PAMS FRESH GENERATION

Pricing Quotation RFQs

September 10, 2026

Pricing Quotation RFQs

An RFQ is a purchasing request that collects supplier information before you prepare a
quotation. Use it to record the shared Pricing Quotation information, requested items, supplier
requirements, and the route you use to submit the request or move it into quotation work.

If you need to…	Go to
Understand how Pricing Quotations fit into the wider work list	Pricing Quotation
Create or work an RFQ	Before you start, then Complete and save the RFQ
Send the request or mark it submitted	Send the RFQ or mark it submitted
Continue with quotation details	Pricing Quotation quotations
Work from the active Pricing Quotation lists	Pricing Quotation active lists
Handle an RFQ in an exception list	Pricing Quotation exception lists

Before you start

Have the purchasing information and the requested items ready before you create the record.
The RFQ panel is the part of the record where you enter supplier and deadline information. It is
available when an inquiry exists and the purchasing job is after Unknown and before Offer, or
when the job is Deleted. The panel body opens while its inquiry is open.

Prerequisites

You need	Why it matters here
A saved or new Pricing Quotation record	**Save** is available for an editable saved record when the inquiry is new or changed.
The purchaser and product type	These are required record-information fields.
The package title	This identifies the shared record.
The supplier, RFQ date, and requested bid information	These complete the RFQ panel; **Required Offer Type** and **Required Bid Due Date** are required only where your company configures them as mandatory.
The item description, unit, and quantity	The RFQ item grid uses these columns; quantity accepts values from `1` through `999999`.
Permission to edit the record	An embedded record or a record without edit permission is read-only. A sent RFQ item grid remains locked until **Enable Editing** is used.

Find or start an RFQ

The RFQs list is the work list for existing requests. It shows the request number, sales-job
number, purchaser, offer type, bid due date, supplier, client, RFQ stage, and package title.

Prerequisites

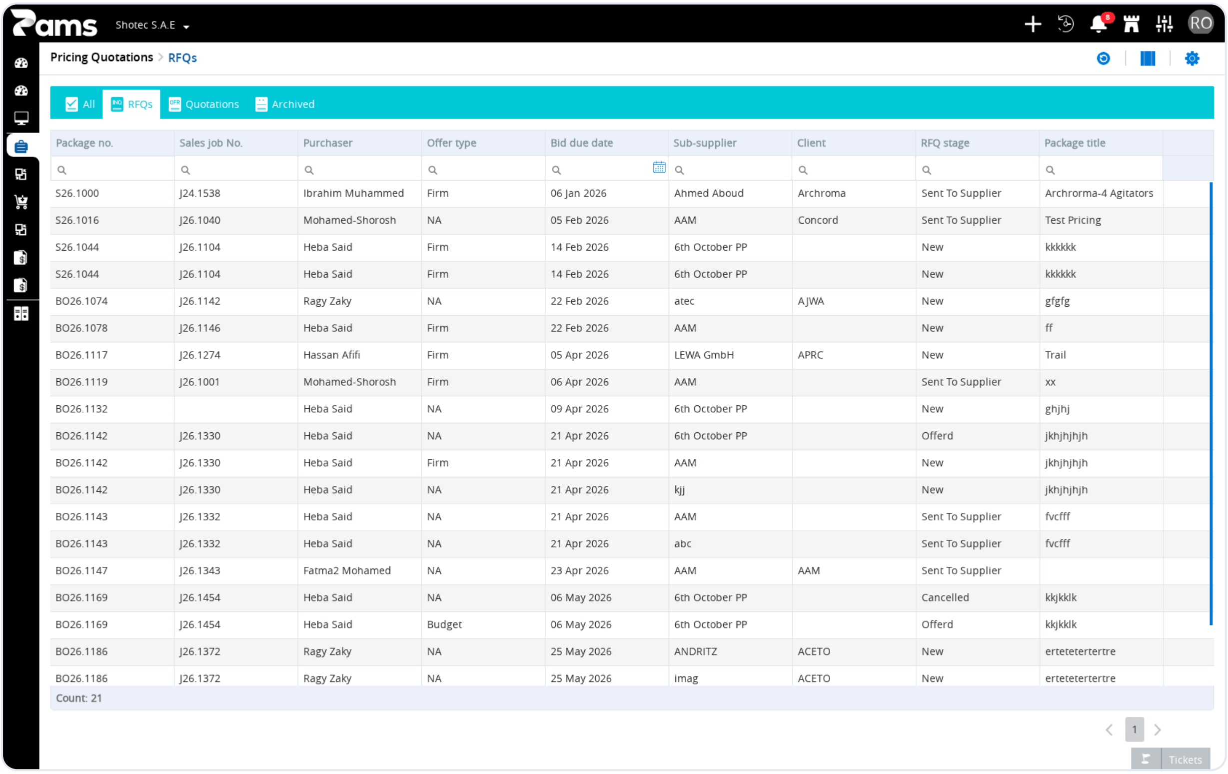
You need access to the Pricing Quotations work list and, for an existing record, its saved
record address.

Steps

1. Open **Pricing Quotations**.
2. Select **RFQs** to view the RFQs list.
3. Choose the route that matches your task:

If you need to…	Open or select
Start a new record	**Pricing Quotations** > **RFQs** > new-record entry point
Work an existing RFQ	**Pricing Quotations** > **RFQs** > saved record

4. Use the list tabs **All**, **RFQs**, **Quotations**, and **Archived** to move between the available Pricing Quotation lists.



Package no.	Sales job No.	Purchaser	Offer type	Bid due date	Sub-supplier	Client	RFQ stage	Package title
S26.1000	J24.1538	Ibrahim Muhammed	Firm	06 Jan 2026	Ahmed Aboud	Archroma	Sent To Supplier	Archrorma-4 Agitators
S26.1016	J26.1040	Mohamed-Shorosh	NA	05 Feb 2026	AAM	Concord	Sent To Supplier	Test Pricing
S26.1044	J26.1104	Heba Said	Firm	14 Feb 2026	6th October PP		New	kkkkkk
S26.1044	J26.1104	Heba Said	Firm	14 Feb 2026	6th October PP		New	kkkkkk
BO26.1074	J26.1142	Ragy Zaky	NA	22 Feb 2026	atec	AJWA	New	gfgfg
BO26.1078	J26.1146	Heba Said	Firm	22 Feb 2026	AAM		New	ff
BO26.1117	J26.1274	Hassan Afifi	Firm	05 Apr 2026	LEWA GmbH	APRC	New	Trail
BO26.1119	J26.1001	Mohamed-Shorosh	Firm	06 Apr 2026	AAM		Sent To Supplier	xx
BO26.1132		Heba Said	NA	09 Apr 2026	6th October PP		New	ghjhj
BO26.1142	J26.1330	Heba Said	NA	21 Apr 2026	6th October PP		Offerd	jkhjhjhjh
BO26.1142	J26.1330	Heba Said	Firm	21 Apr 2026	AAM		New	jkhjhjhjh
BO26.1142	J26.1330	Heba Said	NA	21 Apr 2026	kjj		New	jkhjhjhjh
BO26.1143	J26.1332	Heba Said	NA	21 Apr 2026	AAM		Sent To Supplier	fvcfff
BO26.1143	J26.1332	Heba Said	NA	21 Apr 2026	abc		Sent To Supplier	fvcfff
BO26.1147	J26.1343	Fatma2 Mohamed	NA	23 Apr 2026	AAM	AAM	Sent To Supplier	
BO26.1169	J26.1454	Heba Said	NA	06 May 2026	6th October PP		Cancelled	kkjkklk
BO26.1169	J26.1454	Heba Said	Budget	06 May 2026	6th October PP		Offerd	kkjkklk
BO26.1186	J26.1372	Ragy Zaky	NA	25 May 2026	ANDRITZ	ACETO	New	ertetetertertre
BO26.1186	J26.1372	Ragy Zaky	NA	25 May 2026	imag	ACETO	New	ertetetertertre

Count: 21

Result: The RFQs list is on screen, or the selected new or saved record is open for entering
record information and items.

Enter record information and items

The shared record information identifies the purchasing request, and the item rows state what
the supplier must address. Start with the shared fields, then review the requested items.

Prerequisites

Open **Pricing Quotations**. Select **RFQs**. Use the new-record entry point to create the shared
record, or select a saved RFQ record to review its information and items.

Steps

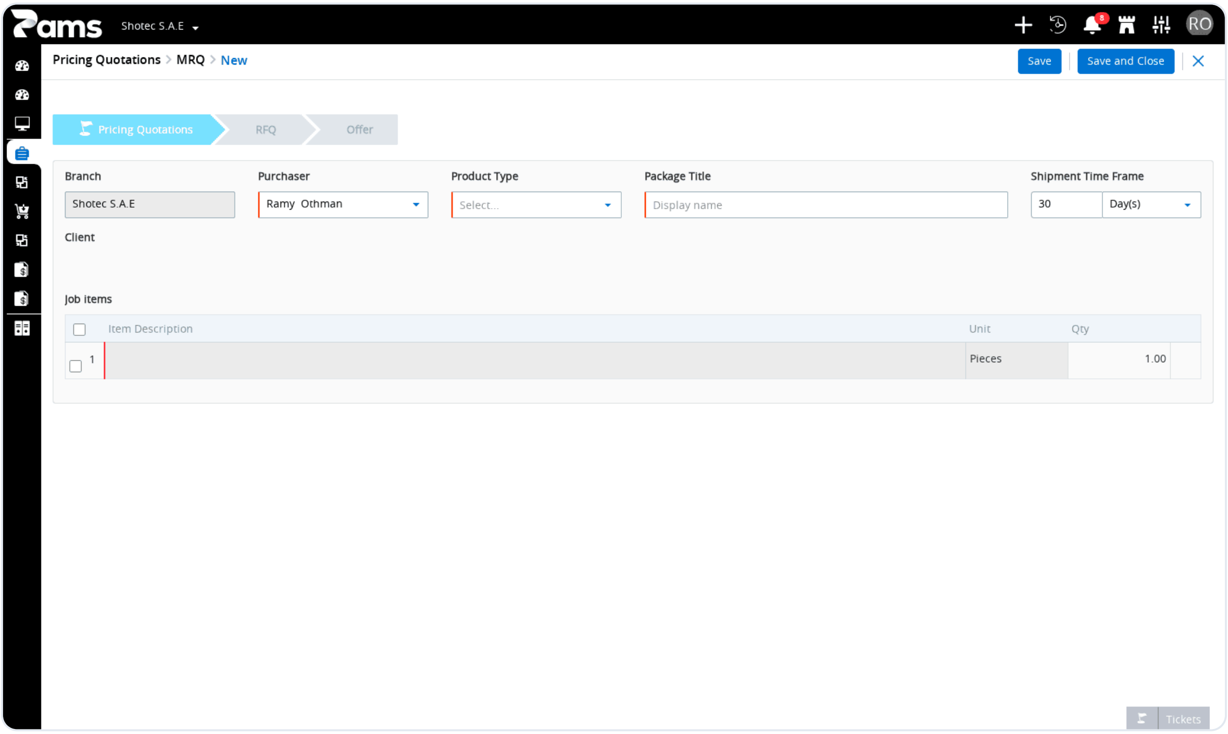
1. Review **Branch**. It is read-only in the shared record information.
2. Select the responsible person in **Purchaser**.
3. Select the applicable value in **Product Type**.
4. Enter the record name in **Package Title**.

5. Enter the value and unit in **Shipment Time Frame** when the field is present.

6. In **Job items**, enter or select the requested item values:

Field	What to enter
Item Description	The requested product or item.
Unit	The unit for the item.
Qty	A quantity from `1` through `999999`.

7. Review the item grid before saving. The RFQ grid shows **Item Description**, **Unit**, and
Qty.



Result: The shared record information and requested item rows are on screen and ready for
the RFQ panel or the record save. Continue to Complete and save the RFQ.

Complete and save the RFQ

The RFQ panel adds supplier and deadline information to the shared record. Complete it before
you submit the request so the supplier receives the information needed for the quotation.

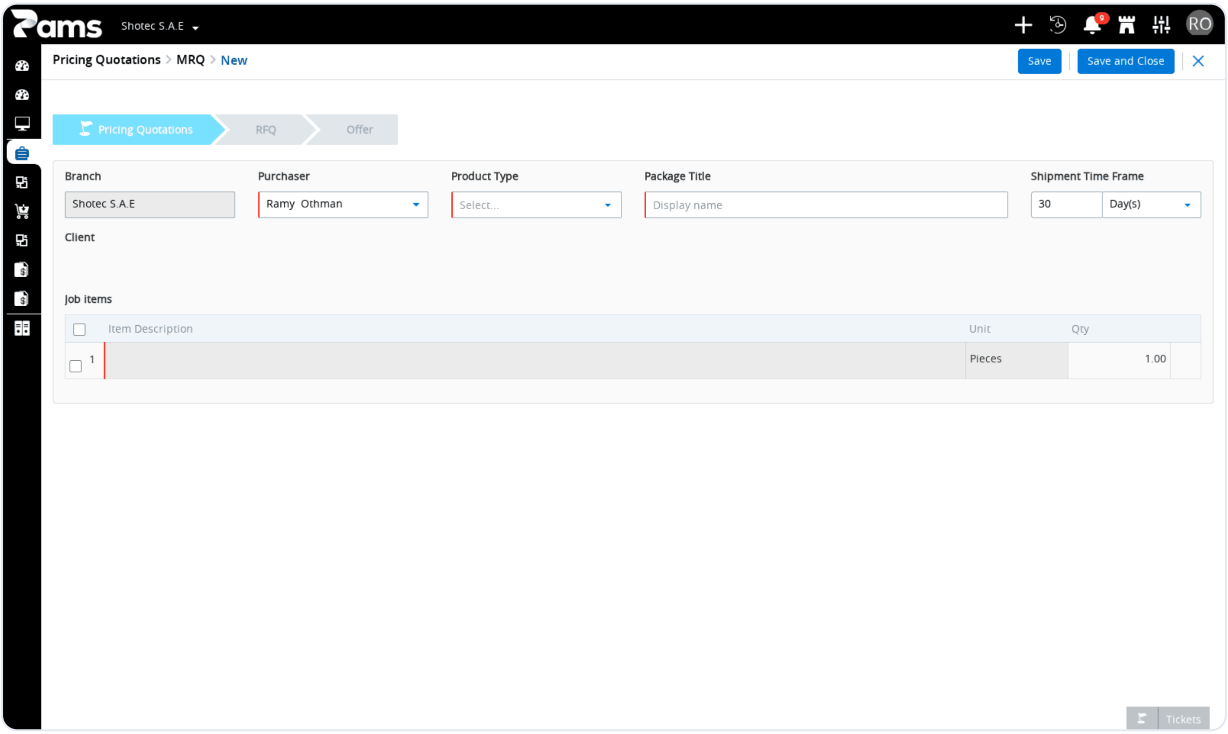
Prerequisites

The record must contain at least one inquiry. The record must be editable, and the inquiry must
be new or changed before **Save** is available for the RFQ panel.

Steps

1. Select or review the supplier in **Vendor**.
2. Select **Required Offer Type** when your company requires it.
3. Enter **RFQ Date**. The date cannot be later than today.
4. Enter **Required Bid Due Date** when your company requires it. The date cannot be earlier
   than **RFQ Date**.
5. Save the work using the action that matches your change:

If you are…	Select
Saving RFQ panel changes	**Save** in the RFQ panel header
Creating the shared record rather than saving an inquiry change	**Save** or **Save and Close** in the record header



Result: The RFQ changes are saved and ready for submission, or the form identifies the
required correction. Continue to When the RFQ cannot be completed.

Send the RFQ or mark it submitted

Submission has two routes. Use **Send RFQ To Sub-supplier** when your access and subscription
include email sending. Without the send permission, use **Consider RFQ As Submitted To**
Sub-supplier instead.

Prerequisites

The RFQ must be saved and unchanged. For the external-send route, email sending permission and
the Send Email subscription must be present.

Steps

1. Open the RFQ panel's three-dots menu.
2. Choose the route that matches your access:

If your route is…	Select
Email sending is available	**Send RFQ To Sub-supplier**
Email sending is not available	**Consider RFQ As Submitted To Sub-supplier**
The RFQ is already at SentToPrincipal and must be sent again	**Re-send RFQ To Sub-supplier**

3. Read the confirmation after the consider-submitted route. The product message is `Inquiry submitted to client`.

Result: The RFQ is sent through the available email route or is marked as submitted without
email sending, ready for the applicable quotation action.

Convert the RFQ to a quotation

Conversion moves eligible RFQ work into quotation work. The RFQ action menu also provides state-specific ways to return, edit, regret, or cancel the request.

Prerequisites

The RFQ must be at the stage required by the action. **Convert to offer**, **Consider RFQ As Not Submitted**, **Enable Editing**, **Regretted To Offer**, and **Cancel RFQ** are available when the RFQ is at SentToPrincipal or ConsederAsSentToPrincipal. **Re-send RFQ To Sub-supplier** is available at SentToPrincipal.

Steps

1. Open the saved RFQ panel's three-dots menu.
2. Select **Convert to offer** when the RFQ is ready to become quotation work.
3. Read the confirmation `Purchasing job converted to offer successfully`.
4. For a different RFQ outcome, select the action that matches the work you need:

If you need to…	Select
Return the RFQ to an unsubmitted state	**Consider RFQ As Not Submitted**
Change a sent RFQ	**Enable Editing**
Regret the RFQ back toward offer work	**Regretted To Offer**
Cancel the RFQ	**Cancel RFQ**

Result: After **Convert to offer**, the purchasing job is in quotation work. The other menu choices keep the work in the RFQ branch described by the selected action.

When the RFQ cannot be completed

Use the exact message on screen to identify whether a field, quantity, or item selection needs attention. Required fields can also depend on your company's mandatory-field settings.

What you see	What to do
`This field is required`	Complete the field carrying the required marker.

What you see	What to do
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Enter a positive quantity from `1` through `999999`.
`Check mandatory field(s)`	Review the fields marked as required and select **Save** again.
`Inquiry must have at least one item`	Add an item to the inquiry.
`Please select one or more items to create a RFQ.`	Select one or more items before creating the RFQ.

Required Offer Type and **Required Bid Due Date** are required only where your company
configures them as mandatory. **Required Bid Due Date** must not be earlier than **RFQ Date**.

The RFQ item grid uses **Item Description**, **Unit**, and **Qty**. Work from those visible headers when entering the request.

Result: You have a message-specific correction to make, or the RFQ is ready for the next
submission or quotation action.