

Find sales job work

September 10, 2026

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Sales jobs is the working list for locating sales work as it moves from **Potentials** through

Inquiries, **Offers**, and **Orders**. Use this page to find an existing record, narrow a list, or move to an archived outcome list. Stage actions belong on the focused pages for each stage.

If you need to...	Go to
Find early opportunity work	Potentials
Find a customer request	Inquiries
Find offer work	Offers
Find order work	Orders
Find an archived outcome	Use Archived to find outcome work
Continue with the full sales flow	Sales jobs lifecycle
Work on the record after opening it	Sales job record

Before you start

The Sales jobs list appears when your account includes the Sales jobs subscription and a saved layout is selected. Open a row only when it belongs to a branch you can access. The list has no required form fields or validation groups. Its columns come from the saved list layout, so work from the headers visible in your own list.

Prerequisites

- You have access to the Sales jobs subscription.
- A saved list layout is selected.
- The record you want belongs to the branch available to your account when you open it.

Choose the list that contains the work

Each active list groups work by its place in the sales flow. Select **Archived** for recorded outcome work.

Prerequisites

- You know whether you are looking for active work or an outcome.

Steps

1. Open the Sales jobs list.
2. Select the list that matches the work you need:

If you need to find...	Select
All sales jobs	All
Early opportunity work	Potentials
Customer requests	Inquiries
Offer work	Offers
Order work	Orders
Ended work	Archived

Result: The selected Sales jobs list is displayed. The Inquiries list also shows **Job Missing Customer Survey**.

The screenshot shows the PAMS Sales Inquiries view. The table displays the following data:

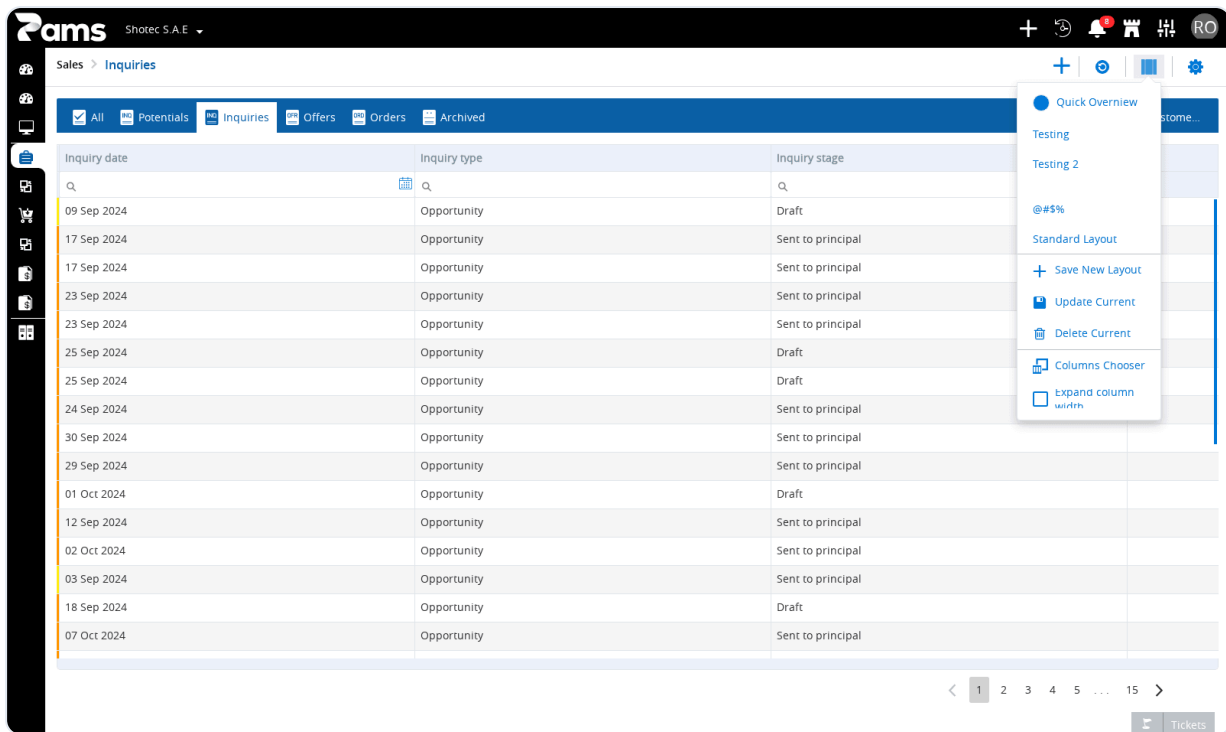
Inquiry date	Inquiry type	Inquiry stage
09 Sep 2024	Opportunity	Draft
17 Sep 2024	Opportunity	Sent to principal
17 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Sent to principal
25 Sep 2024	Opportunity	Draft
25 Sep 2024	Opportunity	Draft
24 Sep 2024	Opportunity	Sent to principal
30 Sep 2024	Opportunity	Sent to principal
29 Sep 2024	Opportunity	Sent to principal
01 Oct 2024	Opportunity	Draft
12 Sep 2024	Opportunity	Sent to principal
02 Oct 2024	Opportunity	Sent to principal
03 Sep 2024	Opportunity	Sent to principal
18 Sep 2024	Opportunity	Draft
07 Oct 2024	Opportunity	Sent to principal
02 Oct 2024	Opportunity	Draft
03 Oct 2024	Opportunity	Draft
08 Oct 2024	Opportunity	Draft

Understand the Sales jobs list

The list is a grid of sales-job rows. In the Inquiries view, the grid displays **Inquiry date**, **Inquiry type**, and **Inquiry stage**. It displays **Opportunity** under **Inquiry type**, and **Draft** or **Sent to principal** under **Inquiry stage**.

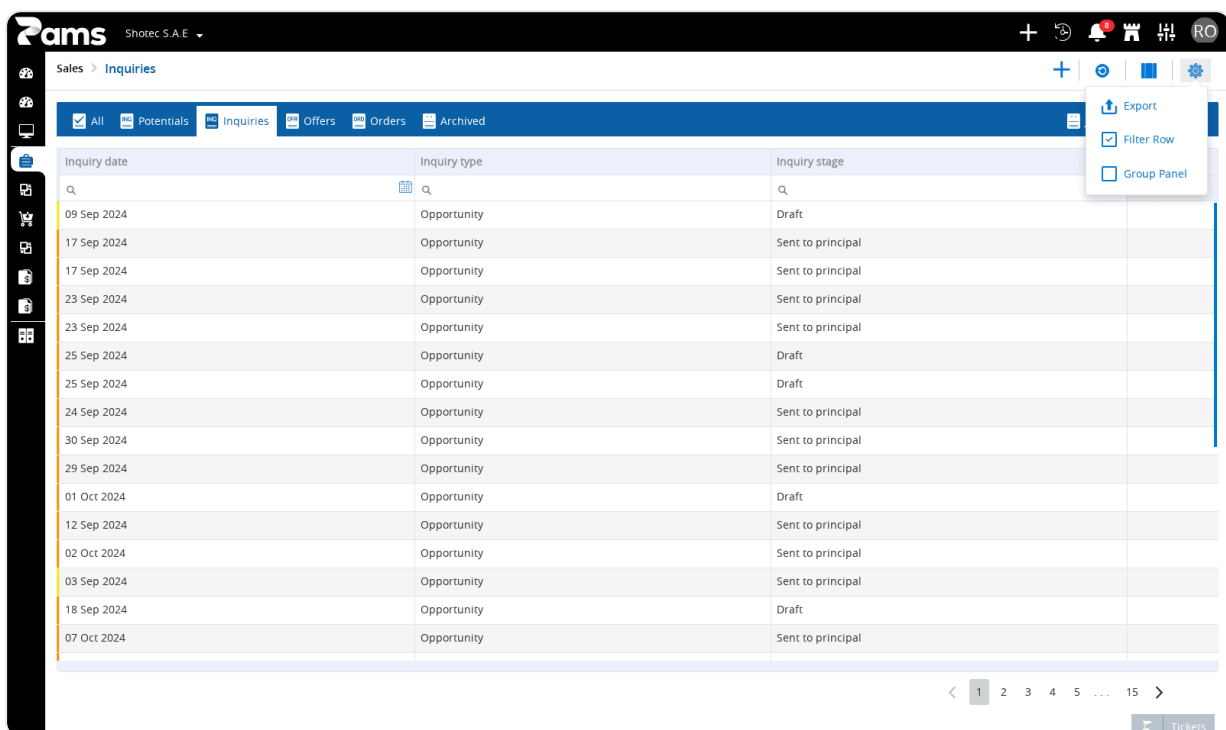
The grid also provides per-column search boxes, a date-calendar filter, colored row-edge indicators, and pagination.

Open **Table Layout** to work with the list layout. It provides **Save New Layout**, **Update Current**, **Delete Current**, **Columns Chooser**, and **Expand column width**.



Open **Settings**. Select **Filter Row** or **Group Panel** from its menu. The archived-outcome grid does not provide the column chooser. **Incl. archived Jobs** is available in **All**; use **Archived** for the named outcome lists.

The list controls are **Refresh**, **Table Layout**, **Settings**, and **Export**.



The columns depend on the saved list layout. Use the headers currently shown in your list when you read or filter rows.

Filter and narrow the list

Use the list settings to display a filter row or a group panel. Row filtering is applied when you apply the filter; grouping is controlled through the list settings. In **All, Incl. archived Jobs** adds archived rows and refreshes the grid.

Prerequisites

- You have opened a Sales jobs list.

Steps

1. Select **Settings**.
2. Choose one list option:

If you need to...	Select
Filter rows	Filter Row
Group rows	Group Panel
Include archived rows in All	Incl. archived Jobs

3. Enter or select the filter values in the grid when **Filter Row** is displayed.
4. Apply the filter from the grid.

If the filter contains forbidden characters, the list displays

Forbidden characters detected. Please remove them and try again. Remove those characters and apply the filter again.

Result: The grid displays the filtered or grouped list. When **Incl. archived Jobs** is selected in **All**, the grid refreshes with archived rows included.

Use Archived to find outcome work

Archived is the list branch for work that has finished or left the normal active route. It provides links to the outcome lists.

Prerequisites

- You are looking for completed or ended work rather than active Potentials, Inquiries, Offers, or Orders.

Steps

1. Select **Archived**.
2. Select the outcome list that matches the work you need:

If you need to find...	Select
Lost work	Lost
Regretted offer work	Regretted to Offer
Cancelled inquiry work	Cancelled Inquiries
Cancelled order work	Cancelled Orders
Rejected order work	Rejected Orders
Missed work	Missed
Deleted inquiry work	Deleted Inquiries

Result: The selected archived outcome list is displayed. Outcome procedures continue on

[Missed, regretted, and cancelled jobs.](#)

Open an existing sales job record

A sales-job row is the entry point to the existing record. Selecting a data row opens the record;

the context menu also provides **Open in new tab**.

After the record opens, its work areas include **Comments, Tasks, Activities, Attachment, Contacts, LGs, and Last Modifications**.

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Sales Jobs > Offers > Job No.: J24.1655

Save

Save and Close

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Inquiry

Offer

Order

Delivered

Order chance

10 %

Status

Technical Evaluation

Reviewed by: Monamed Mamdouh

Reviewed on: 22 Sep 2024

Sales Responsible was: Fatma Mohamed

Branch

Shotec S.A.E

Salesperson Responsible

Fatma Mohamed

Product Type

Complete Product

Job Title

Haditha project

Time Frame

6 Month(s)

End User Account

Orascom (OCI)

File Number

R-SCM-001

Expected Order Date

09 Mar 2025

Client: Orascom (OCI)

Vendor: Scam TPE

Offer/Expired

Bid Due Date: 26 Sep 2024

Expiry Date: 30 Sep 2024

Offer Price: 294,400.00 EUR

Extend Offer Validity

Comments

Tasks

Activities

Attachment

Contacts

LGS

Last Modified...

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Normal text

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Post

Search comments

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Tickets

Prerequisites

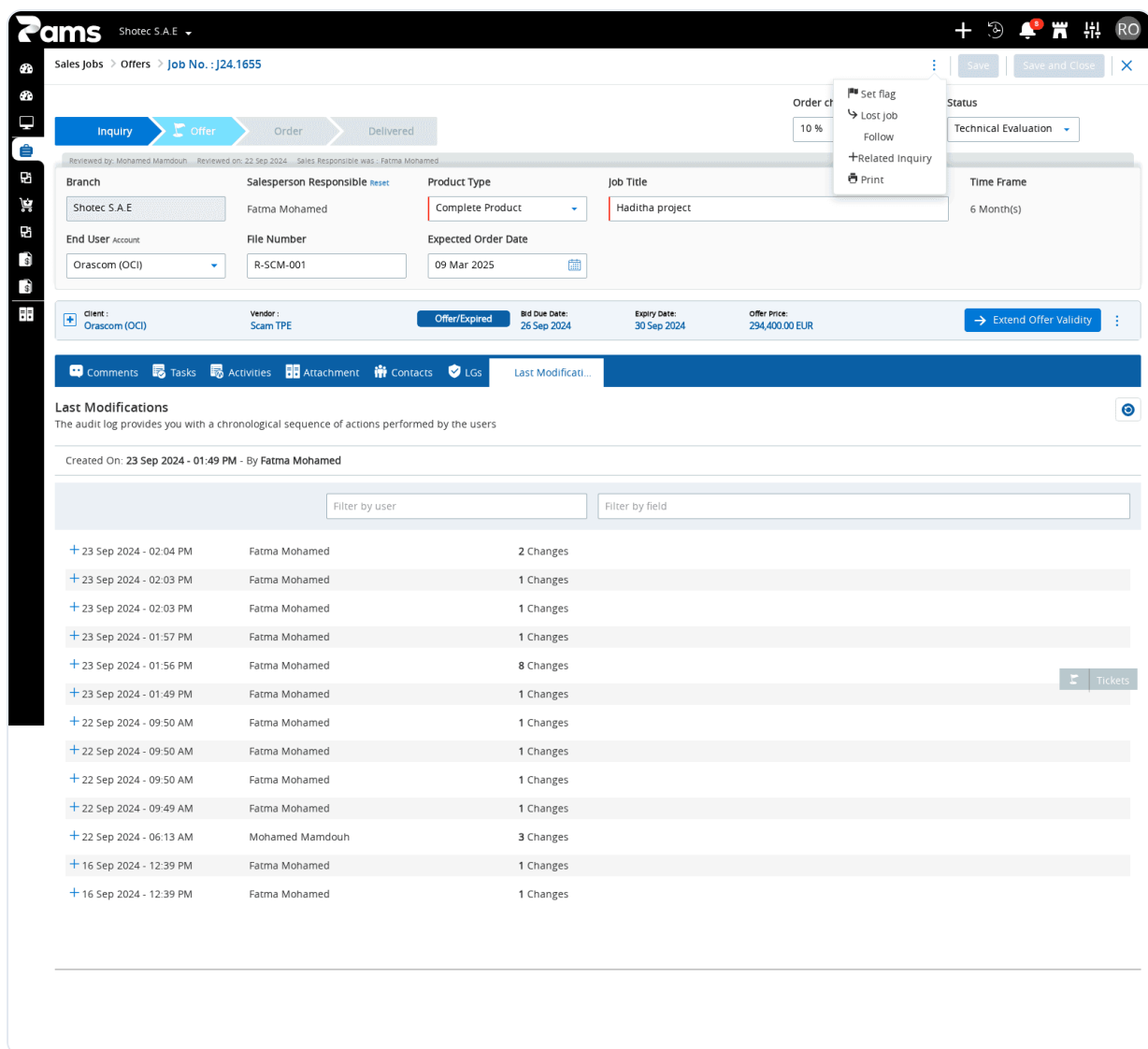
- The target row is visible in the selected list.
- The record belongs to the branch available to your account.

Steps

1. Open the record using one of these options:

If you want to...	Action
Open it in the current tab	Select the row.
Keep the list open	Select Open in new tab from the row context menu.

Result: The selected sales job record opens.



When a list option is unavailable

Use the condition that matches what you see before retrying the list action.

What you see	What it means	What to do
The Sales jobs list, tabs, or list controls do not appear	The Sales jobs subscription is not included.	Contact your administrator about Sales jobs access.
The grid does not appear	A saved layout is not selected.	Select a saved list layout.
A command is missing	The action is not available in this list.	Use another visible action or contact your administrator.

What you see	What it means	What to do
Forbidden characters detected. Please remove them and try again.	The filter contains forbidden characters.	Remove the characters and apply the filter again.
Error loading accounts	The account lookup used by the list could not load.	Retry the list action.

Messages after a row action

Message	What it tells you
Your request was completed successfully	The request completed successfully.
An error occurred while processing your request	The request could not be completed.
Job Deleted Successfully	The sales job was deleted successfully.

Continue with the record

Opening a record ends the locating task on this page. The focused stage pages own the actions that change the work from one stage to another.

Prerequisites

- You have opened the sales job record.
- You know its stage.

Steps

1. Select the focused page for the stage of the record you opened:

If the record is in...	Continue with
Potentials	Potentials
Inquiries	Inquiries
Offers	Offers
Orders	Order completion
An archived outcome	Missed, regretted, and cancelled jobs

Result: The record remains open for the next focused task.