PAMS FRESH GENERATION

Manage purchase job quotations

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An RFQ is a request sent to sub-suppliers for an offer. A purchase quotation records the offer
that comes back, after the RFQ and before the purchase-order stage. Use it to check the offer,
keep a valid alternative or revision, and move the selected quotation forward as a purchase
order (PO).

If you need to…	Go to
Prepare the record and identify the quotation stage	Before you start
Reach the saved purchase job	Find and open a quotation
Check fields, items, and related tabs	Understand the quotation panel
Save, validate, or convert the quotation	Validate and convert a quotation
Create an alternative, revision, or return	Create alternatives, revisions, and returns
Correct a refused action	When a quotation action is refused
Continue after conversion	Continue with the purchase order
Work on the RFQ before the quotation	Purchase job RFQs
Continue with the order after conversion	Purchase job orders
Manage files and history on the record	Purchase job comments, files, and history

Before you start

Before choosing a stage action, prepare the saved record and the offer details.

Prerequisites

- Have a saved purchase job with an open **Offer** panel.
- Make sure the quotation is editable. **Save**, **Valid Offer**, **Alternative Offer**, **Revision**, and **Back to RFQ** depend on the record being saved and editable in the applicable quotation state.
- Have the offer number, offer type, offer date, validity period, delivery time, delivery term, payment method, and payment period ready.
- Check the quotation's item rows before validating it. An offer must contain at least one item.

The **Offer** panel applies while the purchase job is at Offer and before Order, and the individual offer must be open. **Convert To PO** applies when the offer is valid or considered valid. **Alternative Offer** and **Revision** apply when the offer is valid, considered valid, or expired. **Back to RFQ** applies to a saved quotation that is not ordered.

Find and open a quotation

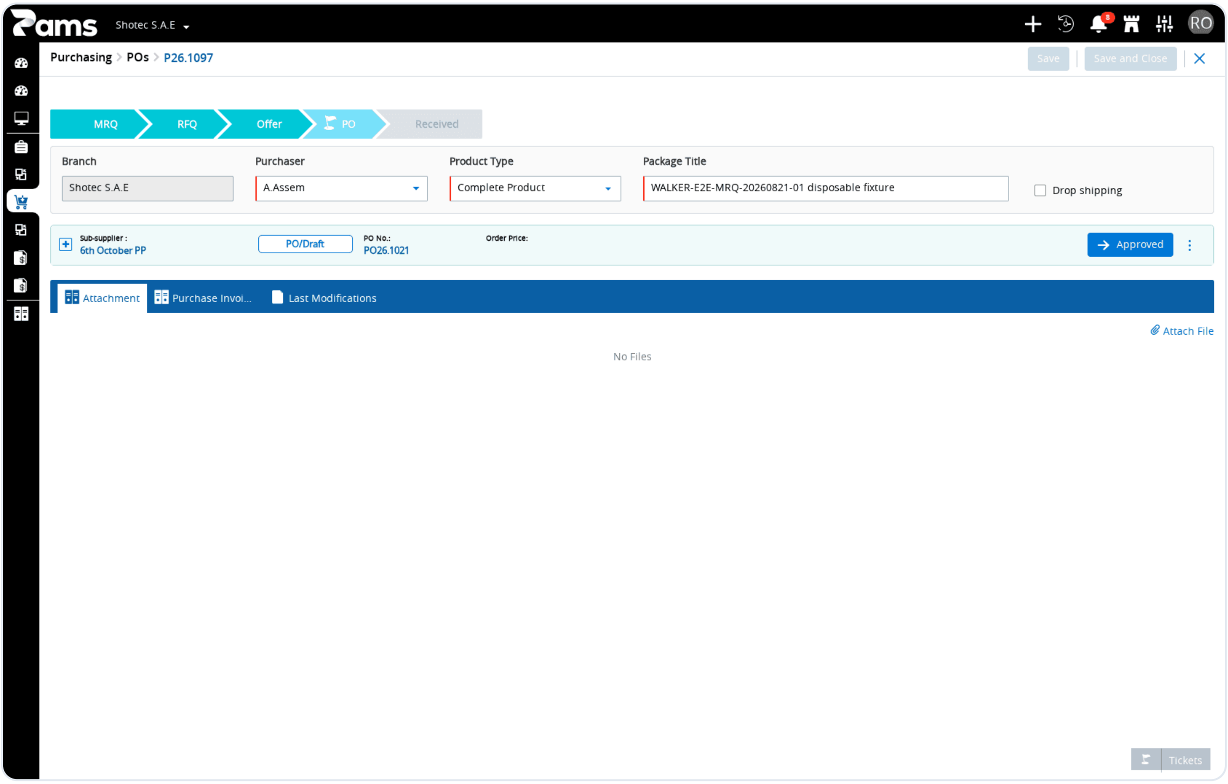
A quotation is opened from the saved purchase-job record at `/procurement/edit/:ID`.

Prerequisites

- Know the saved purchase job you need to review.

Steps

1. Open the saved purchase job record.
2. Select **Offer** in the stage bar.
3. Open the quotation in the **Offer** panel.



Result: The quotation is open in the **Offer** panel.

Understand the quotation panel

The quotation panel contains the offer details, item information, stage actions, and related
record tabs. Review these areas before changing the offer.

Area	What to check
Offer details	**Offer No.**, **Offer Type**, **Offer Date**, **Validity Period**, **Delivery Time**, **Delivery Term**, **Payment Method**, and **Payment Period**
Offer status	**Status** and **Vendor**
Item information	**Product**, **Offer Validation**, **Unit Price**, and **Currency**
Related record work	**Attachment**, **Purchase Invoices**, and **Last Modifications**
Stage actions	**Valid Offer**, **Convert To PO**, **Alternative Offer**, **Revision**, **Rejected Offer**, **Cancel RFQ**, **Denied To Extend**, and **Back to RFQ**

The offer form applies the following value rules:

Field	Rule
Offer Date	The date cannot be later than today.
Validity Period	The value cannot be below `0`.
Delivery Time	The value cannot be below `1`.
Payment Period	The value cannot be below `1`.

The record also includes the product, offer date, offer validation, delivery time, delivery term, payment method, payment period, unit price, and currency columns for quotation items.

Validate and convert a quotation

Use this procedure to save the quotation, mark a saved draft as valid, and convert a valid
quotation into a purchase order.

Prerequisites

- Open a saved, editable quotation in the **Offer** panel.
- Complete the quotation fields and keep at least one item in the offer.

Steps

1. Select **Save** after completing or changing the quotation.
2. Check the quotation fields and item rows if the screen displays `Check mandatory field(s)`.
3. Add an item if the screen displays `Offer must have at least one item`.
4. Enter a value that meets the field rule.
5. Select **Valid Offer** when the saved quotation is a draft.
6. Select **Save** again.
7. Select **Convert To PO** when the quotation is valid or considered valid.

Result: The quotation is marked valid or continues as a purchase order.

Create alternatives, revisions, and returns

These actions keep a quotation's correction and return paths with the quotation stage. Choose
one action that matches the quotation's current status.

Prerequisites

- Open a saved quotation that is not ordered.
- Make sure the quotation is editable.

Steps

1. Select the action that matches the quotation's current status.

Quotation situation	Select
Valid, considered valid, or expired; you need another offer	**Alternative Offer**
Valid, considered valid, or expired; you need a changed version	**Revision**
Valid, considered valid, or expired; you need to reject it	**Rejected Offer**
Valid, considered valid, or expired; you need to cancel the RFQ path	**Cancel RFQ**
Expired; the extension must be refused	**Denied To Extend**
Saved and not ordered; the quotation must return to the RFQ stage	**Back to RFQ**
Rejected; you need to restore the quotation	**Consider Offer as Not Rejected**
Cancelled; you need to restore the RFQ path	**Consider RFQ As Not Cancelled**
Regretted; you need to restore the quotation	**Consider As Not Regretted**
Extension rejected; you need to restore the extension path	**Undo Denied To Extend**

Result: The quotation follows the selected alternative, revision, rejection, cancellation, extension, or RFQ-return path.

When a quotation action is refused

Quotation validation messages identify the information or item state that must be corrected.

Message	What to do
`Check mandatory field(s)`	Complete the required quotation fields.
`Offer must have at least one item`	Add an item to the quotation.
`Please insert at least one product`	Add a product to the package.

Message	What to do
`Check RFQ mandatory field(s)`	Complete the required RFQ fields before continuing the quotation flow.
`Please insert at least one RFQ`	Add an RFQ before continuing.
`Inquiry must have at least one item`	Add an item to the inquiry.
`Check PO mandatory field(s)`	Complete the required purchase-order fields.
`Please insert at least one PO`	Add a purchase order before continuing.
`Order must have at least one item`	Add an item to the order.
`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	Keep the protected item in the order.
`Package products cannot be empty`	Add a product to the package.
`An error occurred while processing your request`	Check the quotation data and try the action again.

The quotation actions can also return these messages:

Message
`Converted to offer successfully`
`Item(s) Regretted`
`Item(s) Cancelled`
`Item(s) Rejected`
`Item(s) Reactivated`
`Product package deleted from all inquiries`
`Product package deleted from all offers`
`Product package deleted from all orders`
`Order updated successfully. Undelivered. A draft invoice was deleted`
`Job reactivated successfully`
`Email sent to client. Added to emails list activity`
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`
`Invalid input. Please enter a non-negative value`
`Invalid input. The tax rate must be between 0 and 100`

Continue with the purchase order

A purchase order is the next purchase-job stage after a quotation is converted. Continue the
order work on the purchase-job order page, and use the record's related tabs for companion work.

Next task	Page
Work on the converted purchase order	Purchase job orders
Return to RFQ work	Purchase job RFQs
Manage files, invoices, and change history	Purchase job comments, files, and history

Result: The quotation work ends at the purchase-order handover or at the selected RFQ
return path.