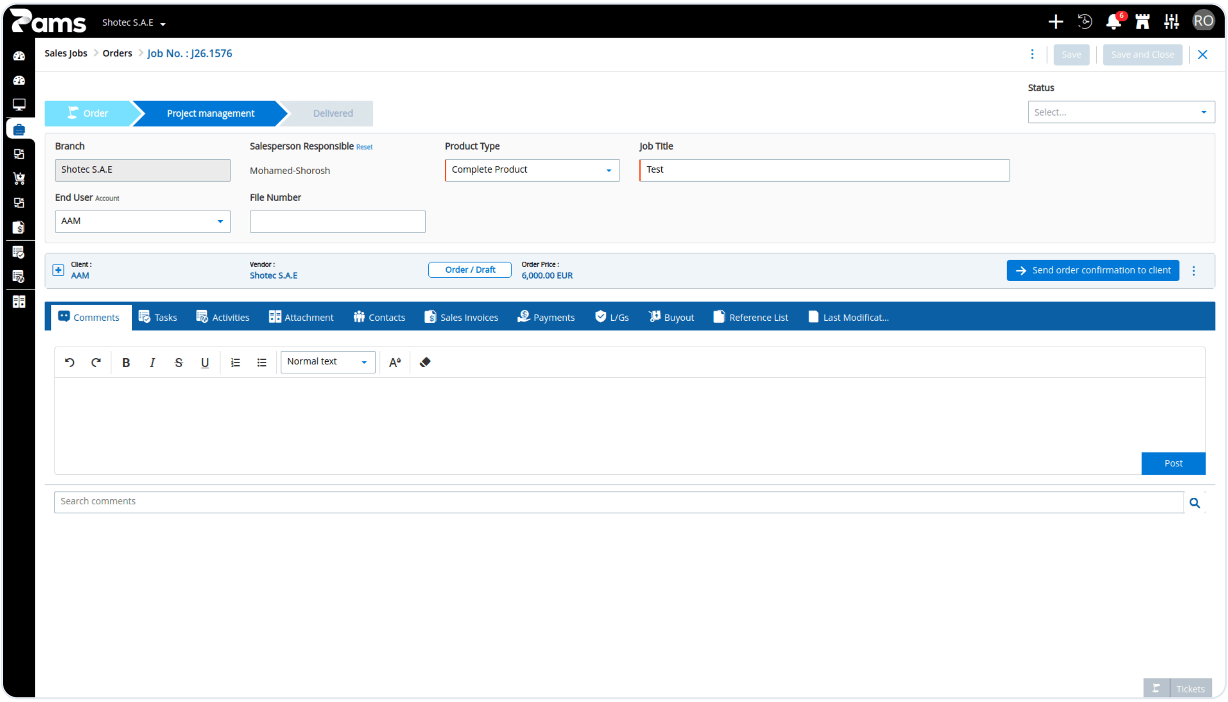
PAMS V2

Sales

July 28, 2026

Sales

Applications › Sales



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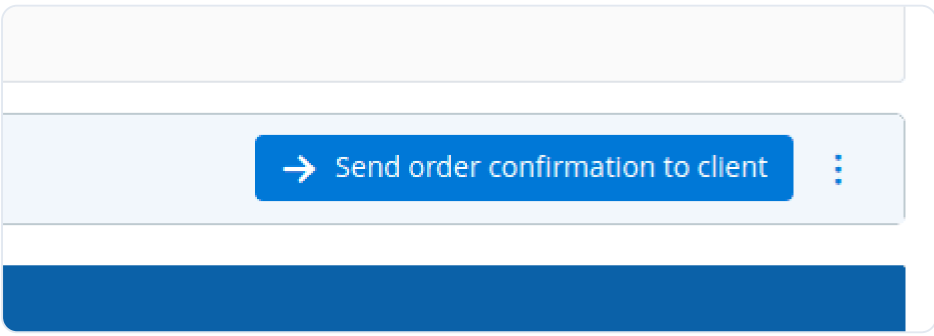
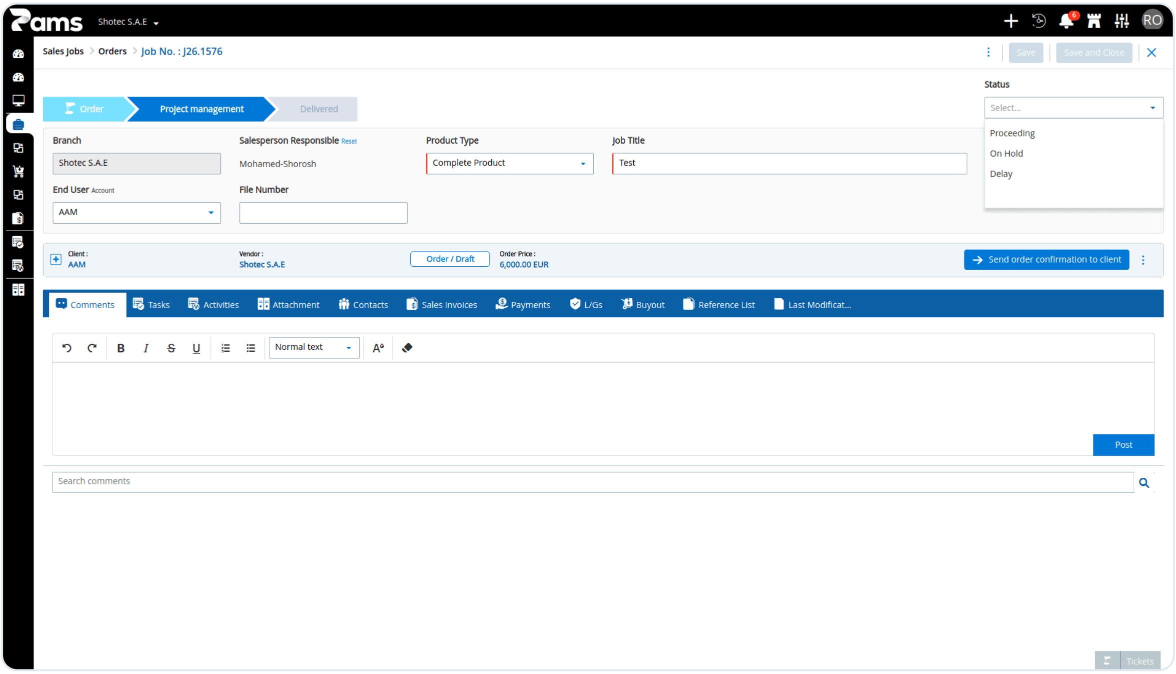


Overview

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.



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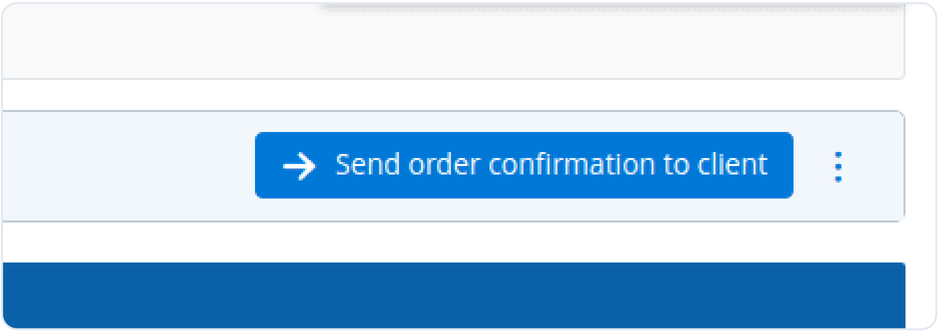
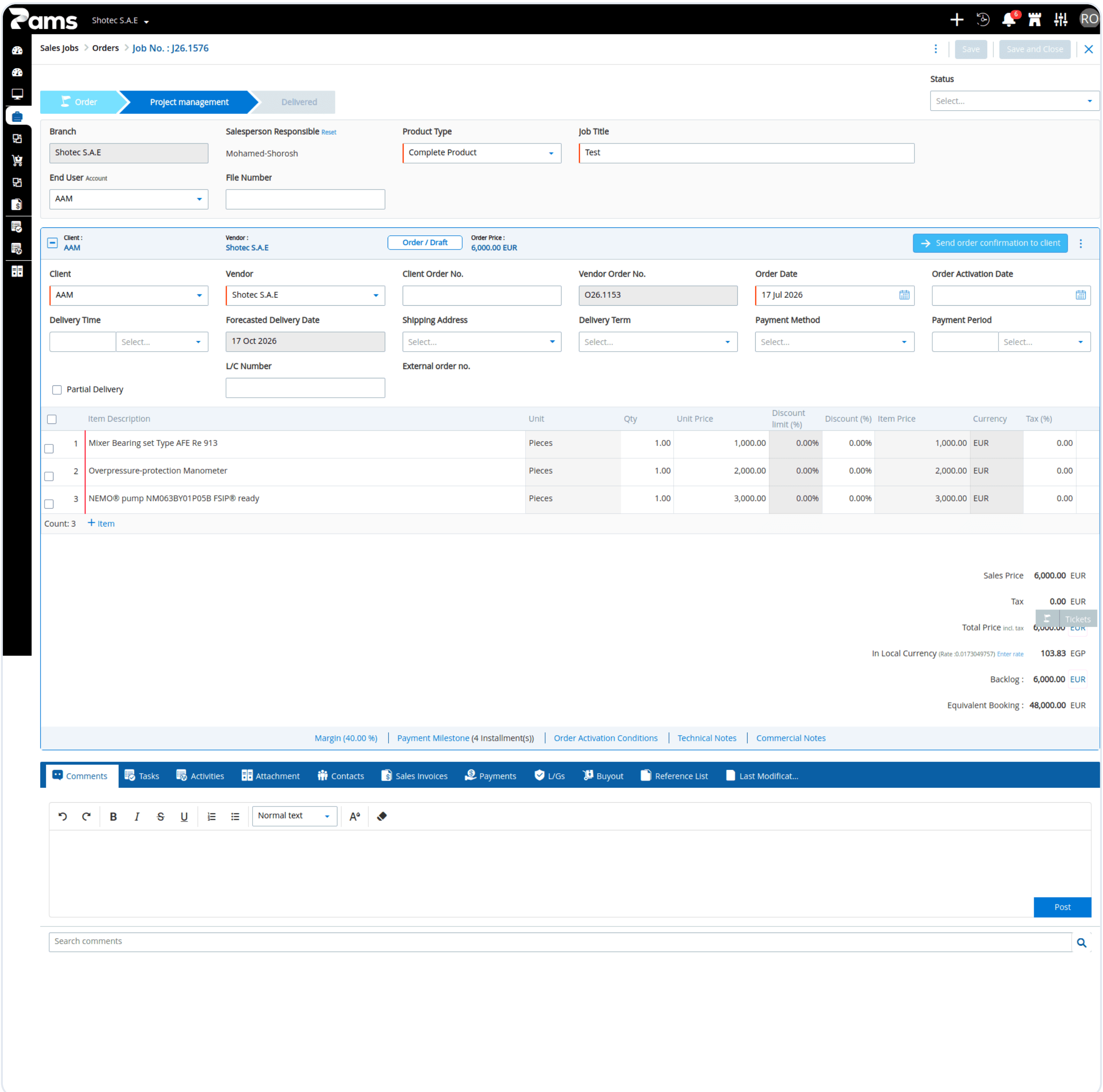


If the screen requires a selection, use **Select...** and then click **Select** to apply the available selection.

> **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.



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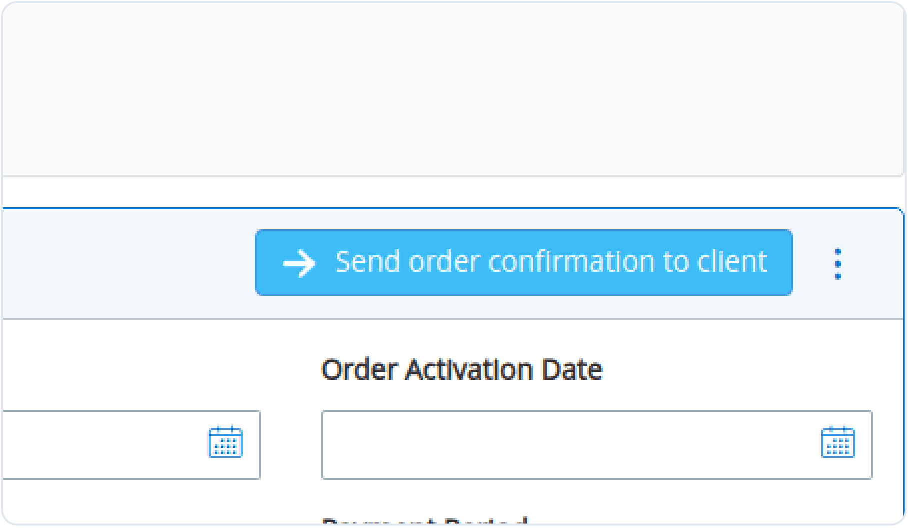

- Enter or revise the **Header**.
- Add the required text in the editor area.
- Format important text using **Bold**, **Italic**, **Strikethrough**, **Underline**, or **Ordered List**.
- If you need to remove a recent change, click **Undo**. To restore an undone change, click **Redo**.
- Add supporting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