

Create a sales job

September 11, 2026

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Overview

A sales job records commercial work as it moves from an early opportunity through inquiry, offer, order, and delivery. Create one when you need a record for a new piece of sales work; open an existing one when you need to continue work already recorded.

If you need to...	Go to
Start a new sales job	Enter the main job information
Check which parts of the form apply	Understand the sales-job form
Add customer, inquiry, or item details	Complete the applicable stage details and items
Save the completed form	Save the sales job and handle validation
Continue the saved work	Continue with the sales-job lifecycle
Read the stage flow	Sales job lifecycle
Locate an existing row	Find sales-job work
Compare the available creation routes	Sales-job variants

The sales-job stages are **Potentials**, **Inquiries**, **Offers**, and **Orders**.

Work can also leave the main path through missed, regretted, cancelled, lost, rejected, or deleted outcomes.

```
flowchart LR
    P[Potentials] --> I[Inquiries]
    I --> O[Offers]
    O --> R[Orders]
    R --> D[completion]
    I --> X[Missed / regretted / cancelled]
    O --> Y[Lost / regretted / cancelled]
    R --> Z[Rejected / cancelled]
```

Prerequisites — what must be in place for this to go smoothly

Prerequisites

Have this ready	Why it matters
The customer and vendor for the job	These parties are selected in Client and Vendor when the applicable stage details are completed.
The job title and product type	They identify the commercial work in the form and in later list views.
The inquiry number, inquiry date, bid due date, and requested offer type when the route asks for them	These values describe the request that the job tracks.
The item description, unit, and quantity	These values define what the job concerns and are checked before saving.
Permission to edit the job and belong to the relevant branch	Edit actions are limited by the job's edit and branch rules.
A saved record with no unsaved panel changes for later stage actions	Several later actions require an existing job and a saved panel.

Some fields are required only where your company configures them. The same applies

to some embedded panels and list columns. Use the fields and headers that appear in your form and list layout.

Important: Check the required marker on the field in front of you. A field can be required on one configured form and optional on another.

Find or open a sales job

A sales-job route is the place where you either start a new record or continue with an existing row. To create a new record, use the standard new-job option in the Sales jobs entry surface.

Prerequisites

- You know whether you are creating a new record or continuing an existing one.

- For an existing record, you know enough identifying information to recognize its row.

Steps

1. Open the standard new-job form to create a standard sales job.
2. Open [Sales-job variants](#) to choose a potential, direct order, or instant-job route.
3. Open [Find sales-job work](#) to continue with an existing sales job.
4. If the sales-job list is already open, use the visible stage tabs and column headers to identify the row instead of relying on a fixed column arrangement.
5. Select the row you need when the list presents it.

Result: You are on the new sales-job form or have identified the existing sales job to open.

The screenshot displays the 'New Inquiry' form in the PAMS system. The form is organized into several sections:

- Header:** Includes the PAMS logo, user 'Shotec S.A.E.', and navigation buttons like 'Save' and 'Save and Close'.
- Stage Tabs:** 'Inquiry' (selected), 'Offer', 'Order', and 'Delivered'.
- Form Fields:**
 - Branch:** Shotec S.A.E.
 - Salesperson Responsible:** Ramy Othman
 - Product Type:** Select...
 - Job Title:** [Empty field]
 - Time Frame:** 180 Day(s)
 - End User:** Select...
 - Estimated Value:** 0.00 EUR
 - In Branch Currency (Rate:1):** 0.00 EUR
 - File Number:** [Empty field]
 - Expected Order Date:** 08 Mar 2027
- Client Information:**
 - Client:** Select...
 - Vendor:** Select...
 - Client Inquiry Number:** [Empty field]
 - Inquiry Date:** 09 Sep 2026
 - Bid Due Date:** [Empty field]
 - Requested Offer Type:** Firm
- Item Grid:**

Item Description	Unit	Qty
1	Pieces	1.00

Count: 1 + Item
- Summary:** Equivalent Booking: 0.00 EUR
- Bottom Section:**
 - Contact to Decision Makers:** Select...
 - Budget Availability:** Select...
 - Chance in Competition:** Select...
 - Calculated Rating:** 0 %
 - Order chance:** Select...

Understand the sales-job form

The sales-job form brings the job's identity, stage details, items, and related work together. The current form displays the stage controls followed by the job fields and an item grid.

Use the stage row to choose a stage, the job fields to identify the work, and the item grid to enter the products or services included in the job.

Area	Fields
Job identity	Status, Branch, Salesperson Responsible, Product Type, Job Title, End User, Estimated Value, File Number, Expected Order Date
Parties and inquiry	Client, Vendor , and applicable inquiry fields
Assessment	Contact to Decision Makers, Budget Availability, Chance in Competition, Order chance
Item grid	Item Description, Unit, Qty

The form also displays the readouts **Time Frame**, In Branch Currency (Rate:1), and **Calculated Rating** when they apply. The item grid currently shows the headers **Item Description, Unit**, and **Qty**.

The form can include leads, inquiries, offers, orders, comments, tasks, activities, files, contacts, invoices, payments, letters of guaranties, purchasing, job costing, references, and customer survey areas. A panel or tab appears only when its stage, record, feature access, or user role permits it. Related-work guidance is in [Sales-job comments and tasks](#), [Sales-job activities and files](#), and [Sales-job contacts, guarantees, and history](#).

The form also contains **Save** and **Save and Close**. The Team field is not part of the available form, and **Category** is not an item-grid header.

Enter the main job information

The main information identifies the work, the parties responsible for it, and the commercial assessment that accompanies it.

Prerequisites

- You are on the standard new-job form or on a permitted editable sales-job form.
- You have the job title, product type, customer, vendor, and any available dates or commercial assessment information.

Steps

1. In **Branch**, review the branch shown for the job.

2. In **Salesperson Responsible**, select the person responsible for the sales job.
3. In **Product Type**, select the product type that describes the job from the available list. **UNVERIFIED** is available in the **Product Type** list.
4. In **Job Title**, enter the title used to recognize the job.
5. In **End User**, select the end user when the field is available.
6. In **Estimated Value**, enter the estimated value when it is available.
7. In **File Number**, enter the file number when you use one.
8. In **Expected Order Date**, enter the expected date when it is available.
9. In **Client**, select the company the request came from.
10. In **Vendor**, select the vendor connected with the job when the applicable stage requires one.
11. Complete the assessment fields that apply.

If you need to record...	Use
The people who decide	Contact to Decision Makers
The customer's budget position	Budget Availability
The competitive position	Chance in Competition
The likelihood of an order	Order chance
A stage-specific status	Status

12. In **Order chance**, choose a value when the field appears: 90 % , 70 % , 50 % , 30 % , or 10 % .

13. Review the required markers before moving to the stage details.

Result: The identifying, party, date, and assessment information is entered on the sales-job form.

Complete the applicable stage details and items

Stage details describe the request, offer, or order represented by the job. Item rows describe the products or services included in that stage.

Prerequisites

- The main job information is entered.

- You know which stage details apply to the selected route.
- You have each item's description, unit, and quantity.

Steps

1. In the inquiry details, complete the fields that apply.

Information to record	Field
The customer's inquiry reference	The applicable inquiry field
The date of the inquiry	The applicable inquiry field
The date by which the bid is due	The applicable inquiry field
The requested offer format	The applicable inquiry field

2. In the item grid, enter the item description in **Item Description**.
3. Select the matching unit in **Unit**.
4. Enter the quantity in **Qty**.
5. Review the applicable offer or order panel before saving.

Panel	Use it for
Inquiry details	Request and bid information
Offer details	Offer information and offer-stage work
Order details	Order information and order-stage work

6. Correct the item row if ****This field is required **** appears.
7. In **Qty**, enter a value greater than zero and no greater than the displayed limit if **Invalid input. The value must be greater than 0 and cannot exceed 999,999.00** appears.

Result: **Qty** contains a value greater than zero and no greater than the displayed limit.

8. Select the affected price or tax entry in the applicable offer or order grid and correct it if **Invalid input. Please enter a non-negative value** appears.

Result: The affected price or tax value is non-negative.

Result: The applicable inquiry, offer, or order information and item rows are ready for validation.

Save the sales job and handle validation

Saving validates the form before it commits the job. **Save** keeps the form in the current work area; **Save and Close** is the alternate save control shown on the form.

Prerequisites

- The applicable fields and item rows are complete.
- You have checked the required markers.
- You are not trying to trigger an embedded activity, purchasing, email, or other related workflow from this page.

Steps

1. Select **Save**.
2. Inspect the message on screen and select the corrective action in this table.

Message	Corrective action
Check mandatory field(s)	Complete the fields with required markers.
One or more items has ZERO quantity	Enter a quantity greater than zero in Qty .
One or more items has no unit	Select a value in Unit .

Message	Corrective action
An error occurred while processing your request	Correct the fields you changed and select Save again.
Error saving custom fields	Select Save again after reviewing the configured fields.
An account with this name already exists	Use the existing account rather than creating a duplicate.
A project with this name already exists	Use the existing project rather than creating a duplicate.
Please save opened inquiry first (owning page: Sales-job lifecycle)	Save the open inquiry before continuing with the sales job.
All inquiries must be in draft stage to revert to potential (owning page: Sales-job lifecycle)	Keep the inquiry in draft before returning to the potential stage.
Cannot be un-delivered – a due invoice already exists	Continue from the invoice state rather than attempting to reverse delivery here.
All offers must be in draft status to revert to inquiry	Return the offer to draft before returning to inquiry.
Error {{errorMsg}}	Use the text substituted for {{errorMsg}} to correct the affected entry.
This field is required	Complete the item field identified by the validation marker.
Invalid input. The value must be greater than 0 and cannot exceed 999,999.00	Correct the quantity in Qty .
Invalid input. Please enter a non-negative value	Correct the affected price or tax value in the applicable grid.
Custom fields saved successfully	Continue with the next available sales-job action.
Job updated successfully	Continue with the updated sales job.
Job deleted successfully	Follow Sales job lifecycle for the resulting job state.
Job regretted successfully	Follow Sales job lifecycle for the resulting job state.
Job cancelled successfully	Follow Sales job lifecycle for the resulting job state.

Message	Corrective action
Job missed successfully	Follow Sales job lifecycle for the resulting job state.
Job reactivated successfully	Continue with the reactivated sales job.
Converted to offer successfully	Continue in Offers .
Converted to inquiry successfully	Continue in Inquiries .
Converted To Regretted	Follow Missed, regretted, and cancelled jobs .
Converted to cancelled	Follow Missed, regretted, and cancelled jobs .
Converted to lost	Follow Missed, regretted, and cancelled jobs .

Message	Owning page
Please save opened inquiry first (owning page: Sales-job lifecycle)	Sales-job lifecycle
All inquiries must be in draft stage to revert to potential (owning page: Sales-job lifecycle)	Sales-job lifecycle

Result: You have identified the correction or next page for the message shown.

3. Read the message in the following table and follow its stated correction on the named owning page.

Message	Owning page	Exact source
Cannot be un-delivered – a due invoice already exists	Sales-job lifecycle	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:42964
All offers must be in draft status to revert to inquiry	Sales-job lifecycle	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:42968
Error {{errorMsg}}	Sales-job lifecycle	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:42972
An account with this name already exists	Sales-job lifecycle	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:42976

Message	Owning page	Exact source
A project with this name already exists	Sales-job lifecycle	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:42980
Please enter action for each milestone	Sales offer	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:54577
Please save opened cost sheet first	Sales offer	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:54581
There is a maximum discount that exceeds the negotiation margin.	Cost calculation	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:55749
Your request was completed successfully	Account details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:57428
Error: Vendor not saved yet	Account details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:57442
Error: Client not saved yet	Account details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:57446
This Field Is Required	Account details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:57450
Forbidden characters detected. Please remove them and try again.	Contacts	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:61543
You already have a contact with this name	Contact details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:62064
Just '_'-'.' And '&' Characters Accepted	Files	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:62920
Sales order is archived	Bill of materials	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:68711
Booked quantity for this job is greater than the required BOM quantity	Bill of materials	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:68715

Message	Owning page	Exact source
You cannot edit or delete the product after the purchase package is created	Bill of materials	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:68719
Cannot be deleted. Product is in purchasing	Bill of materials	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:68723
You cannot edit the product after the PO is created	Bill of materials	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:68727
This product is already included in BOM	Products list	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:69655
The first variant cannot be deleted	Product details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:70074
An error occurred while connecting to your CRM system.	Product details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:70078
Please select one product	Product details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:70082
Package must have at least one item	MRQ details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:71885
You cannot save without adding at least one product	MRQ details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:71893
One of products has no quantity	MRQ details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:71897
Action not allowed	Activities	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:74823
Check validation	Principal invoices	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:77784
No remaining items. All items have been selected	Purchasing	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:81745
This action is only allowed if you belong	Purchasing	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:81753

Message	Owning page	Exact source
to that branch		
Please enter at least one email	Purchasing	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:81757
Inquiry must have at least one item	Purchasing	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:81761
Offer must have at least one item	Purchasing	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:81765
Order must have at least one item	Purchasing	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:81769
Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted	Purchasing	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:81773
Please select one or more items to create a RFQ.	Purchasing	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:81781
Error loading accounts	Deliveries and orders	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:90933
Serial you have entered already exist and belong to same manufacturer	Reference details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:92082
There is error in serial you have entered	Reference details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:92086
Minimum: At least one serial	Reference details	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:92094
You don't have permission	Letters of guaranties	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:94558
LG still needs confirmation	Letters of guaranties	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:94562
LG has one or more extensions or deductions and cannot be reverted to the requested stage	Letters of guaranties	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:94566

Message	Owning page	Exact source
Please choose a date after the current expiry date	Letters of guaranties	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:94570
There is a pending increase you can edit	Letters of guaranties	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:94574
One topic and at least one note is required	New activity	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:97968
There is no topic to print	New activity	runs/pams-sales-jobs/facts/facts-screen-create-sales-job-1.json:97972
Required Receiving Date	MRQ details	Frontend/src/assets/i18n/en.json:1175
Required Receiving After	MRQ details	Frontend/src/assets/i18n/en.json:1176
Invalid input. Please enter a non-negative value	Sales offer and order item grids	Frontend/src/app/components/sales/new-job/offer-panel-details/offer-panel-details.component.ts:427
Please save opened inquiry first	Inquiry editing	Frontend/src/assets/i18n/en.json:253
All inquiries must be in draft stage to revert to potential	Potential conversion	Frontend/src/assets/i18n/en.json:2211
Required Offer Type	Inquiry details	Frontend/src/assets/i18n/en.json:1130
Required Bid Due Date	Inquiry details	Frontend/src/assets/i18n/en.json:1129

Result: You know which page owns an embedded-area message.

Result: The form has been submitted for validation.

Continue with the sales-job lifecycle

The saved job continues through the sales-job lifecycle. Read [Sales job lifecycle](#) for the stage flow.

Read [Sales-job record](#) for the workspace after you open a row.

Steps

1. Use the stage shown on the sales-job form to identify whether the work is in **Potentials, Inquiries, Offers, Orders**, or the final stage.
2. Open [Sales-job information and assessment](#) when you need field-level guidance for the job information or assessment.
3. Open [Sales-job items](#) when you need detailed item-grid guidance.
4. Open [Sales-job comments and tasks](#) for related comments and tasks.
5. Open [Sales-job activities and files](#) for activities and attachments.
6. Open [Sales-job contacts, guarantees, and history](#) for contacts, guarantees, and history.

Result: You know which sales-job page owns the next stage or related workspace activity.