PAMS FRESH GENERATION

Sales job information and assessment

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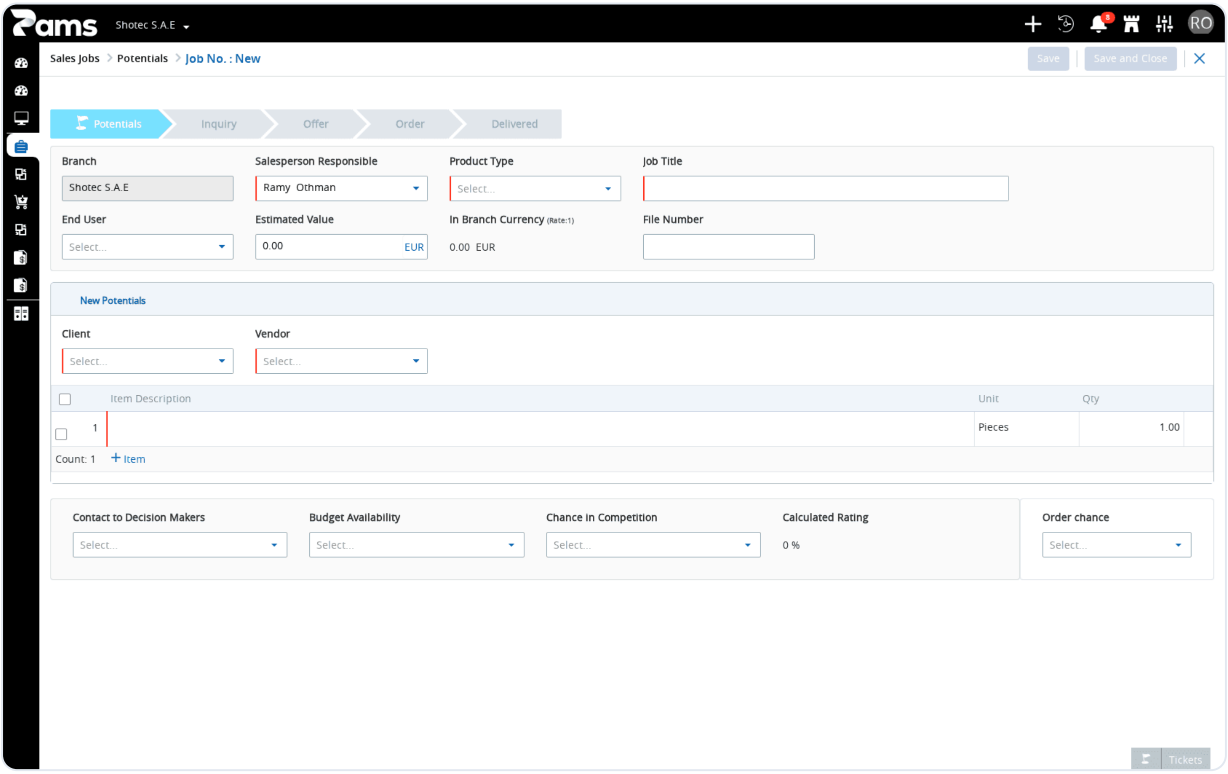
Sales job information and assessment

Use this page to maintain the shared information on a sales job, review its commercial assessment, and save changes without overlooking a required field or an edit restriction.

Overview

A sales job's shared information and commercial assessment describe the opportunity, the
parties involved, the expected order, and the factors used to calculate its rating. Maintain
these details while the job moves through Potential, Inquiry, Offer, and Order work.

If you need to…	Go to
Reach a new or existing sales job	Find and open a sales job
Locate a field and understand what is shown	Understand the information and assessment screen
Enter or change job information	Maintain shared sales-job information
Review the commercial assessment	Review the commercial assessment
Work with a locked or archived job	Edit or restore archived information
Add or price the job's items	Sales job items
Follow the job through its stages	Sales jobs lifecycle
Understand the whole record work area	Sales job record
Create a new sales job	Create sales job



Before you start

Before you edit a job, have the client, vendor, salesperson, product type, job title, inquiry dates, bid deadline, and expected order date available. The client and vendor selections are part of the job information used by later sales work, so choose the records that match the request rather than creating a placeholder.

The screen requires a signed-in user. Editing a saved inquiry, offer, or order also depends on the job stage, your edit permission, and whether the record has unsaved changes. Archived jobs use separate **Edit** or **Restore** actions. Company configuration can make additional fields mandatory, including **Order chance**, **End User**, Team, **Estimated Value**, **File Number**, **Client Inquiry Number**, **Inquiry Date**, **Requested Offer Type**, **Contact to Decision Makers**, **Budget Availability**, and **Chance in Competition**.

Find and open a sales job

Open the record you want to maintain before continuing its stage-specific sales work.

Prerequisites

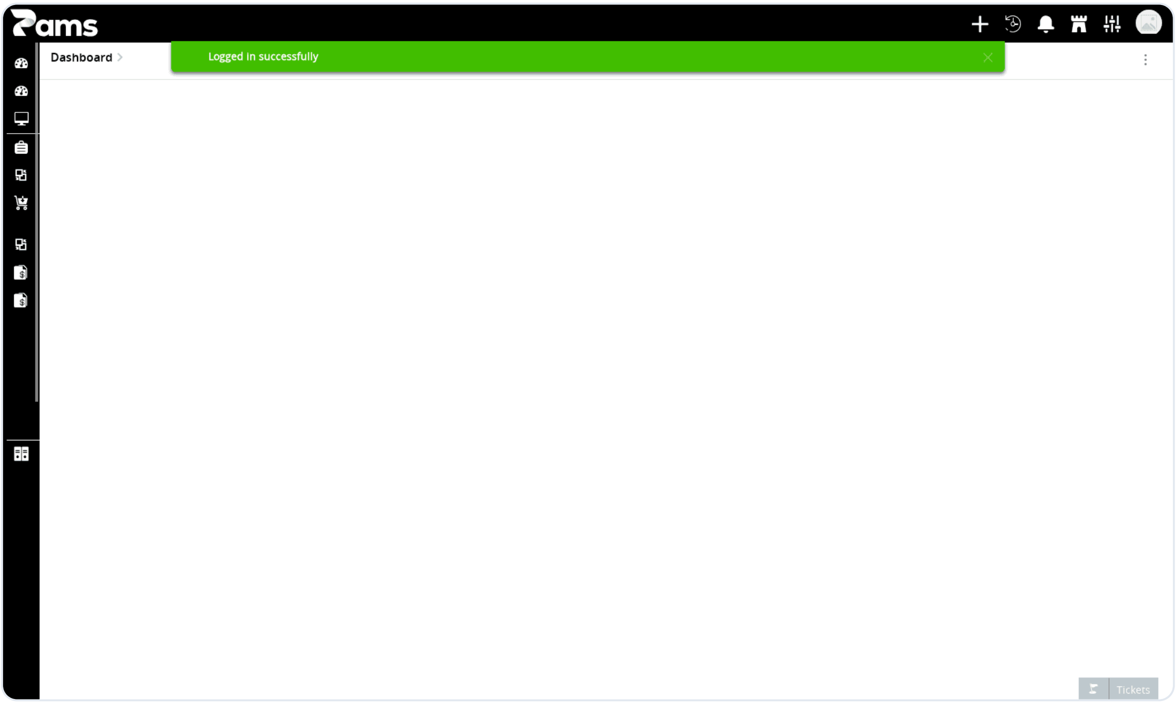
- You are signed in.
- You know whether you are creating a new potential or maintaining a saved job.

Steps

1. Open the sales-job route that matches your work.

If you need to…	Open
Create a standard sales job	Open the sales-job list and choose the standard sales-job entry option.
Create a potential	Open the Potentials list and choose its new-entry option.
Create a direct order	In the sales-job list, use the new-entry menu for direct orders.
Create an instant job	In the sales-job list, use the new-entry menu for instant jobs.

2. On the potential route, select **Add new**.
3. Select **Inquiry**.



Result: The sales-job information surface opens on the potential sales-job entry screen.

Understand the information and assessment screen

The potential route places shared job information above the sales-job item area and the
commercial assessment controls below it. The potential surface shows these fields and buttons:

Area	Fields or controls	What you use it for
Job identity	**Branch**, **Salesperson Responsible**, **Product Type**, **Job Title**	Identify the branch, responsible person, job type, and job description.
Opportunity details	**End User**, **Estimated Value**, **File Number**, **Expected Order Date**	Record the end user, expected value, internal reference, and expected order timing.
Counterparties and inquiry	**Client**, **Vendor**, **Client Inquiry Number**, **Inquiry Date**, **Bid Due Date**, **Requested Offer Type**	Record the parties and the inquiry information when those fields are present for the stage.
Commercial assessment	**Contact to Decision Makers**, **Budget Availability**, **Chance in Competition**, **Order chance**	Record the assessment inputs used by the calculated rating.
Commit	**Save**, **Save and Close**	Commit the changes or commit them and close the surface.

On the potential route, **Salesperson Responsible**, **Product Type**, **Job Title**, **File Number**, **Client**, and **Vendor** carry a required marker. **Branch**, **End User**, **Estimated Value**, **Contact to Decision Makers**, **Budget Availability**, **Chance in Competition**,
and **Order chance** do not carry a required marker on that route. The required marker for a
configuration-conditional field can differ when company configuration changes.

The item area shows the headers **Item Description**, **Unit**, and **Qty**. The complete field
display and other list columns depend on company setup. The potential route shows In Branch Currency (Rate:1) and **Calculated Rating** as hidden readouts, so use the visible
assessment controls and the headers on screen for the work in front of you. Team is not available
on this surface. Use these visible fields and headers to begin maintaining the job information.

Maintain shared sales-job information

Shared sales-job information is the identity and commercial context that later sales work uses
to recognize the opportunity and its parties.

Prerequisites

- The information surface is open.
- You have the client, vendor, salesperson, product type, job title, and dates to enter.
- You know that company configuration can add mandatory requirements.

Steps

1. In **Salesperson Responsible**, select the person responsible for the sales job.
2. In **Product Type**, select the product type for the job.
3. In **Job Title**, enter the job description.
4. In **End User**, select the end user when the field is available.
5. In **Estimated Value**, enter a value of `0` or more when the field is available.
6. In **File Number**, enter the internal file reference when the field is available.
7. In **Expected Order Date**, choose today or a later date for a new record. For a saved
   record, choose a date on or after the date the record was created.
8. In **Client**, select the client for the sales job.
9. In **Vendor**, select the vendor for the sales job.
10. Enter the inquiry information when those fields appear for the current stage.

Field	Rule
Client Inquiry Number	Required only where your company configures it.
Inquiry Date	Required only where your company configures it; it cannot be later than today.
Bid Due Date	Required; it cannot be earlier than **Inquiry Date**.
Requested Offer Type	Required only where your company configures it.

Result: The shared identity, parties, and available inquiry details are entered on the sales-job surface, ready for assessment or saving.

Review the commercial assessment

The commercial assessment records the signals used to judge how likely the sales job is to become an order. It includes assessment selectors, commission and margin amounts, and a calculated rating.

Prerequisites

- The shared sales-job information is open.
- You have the commercial assessment information needed for the current stage.

Steps

1. In **Contact to Decision Makers**, select the available value that describes contact with decision makers.
2. In **Budget Availability**, select the available value that describes budget availability.
3. In **Chance in Competition**, select the available value that describes the competitive position.
4. In the assessment area, select **Order chance** when that control is available.

   The offer-stage control lists `90 %`, `70 %`, `50 %`, `30 %`, and `10 %`. The assessment control uses the values available for the current company setup.
5. Enter the commission or margin amount when its modal is available.

Value	Rule
Percentage	Cannot be below `0` or above the estimated value.
Commission amount	Required in its validation group; cannot be below `0` or above the estimated value.
Margin amount	Required in its validation group; cannot be below `0` or above the estimated value.

6. In the modal, select **Ok** to apply the commission or margin entry.

Result: The assessment inputs are recorded in the open surface, and the calculated rating
readout is available where the current stage and company setup display it. If the job is archived,
continue with Edit or restore archived information;
otherwise continue to saving.

Edit or restore archived information

An archived sales job is a job whose stage prevents ordinary editing. The available action
depends on the archived stage and your permission.

Prerequisites

- The archived sales job is open.
- You have the permission required by the available action.

Steps

1. In the archived details area, choose the action that matches the job stage.

If the job is…	Select
Regretted, cancelled, lost, or rejected	**Edit**
Deleted and you are allowed to edit it	**Restore**

Result: The eligible archived record enters its permitted editing path, ready for the shared information to be maintained or saved.

Save the information

Saving commits the shared information and assessment changes to the open sales job.

Prerequisites

- The required fixed fields are complete.
- Configuration-conditional required fields are complete where your company makes them
  mandatory.

- Dates and amounts satisfy their rules.

Steps

1. Select **Save** to commit the changes and remain on the sales-job surface.
2. Select **Save and Close** to commit the changes and close the surface.

Result: The save path validates the form before committing it. A successful operation uses
the success message appropriate to the action, including `Custom fields saved successfully`,
`Job updated successfully`, `Job deleted successfully`, `Job regretted successfully`,
`Job cancelled successfully`, `Job missed successfully`, `Job reactivated successfully`,
`Converted to offer successfully`, `Converted to inquiry successfully`, `Converted To Regretted`,
`Converted to cancelled`, or `Converted to lost`.

Fix validation and save errors

Validation messages identify the value that must be corrected before the sales job can be
saved. The save path also carries errors from related sales-job work.

Message	What to do
`An error occurred while processing your request`	Review the fields and try the save again.
`Error saving custom fields`	Review the custom fields and try the save again.
`Cannot be un-delivered – a due invoice already exists`	Stop the reversal and review the due invoice.
`All offers must be in draft status to revert to inquiry`	Return the offers to draft status before reverting to inquiry.
`Error {{errorMsg}}`	Read the displayed error detail and correct the reported value or action.
`An account with this name already exists`	Select the existing account instead of creating another one.
`A project with this name already exists`	Select the existing project instead of creating another one.
`Check mandatory field(s)`	Complete every field carrying a required marker.

Message	What to do
`Please save opened inquiry first`	Save the opened inquiry before continuing.
`All inquiries must be in draft stage to revert to potential`	Return the inquiries to draft stage before reverting to potential.
`One or more items has ZERO quantity`	Correct the item quantity before saving.
`One or more items has no unit`	Select a unit for each affected item before saving.

The save error path is silent at the component level. If nothing changes after selecting **Save**, do not assume the record was saved; review the fields and try again.

Result: The blocking message is matched to a correction, or the unchanged record is ready
for you to review and try again.

Know what happens next

After the shared information is saved, the sales job continues through its current stage and
its related work areas. Use the page that owns the next task rather than repeating its controls
here.

- Follow stage movement in Sales jobs lifecycle.
- Map the whole work area in Sales job record.
- Add or price rows in Sales job items.
- Create a new record from Create sales job.
- Review company-configured mandatory rules in Configuration dynamic validation.
- Review order-chance setup in Configuration sales order chance.