Prepare purchase job information

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Overview

A purchase job is the shared purchasing record that collects the information and package
items needed before the job continues through purchasing stages. In PAMS, an MRQ can lead
to an RFQ and then a PO. Use this page to prepare the shared record and its package items;
use the focused pages for RFQ, quotation, and purchase-order work.

If you need to…	Go to…
Start a new purchasing record	Find or start a purchase job
Check the shared fields and package grid	Understand the shared information and package area
Add products from an MRQ and save the record	Maintain package items and save the record
Choose the option for a Direct Order or another job type	Handle stage and record variations
Resolve a validation message or an unavailable record	When saving or selecting items goes wrong
Continue with the wider purchase-job workspace	Purchase job record
Work with RFQs, quotations, or purchase orders	Purchase job RFQs, Purchase job quotations, or Purchase job orders
Continue with MRQ-specific work	MRQ record follow-up

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

Prerequisites

Have this ready	Why it matters here
The purchase-job information you want to record	**Purchaser**, **Product Type**, and **Package Title** are required on the shared form.
The MRQ products you want to add	**MRQ product** opens **Planned orders**, where products are selected for the package.
An editable record with changes to save	**Save** and **Save and Close** are available when you can edit, there are changes, and a save is not already in progress.
A record at a stage that permits product selection	**MRQ product** is available through Order, including a Direct Order at Order.

The main record area appears when the purchasing feature is included and the page shows the
purchase-job surface rather than the product's not-found page. Save the record before you
return to it or use its follow-up surfaces.

Find or start a purchase job

A new purchase job is the blank purchasing surface; a saved purchase job is the record you
return to when you need to change its shared information or package items.

Prerequisites

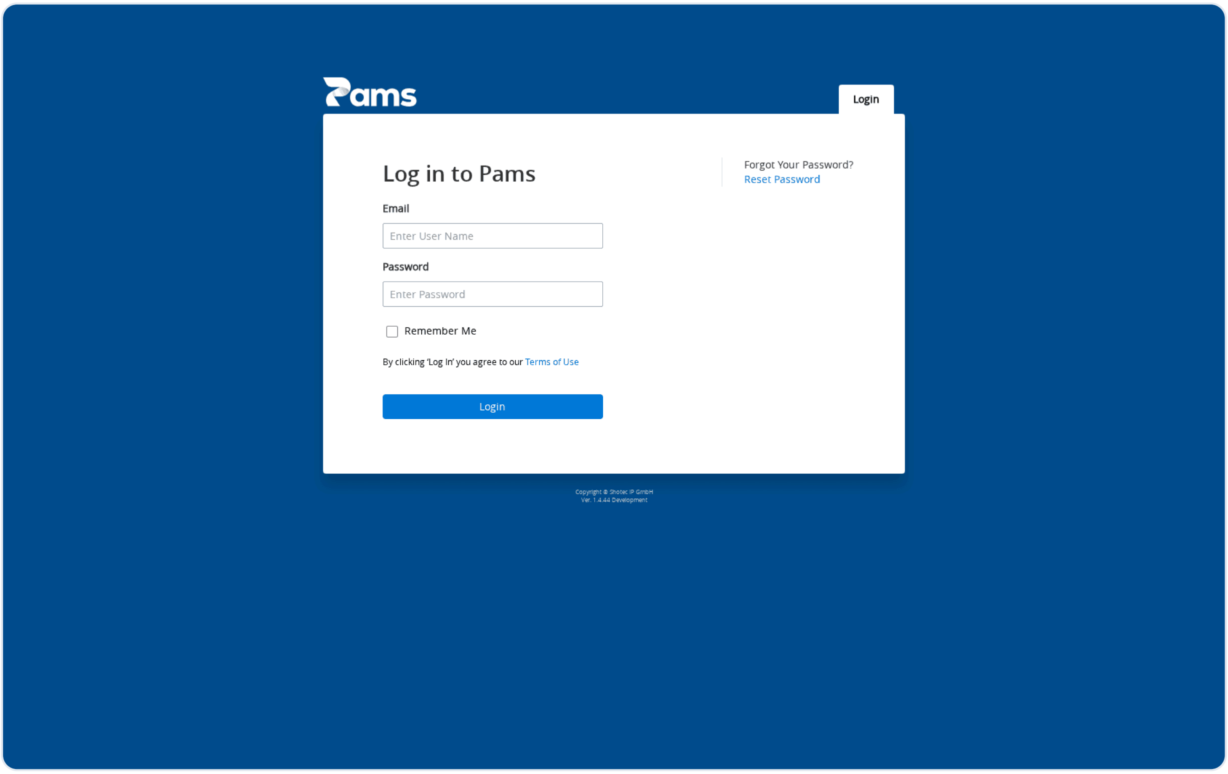
- Have the required purchase-job information ready.
- Know whether you are starting a new record or returning to a saved record.

Steps

1. Open **Purchase Jobs** from the purchasing area.
2. In **Purchase Jobs**, use the table to select the entry that matches your task.

If you need to…	In Purchase Jobs, choose…
Start a new purchase job	Select the new purchase-job entry.
Open a saved purchase job	Select the saved purchase job from the list.
Start a Direct Order	Select **Direct order** to begin that purchase job.

3. Confirm that the page shows the purchase-job information surface before entering data.



Result: You are on a new purchase-job surface or on the saved purchase-job surface.

Understand the shared information and package area

The shared information area identifies the purchase job, while the package-items grid lists
the products being prepared for the purchasing flow.

The page contains these fields:

Field	What you see
Branch	Read-only branch text.
Purchaser	A single-selection picker. The field carries a required marker.
Product Type	A selection field. The field carries a required marker.
Package Title	A text field. The field carries a required marker.
Drop shipping	A check box for the destination type.

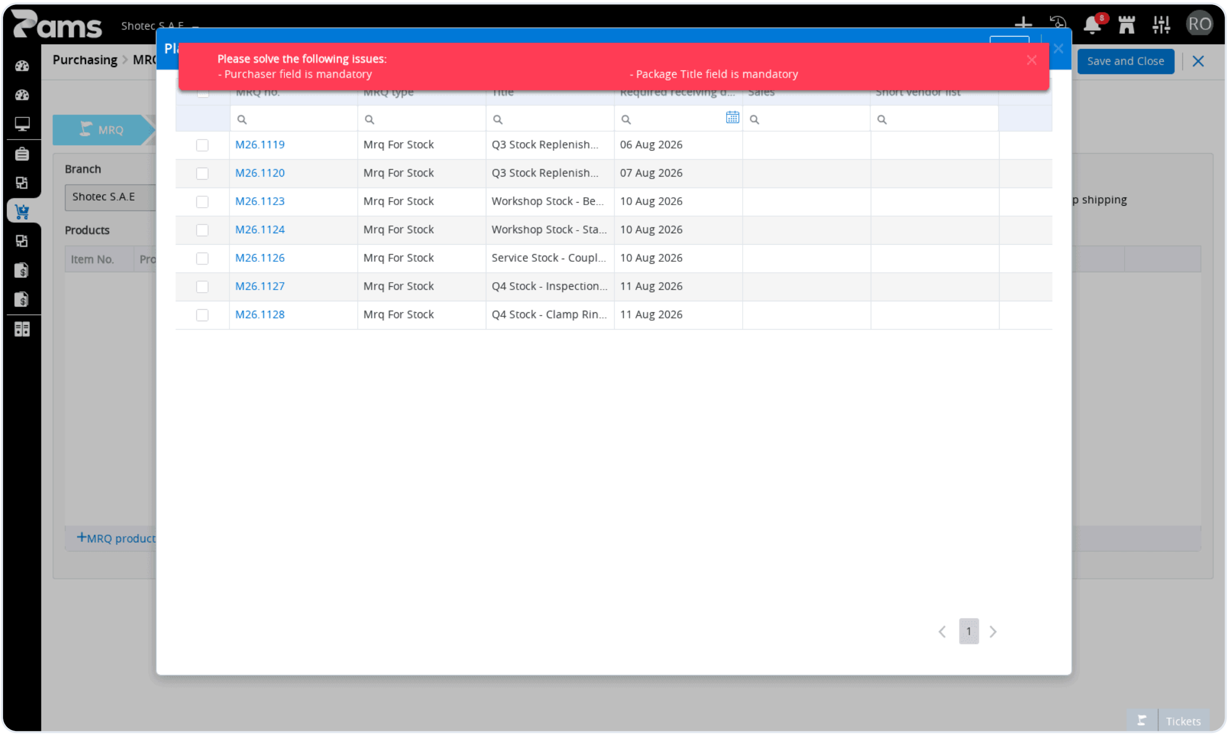
The page shows the current stage on the record. The package area is headed **Products** and displays **MRQ product** for product selection.

The package grid can show these headers:

Header	Use it to read…
Item No.	The item number.
Product	The product row.
Category	The product category.
Group	The product group.
MRQ Qty.	The quantity requested by the MRQ.
MRQ type	The MRQ type.
Qty	The package quantity.
Unit	The quantity unit.
Required Receiving Date	The required receiving date.
Job no.	The related job number.
MRQ	The related MRQ.
V.L.	The short vendor-list indicator.
Is limited V.L.	Whether the item is limited to the short vendor list.
Stage	The product stage.
Current vendor	The current vendor from Order onward.

The new-record surface currently shows `No data` until package items are present.

Selecting **MRQ product** opens **Planned orders**. That selection surface can show **MRQ no.**,
Title, and **Short vendor list**.



Maintain package items and save the record

Maintaining a purchase job means entering its shared information, adding the products that
belong in its package, and committing the record-level changes.

Prerequisites

- Open a new or editable purchase-job surface.
- Have the purchaser, product type, package title, and MRQ products ready.

Steps

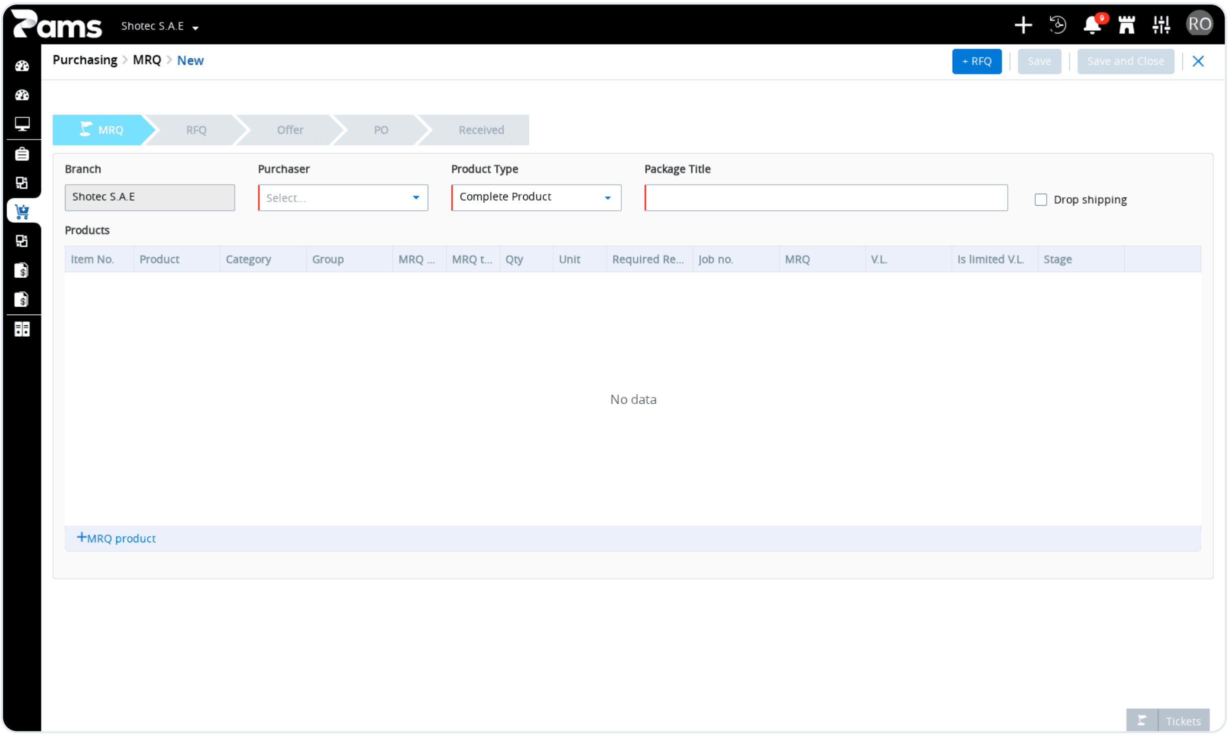
1. In **Purchaser**, select the person responsible for the purchasing job.
2. In **Product Type**, select the product type for the record.
3. In **Package Title**, enter the package title.
4. Select **Drop shipping** when the purchase job uses that destination type.
5. Select **MRQ product**.
6. In **Planned orders**, select the MRQ product or products to add.
7. Select **OK** to return to the purchase-job surface.
8. Check the package grid for the selected product rows.

9. Select the record-level save action that matches your next move.

If you need to…	Select…
Keep working on the record	**Save**
Save and leave the record	**Save and Close**

10. If validation appears, enter the missing values in the fields identified by the displayed validation.

11. If validation appears, select the save action again.



Result: The record is saved. **Save** keeps the purchase-job surface open, while **Save and**
Close leaves it; displayed validation identifies values that still need correction.

Handle stage and record variations

The available package and handoff actions change with the job type and stage shown on the
purchase-job surface.

A purchase-job stage represents the record's position in the purchasing flow.

Prerequisites

- Check the current stage shown on the record.
- Check whether the job is a Direct Order before choosing a handoff action.

Steps

1. Choose the available package action for the record state.

If the record is…	Choose this option
At or before Order and you need to add an MRQ product	Select **MRQ product**.
A Direct Order at Order	Select **MRQ product** or **Direct P.O.** when it is shown.
A non-Direct Order in an eligible creation stage	Select **RFQ** when it is shown.

2. Read the **Current vendor** column when the record reaches Order.
3. Select the displayed handoff action from the active top action group.

The package grid displays **Current vendor** when the record reaches Order. The shared
information form shows no **Time Frame for Shipment** or **Status** fields.

Result: You use the package or handoff action that matches the job type and stage without
entering the focused RFQ, quotation, or purchase-order procedure.

When saving or selecting items goes wrong

Use the exact message on screen to identify what to correct or which focused page owns the
next action.

What you see	What it means	What to do
`This Field Is Required`	A required shared field is empty.	Complete **Purchaser**, **Product Type**, or **Package Title**, then select **Save** again.
`Saved Successfully`	A new purchase job was saved.	Continue on the saved purchase-job surface.
`Updated Successfully`	An existing purchase job was updated.	Continue with the updated purchase-job surface.

What you see	What it means	What to do
`Please choose at least one MRQ`	No MRQ was selected in **Planned orders**.	Select at least one MRQ product before confirming the selection.
`Please choose at least one product`	No product was selected in a product-selection dialog.	Select a product before confirming the dialog.
`Please insert at least one product`	The purchase job has no product to save.	Select **MRQ product**, add a product, and select **Save** again.
`Package products cannot be empty`	The package contains no products.	Add a product with **MRQ product**, then save again.
`Check mandatory field(s)`	A required value in the record or its active items is missing.	Review the required fields and active item data, then select **Save** again.
`Saving Error`	A new-record save returned an error.	Review the shared information and select **Save** again.
`Updating Error`	An existing-record update returned an error.	Review the changed information and select **Save** again.
`404 Page Not Found`	The attempted saved-record route did not open the purchase-job surface.	Return to the purchase-job list and open the saved record from there.

The following messages belong to focused pages rather than this shared-information task:

Message	Owning page
`Check RFQ mandatory field(s)` ; `Please insert at least one RFQ` ; `Inquiry must have at least one item` ; `Invalid input. The value must be greater than 0 and cannot exceed 999,999.00` ; `Required Offer Type` ; `Required Bid Due Date`	Purchase job RFQs
`Offer must have at least one item` ; `Invalid input. Please enter a non-negative value` ; `Invalid input. The tax rate must be between 0 and 100`	Purchase job quotations
`Check PO mandatory field(s)` ; `Please insert at least one PO` ; `Order must have at least one item` ; `Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted` ; `Order updated successfully. Undelivered. A draft invoice was deleted` ; `Please enter action for each milstone`	Purchase job orders
`Product package deleted from all inquiries` ; `Product package deleted from all offers` ; `Product package deleted from all orders` ; `Item(s) Regretted` ; `Item(s) Cancelled` ; `Item(s) Rejected` ; `Item(s) Reactivated` ; `Job reactivated successfully`	Purchase job exception lists

Message	Owning page
`Email sent to client. Added to emails list activity`; `An error occurred while processing your request`	Purchase job comments, files, and history
`Forbidden characters detected. Please remove them and try again.`	Purchase job work lists
`You already have a contact with this name`	Contact record
`Your request was completed successfully`; `Just '_'’-''.' And '&' Characters Accepted`	Purchase job comments, files, and history

Continue after saving the purchase job

After a successful new-record save, continue with the saved purchase-job surface. On a saved
record, use **Attachment** for attached documents and **Purchase Invoices** for purchase-invoice
follow-up. Continue with the wider record in Purchase job record, or choose the focused
page for the next purchasing stage:

- Purchase job RFQs for RFQ actions.
- Purchase job quotations for quotation actions.
- Purchase job orders for purchase-order actions.
- Create direct purchase order for the Direct P.O. route.
- MRQ record follow-up for MRQ-specific follow-up.
- Purchase job comments, files, and history for companion record work.

After the validation shown above, the new purchase-job surface remains open. The attempted
saved-record opening shows `404 Page Not Found`.

Result: You know whether to continue with the purchase-job record or open the focused page
that owns the next purchasing action.