PAMS FRESH GENERATION

Manage purchase orders

September 11, 2026

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A purchase job is the record that contains the purchase-order panel and its current order state.
A purchase order is the post-quotation record you use to move that job through approval, award
submission, activation, and receipt. It belongs to the `Order` stage and continues toward
`Delivered`.

If you need to…	Go to…
Prepare the order fields and save the order	Save the order and request approval
Choose the approval route for your role	Approve and submit the order award
Activate an approved order or record receipt	Activate the order and record receipt
Amend, reject, cancel, reverse, or return an order	Amend, correct, or close the order
Work on the quotation before conversion	Manage purchase job quotations
Create a direct purchase order	Create a direct purchase order
Continue with warehouse receipt and handling	Goods receipt notes or Warehouse fulfillment flow
Review supporting files and history	Comments, files, and history on a purchase job

The order panel is available after quotation work has produced an order. Direct purchase-order
creation is a separate task.

Before you start

Before you start, the purchase order must be saved and attached to a quotation conversion. The
fields below determine which information you complete before each order action.

Prerequisites

Have this ready	Why it matters here
A purchase job with an existing order	Order actions require an existing order and no unsaved order changes.
The purchaser, product type, and package title	These are required fields on the purchase-job record.
The order number, delivery details, payment details, and logistics costs	These order fields can be required by your company configuration.
The order's current state	Approval, activation, amendment, receipt, correction, and closure actions depend on it.
The permission needed for the intended action	Approval, editing, mail, and action availability vary by role and configuration.

The order save validates before saving. Leaving with unsaved changes can invoke the page's
leave-page protection.

Find and open the purchase job

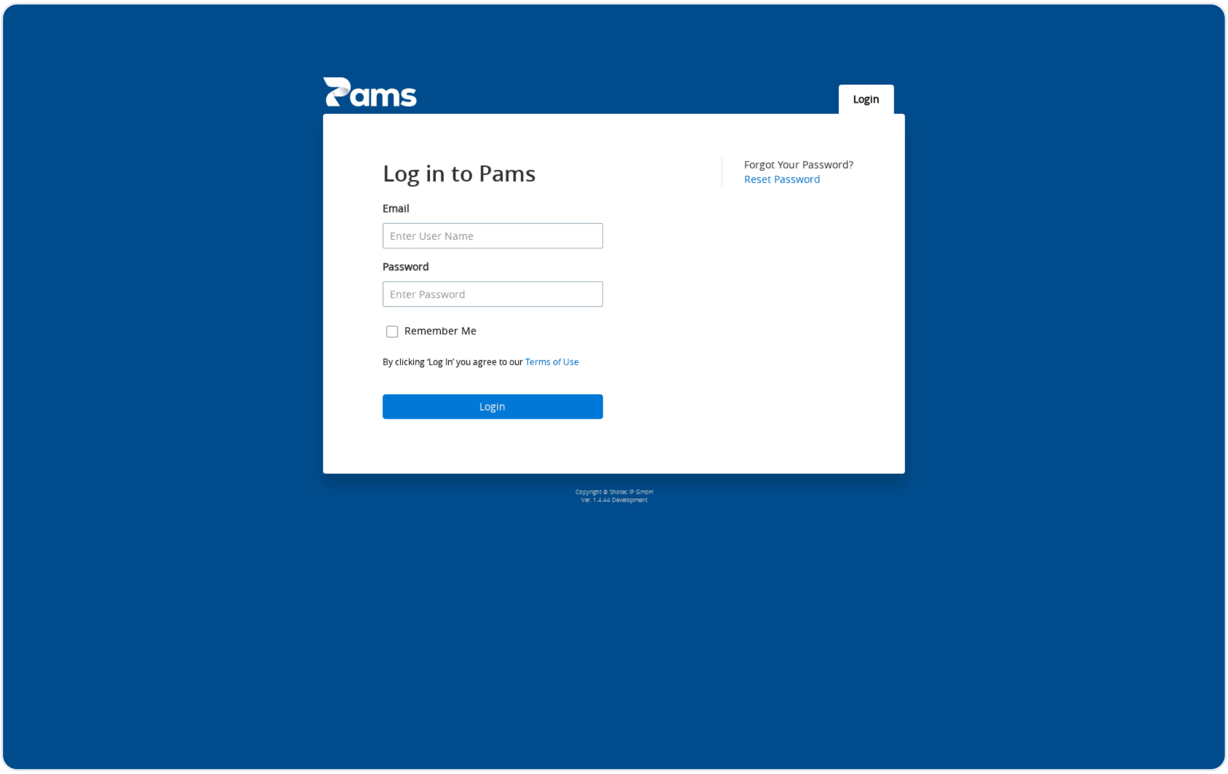
Open the saved purchase job to reach its purchase-order panel and current order state.

Prerequisites

- Know the saved purchase job you need to work on.
- Sign in before opening the order panel.

Steps

1. Open the saved purchase job.
2. If `Log in to Pams` appears, enter your details in **Email** and **Password**.
3. Select **Login**.
4. In the purchase-job workspace, open the purchase-order panel beneath the `PO` stage marker.



Result: The purchase-job record is open at its purchase-order area.

> **Note:** Sign in before opening the purchase-job route.

Understand the purchase-order workspace

The purchase-order workspace combines order information, item rows, state-dependent actions,
and supporting tabs. The visible fields and item headers can vary with the page setup.

Order information

Field	What to enter or check
PO No.	Enter the purchase-order number when your company configuration requires it.
Branch	Review the branch shown for the purchase job.
Delivery Time	Select the delivery-time unit when configured as mandatory.
Delivery Term	Select the delivery term when configured as mandatory.
Forecasted Receiving Date	Enter a date on or after the order date.

Field	What to enter or check
Payment Method	Select a payment method when configured as mandatory.
Payment Period	Select a payment period when configured as mandatory.
Status	Review the order status.
Forecasted Logistics Costs	Enter a non-negative amount when configured as mandatory.
Logistics Costs	Enter a non-negative amount when configured as mandatory.
Rate to	Enter a non-negative rate when the local-currency-rate window is open.
Order Activation Date	Enter a date on or after the order date in the activation window.
Received On	Enter a date no later than `Today` in a delivery-date window.

The workspace also shows the required record fields **Purchaser**, **Product Type**, and **Package Title**. The item area includes the headers `Item No.`, `Product`, `Category`, `Group`, `MRQ Qty.`, `MRQ type`, `Qty`, `Unit`, `Required Receiving Date`, `Job no.`, `MRQ`, `V.L.`, `Is limited V.L.`, and `Stage`.

The workspace can also provide these order actions:

Action	Use
Purchasing PO template	Download the purchase-order template when printing is permitted.
Rate to	Enter a non-negative local-currency rate when the rate window is open.
Payment Milestone	Open payment-milestone work for an existing order.

The state-dependent actions are the controls that move the order through its work. They are available only when the order is saved, has no unsaved changes, the record is editable, and the current state meets the action's condition.

Use these conditions to choose the appropriate action in the next section.

Save the order and request approval

When the order panel is open, complete its information and send it into the approval path.

Prerequisites

- The purchase job exists and the order panel is open.
- Complete the fields your company configuration requires.
- Include at least one order item.

Steps

1. Complete the required order fields, including **Delivery Time**, **Delivery Term**, **Payment Method**, **Payment Period**, and the configured cost fields.
2. Select **Save**.
3. If the order is eligible for approval, select **Request Approval**.

If the order has no item, the page can display `Order must have at least one item`. If a required
order field is empty, it can display `Check PO mandatory field(s)`.

Result: The order is saved, and the approval action is available according to the order's
state and your role.

Approve and submit the order award

When the saved order is eligible for approval or award submission, choose the action that matches
your role and the order state.

Prerequisites

- The order has an ID and no unsaved changes.
- The job is after `Regretted Offer` and before `Deleted`.
- The order state and your approval and mail permissions determine which option is available.

Steps

1. Select the action that matches the state and permission shown on screen.

If…	Select…
The approval process is configured and you cannot approve the order	**Request Approval**

If…	Select…
The approval process is configured and you can approve the order	**Approved**
The order is approved and mail permission is available	**Send order award to Sub-supplier**
Mail permission is unavailable	**Consider PO award as submitted**

2. If the approval request is awaiting a decision, select **Reject Approval Request** to reject
   it or **Cancel Approval Request** to withdraw it, according to your permission.

The page can display `An error occurred while processing your request` when processing fails.

Result: The order is approved, rejected, withdrawn, submitted to the sub-supplier, or marked
as submitted according to the control you selected.

Activate the order and record receipt

When the order has reached activation or receipt work, use the action that matches its current
state.

Prerequisites

- The order is in `Awaiting Activation` or `Consider As Awaiting Activation` for activation.
- For receipt correction, the order is in `Delivered`.
- The order is saved and has no unsaved changes.

Steps

1. Select the action that matches the current state.

Current state	Select…
`Awaiting Activation` or `Consider As Awaiting Activation`	**Activate PO**
`Delivered`	**Consider as not received**

2. Complete the field for the selected action.

Selected action	Complete…
Activate PO	**Order Activation Date**, on or after the order date
Consider as not received	**Received On**, no later than `Today`

3. In the window for the selected action, select the button at the bottom of the window.

The page can display `Order updated successfully. Undelivered. A draft invoice was deleted` after
the undelivered correction.

Result: The order is activated, or the receipt state is corrected with the date entered.

Amend, correct, or close the order

Use the action that matches the order state; these controls correct a state without treating a
different state as if it were current.

Prerequisites

- The order is saved and has no unsaved changes.
- The order state is visible in the purchase-order area.
- You have permission to edit or change the order.

Steps

1. Select one action from the table that matches the current state.

Current state or condition	Select…
Valid or considered awaiting activation	**Order amendment**
Editing is allowed for an approved or activation state	**Enable Editing**
The order is rejected	**Consider PO acceptance as not rejected**
The order is cancelled	**Consider P.O. as not Cancelled**
The order is valid or considered awaiting activation and acceptance must be rejected	**Rejected PO acceptance**
The order is not cancelled, rejected, or in the completed-receipt state	**Cancel PO**
A non-direct order is below Approved	**Back to Offer**

Current state or condition	Select…
The order is approved in an approval process	**Consider as not approved**
The award is in a valid or considered-awaiting-activation state	**Consider PO award as not submitted**

2. Complete the fields the selected correction window asks for, including **Regret Date**,
   Comment, **Amount**, or **Reject Date** when they appear.

3. In the correction window, select the button at the bottom of the window.

The page can display `Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted` if
an item deletion is attempted for either of those item states.

Result: The order is amended, returned, rejected, cancelled, reopened for editing, or left in
its current state after the selected correction.

If the action produces a message, use the matching row in When order work goes wrong.

When order work goes wrong

Use the message text in the first column to choose the corrective action. Messages owned by
another purchase-job stage are listed with that stage so you can continue in the right task.

What you see	What it means	What to do
`Check PO mandatory field(s)`	A configured order field is empty.	Complete the required order fields and select **Save** again.
`Please insert at least one PO`	The page requires a purchase order.	Add the purchase order information before saving.
`Order must have at least one item`	The order has no item.	Add an item before selecting **Save**.
`Please enter action for each milstone`	A payment milestone has no action.	Complete each milestone action before saving.
`An error occurred while processing your request`	Processing failed.	Check the order state and permissions, then retry the

What you see	What it means	What to do
		available action.
`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	The item is in a protected state.	Do not use deletion as the correction route.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	A quantity is outside the accepted range.	Enter a positive quantity within the displayed limit.
`Invalid input. Please enter a non-negative value`	A numeric value is negative.	Enter zero or a positive value.
`Invalid input. The tax rate must be between 0 and 100`	The tax rate is outside its accepted range.	Enter a rate from 0 through 100.
`Required Offer Type`	The inquiry requires an offer type.	Continue in the procurement inquiry task.
`Required Bid Due Date`	The inquiry requires a bid due date.	Continue in the procurement inquiry task.
`Forbidden characters detected. Please remove them and try again.`	A list value contains forbidden characters.	Remove the unsupported characters in the owning list page.
`You already have a contact with this name`	The contact name already exists.	Continue in the contact details page and use the existing contact or a different name.
`Check RFQ mandatory field(s)`	An RFQ field is empty.	Continue in the purchase-job RFQ task.
`Please insert at least one RFQ`	The RFQ requires an RFQ entry.	Continue in the purchase-job RFQ task.
`Please insert at least one product`	A package requires a product.	Continue in package maintenance.
`Check mandatory field(s)`	A shared form has an empty required field.	Correct the required field in the owning stage panel.
`Inquiry must have at least one item`	The inquiry has no item.	Continue in the procurement inquiry panel.
`Offer must have at least one item`	The offer has no item.	Continue in the procurement offer panel.
`Package products cannot be empty`	A package contains no products.	Continue in package maintenance.

What you see	What it means	What to do
`Product package deleted from all inquiries`	A package deletion affected inquiries.	Continue in package maintenance.
`Product package deleted from all offers`	A package deletion affected offers.	Continue in package maintenance.
`Product package deleted from all orders`	A package deletion affected orders.	Continue in package maintenance.
`Item(s) Regretted`	An item was moved to a regretted state.	Continue in the inquiry or offer item task.
`Item(s) Cancelled`	An item was moved to a cancelled state.	Continue in the inquiry or offer item task.
`Item(s) Rejected`	An item was moved to a rejected state.	Continue in the inquiry or offer item task.
`Item(s) Reactivated`	An item was moved back to an active state.	Continue in the inquiry or offer item task.
`Job reactivated successfully`	The job was reactivated.	Continue in the purchase-job record task.
`Email sent to client. Added to emails list activity`	An email action completed and added an activity entry.	Continue in the purchase-job activity task.
`Converted to inquiry successfully`	A conversion produced an inquiry.	Continue in the purchase-job RFQ task.
`Converted to offer successfully`	A conversion produced an offer.	Continue in the purchase-job quotation task.

Out of scope messages

The shared screen can show this message even though the corrective work belongs to another page.

Message	Owning page
`Your request was completed successfully`	File library

After resolving a message, return to the order action that matches the current state.

What happens next

When the purchase order reaches receipt work, the next operational activity belongs to warehouse
receipt and fulfillment. For supporting information, use the purchase-job work lists or the page
for comments, files, and history.

Continue with…	Use…
The quotation before the order	Manage purchase job quotations
Physical receipt documentation	Goods receipt notes
Warehouse handling after receipt	Warehouse fulfillment flow
Operational follow-up	Purchase job work lists
Supporting files and history	Comments, files, and history on a purchase job

Result: You know which purchase-job or warehouse task continues the work from the order's
current state.