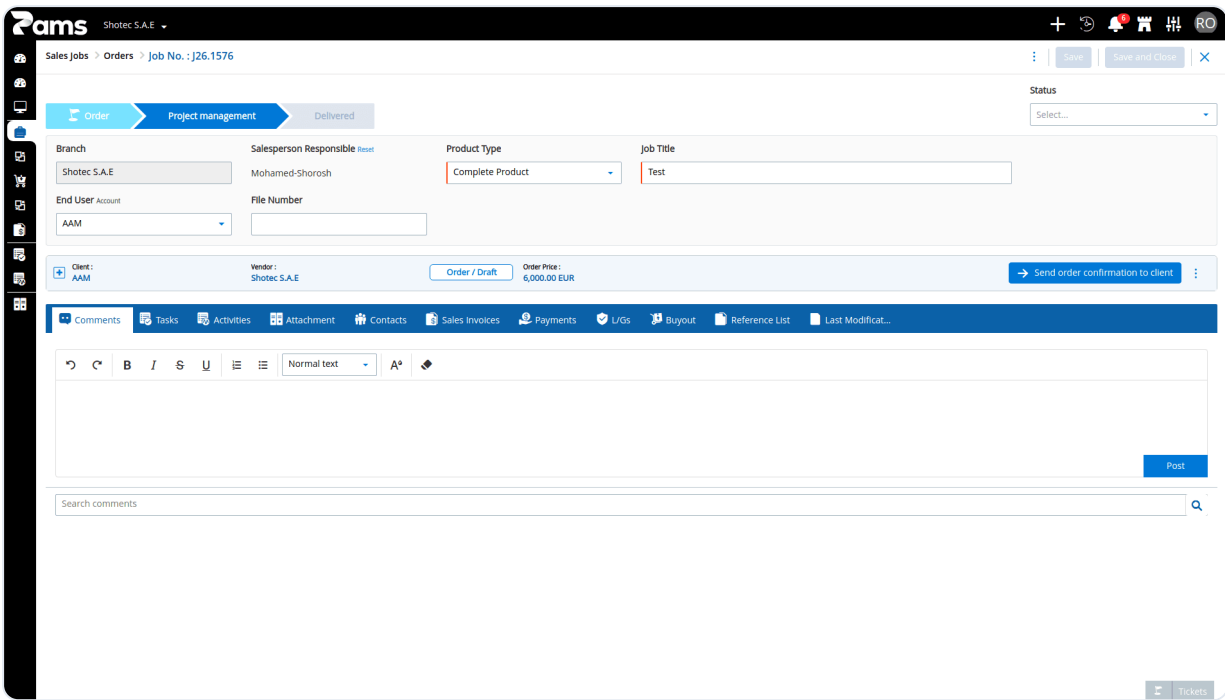


Sales

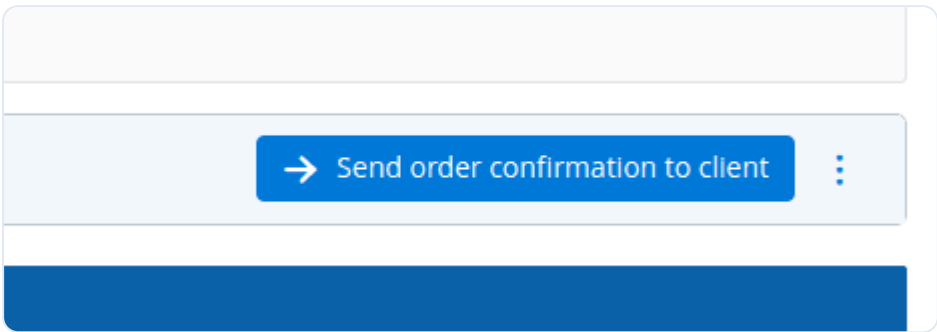
July 28, 2026

Sales

Applications › Sales



sales



Overview

Use the Sales workspace to prepare sales content, add supporting files and comments, and send an order confirmation to the client when the record is ready. Sales representatives and account managers use this screen to maintain clear, client-ready information before communicating the order confirmation. Project managers, purchasing officers, warehouse managers, and finance users can use the comments and attached files to review the sales record when relevant to their work.

Workflow

1. Open **Sales** from the application navigation and locate the sales record you need to prepare.

The screenshot displays the Pams application interface for the Sales workspace. The top navigation bar shows the 'ams' logo and the user 'Shotec S.A.E.'. The sidebar on the left contains various icons for navigation. The main content area is titled 'Sales Jobs > Orders > Job No.: J26.1576'. It features a status dropdown menu with options: 'Select...', 'Proceeding', 'On Hold', and 'Delay'. Below this, the 'Order' section contains fields for 'Branch' (Shotec S.A.E.), 'Salesperson Responsible' (Mohamed-Shorosh), 'Product Type' (Complete Product), 'Job Title' (Test), 'End User Account' (AAM), and 'File Number'. A 'Client' section below shows 'Client: AAM', 'Vendor: Shotec S.A.E.', and an 'Order / Draft' button. To the right, the 'Order Price' is 6,000.00 EUR, and there is a 'Send order confirmation to client' button. The 'Comments' section at the bottom has a text area, a 'Post' button, and a 'Search comments' input field. A 'Tickets' button is located at the bottom right.

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The image shows a close-up of the 'Send order confirmation to client' button. The button is blue with a white right-pointing arrow and the text 'Send order confirmation to client'. To the right of the button is a vertical ellipsis menu icon. The button is set against a light blue background with a subtle gradient.

If the screen requires a selection, use **Select...** and then click **Select** to apply the available selection.

Note: The available screen does not show a separate sales-order creation action. Use the Sales screen to complete and maintain the record that is already open.

2. Prepare the sales content before saving it.

The screenshot displays the 'ams' software interface for 'Shotec S.A.E.'. The main window shows a 'Sales Jobs > Orders > Job No.: J26.1576' header. The 'Order' tab is active, showing a form with the following fields:

- Branch: Shotec S.A.E.
- Salesperson Responsible: Mohamed-Shorosh
- Product Type: Complete Product
- Job Title: Test
- End User Account: AAM
- File Number: (empty)

Below the form, there is a section for 'Client: AAM' and 'Vendor: Shotec S.A.E.' with a button 'Order / Draft' and 'Order Price: 6,000.00 EUR'. A button 'Send order confirmation to client' is also visible.

The 'Order' section includes fields for 'Client Order No.', 'Vendor Order No.', 'Order Date', 'Order Activation Date', 'Delivery Time', 'Forecasted Delivery Date', 'Shipping Address', 'Delivery Term', 'Payment Method', and 'Payment Period'. A checkbox for 'Partial Delivery' is also present.

A table of items is shown below the order details:

Item Description	Unit	Qty	Unit Price	Discount Limit (%)	Discount (%)	Item Price	Currency	Tax (%)
1 Mixer Bearing set Type AFE Re 913	Pieces	1.00	1,000.00	0.00%	0.00%	1,000.00	EUR	0.00
2 Overpressure-protection Manometer	Pieces	1.00	2,000.00	0.00%	0.00%	2,000.00	EUR	0.00
3 NEMO® pump NM063BY01P05B FSIP® ready	Pieces	1.00	3,000.00	0.00%	0.00%	3,000.00	EUR	0.00

Count: 3 + Item

Summary section:

- Sales Price: 6,000.00 EUR
- Tax: 0.00 EUR
- Total Price incl. tax: 6,000.00 EUR
- In Local Currency (Rate: 0.0172048757) Enter rate: 103.83 EGP
- Backlog: 6,000.00 EUR
- Equivalent Booking: 48,000.00 EUR

At the bottom, there is a 'Comments' section with a text area, a 'Post' button, and a search bar.

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The screenshot shows a user interface with a light blue header bar containing a button labeled "→ Send order confirmation to client" and a three-dot menu icon. Below this is a section titled "Order Activation Date" in bold. Under the title are two empty rectangular boxes, each with a small calendar icon on its right side, indicating date selection fields.

- Enter or revise the **Header**.
- Add the required text in the editor area.
- Format important text using **Bold**, **Italic**, **Strikethrough**, **Underline**, or **Ordered List**.
- If you need to remove a recent change, click **Undo**. To restore an undone change, click **Redo**.
- Add supporting material in **files[]** where required.

Choose **Save** when you want to keep your work open for further review or editing.

3. Decide whether comments are needed before the order confirmation is sent.

- Click **comments** to work with comments on the record.
- Use **Search comments** when you need to locate a comment.
- Return to the sales content and make any required corrections.
- Click **Save** after updating the record.

Tip: Use comments for review points and clarifications so that the sales content itself remains suitable for the client-facing order confirmation.

4. Review the record and choose whether to revise it or send the confirmation.

- If the content is not ready, revise the **Header**, text, files, or comments, then click **Save**.
- If the record is ready for the client, click **Send order confirmation to client**.

This action sends the order confirmation to the client. Review the visible content carefully before selecting it.

Warning: Do not use **Send order confirmation to client** until the Header, formatted content, files, and relevant comments have been reviewed. The screen provides editing and save controls, but no displayed action for recalling a sent confirmation.

5. Decide whether to continue working on the record or finish the current session.
 - Click **Save** to retain the record and remain on the Sales screen.
 - Click **Save and Close** to save the record and close it when no further work is required.

Examples

A sales representative is preparing an order confirmation for a client project.

1. The representative opens **Sales** and uses **Select...** followed by **Select** to work with the relevant sales record.
2. In **Header**, they enter:

Order Confirmation - Office Fit-Out Materials
3. They add confirmation text in the editor and use **Bold** for the order-confirmation title. They use **Ordered List** to present the main items clearly.
4. They add the related commercial document in **files[]**.
5. Before sending, the account manager adds an internal review point through **comments**. The representative uses **Search comments** to find the review point, updates the text, and clicks **Save**.
6. After confirming that the header, content, and attached material are correct, the representative clicks **Send order confirmation to client**.
7. The representative clicks **Save and Close** to complete the work session.

Tips

Tip: Use **Save** regularly while preparing longer sales content, especially after adding files or making substantial formatting changes.

Note: Use **Undo** and **Redo** for recent editing changes. Save the record once the content is in its intended form.

Warning: Keep client-facing confirmation text distinct from internal discussion. Use **comments** for internal context and use the editor content for the information that will be reviewed before sending the order confirmation.

Troubleshooting

Symptom	Likely cause	Fix
The required sales record is not displayed.	A selection has not been made or the current selection is not the intended one.	Use Select... , choose the available selection, and click Select .
A recent text change was made by mistake.	An edit or formatting action was applied unintentionally.	Click Undo . If needed, click Redo to restore the reversed change.
A comment cannot be located.	The record contains multiple comments.	Use Search comments to find the relevant comment.
Changes are not visible after leaving the screen.	The record may not have been saved before closing.	Click Save before continuing, or click Save and Close when you are finished.

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