Purchase job workflow

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Understand the purchase job workflow

A purchase job tracks procurement work from a material requisition (MRQ) through an RFQ,
quotation, and purchase order. An MRQ records the material request, an RFQ asks a supplier for
an offer, a quotation records the supplier's response, and a purchase order commits the purchase.
The purchase-work lists are the starting point; detailed work on each record continues on the
focused MRQ, RFQ, quotation, or purchase-order page.
The route continues into receiving and warehouse fulfilment.

If you need to…	Go to
Find an MRQ or open the purchase-work entry list	Find the MRQ and purchase work
Move an MRQ into RFQ and quotation work	Move an MRQ through RFQ and quotation
Continue from a quotation to approval and activation	Hand the quotation to purchase-order approval and activation
Find active RFQ, quotation, or PO work	Find active purchase job work
Find archived or exception work	Find archived and exception purchase job work
Complete the detailed record task	Manage purchase job RFQs, Manage purchase job quotations, or Manage purchase orders

After purchase-order approval and activation, continue with receiving and warehouse fulfilment.

Before you follow the hand-offs, prepare your session, list access, and starting record.

Before you start

An authenticated session lets you open the MRQ and Purchase Jobs routes. The list content is
available when the purchasing feature is included, and the purchase-work list appears after a
list layout is available. Your access also controls whether the new-entry links appear.

Prerequisites

Have this ready	Why it matters
An authenticated PAMS session	You are signed in and can open the purchase-work list.
The MRQ or package you need to continue	The list row identifies the package, supplier, offer, and order information used to choose the next stage.
The relevant work stage	Choose the list that matches the stage you need to continue.
The access needed for new work	The RFQ and **Direct P.O.** links appear only when new-entry access allows them.
A saved list layout	The purchase-work list appears when a selected layout is available.

Do not treat the list as the record editor. Record fields, approval panels, activation panels,
quotation details, purchase-order details, and direct-order fields belong to their focused pages.

Find the MRQ and purchase work

Use the MRQ entry when you are starting the procurement route. Purchase Jobs lists the RFQ,
quotation, purchase-order, and archived work that follows it.

Prerequisites

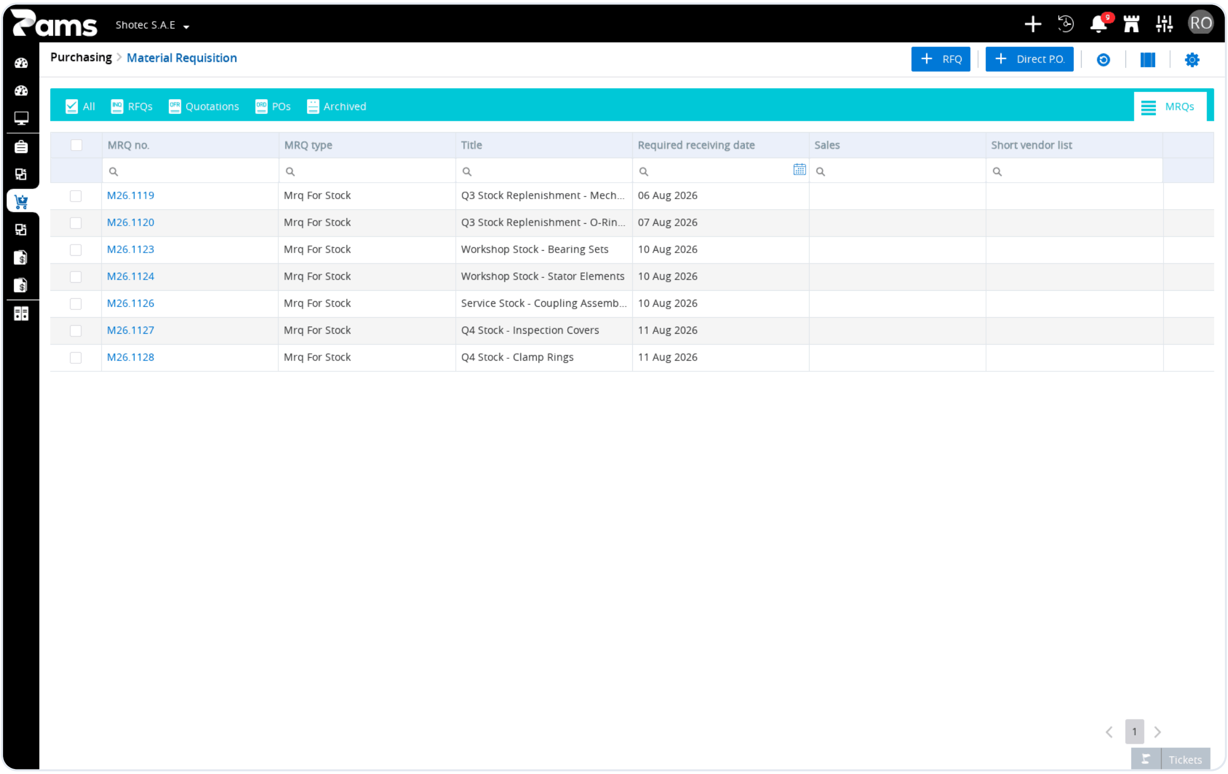
- You are signed in.
- You know whether you are starting from the MRQ list or continuing an existing purchase job.

Steps

1. Open the MRQ list when you are starting from the purchase-work entry.
2. Select the work list that matches your next task.

If you need to…	Select
Review every purchase job	**All**
Work on RFQs	**RFQs**
Work on supplier quotations	**Quotations**
Work on purchase orders	**POs**
Review archived work	**Archived**

3. Select an MRQ row to open its MRQ record.
4. Select a purchasing row to open its purchasing record with the selected stage, account, and
product context.



Result: The list for the selected work stage is on screen, or the related MRQ or purchasing
record opens for the next focused task.

Open the MRQ list. **All**, **Quotations**, **POs**, **Archived**, and **MRQs** can appear on the purchase-work entry. Select the list that is actually available on your screen.

When the list remains open, read its row headers before moving to the next focused task.

Read the purchase work list

A purchase-work row brings together the package identity, purchasing responsibility, supplier,
offer progress, and order progress so you can choose the next record task.

Reader-facing label	What it helps you identify
MRQ no.	Find the requisition row to continue.
MRQ type	Distinguish the kind of material request.
Title	Identify the requested package.
Required receiving date	Check when the requested material is needed.
Sales	Relate the request to its sales work.
Short vendor list	Review the supplier information shown for the request.

The columns on the MRQ list come from your selected list layout, so work from the headers you
actually see rather than expecting a fixed set of columns. The purchase-work list appears when a
selected layout is available.

Result: You can use the visible row headers to identify the package and decide which focused
record page to open next.

Move an MRQ through RFQ and quotation

The RFQ and quotation hand-off moves the supplier request into response and purchase-order work.

Prerequisites

- You have opened the relevant MRQ or package row.
- You have the RFQ and supplier information needed by the focused record page.

Steps

1. Select **RFQ** to open the new RFQ form when you need to start RFQ work from the list.
2. Complete the RFQ on Manage purchase job RFQs.
3. Continue to the quotation page after the RFQ is converted to offer work.
4. Complete quotation validation and conversion on Manage purchase job quotations.

When an RFQ has no required purchase item, the page can display `Please insert at least one RFQ`
or `Please insert at least one product`. Follow the focused RFQ or quotation page for the correction.

Result: The work is handed from the MRQ entry to RFQ work and then to the quotation procedure.

Hand the quotation to purchase-order approval and activation

Use the purchase-order page for approval and activation.

Prerequisites

- You have completed the quotation work.
- You are on the purchase-order page for the package.

Steps

1. Select **Convert To PO** from the quotation procedure when the quotation is ready for a
purchase order.
2. Select **Request Approval** on the purchase-order page to send the order into approval work.
3. Select **Approved** when the purchase-order approval action is available.
4. Select **Activate PO** after approval to hand the order to activation.
5. Open Manage purchase orders when the order reaches `Awaiting activation` or the valid purchase-order stage.

The separate direct-order branch starts with **Direct P.O.** when new-entry access allows that
link. Its form belongs to Create a direct purchase order.

Result: The quotation has been handed to purchase-order approval and activation, or you have
opened the separate direct-order task.

Recover from a blocked list action

List feedback tells you whether to correct a filter, review the list state, or move to archived
and exception work. Record-stage messages belong to the focused record pages.

What you see	What to do
`Forbidden characters detected. Please remove them and try again.`	Remove the forbidden characters from the filter.
`You are about to archive this product. This action cannot be undone. Are you sure?`	Review the row before confirming an archive action.
`NO Data to Export`	Return to the list.
`Data Importing completed`	Continue working with the refreshed list.
If **RFQs** is unavailable	Use the visible work list, then open Find active purchase job work for the active list routes.
Archived or exception work needs recovery	Open Find archived and exception purchase job work.
If **Log in to Pams** appears	Sign in again before opening the list.
The page is empty and has no controls or buttons	Return to the route after authentication.

Steps for the empty export result:

1. Return to the purchase-work list after `NO Data to Export`.
2. Select a list containing data.
3. Select **Export**.

The list displays the export options after **Export** is selected.

The focused record pages handle these additional messages:

Message	Continue with
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Manage purchase job RFQs
`Invalid input. Please enter a non-negative value`	Manage purchase job RFQs

Message	Continue with
`Invalid input. The tax rate must be between 0 and 100`	Manage purchase job quotations
`Product package deleted from all inquiries`	Purchase job information
`Product package deleted from all offers`	Manage purchase job quotations
`Product package deleted from all orders`	Manage purchase orders
`Order updated successfully. Undelivered. A draft invoice was deleted`	Manage purchase orders
`Job reactivated successfully`	Purchase job record
`Converted to inquiry successfully`	Manage purchase job RFQs
`Converted to offer successfully`	Manage purchase job quotations
`Please insert at least one PO`	Manage purchase orders
`Please insert at least one RFQ`	Manage purchase job RFQs
`Please insert at least one product`	Purchase job information
`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	Manage purchase orders
`An error occurred while processing your request`	Purchase job record
`Package products cannot be empty`	Purchase job information
`Required Offer Type`	Manage purchase job RFQs
`Required Bid Due Date`	Manage purchase job RFQs
`Your request was completed successfully`	Purchase job record
`Inquiry must have at least one item`	Manage purchase job RFQs
`Offer must have at least one item`	Manage purchase job quotations
`Order must have at least one item`	Manage purchase orders
`Please enter action for each milstone`	Manage purchase orders

Message	Continue with
`You already have a contact with this name`	Contact record

Result: You know whether to correct the list action, sign in again, or continue in the archived and exception work page.

Continue after the purchase order hand-off

After purchase-order approval and activation, the procurement chain continues into receiving and
warehouse fulfilment. The purchase-work page remains the place to locate the package stage; the
focused purchase-order and warehouse pages carry the detailed actions.

Next need	Go to
Review purchase-order approval or activation details	Manage purchase orders
Review the purchase-job workspace around the hand-off	Purchase job record
Maintain shared purchase-job information	Prepare purchase job information
Continue with receiving and warehouse work	Warehouse fulfilment flow
Review archived or exception outcomes	Find archived and exception purchase job work

The purchasing row opens the purchasing record with stage, account, and product context. Use that
record route when the next task needs record-level information or a panel action.

Result: The purchase-order hand-off is complete in this process map, and you know which
focused page continues the work.