

Sales job items

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A sales-job item is a row that records the product content of the job. Item work sits in the sales flow that moves through its sales stages and into fulfillment.

If you need to...	Go to
Find the job that contains the item rows	Find sales job work
See how the item area fits into the complete record	Sales job record
Add or price a row	Add item rows
Review delivery and commercial values	Price the item and review delivery details
Follow the job after item work	Sales jobs lifecycle
Continue from an order toward delivery	From orders through fulfillment
Review cost and margin information	Job profitability record

Before you start

Have the sales job open and ready to edit. The record uses **Salesperson Responsible** and **Product Type** as required fields, and the item area contains the product description, unit, and quantity. The record can also show additional job details; the visible fields and required markers depend on the current panel and company configuration.

Prerequisites

Have this ready	Why it matters here
A sales job in the edit record	Item rows belong to the sales-job record.
The client, vendor, salesperson, and product type	These are the record choices shown with the item area.
The product description, unit, and quantity	These are the item-grid values used to describe and measure a row.
Permission to edit the record	The item controls and save actions depend on edit access.
The job's current stage	The stage changes which panels and item actions apply.

The record can also show **Save** and **Save and Close**. The item panel may expose fields that depend on company configuration, so use the fields and required markers shown on your screen.

Open the relevant Inquiry, Offer, or Order panel and expand it before you work with its item rows.

If the panel is collapsed, its item controls are not visible.

Find and open the sales job

The inquiry list is the starting point for opening a sales job. Choose the tab that matches the work you need to open.

Work to open	Tab
All listed sales jobs	All
Early opportunity work	Potentials
Inquiry work	Inquiries
Offer work	Offers
Order work	Orders
Archived work	Archived
Jobs needing a customer survey	Job Missing Customer Survey

Prerequisites

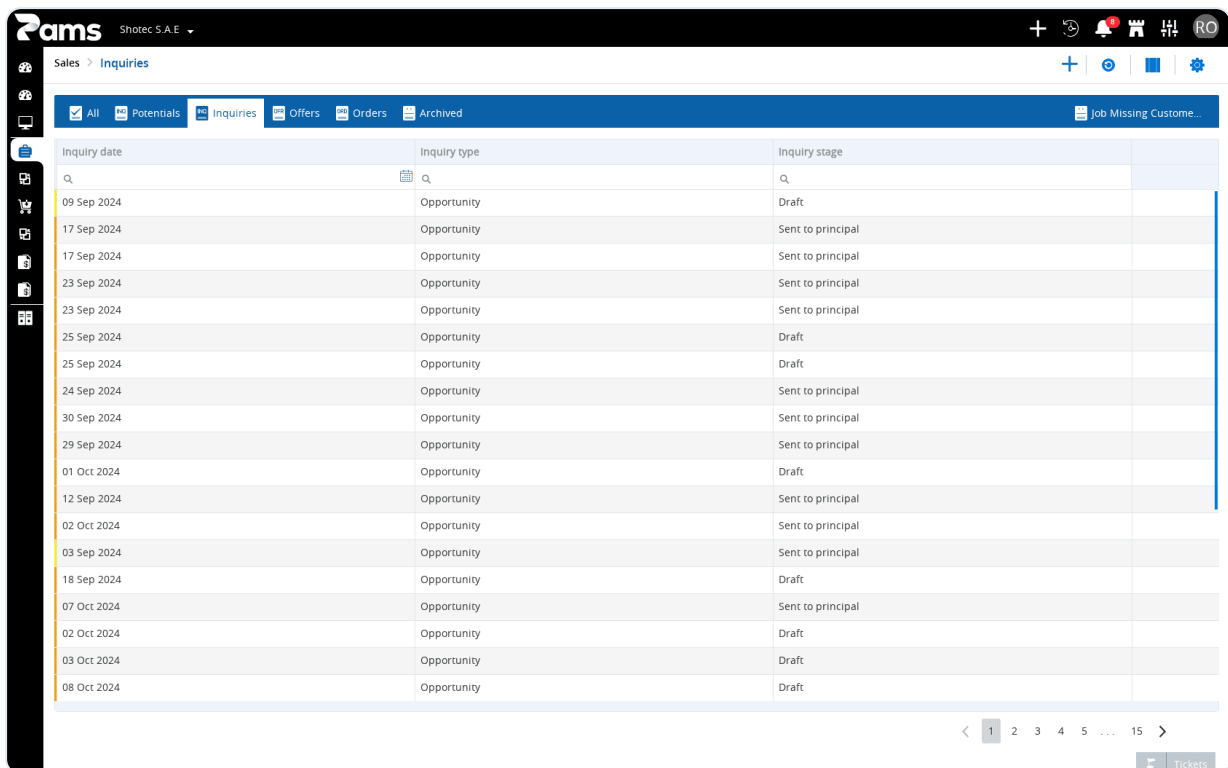
- You know which saved sales job to open.

Steps

1. Open the inquiry list from the Sales workspace.
2. Choose the path that matches your work.

If you need to...	Action
Open a saved sales job	Select its row and wait for the sales-job record to open.
Create a new potential	Select Add new .

3. If you chose **Add new**, select **Potentials**.



The screenshot shows the PAMS Sales workspace with the 'Inquiries' tab selected. The table displays a list of inquiries with columns for Inquiry date, Inquiry type, and Inquiry stage. The data is as follows:

Inquiry date	Inquiry type	Inquiry stage
09 Sep 2024	Opportunity	Draft
17 Sep 2024	Opportunity	Sent to principal
17 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Sent to principal
25 Sep 2024	Opportunity	Draft
25 Sep 2024	Opportunity	Draft
24 Sep 2024	Opportunity	Sent to principal
30 Sep 2024	Opportunity	Sent to principal
29 Sep 2024	Opportunity	Sent to principal
01 Oct 2024	Opportunity	Draft
12 Sep 2024	Opportunity	Sent to principal
02 Oct 2024	Opportunity	Sent to principal
03 Sep 2024	Opportunity	Sent to principal
18 Sep 2024	Opportunity	Draft
07 Oct 2024	Opportunity	Sent to principal
02 Oct 2024	Opportunity	Draft
03 Oct 2024	Opportunity	Draft
08 Oct 2024	Opportunity	Draft

Result: The saved sales-job record or the new potential form opens.

Understand the item surface

The item surface is the part of the sales-job record where each row describes product content.

The record view shows the columns **Item Description**, **Unit**, and **Qty**. The record also shows **Save** and **Save and Close**.

The item work connects to several areas of the record:

Area	What you use it for
Item grid	Add, describe, measure, and select item rows.
Offer details	Review item prices, discounts, totals, and delivery values.
Order details	Review order delivery values and order-stage restrictions.
Cost calculation	Review purchase price and other direct cost information.
Margin by items	Review item margin and price actions.

An item mode is the choice between **Package** and **Unitized**. The item controls also include

+ **Item** and **Reset Item** where the surface offers them. The available item mode and the values

initially shown depend on the job state and the fields available on the surface.

Add item rows

Use an item row to state what product is part of the job, which unit measures it, and how much is

needed. The item description is required. The quantity accepts values from 0.1 through the configured maximum.

Prerequisites

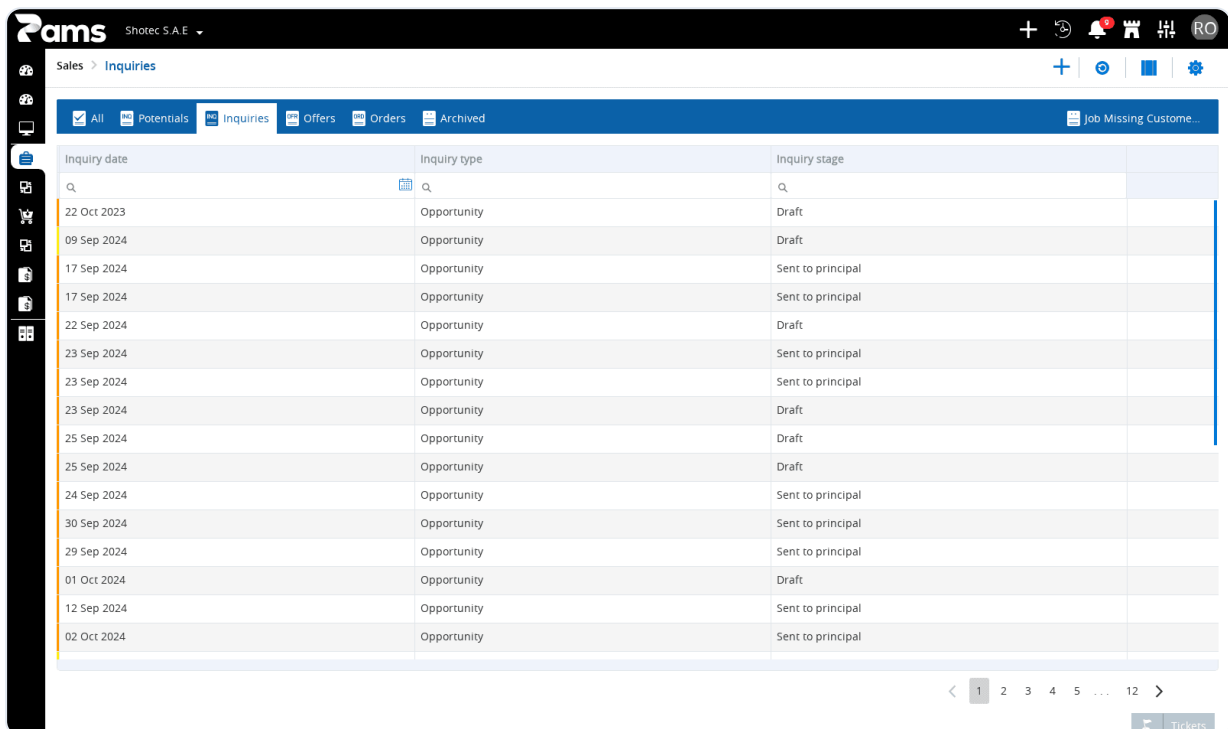
- The sales-job edit record is open.
- You know the product description, unit, and quantity to enter.

Steps

1. In the items grid, select **Item**.
2. In **Item Description**, select the product for the new row.
3. In **Unit**, select the unit for the row.
4. In **Qty**, enter a value from 0.1 through the configured maximum.
5. Choose the item mode that the surface offers.

If you need to...	Choose
Record an item as an individual, measured row	Unitized
Record an item as a grouped package	Package

6. Select **Save**.
7. When working from a saved new potential, select **Receive inquiry** to continue the inquiry flow.



The screenshot shows the PAMS Sales > Inquiries interface. The table displays a list of inquiries with columns for Inquiry date, Inquiry type, and Inquiry stage. The data is as follows:

Inquiry date	Inquiry type	Inquiry stage
22 Oct 2023	Opportunity	Draft
09 Sep 2024	Opportunity	Draft
17 Sep 2024	Opportunity	Sent to principal
17 Sep 2024	Opportunity	Sent to principal
22 Sep 2024	Opportunity	Draft
23 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Draft
25 Sep 2024	Opportunity	Draft
25 Sep 2024	Opportunity	Draft
24 Sep 2024	Opportunity	Sent to principal
30 Sep 2024	Opportunity	Sent to principal
29 Sep 2024	Opportunity	Sent to principal
01 Oct 2024	Opportunity	Draft
12 Sep 2024	Opportunity	Sent to principal
02 Oct 2024	Opportunity	Sent to principal

Result: The item row remains in the item grid with its **Item Description**, **Unit**, and **Qty** values.

For a new Unitized Inquiry, Offer, or Order row, the starting quantity is **1** and the starting unit price is **0**.

For the worked request, enter quantity **40** for the DN150 electric valve actuators at the quantity step.

Price the item and review delivery details

Pricing tells you the commercial value of the item; delivery details tell you how the job carries

that item toward fulfillment. Where the pricing fields are available, the area includes **Unit**

Price, **Item Price**, **Discount limit (%)**, **Discount (%)**, and **Currency**. Offer and order details also include **Delivery Time** and **Delivery Term**.

Prerequisites

- An item row is present.
- You have the commercial values and delivery details to enter or review.

Steps

1. In **Unit Price**, enter or review the price for one unit.
2. In **Discount (%)**, enter or review the item discount.
3. Review **Item Price**.
4. Review **Currency**.
5. In **Delivery Time**, enter or review the delivery period.
6. In **Delivery Term**, select or review the delivery term.
7. Open the cost or margin area you need.

If you need to...	Select
Review purchase-price information	Purchase Price
Review other direct costs	Other Direct Cost
Release item prices	Release Prices

The delivery and commercial fields can be required only where your company configures them. The commission and margin fields appear in their respective popups; the commission fields include

Percentage, and the margin fields include **Agreed Margin Amount**.

Result: The item row shows the available pricing and delivery values for the current sales-job stage.

Use Unitized and Packages lines

Unitized and Packages are item types that change which commercial values the Offer and Order grids accept for a line. The Inquiry grid does not offer the type switch.

Item type	Values available in the Offer or Order grid
Unitized	Unit, quantity, unit price, discount, calculated total, and currency where those columns apply.
Packages	Total price remains available; unit, quantity, unit price, and discount are cleared and disabled.

For a Unitized line, the calculated total is unit price multiplied by quantity, less the discount.

For a Packages line with a positive total price, the panel calculation uses quantity **1**, copies the total to unit price, and resets discount to **0**.

Selecting a product disables the **Unit** cell. When the grid is otherwise editable, the total-price cell remains available for a Packages line.

Handle item branches and locks

The same item row can behave differently as the job progresses. The item grid can become read-only according to the offer stage, order stage, edit mode, and approval state. Purchase-package and purchase-order activity can also prevent later item changes.

Condition	What to check on screen
The job is before Order	Work with the pre-order item and pricing fields shown for that stage.
The offer or order has progressed	Check whether the row controls are available before changing a value.
A purchase package exists	Treat product editing and deletion as restricted.
A purchase order exists	Treat product editing as restricted.
The item is ready for shipment or has entered fulfillment	Treat deletion as restricted.
The item is linked to an invoice or delivery work	Continue in the owning invoice or delivery page.

An Order with invoices cannot accept a new item line. In that Order grid, **Qty**, total price, discount, and tax are read-only.

Prerequisites

- The record is open at the stage where you need to change the item.
- You can see the item controls for that stage.

Steps

1. Check the current stage shown in the sales-job record.
2. Check whether the item row controls are available.
3. Edit an available item field, such as **Qty**.
4. Select **Save**.

Result: The row remains editable when the current stage and related work permit the change; otherwise the applicable lock message identifies the blocked operation.

Follow item values into delivery and invoices

Item values continue into downstream work. A partial delivery reduces the original item's quantity and creates a second item for the shipped quantity. Invoice creation copies quantity, unit, unit price, discount, tax, and total into invoice items.

Note: A new item in an Order can also update bill-of-material details; a changed quantity can notify the project manager when the item has bill-of-material products.

Save the item changes and resolve validation errors

Saving checks the item rows and returns a message when the change succeeds or when a rule blocks

it. Use the exact message on screen to choose the correction.

Prerequisites

- The item row contains the values you want to keep.
- You can select **Save** or **Save and Close**.

Steps

1. Select **Save**.
2. Look for `Your request was completed successfully` after the save.
3. Select the corrective action for the message shown on screen.

Message	Corrective action
This field is required	Complete Item Description .
Invalid input. The value must be greater than 0 and cannot exceed 999,999.00	Correct Qty .
Invalid input. Please enter a non-negative value	Enter zero or a positive value in the affected price or cost field.
One or more items has ZERO quantity	Correct the zero quantity in Qty .
One or more items has no unit	Select a value in Unit .
Inquiry must have at least one item	Add an item to the inquiry.
Offer must have at least one item	Add an item to the offer.
Order must have at least one item	Add an item to the order.
Package must have at least one item	Add an item to the package.
You cannot save without adding at least one product	Add at least one product before saving.
One of products has no quantity	Enter a quantity for each product.

Message	Corrective action
Check mandatory field(s)	Complete the required fields shown on the form.
Check validation	Correct the validation indicated on the current form.
This action is only allowed if you belong to that branch	Use the branch permitted for the action.
There is a maximum discount that exceeds the negotiation margin.	Reduce the maximum discount to the negotiation margin.
No remaining items. All items have been selected	Continue with the selected items.
Please select one or more items to create a RFQ.	Select one or more item rows before creating the RFQ.
Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted	Keep the item row and continue without deleting it.
Sales order is archived	Do not add the product to the archived order.
Booked quantity for this job is greater than the required BOM quantity	Reduce the booked quantity to the required quantity.
You cannot edit or delete the product after the purchase package is created	Leave the product unchanged after the purchase package exists.
Cannot be deleted. Product is in purchasing	Leave the product unchanged while it is in purchasing.
You cannot edit the product after the PO is created	Leave the product unchanged after the PO exists.
This product is already included in BOM	Select a product that is not already in the BOM.
The first variant cannot be deleted	Keep the first variant.
Please select one product	Select one product.
Action not allowed	Stop the action and continue with an available control.
Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters and try again.
Required Receiving Date	Enter the required receiving date.

Message	Corrective action
Required Receiving After	Enter the required receiving-after value.
Required Offer Type	Select the required offer type.
Required Bid Due Date	Enter the bid due date.
Error saving custom fields	Correct the custom fields and save again.
An error occurred while processing your request	Review the current fields and try the action again.

Result: The item changes are saved when the success message appears; otherwise the displayed message identifies the value or item condition to correct.

Continue the sales job

After item work, the sales job continues through its stage flow or through a related work area.

Continue complete lifecycle, purchasing, invoicing, delivery, or profitability work in the owning area.

Continue with...	Open
Stage movement	Sales jobs lifecycle
Offer work	Offers
Order work	Orders
Order-to-delivery work	From orders through fulfillment
Purchase-package work	Purchase job record
Invoice work	Invoice lifecycle
Cost and margin work	Job profitability record

Result: You know which sales-job stage or related work area to open next.