Inquiries

September 10, 2026

Inquiries

What an inquiry is

An Inquiry is a sales-job stage between a Potential and an Offer. A Potential is the earlier sales
stage, and an Offer is the next stage for pricing the request. You use an Inquiry to complete the
request, send it to a principal or vendor when required, correct or approve its outcome, and move an
eligible record forward to an Offer.

The sales flow includes these main stages:

```
stateDiagram-v2
    Potential --> Inquiry: Receive inquiry
    Inquiry --> Offer: Go to offer
    Inquiry --> Regretted Inquiry: Regret
    Inquiry --> Cancelled Inquiry: Inquiry Cancelled By Client
```

If you need to…	Go to
Qualify an early sales opportunity before it becomes an Inquiry	Potentials
Complete, send, correct, or advance an Inquiry	This page
Continue with pricing and the offer	Offers
Understand the complete sales-stage sequence	Sales jobs lifecycle

Before you start

Prerequisites

Have this ready	Why it matters
The client company	The client is a required selection on the Inquiry panel.
The vendor or principal	The vendor is a required selection and determines which send route is available.
The customer's reference and requested deadline	They give you the information for **Client Inquiry Number** and **Bid Due Date**.
The requested items, units, and quantities	The Inquiry item grid records what the Offer must address.
Permission to send correspondence or advanced approval access, when those routes apply	These permissions control which Inquiry actions appear.
A saved Inquiry with no unsaved changes	**Go to offer**, resend, approval, and correction routes have saved-record conditions.

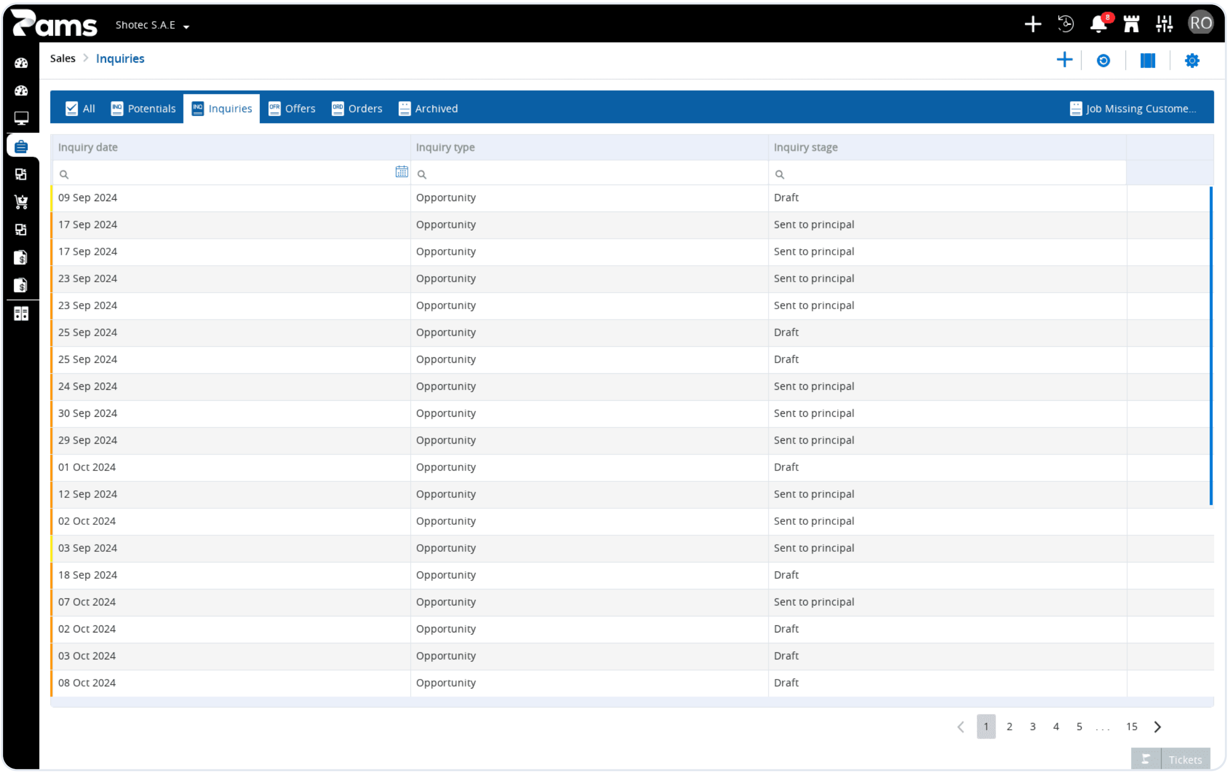
The **Inquiry Date** cannot be later than today, and **Bid Due Date** cannot be earlier than the
Inquiry Date. **Client Inquiry Number**, **Inquiry Date**, and **Requested Offer Type** are required
only where your company configures them as mandatory.

Find or open an inquiry

An Inquiries list is the work list for sales jobs at the Inquiry stage. Use it to start a new record or
to open a saved record.

1. Open the sales-jobs list.
2. Select **Inquiries** from its sales-job views.

The list uses **Inquiry date**, **Inquiry type**, and **Inquiry stage** as its visible columns. The
other sales-job tabs help you move to the surrounding stages: **All**, **Potentials**, **Offers**, **Orders**, **Archived**, and **Job Missing Customer Survey**.



3. Select **Add new**.
4. Choose one route from the table.

If you need to…	Select
Start an Inquiry workspace	**Inquiry**
Start a direct order instead	**Direct order**

After you select **Direct order**, the direct-order workspace opens. Continue there for that separate
task rather than completing an Inquiry.

5. Select an existing list row when you need to continue a saved Inquiry.

The saved record opens in the sales-job workspace at `/sales/edit/<record-id>`.

Result: You are either in a new Inquiry workspace or in the saved sales-job workspace for an
existing Inquiry.

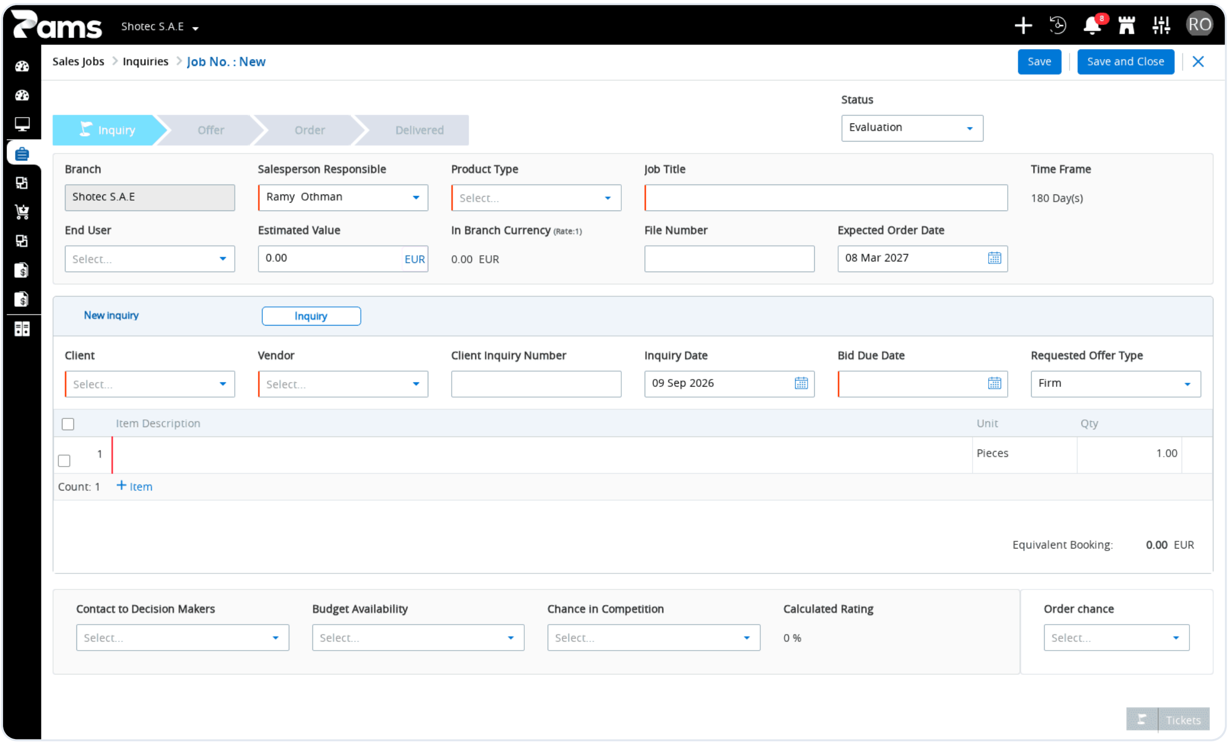
Understand the Inquiry workspace

The Inquiry workspace is the part of a sales-job record where you identify the client and vendor,

record the request, and enter the requested items. A saved record also exposes companion areas for
work that belongs to the wider sales job.

The new-Inquiry workspace showed these fields:

Area	Fields or controls
Job header	**Status**, **Branch**, **Salesperson Responsible**, **Product Type**, **Job Title**, **End User**, **Estimated Value**, **File Number**, and **Expected Order Date**
Inquiry panel	**Client**, **Vendor**, **Client Inquiry Number**, **Inquiry Date**, **Bid Due Date**, and **Requested Offer Type**
Assessment fields	**Contact to Decision Makers**, **Budget Availability**, **Chance in Competition**, and **Order chance**
Item grid	**Item Description**, **Unit**, and **Qty**
Actions	**Save** and **Save and Close**



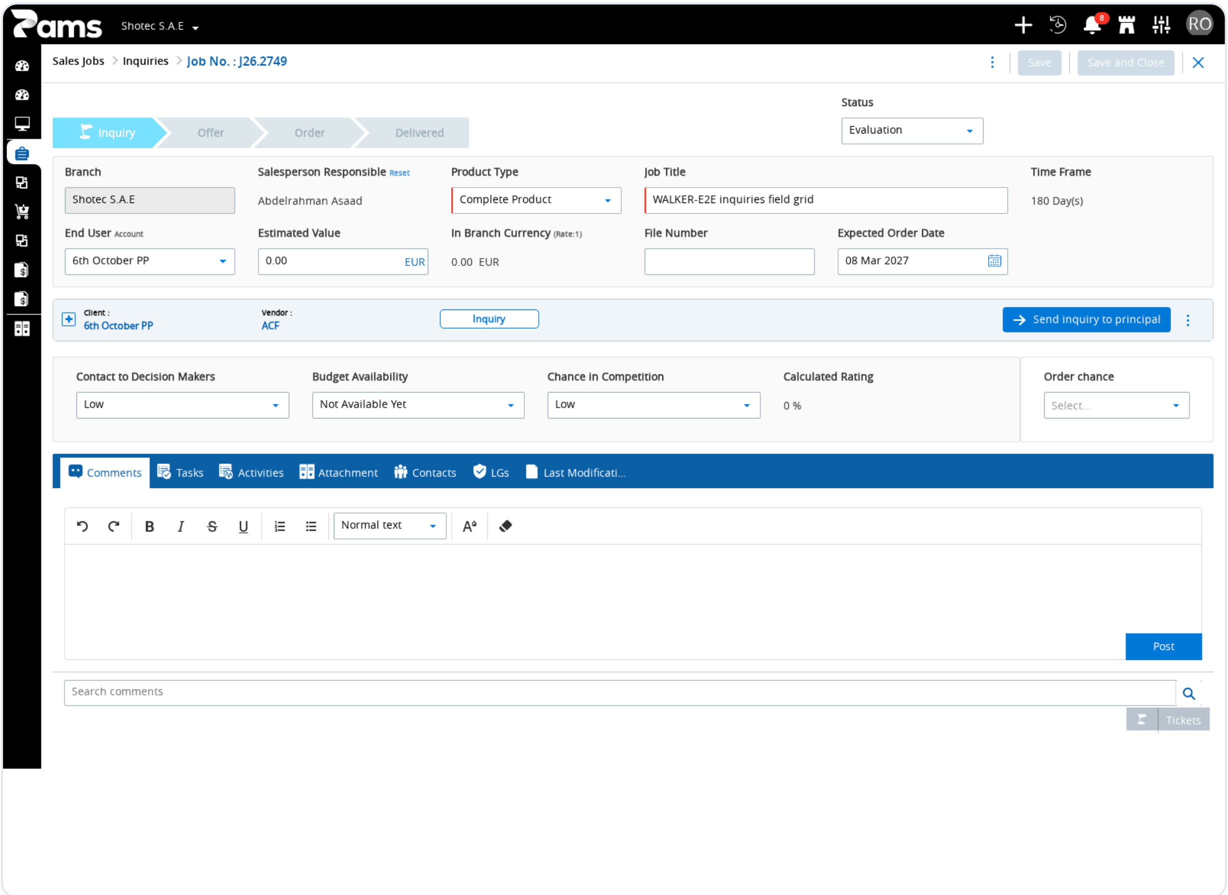
Client and **Vendor** are required. **Bid Due Date** is required and cannot precede **Inquiry**
Date. **Client Inquiry Number**, **Inquiry Date**, and **Requested Offer Type** are required only
where your company configures them as mandatory. The Inquiry item row requires **Item Description**.

Unit can be unavailable for package items or when the selected product supplies a unit. **Qty**
accepts values greater than zero up to `999,999.00` in the visible validation rule.

Custom fields can appear in the Inquiry area when your company has configured them for Inquiry records.
Their labels and values depend on that configuration.

After the record is saved, the workspace showed the **Inquiry** stage and these companion areas:

Area	Use it to…
Comments	Shown after saving.
Tasks	Shown after saving.
Activities	Shown after saving.
Attachment	Shown after saving.
Contacts	Shown after saving.
LGs	Shown after saving.
Last Modifications	Shown after saving.



Result: You can tell the shared sales-job fields from the Inquiry panel, the item grid, and the
companion areas that appear after saving.

Complete and save an inquiry

Completing an Inquiry records the request that the later Offer must address. Enter the client, vendor,
dates, requested offer information, and at least one requested item before saving.

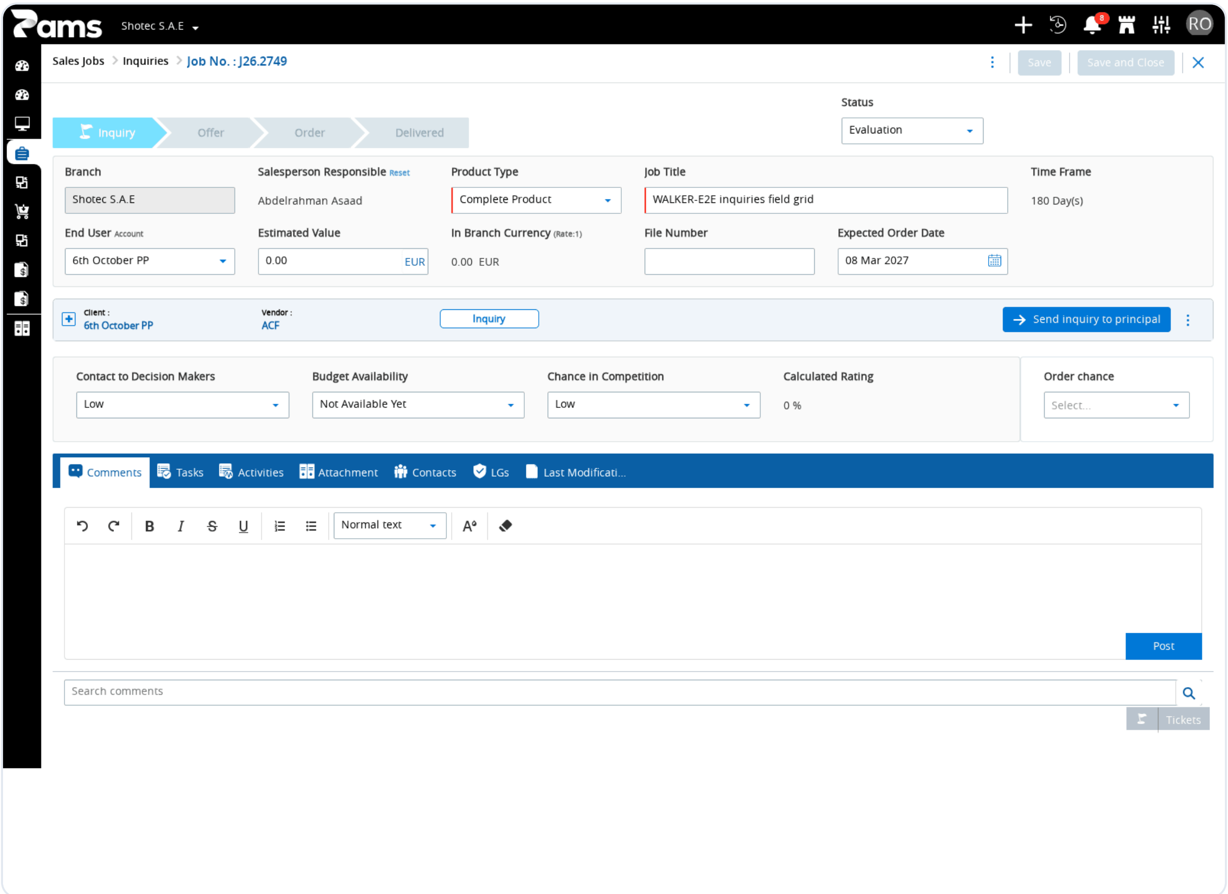
Prerequisites

- You know the client, vendor, requested item, unit, quantity, and bid deadline.
- You are in a new Inquiry workspace or have an Inquiry with unsaved changes.

Steps

1. In **Client**, select the company that sent or requested the Inquiry.
2. In **Vendor**, select the principal or vendor that will respond.
3. In **Client Inquiry Number**, enter the customer's reference when one is available.
4. In **Inquiry Date**, enter the date of the request.

5. In **Bid Due Date**, select a date on or after **Inquiry Date**.
6. In **Requested Offer Type**, select the requested offer type when the field is required for your company.
7. In the item grid, enter the requested product or service in **Item Description**.
8. In **Unit**, select the unit for the item when the field is available.
9. In **Qty**, enter a quantity greater than zero.
10. Select **Save**.



Result: The saved sales-job workspace opens with the **Inquiry** stage. The workspace shows
Send inquiry to principal when that action is available for the record.

Send an inquiry and handle its branches

The Inquiry action menu changes with the vendor, stage, saved state, and your permissions. Use the
route that matches the question you need to answer.

If you need to…	Use this action	Before you select it
Send the Inquiry to an external principal	**Send inquiry to principal**	Mail sending is allowed, the vendor is external, and the Inquiry is new.
Send it again after it was sent	**Re-send inquiry to principal**	Mail sending is allowed, the vendor is external, and the Inquiry is at the sent-to-principal stage.
Record that it was sent without correspondence	**Consider As Sent To Principal**	The Inquiry is new, the vendor is external, and correspondence is unavailable.
Approve or reject a regret request	**Regretting Approval** or **Regretting Disapproval**	The Inquiry is awaiting regret approval and you have advanced approval access.
Approve or reject a cancellation request	**Approve Cancelled** or **Disapprove Cancelled**	The Inquiry is awaiting cancellation approval and you have advanced approval access.
Reverse a regret or cancellation choice	**Consider as not regretted** or **Consider as not cancelled**	The Inquiry is in the corresponding regret or cancellation state.
Reverse the considered-sent state	**Consider as not sent to principal**	The Inquiry is external and in the considered-sent state.
Request a regret	**Regret**	The received job is before the Offer stage.
Request a client cancellation	**Inquiry Cancelled By Client**	The received job is before the Offer stage.
Produce an Inquiry printout	**Print**	Print access is available.

1. Review the current **Inquiry** stage and the selected **Vendor** before opening the action menu.
2. Select the action that matches your vendor and stage from the table above.
3. Read the resulting stage or message before choosing another action.

Result: The Inquiry remains in the branch selected by the action, or the action is unavailable
until its stage, saved state, vendor, or permission condition is met.

Resolve validation and save problems

When an Inquiry action stops, use the exact message on screen to identify the correction. Correct the
field or item it names, then retry the action.

What you see	What it means	What to do
`This Field Is Required`	A required field is empty.	Complete the field marked as required, then select **Save**.
`This field is required`	The item description is empty.	Enter the requested item in **Item Description**.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	The quantity is outside the accepted range.	Enter a quantity greater than zero and no greater than `999,999.00` in **Qty**.
`You just changed the vendor after sending this inquiry to another vendor. The inquiry will return to draft`	The vendor was changed after the Inquiry was sent.	Review the vendor and continue from the draft state.
`Inquiry must have at least one item`	The Inquiry has no item row to process.	Add an item and complete **Item Description** before saving.
`Please save opened inquiry first`	The open Inquiry has not been saved before the next action.	Select **Save**, then retry the action.
`Required Offer Type`	The requested offer type is required.	Complete **Requested Offer Type**.
`Required Bid Due Date`	The bid deadline is required.	Complete **Bid Due Date**.
`Error loading accounts`	The account lookup could not load its choices.	Retry the lookup before selecting **Client** or **Vendor**.
`Error: Vendor not saved yet`	The vendor selection is not saved.	Save the vendor selection before retrying.
`Error: Client not saved yet`	The client selection is not saved.	Save the client selection before retrying.
`Forbidden characters detected. Please remove them and try again.`	A text value contains a forbidden character.	Remove the character and retry the save.
`An error occurred while processing your request`	The request was not completed.	Review the current fields and retry the action.

What you see	What it means	What to do
`Inquiry updated successfully`	The Inquiry update completed.	Continue with the next action for the current stage.
`Inquiry successfully considered as sent to principal`	The Inquiry was marked as considered sent.	Continue with the next available Inquiry action.
`Converted to offer successfully`	The Inquiry-to-Offer conversion completed.	Continue in Offers.
`Your request was completed successfully`	The requested operation completed.	Continue with the next available action.

The following messages belong to other workflows. Use the page for the named workflow when one of
these messages appears:

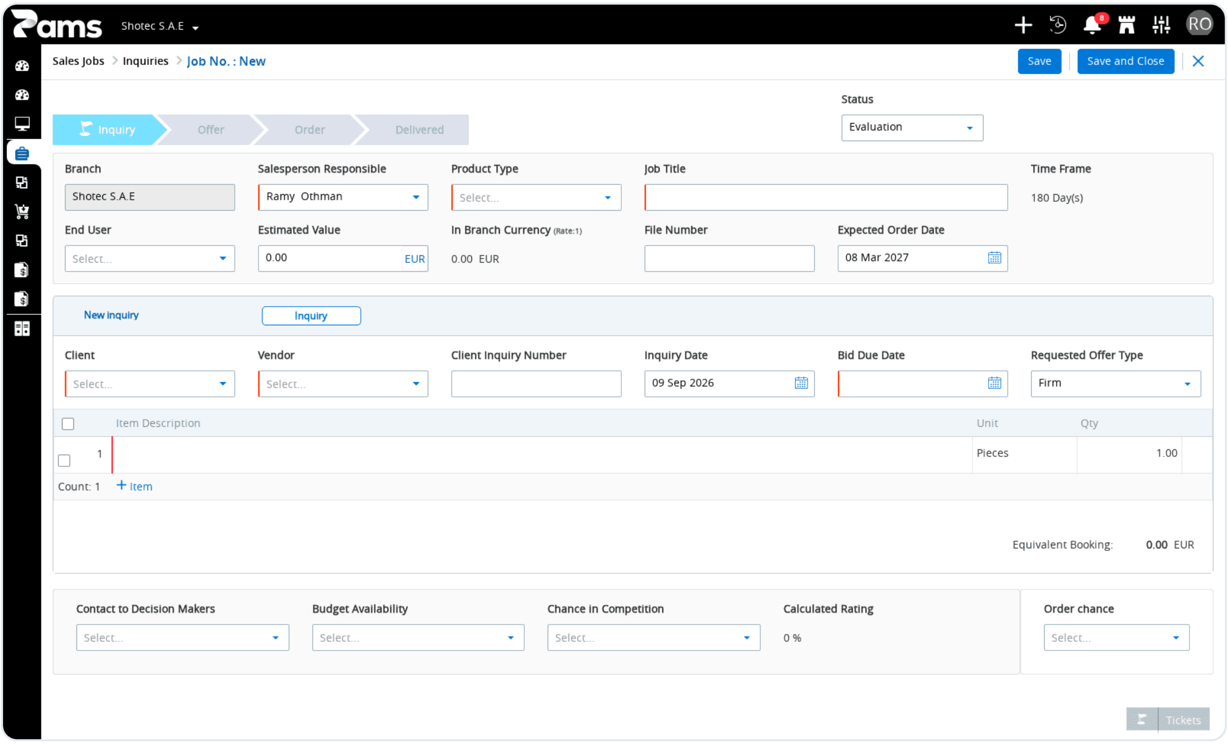
Message	Owning workflow
`Items updated successfully`	Offers and orders
`Order updated successfully`	Orders
`Required Receiving Date`	Orders
`Invalid input. Please enter a non-negative value`	Offers and orders
`Custom fields saved successfully`	Custom fields
`Job updated successfully`	Sales job record
`Job deleted successfully`	Sales job record
`Job regretted successfully`	Sales job lifecycle
`Job cancelled successfully`	Sales job lifecycle
`Job missed successfully`	Sales job lifecycle
`Job reactivated successfully`	Sales job lifecycle
`Converted to inquiry successfully`	Potentials
`Error saving custom fields`	Custom fields
`Cannot be un-delivered – a due invoice already exists`	Delivered sales jobs
`All offers must be in draft status to revert to inquiry`	Offers
`An account with this name already exists`	Accounts
`A project with this name already exists`	Projects

Message	Owning workflow
`All inquiries must be in draft stage to revert to potential`	Potentials
`Please enter action for each milstone`	Payment milestones
`Please save opened cost sheet first`	Cost sheets
`You already have a contact with this name`	Contacts
`Booked quantity for this job is greater than the required BOM quantity`	Bill of materials
`You cannot edit or delete the product after the purchase package is created`	Purchasing
`Cannot be deleted. Product is in purchasing`	Products
`You cannot edit the product after the PO is created`	Purchasing
`This product is already included in BOM`	Bill of materials
`The first variant cannot be deleted`	Products
`An error occurred while connecting to your CRM system.`	CRM integration
`Please select one product`	Products
`Required Receiving After`	Orders
`Package must have at least one item`	Purchasing packages
`You cannot save without adding at least one product`	Products
`Action not allowed`	Shared workflow controls
`Please enter at least one email`	Invoices and payables
`Offer must have at least one item`	Offers
`Order must have at least one item`	Orders
`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	Orders
`Please select one or more items to create a RFQ.`	Purchasing
`Serial you have entered already exist and belong to same manufacturer`	Serial numbers
`There is error in serial you have entered`	Serial numbers

Message	Owning workflow
`Minimum: At least one serial`	Serial numbers
`LG has one or more extensions or deductions and cannot be reverted to the requested stage`	Letters of guarantee
`Please choose a date after the current expiry date`	Letters of guarantee
`One topic and at least one note is required`	Activities

Selecting **Save** with the required new-Inquiry fields empty displayed the following validation
summary:

`Please Solve the Following Issues : | - Product type is required | - Job title is required | - Client is required | - Vendor is required | - Bid Due Date is required | - Item Description is required | - Vendor and client is the same.. It is not possible.`



The **Inquiry Date** and **Bid Due Date** boundary rules also apply when you save. If a date is refused,
correct the date and retry **Save**.

Convert an eligible inquiry to an offer

An eligible Inquiry is a saved Inquiry that has no unsaved changes and meets the vendor and stage
conditions for the Offer handover. The handover changes the sales flow from Inquiry to Offer.

Prerequisites

- The Inquiry is saved with no unsaved changes.
- The Inquiry is before the Offered stage.
- The vendor and your role meet the current **Go to offer** action condition.

Steps

1. Open the saved Inquiry workspace.
2. Check the **Inquiry** stage in the workspace.
3. Open the Inquiry action menu.
4. Select **Go to offer** when it is available.

Result: The Inquiry-to-Offer handover is initiated, and the next work continues in Offers.