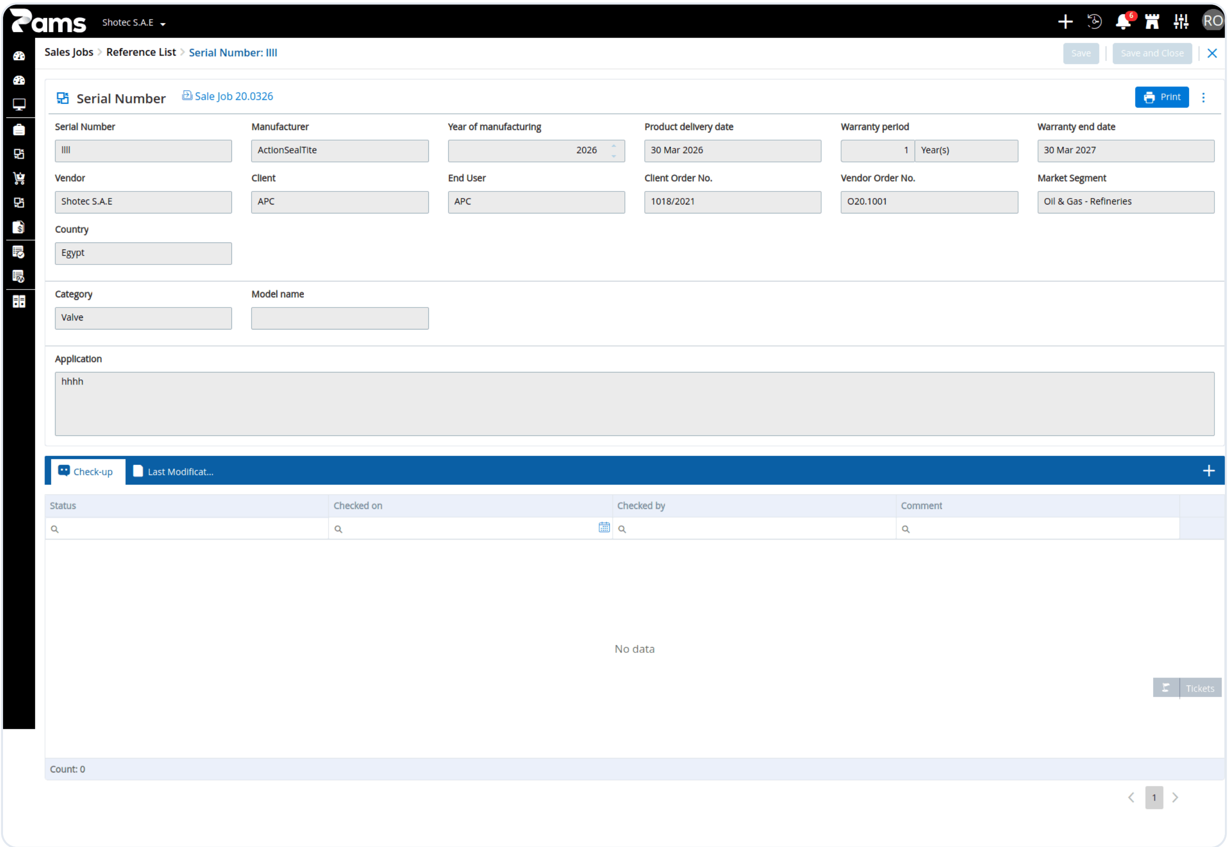
PAMS V2

Reference List

July 29, 2026

Reference List

Applications › reference list



reference list

Overview

The Reference List provides a central workspace for reviewing reference records and their related information. Sales representatives, project managers, purchasing officers, warehouse managers, finance users, and payments officers can use it when they need to locate a reference record, review its check-related details, attach supporting files, or access the related contact and RFQ views.

Use the Reference List from **Data** > **Reference List** when working with records that require selection, checking, comments, or attached documentation.

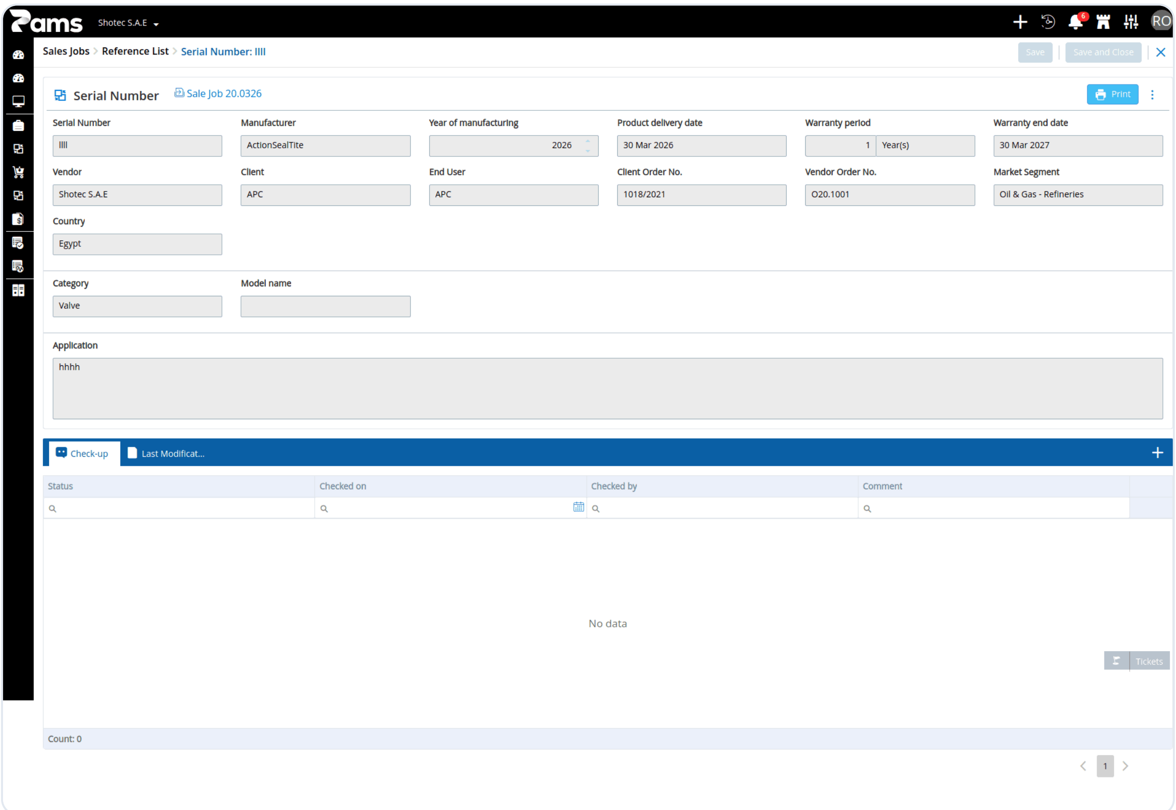
Settings

No separate feature settings are available on the provided Reference List screens. Before saving a reference record, ensure that you can select the required value using **Select...** and that any supporting documents are ready to attach through **Attach**.

> **Note:** If the system displays the sign-in screen, enter the required credentials before continuing. The Reference List cannot be used until access is granted.

Workflow

1. Open the Reference List workspace from **Data** > **Reference List**.



reference list

Review the available reference-record information. The list includes check-related information, such as status, the person who checked the record, and comments. Use this workspace to identify the record that requires review or update.

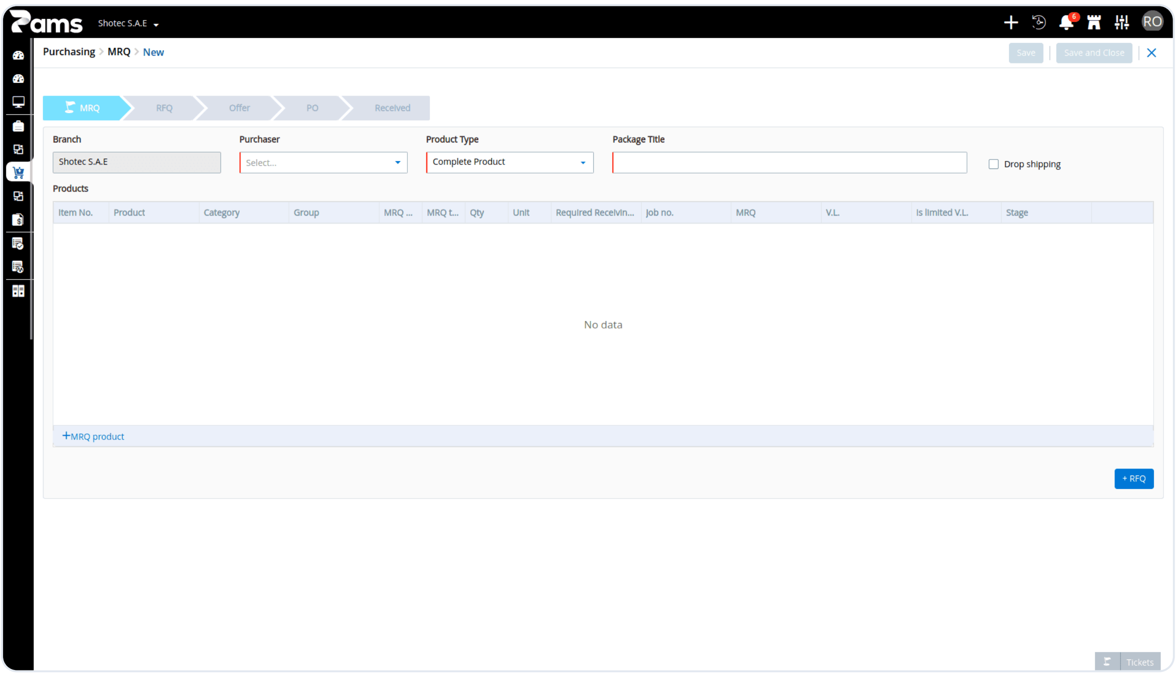
2. Decide whether to narrow the displayed records before opening or updating a record.
    - To apply the currently selected criteria, select **Apply filter**.
    - To choose a value or record, select **Select...** or **Select**.
    - To review available serial-status information, select **serialStatus**.

   Use filtering when the list contains more records than you need to review. Do not apply a filter unless the selected criteria match the reference record you are trying to locate.

   > **Tip:** Apply a filter before reviewing check-related details when you are working with a specific sales job, RFQ, buyout, stock item, or other business reference.

3. Decide whether you need to create or update a reference record.

   Select **Save** to keep the current record open after saving, or select **Save and Close** to save the record and return to the previous view.



Reference List

If a sign-in prompt is displayed, enter **Enter User Name** and **Enter Password** and then select **Login**. Use **Ok** to acknowledge a displayed confirmation or message.

> **Warning:** Select **Save** or **Save and Close** only after you have selected the required value through **Select...**. The screen does not provide a separate validation action for incomplete selections.

4. Decide whether supporting evidence is required for the reference record.

   Select **Attach** and add the required files to **files[]**. Save the record after attaching the files.

   Use attachments for documents that must remain available with the reference record, such as supporting correspondence, supplier material, job documentation, or check evidence.

5. Decide whether the record requires follow-up through tickets.

   Select **Tickets** when you need to access the ticket action available from the Reference List screen. After completing the required ticket-related work, return to the reference record and select **Save** or **Save and Close** if you changed the record.

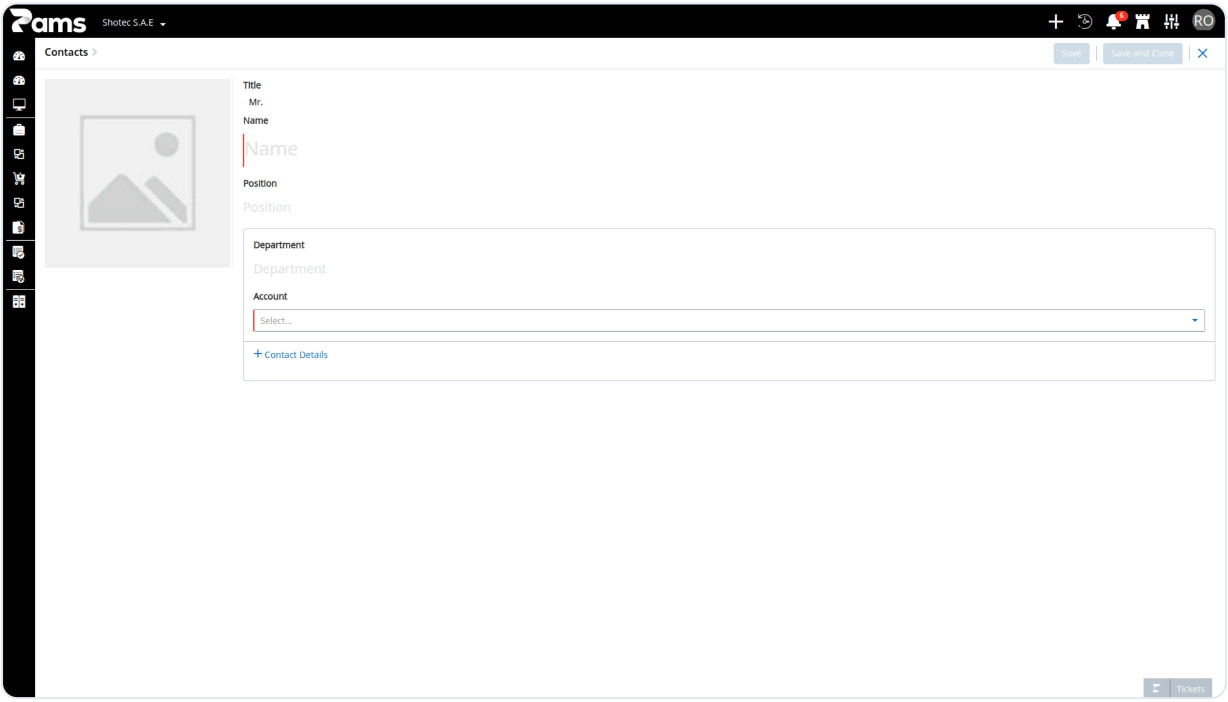
6. Review the record's displayed check information before finishing.

   Reference records can display check-related details, including status, the person who performed the check, and comments. Confirm that you are working on the intended record, then choose one of the following:

   - Select **Save** to retain the record in the current workspace.
   - Select **Save and Close** to save the work and leave the record.
   - Select **Print** when you need the available printed output.
   - Select **Ok** when a message or confirmation requires acknowledgement.

   The provided screens do not show an action that changes a record from one check status to another. Review the displayed status and comments as record information, rather than assuming that saving changes the status.

Contact



Reference List

The **contact** tab holds the contact-stage view of the Reference List record. Use this tab to review or work with the contact-related record view while the reference record is open. The available screen information does not identify additional fields or an action that moves a record into or out of this tab.

Use **Save** or **Save and Close** after making any available changes on the record. If supporting material is required, use **Attach** and confirm that the files are included before saving.

RFQ

The **rfq** tab holds the RFQ-stage view of the Reference List record. Use this tab when the reference record must be reviewed in relation to RFQ information. The provided screen information does not list RFQ fields or a control that transfers records into or out of this tab.

Review the available RFQ view and return to the main record actions when finished. Use **Save** to keep the record open, or **Save and Close** to complete the update and exit the record.

Examples

A purchasing officer needs to retain documentation for a reference record connected with an RFQ for a sales job.

1. The purchasing officer opens **Data** > **Reference List** and uses **Select...** to locate the required reference record.
2. The officer selects **Apply filter** after choosing the relevant value, then reviews the displayed check-related information to confirm that the correct record is open.
3. The officer opens the record and selects the **rfq** tab to review the RFQ-related view.
4. The officer selects **Attach** and adds the supplier’s quotation document to **files[]**.
5. The officer selects **Save** to retain the attachment while continuing to review the record. After confirming that no further update is required, the officer selects **Save and Close**.

The result is a saved reference record with its supporting RFQ document attached and available from the Reference List.

Tips

> **Tip:** Use **Save** when you need to continue working in the record. Use **Save and Close** only when the current work is complete.

> **Note:** Use **Print** only after confirming that the selected or filtered record is the one you intend to print.

> **Warning:** Do not treat the displayed checked status as a workflow action. The available screens show check-related details, but they do not show a button that changes the status.

Troubleshooting

Symptom	Likely cause	Fix
You cannot access the Reference List record screen.	A sign-in prompt is displayed.	Enter **Enter User Name** and **Enter Password**, then select **Login**.
The required reference record is not visible.	The list is not filtered to the required selection, or the selected value is not the intended one.	Use **Select...** or **Select** to choose the required value, then select **Apply filter**.

Symptom	Likely cause	Fix
Supporting documentation is not available on the record.	The file was not added to **files[]** or the record was not saved after attachment.	Select **Attach**, add the file, and select **Save** or **Save and Close**.
A confirmation or message remains open.	The system requires acknowledgement.	Select **Ok** and continue with the required action.

Related pages

- reference list — Overview
- reference list — Learning Path