

Sales job variants

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Sales job variants

Overview

A sales job starting route is the entry point you choose for the kind of sales work you are

recording. **Potentials** starts early opportunity work, **Direct order** starts order work without

the earlier route, and **Standing job** starts the standing-job route when that choice is available.

All three routes open the same sales-job workspace; the route sets which starting mode the workspace uses.

If you need to...	Go to
Start early opportunity work	Potentials
Start an order directly	Direct order
Start standing-job work	Standing job
Enter the new sales-job information	Create a sales job
Review shared sales-job fields and assessment	Sales job information and assessment
Work with the saved sales-job record	Sales job record

Before you start

Prerequisites

Have or know	Why it matters
Permission to open Sales jobs	You must be signed in to open the Sales jobs choices.

Have or know	Why it matters
The sales-job information you intend to record	The first screen includes required fields such as Salesperson Responsible , Product Type , and Job Title .
Your company's field and list configuration	Required markers and available fields can depend on company configuration.
The layout used for your item and related lists	Some columns are taken from saved list layouts.
The route you intend to use	The route selects the starting mode before the workspace opens.

The form validates before saving and protects the page when you leave it. A field marked configuration-dependent is required only where your company configures it. The page can also include company-added fields and saved-layout columns, so use the labels and headers that appear for you.

The workspace remains unchanged until you choose a control that changes a record. Do not select **Save** or **Save and Close** until the information is complete.

Find and choose a starting route

A starting route is a choice in the Sales jobs creation menu. Select the route that matches the work you are beginning.

Prerequisites

- You can open the Sales jobs creation choices.
- You know whether you are starting Potential work, direct order work, or standing-job work.

Steps

1. Select **Add new** beside the Sales jobs creation choices.
2. Choose one route from the table.

If you need to...	Select
Start early opportunity work	Potentials
Start an order directly	Direct order

If you need to...	Select
Start standing-job work when the choice is present	Standing job

3. Check that the selected workspace opens with the starting mode you chose.

Choice	Visible starting mode
Potentials	Potential workspace
Direct order	Direct-order workspace
Standing job	Standing-job workspace

Result: The selected starting route opens the sales-job workspace, or **Standing job** remains unavailable in the creation choices.

The screenshot shows the 'New Potentials' form in the PAMS Fresh Generation system. The form is titled 'Sales Jobs > Potentials > Job No.: New' and includes a navigation bar with 'Potentials', 'Inquiry', 'Offer', 'Order', and 'Delivered'. The main form area contains several sections: 'Branch' (Shotec S.A.E), 'Salesperson Responsible' (Ramy Othman), 'Product Type' (Select...), 'Job Title' (empty), 'End User' (Select...), 'Estimated Value' (0.00 EUR), 'In Branch Currency (Rate:1)' (0.00 EUR), 'File Number' (empty), 'Client' (Select...), 'Vendor' (Select...), 'Item Description' table with one row (1, Pieces, 1.00), 'Contact to Decision Makers' (Select...), 'Budget Availability' (Select...), 'Chance in Competition' (Select...), 'Calculated Rating' (0 %), and 'Order chance' (Select...). A sidebar on the left shows various icons, and a 'Tickets' button is at the bottom right.

The creation choices showed **Potentials** and **Direct order**.

Recognize the Potential workspace

The Potential surface is the starting workspace for early opportunity work. On the loaded Potential route, the visible form fields and controls were:

Field or control	Type	Required marker on this surface
Branch	Text field	No
Salesperson Responsible	Selection field	Yes
Product Type	Selection field	Yes
Job Title	Text field	Yes
End User	Selection field	No
Estimated Value	Number field	No
File Number	Text field	Yes
Client	Selection field	Yes
Vendor	Selection field	Yes
Contact to Decision Makers	Selection field	No
Budget Availability	Selection field	No
Chance in Competition	Selection field	No
Order chance	Selection field	No

The page also reports an In Branch Currency readout and **Calculated Rating** as hidden readouts.

The item grid has the headers **Item Description**, **Unit**, and **Qty**. The available save controls are **Save** and **Save and Close**.

The Potential workspace opens without a dialog or stage-change message.

Use [Sales job information and assessment](#) for the shared field work and [Sales job items](#) for the item rows.

Handle route-availability branches

Route availability answers a different question from field availability: it tells you which kind of sales job you can start from the creation choices.

Prerequisites

- You have opened the Sales jobs creation choices.
- You know which route you intend to start.

Steps

1. Select **Add new**.

If you need to...	Select
Start early opportunity work	Potentials
Start an order directly	Direct order
Start standing-job work when the choice is present	Standing job

2. Choose one available route from the table.

Result: **Direct order** and **Potentials** are available choices; **Standing job** is unavailable in the creation choices.

When **Standing job** is unavailable, select **Potentials** or **Direct order** instead.

Choose another starting route

The Sales jobs creation choices let you select a different starting route.

Prerequisites

- You have selected a starting route.

Steps

1. Review the starting choices on screen.
2. Return to the Sales jobs creation choices when you need a different starting route.
3. Select **Add new**.
4. Choose an available route.

Result: You can choose another available starting route.

Continue with the owning page

The route page answers which starting workspace to open. The pages below own the work after that choice.

Work you need to do	Page
Create the selected sales-job type	Create a sales job
Maintain shared fields and assessment	Sales job information and assessment

Work you need to do	Page
Work with product rows	Sales job items
Follow Potential work	Potentials
Follow Inquiry work	Inquiries
Follow order-to-delivery work	Orders and the delivery workflow
Review the saved record	Sales job record
Work with comments and tasks	Sales job comments and tasks
Work with activities and files	Sales job activities and files
Work with contacts, guarantees, and history	Sales job contacts, guarantees, and history

The focused pages above own the shared fields, actions, choice lists, and save behaviour. Use them when you need to enter values, select list options, save a record, or continue the sales-job flow.

The available choice lists are owned by the focused pages below. Use the list that opens beside each field or action.

Use [Sales job information and assessment](#) to choose **Status** and **Requested Offer Type**. Use [Create a sales job](#) to choose **Product Type**.

Choice control	Available choices
Order chance	90 % , 70 % , 50 % , 30 % , 10 %
Contact to Decision Makers	High , Medium , Low
Budget Availability	Not Available Yet , In Progress , Available
Chance in Competition	High , Medium , Low
Regret Reason	Missed, regretted, and cancelled jobs
Cancellation Reason	Missed, regretted, and cancelled jobs
Lost Reason	Missed, regretted, and cancelled jobs

For validation and save messages, use the focused page where the related action is performed. The messages available for the related sales-job work are:

Class	Message	Owning work
success	Custom fields saved successfully	Shared sales-job fields
success	Job updated successfully	Shared sales-job fields
success	Job deleted successfully	Sales-job record
success	Job regretted successfully	Sales-job lifecycle
success	Job cancelled successfully	Sales-job lifecycle
success	Job missed successfully	Sales-job lifecycle
success	Job reactivated successfully	Sales-job lifecycle
success	Converted to offer successfully	Sales-job lifecycle
success	Converted to inquiry successfully	Sales-job lifecycle
success	Converted To Regretted	Sales-job lifecycle
success	Converted to cancelled	Sales-job lifecycle
success	Converted to lost	Sales-job lifecycle
error	An error occurred while processing your request	Shared sales-job action
error	Error saving custom fields	Shared sales-job fields
error	All offers must be in draft status to revert to inquiry	Sales-job lifecycle
error	Error {{errorMsg}}	Sales-job lifecycle
error	An account with this name already exists	Account details
error	A project with this name already exists	Project details
error	Check mandatory field(s)	Shared sales-job validation
error	Please save opened inquiry first	Sales-job lifecycle
error	All inquiries must be in draft stage to revert to potential	Sales-job lifecycle
error	One or more items has ZERO quantity	Sales-job items
error	One or more items has no unit	Sales-job items

Owning page	Message
Sales offer information	Please enter action for each milstone ; Please save opened cost sheet first

Owning page	Message
Cost calculation	There is a maximum discount that exceeds the negotiation margin.
Account details	Your request was completed successfully ; Error: Vendor not saved yet ; Error: Client not saved yet ; This Field Is Required
Contacts and contact details	Forbidden characters detected. Please remove them and try again. ; You already have a contact with this name
Files	Just '_'-'-'.' And '&' Characters Accepted
Bill of materials	Sales order is archived ; Booked quantity for this job is greater than the required BOM quantity ; You cannot edit or delete the product after the purchase package is created ; Cannot be deleted. Product is in purchasing ; You cannot edit the product after the PO is created
Embedded sales and purchasing panels	Invalid input. The value must be greater than 0 and cannot exceed 999,999.00 ; Invalid input. Please enter a non-negative value
Products and product details	This product is already included in BOM ; The first variant cannot be deleted ; An error occurred while connecting to your CRM system. ; Please select one product
Materials request	Package must have at least one item ; You cannot save without adding at least one product
Activities	Action not allowed ; One topic and at least one note is required
Purchasing details	Cannot be un-delivered – a due invoice already exists ; Please enter at least one email ; Inquiry must have at least one item ; Offer must have at least one item ; Order must have at least one item ; Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted ; Please select one or more items to create a RFQ.
Procurement details	Required Offer Type ; Required Bid Due Date
Outgoing payment details	Required Receiving Date ; Required Receiving After
Deliveries	Error loading accounts
Reference list details	Serial you have entered already exist and belong to same manufacturer ; There is error in serial you have entered ; Minimum: At least one serial
Letters of guarantee details	LG has one or more extensions or deductions and cannot be reverted to the requested stage ; Please choose a date after the current expiry date

Result: You know which page owns the next action instead of repeating the shared workspace inventory on this route-comparison page.