# Potentials

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# Potentials

## Potentials

A Potential is an early sales-job stage used before an Inquiry. It is the place to record the job,
qualify the opportunity, and then receive an inquiry when the work is ready to continue.
An Inquiry is the next sales-job stage for work that continues from a Potential.

The normal path is `Potential` → `Inquiry` → `Offer` → `Order` → `Delivered`. A Potential can also
leave the active path through missed, regretted, or cancelled outcomes.

| If you need to… | Go to |
| --- | --- |
| Create and qualify an early sales opportunity | Create and qualify a Potential |
| Find an existing Potential | Find and open a Potential |
| Review the fields and stage tabs | Understand the Potential screen |
| Maintain a saved Potential or receive an inquiry | Maintain the Potential panel and receive an inquiry |
| Continue after the inquiry handoff | Inquiries |
| Work with offers after an inquiry | Offers |

## Before you start

### Prerequisites

- Have the job information ready: the responsible salesperson, product type, job title, client,
  vendor, and the qualification details you want to record.
- Know the inquiry date and bid due date if the Potential includes an inquiry panel.

- Have access to the target-job flow. The **Potentials** tab is available for a target job, not for
  direct or instant jobs.
- Save the Potential before using actions that require a saved record, such as **Receive inquiry**.
- Keep the panel free of unsaved changes before using a stage action.

| Rule | Fields |
|---|---|
| Required only where configured | **End User**, **Estimated Value**, **File Number**, **Client Inquiry Number**, **Inquiry Date**, **Requested Offer Type**, **Contact to Decision Makers**, **Budget Availability**, **Chance in Competition**, **Order chance** |
| Required on the new-Potential surface | The form marks **Salesperson Responsible**, **Product Type**, **Job Title**, **Client**, **Vendor**, and **Bid Due Date** as required. |

## Find and open a Potential

A Potential list is the starting point when you need to choose an existing sales job. The list presents
the job and inquiry information as columns, while the new-Potential route opens an empty job surface.

### Prerequisites

- Know whether you are creating a new Potential or opening an existing one.
- For an existing record, know enough of the visible job information to choose the correct row.

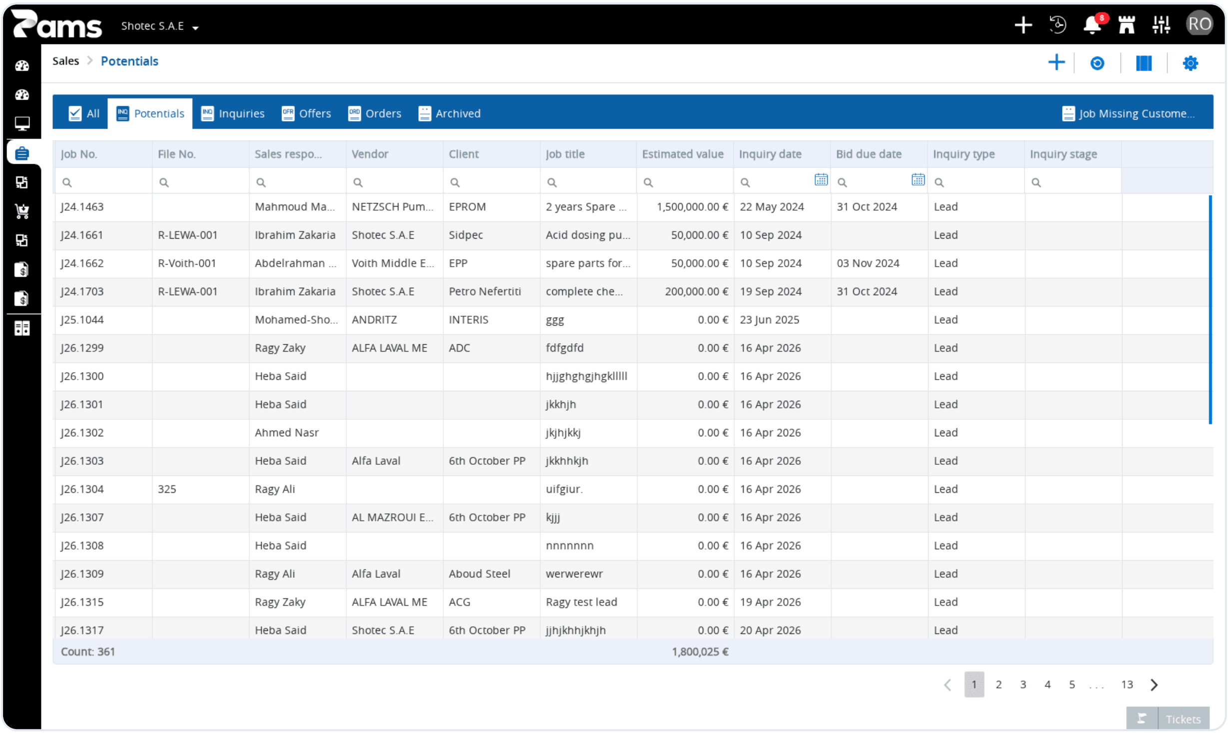
### Steps

1. Open the Potentials list at `/sales/list/Potentials/view`.
2. Use the visible headers to identify the row.

| Job identity | Responsibility and parties | Dates and stage |
|---|---|---|
| Use **Job No.**, **File No.**, and **Job title** | Use **Sales responsible**, **Vendor**, and **Client** | Use **Estimated value**, **Inquiry date**, **Bid due date**, **Inquiry type**, and **Inquiry stage** |

3. Choose the path for the work you need to do.

| If you need to… | Action |
|---|---|
| Open an existing Potential | Select its row. |
| Create a new Potential | Open the new Potential entry from the Sales jobs area. |




**Result:** The Potentials list is open for selection, or the new-Potential surface is ready for entry.

## Understand the Potential screen

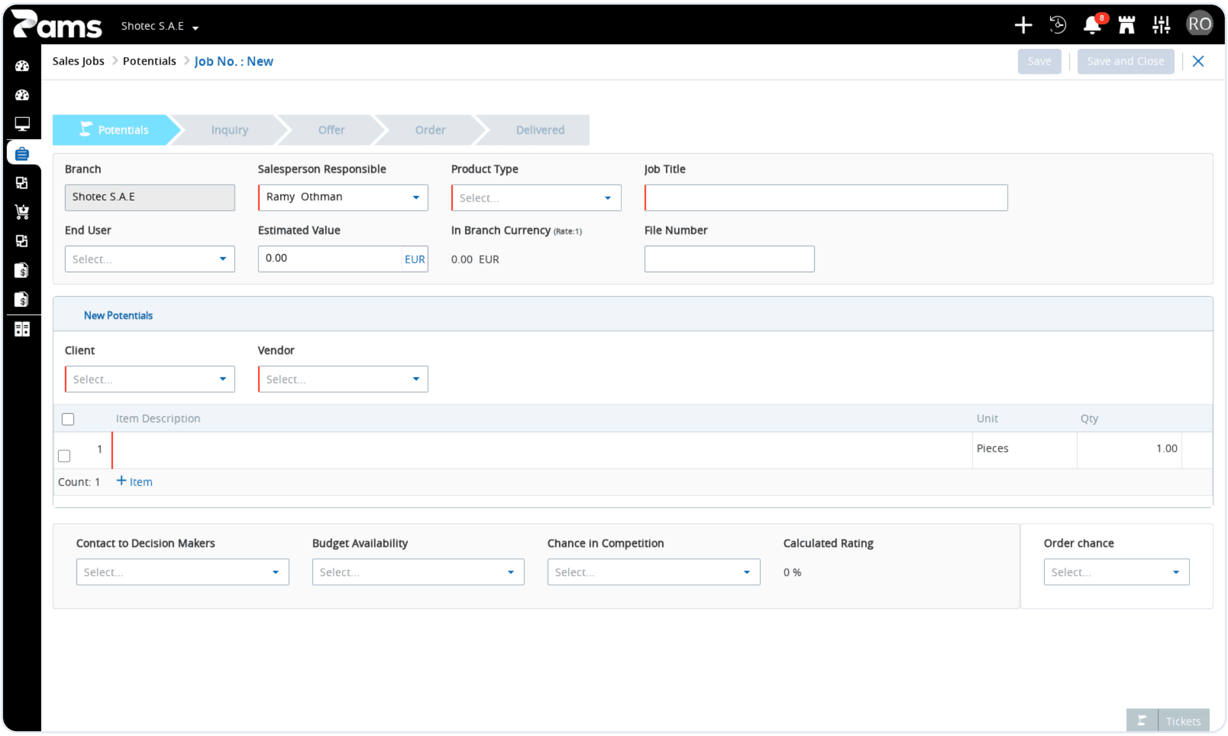
The Potential screen combines the sales-job information with the Potential panel, an item area, stage
tabs, and save controls. The list's columns are the headers visible in your list; the new-Potential
surface currently shows the following fields and controls.

| Area | What you can see |
|---|---|
| Job information | The screen includes **Branch**, **Salesperson Responsible**, **Product Type**, **Job Title**, **End User**, **Estimated Value**, and **File Number** |
| Potential panel | The panel includes **Client**, **Vendor**, **Client Inquiry Number**, **Inquiry Date**, **Bid Due Date**, and **Requested Offer Type** |
| Qualification | **Contact to Decision Makers**, **Budget Availability**, **Chance in Competition**, **Order chance** |

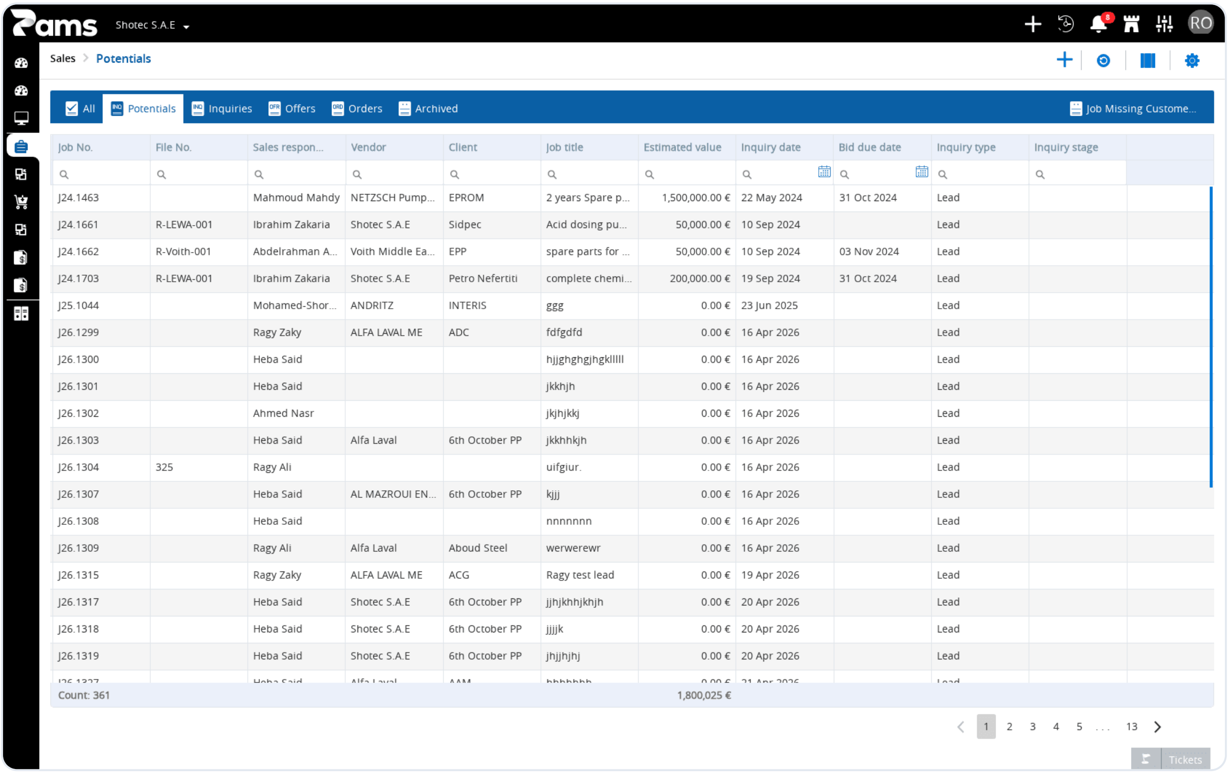
| Area | What you can see |
| --- | --- |
| Item area | **Item Description**, **Unit**, **Qty** |
| Stage tabs | The workflow tabs are **Potentials**, **Inquiry**, **Offer**, **Order**, and **Delivered** |
| Save controls | **Save**, **Save and Close** |
| Related area | **Tickets** |

The new-Potential surface also shows the item-area columns **Item Description**, **Unit**, and **Qty**.
The availability fields are **Contact to Decision Makers**, **Budget Availability**, **Chance in Competition**,
and **Order chance**. Their required markers depend on company configuration.

When enabled for your company, the Potential screen also provides **Commissions** and **Margin**.
These surfaces are conditional and do not appear for every configuration.




The Potential panel appears for `Potential` through `Cancelled Potential`, and for a deleted job. Open
the panel before looking for its fields. The list shows 11 columns and three toolbar buttons titled
**Refresh**, **Table Layout**, and **Settings**.




## Create and qualify a Potential

Creating a Potential records the early sales opportunity and its qualification information before the
work becomes an Inquiry.

### Prerequisites

- Open the new Potential entry from the Sales jobs area.
- Have the job and qualification information ready.

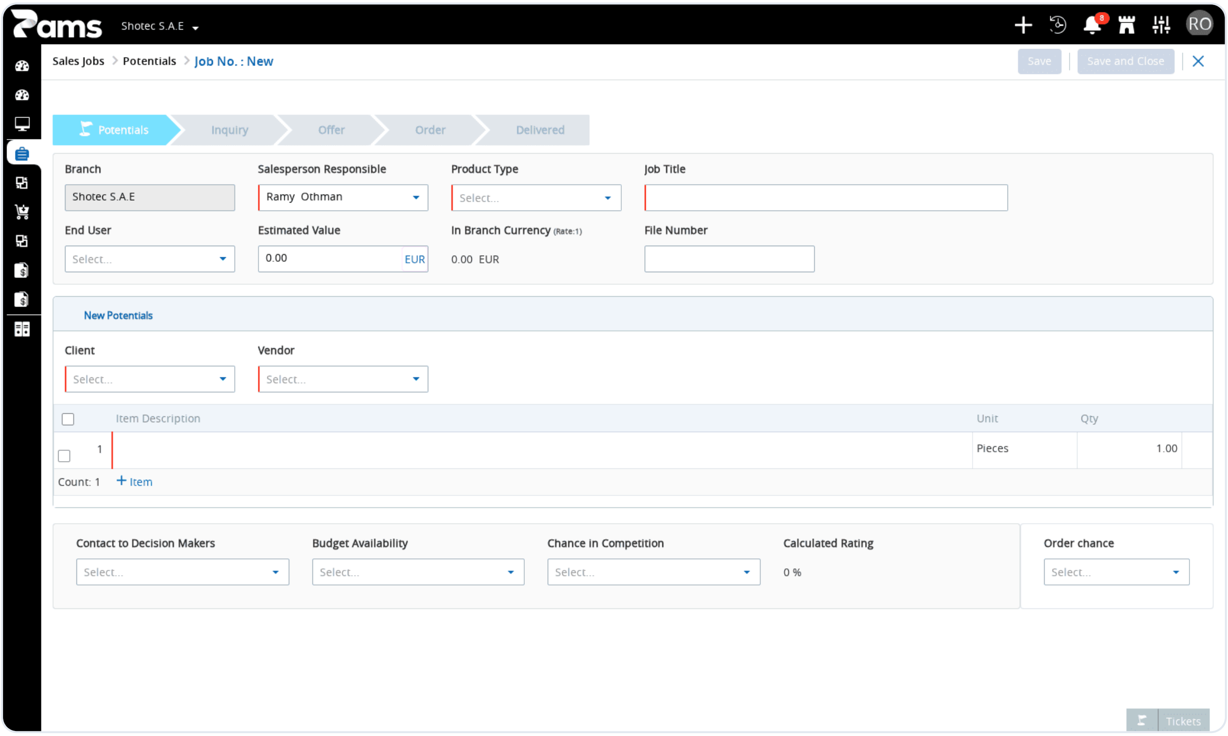
### Steps

1. In **Salesperson Responsible**, select the person responsible for the sales job.
2. In **Product Type**, select the product type for the job.
3. In **Job Title**, enter the job title.
4. In **Branch**, select or enter the branch shown for the job.
5. In **End User**, select the end user when the job requires one.
6. In **Estimated Value**, enter a value of `0` or greater.
7. In **File Number**, enter the file reference when one is available.

8. In **Client**, select the client for the Potential.
9. In **Vendor**, select the vendor for the Potential.
10. In **Contact to Decision Makers**, select the qualification value when the field is configured for your company.
11. In **Budget Availability**, select the qualification value when the field is configured for your company.
12. In **Chance in Competition**, select the qualification value when the field is configured for your company.
13. In **Order chance**, select the qualification value when the field is configured for your company.
14. Select **Save** or **Save and Close** to finish the entry.

| If you want to… | Select |
|---|---|
| Save the Potential and remain on the entry surface | **Save** |
| Finish entering the Potential from this surface | **Save and Close** |

If a required value is missing, the screen can show `Check mandatory field(s)`. Correct the required field and select **Save** again. A successful update can show `Job updated successfully`.




**Result:** The Potential is saved with the job information and qualification values entered on the
screen.

## Add an item to a Potential

Use an item when the Potential must carry a requested product or service line into the next stage.

### Prerequisites

- Open a new Potential.
- Have the item description and quantity ready.

### Steps

1. Select **Item** in the Potential item area.
2. In **Item Description**, enter the item description.
3. In **Qty**, enter a quantity from `0.1` through the configured maximum.
4. Select the Potential panel **Save**.

If the description is blank, the item cannot be saved. If the quantity is invalid, correct it before
saving. The Potential item grid shows **Item Description**, **Unit**, and **Qty**; a new

Unitized item
starts with quantity `1` and unit price `0`, although price is not a Potential grid column.

If the item data is invalid, the validation summary can show `Please Solve the Following Issues :`.
For an empty item description, it can include `Item No. 1 Description is required`.
Correct the item
before selecting **Save** again.

**Result:** The Potential contains the active item line and is ready for validation or conversion.

## Mark a Potential missed

Use the missed outcome when a saved Potential is no longer active.

### Prerequisites

- Open a saved Potential that you can edit.
- The Potential is not already missed.

### Steps

1. Open the Potential action menu.
2. Select **Missed opportunity**.
3. In the **Missed opportunity** dialog, select **OK**.

PAMS displays `Job updated successfully` and refreshes the record history.

**Result:** The Potential moves to the missed outcome.

## Reactivate a missed Potential

Reactivate a missed opportunity when it returns to active Potential work.

### Prerequisites

- Open a job in the missed Potential state.
- Have permission to edit the job.

### Steps

1. Open the Potential action menu.
2. Select **Reactivate opportunity**.
3. In the **Activate missed opportunity** dialog, select **OK**.

PAMS displays `Job updated successfully` and refreshes the record history.

**Result:** The missed opportunity returns to active Potential work.

## Maintain the Potential panel and receive an inquiry

The Potential panel holds the client-facing inquiry details that become relevant as the early opportunity
is qualified. Maintaining it keeps the record ready for the next sales stage.

**Prerequisites**

- Open a Potential panel.
- Save the Potential before using **Receive inquiry**.
- Make sure the panel has no unsaved changes before using a stage action.

**Steps**

1. In **Client Inquiry Number**, enter the client inquiry reference when the field is configured for your company.
2. In **Inquiry Date**, enter today or an earlier date.
3. In **Bid Due Date**, enter a date on or after **Inquiry Date**.
4. In **Requested Offer Type**, select the requested offer type when the field is configured for your
company.
5. Select **Save** in the Potential panel when the panel is new or has unsaved changes.
6. Select **Receive inquiry** when the Potential is saved, its potential stage is `new`, the job is not
deleted, and the job is not Missed Potential.

The conversion creates an Inquiry and copies the Potential's active item lines. After conversion, select
the **Inquiry** panel header to expand it.

PAMS displays `Converted to inquiry successfully` after **Receive inquiry**. If the conversion cannot complete,
it displays `An error occurred while processing your request`.

The send-mail variant of the handoff also depends on mail permission and the principal relationship.
When mail is unavailable, the alternative **Consider As Sent To Principal** action can

be shown for a
new inquiry when its conditions are met.

**Result:** The Potential panel is saved, or the eligible Potential is handed to the Inquiry stage.

### Go to offer

Use **Go to offer** when the Inquiry is eligible to move into Offer work.

#### Prerequisites

- Have an Inquiry reached from a Potential.
- For an external principal, the Inquiry is before Offered and meets the relationship conditions.
- For an own-company Vendor, the Inquiry is new.

#### Steps

1. Open the Inquiry action menu.
2. Select **Go to offer**.

PAMS displays `Converted to offer successfully` after the action.

**Result:** The Inquiry moves to Offer work.

## When a Potential does not behave as expected

Use the message shown on screen to decide what to correct. The following messages belong to the Potential
flows.

| What you see | What to do |
|---|---|
| `Check mandatory field(s)` | Complete the required field and select **Save** again. |
| `All inquiries must be in draft stage to revert to potential` | Return the inquiry to its draft stage before using **Back to potential**. |
| `An error occurred while processing your request` | Check the values and the record state, then retry the action. |
| `Error {{errorMsg}}` | Read the inserted error text and correct the indicated condition. |

| What you see | What to do |
| --- | --- |
| `Custom fields saved successfully` | Continue after the custom fields save completes. |
| `Job updated successfully` | Continue with the saved Potential. |
| `Job regretted successfully` | Continue on the regretted outcome route. |
| `Job cancelled successfully` | Continue on the cancelled outcome route. |
| `Converted to inquiry successfully` | Continue the record in Inquiries. |
| `Converted To Regretted` | Continue on the regretted outcome route. |
| `Converted to cancelled` | Continue on the cancelled outcome route. |

The Potential-specific actions are also conditional. **Receive inquiry** requires a saved Potential at the `new` stage. **Go to offer** is available before the Offered stage under its relationship conditions. **Back to potential** requires a target job at `Potential` with an inquiry at `new`. Editing and approval actions also depend on permissions and the current state.

The new-Potential surface shows the controls listed in the job information, Potential details, and qualification fields described in Understand the Potential screen. It does not show **Bid Due Date** or **Requested Offer Type** on that surface; those fields belong to the opened Potential panel.

## Out of scope

The message `Please save opened inquiry first` belongs to the opened Inquiry flow rather than the Potential flow.

## What happens next

- Open Inquiries to continue the inquiry work after **Receive inquiry**.
- Open Offers when the inquiry is ready for offer work after **Go to offer**.

**Result:** Inquiry work continues on the Inquiries page, followed by offer work when the inquiry is eligible.