PAMS (V2 PIPELINE RUN)

Creating And Tracking Leads

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Distinguishing Inquiry from Formal Inquiries

Use **Inquiry** in Pams to capture sales Sales Jobs at their earliest stage. A Inquiry gives you a place to record a possible customer need before you have enough confirmed information to create an **Inquiry**. For example, you may know the prospect’s organization, have received an initial request, or have identified a possible project, but still need to confirm the required products, quantities, timing, or buying intent.

A Inquiry normally moves through four working stages:

- **Initial capture:** Record the first contact or Sales Job while details are still limited.
- **Qualification:** Gather information about the prospect, their requirement, the possible value of the Sales Job, and the expected decision process.
- **Follow-up:** Add notes and activities as you call, meet, visit, or exchange emails with the prospect.
- **Conversion:** Create a formal **Inquiry** when the Sales Job is sufficiently defined for your sales team to begin handling it as a sales requirement.

Create a Inquiry rather than an Inquiry when important information is still unclear. This may include the prospect’s contact details, the exact requirement, the product or service needed, the requested delivery timing, or whether the prospect is genuinely planning to buy. Recording these Sales Jobs as Inquiry keeps early conversations visible without filling the Inquiry list with incomplete records.

A formal Inquiry is more appropriate once you can clearly identify the prospect and describe the Sales Job well enough for sales work to begin. Until then, use the Inquiry record to collect and organize the information needed for that decision.

[SCREENSHOT: The Inquiry workspace showing a list of early sales Sales Jobs and their current status or stage.]

Finding Existing Inquiry Before Creating a New One

Before you add a new record, check the **Inquiry** workspace for an Sales Job that may already be tracked. This protects the follow-up history, keeps responsibility clear, and prevents two team members from working on the same prospect separately.

1. Open the **Inquiry** workspace and review the current Inquiry list. Start with records that are active or recently updated, especially if the prospect has contacted your organization more than once.
2. Use the search control to look for identifying information you already have. Search by the prospect’s name, organization name, contact name, or words from the potential requirement. If the prospect is associated with an existing **Account** or **Contact**, use those names when searching.
3. Narrow the list with the available filters. Focus on Inquiry assigned to a particular sales owner, Inquiry in an active status or stage, or Inquiry that have been updated recently. Use sorting controls to bring the most recently changed or most relevant records into view.
4. Open any likely match before creating a new Inquiry. Read the **Title**, **Description**, **Note**, assigned owner, current status or stage, and recorded activities. Check whether the existing record already describes the same prospect, project, or sales need.
5. If you find a matching Inquiry, continue the follow-up on that record. Add the new information to its notes or activities instead of creating another Inquiry for the same Sales Job.

Searching first is particularly important when a prospect contacts more than one salesperson, sends a follow-up message after an earlier discussion, or uses a different contact person for the same organization. The existing Inquiry should remain the single place where the team records the Sales Job’s progress.

Capturing a New Sales Inquiry

Create a new Inquiry when you have confirmed that the Sales Job is not already listed in **Inquiry**. At this stage, record what is known without delaying the entry because some details are still missing.

1. In the **Inquiry** workspace, select **New Inquiry** to open a blank Inquiry record.
2. Enter a clear **Title**. Make the title easy to recognize in the Inquiry list by including the prospect and the potential need. A title should help another salesperson understand the Sales Job without opening the record.

3. Add the available prospect information. Where the form provides **Account**, **Contact**, or similar details, select or enter the information you know. Include the organization or contact name even when you do not yet have every contact detail.
4. Record the potential sales need in **Description** or **Note**. Include early information such as the products or services discussed, project context, expected timing, or the questions the prospect has raised. Do not guess quantities, prices, delivery dates, or commercial terms that have not been confirmed.
5. Record the original source or context when it is available. For example, note whether the Inquiry came from an email, call, meeting, visit, referral, market discussion, or another initial interaction. This makes the Sales Job easier to understand during later follow-up.
6. Select **Save**. The Inquiry is then available in the Inquiry list for assignment, activity tracking, qualification, and conversion into an Inquiry when ready.

[SCREENSHOT: A new Inquiry form showing the Title, prospect details, Description or Note, and Save action.]

A saved Inquiry does not need to be complete. Its purpose is to preserve the Sales Job and give the sales team one shared record for gathering the missing details.

Organizing Inquiry for Follow-Up

A Inquiry becomes useful when responsibility and the next customer interaction are visible. Use the Inquiry record and the **Inquiry** list together to keep each Sales Job moving forward.

1. Open the Inquiry record and assign it to the appropriate sales owner. The assigned owner should be the person responsible for the next interaction with the prospect. Confirm ownership whenever a Inquiry is transferred between salespeople or sales teams.
2. Use the available status or stage controls to show the Inquiry's current position. Keep newly received Sales Jobs separate from Inquiry that are being qualified or actively followed up. Update the status or stage whenever the Inquiry moves from an initial conversation to a more defined sales discussion.
3. After each interaction, add the outcome to the Inquiry record. Record follow-up notes and activity details after calls, emails, meetings, or visits. State what the prospect said, what information was requested, and what still needs to be confirmed.

4. Add the next follow-up details before leaving the record. Use the available **Activities**, **Tasks**, or reminder options to make the next contact visible. A useful follow-up entry identifies the action needed, such as confirming a requirement, collecting contact details, or checking the expected decision date.
5. Return to the **Inquiry** list regularly and review records by status, stage, owner, or recent activity. Pay particular attention to active Inquiry with no recent update, as these may need a call, email, meeting, or decision on whether to continue pursuing them.

Use concise, factual notes so that another team member can understand the latest discussion quickly. Keep customer promises, open questions, and next actions on the same Inquiry record rather than in separate personal records.

Qualifying Inquiry and Creating Formal Inquiries

Convert a Inquiry into an **Inquiry** only after you understand the Sales Job well enough to begin formal sales handling. Qualification is the point where you decide whether the prospect’s requirement is real, sufficiently clear, and worth progressing.

1. Open the Inquiry record and review the information already captured. Confirm that you can identify the prospect or organization, understand the potential requirement, and explain the commercial Sales Job clearly enough for the sales team to work on it.
2. Review the Inquiry’s notes and recorded activities. Check for unresolved questions about products, quantities, delivery expectations, technical requirements, or buying intent. If important points remain unknown, keep the record as a Inquiry and schedule the required follow-up.
3. Update the Inquiry’s status, stage, or qualification details to reflect your decision. Use these controls to distinguish Inquiry that remain under qualification from Inquiry that are ready for formal handling.
4. When the Sales Job is ready, use the action that creates an **Inquiry** from the Inquiry. This begins the formal sales process and gives the Sales Job an Inquiry record for the work that follows.
5. Open the resulting Inquiry and verify that it contains the prospect information and Sales Job context collected on the Inquiry. Review the customer details, requirement description, notes, and any relevant follow-up information. Add any missing information before moving forward with pricing or an offer.

6. Keep unqualified, inactive, or incomplete Sales Jobs in the appropriate Inquiry status instead of converting them prematurely. This keeps the Inquiry list focused on Sales Jobs that are ready for active sales work.

A Inquiry should become an Inquiry because the Sales Job is understood, not simply because time has passed. Accurate qualification gives the sales team a cleaner pipeline and prevents incomplete requests from moving into pricing and offer work too early.

Resolving Common Inquiry Tracking Problems

Use the **Inquiry** list and the individual Inquiry record to correct common tracking issues before they affect customer follow-up or sales reporting.

1. **A duplicate Inquiry appears to exist.** Search the Inquiry list using the prospect name, organization name, contact name, and potential requirement. Open both records and compare the **Title**, **Description**, notes, assigned owner, and recorded activities. Keep follow-up information together on the record that best represents the Sales Job. Continue using that record for future interactions instead of maintaining parallel Inquiry.
2. **A Inquiry has no clear owner.** Open the Inquiry and assign it to the salesperson responsible for the next customer interaction. Do this before relying on owner-based list views, since an unassigned Inquiry may not appear in the sales owner's working list.
3. **An Sales Job has stalled.** Filter or sort the **Inquiry** list to identify active records with no recent activity or recent update. Open each Inquiry, review the last note or activity, and record the next required action. If the prospect is still interested, update the follow-up details. If the Sales Job is no longer active, reflect that using the appropriate status or stage.
4. **The Inquiry cannot yet become an Inquiry.** Return to the Inquiry record and identify what is missing. Complete the prospect details, clarify the requirement in **Description** or **Note**, and record the information gained through follow-up. Keep the Sales Job in the Inquiry process until the required context is available.
5. **The current status does not match the actual situation.** Update the Inquiry's status or stage immediately after a meaningful change, such as a confirmed requirement, a postponed discussion, or a decision not to proceed. Accurate status information makes the Inquiry list a reliable view of the team's current pipeline.

[SCREENSHOT: A filtered Inquiry list highlighting active records that need follow-up and showing the assigned sales owner.]

Overview

In Pams, **Inquiry** provide a shared working list for early sales Sales Jobs that are not yet ready to be managed as formal **Inquiries**. Each Inquiry record brings together the prospect information, Sales Job description, assigned sales owner, status or stage, notes, and follow-up activity for one potential sale.

Use the **Inquiry** list to answer practical daily questions:

- Which prospects have recently contacted the team?
- Which Inquiry are assigned to you or another salesperson?
- Which Sales Jobs are still being qualified?
- Which Inquiry have not had recent activity?
- Which Sales Jobs have enough information to move into an Inquiry?

The Inquiry workflow is designed for sales conversations that begin with partial information. You may only know an organization name, a contact name, a possible project, or a general product need. Entering that information into a Inquiry record ensures the Sales Job is visible to the team from the first interaction, while leaving room to gather the details needed for formal sales work.

As the Sales Job develops, use the Inquiry record to document customer calls, meetings, visits, emails, questions, and next follow-up actions. Update the assigned owner and status or stage so the Inquiry list continues to reflect the real position of the Sales Job.

When the prospect, requirement, and sales potential are sufficiently clear, create an **Inquiry** from the Inquiry. The Inquiry then becomes the record used for the next stages of the sales cycle, including pricing, offers, Orders, delivery, invoicing, and payment. Keeping early Sales Jobs in Inquiry and confirmed requirements in Inquiries gives sales teams a clearer, more manageable pipeline.

Prerequisites

Before creating or updating a Inquiry in Pams, make sure you have access to the **Inquiry** workspace and have checked whether the Sales Job is already being tracked. A Inquiry can be created with limited information, but the information you enter should be factual and useful to the sales owner who will follow up.

Prepare the details you know from the first interaction:

- The prospect’s organization name or contact name.
- A short description of the possible sales need.
- The context in which the Sales Job was identified, such as a call, email, meeting, visit, referral, or market discussion.
- Any known product, project, timing, or requirement details.
- The salesperson who should own the next interaction, if this is already decided.

You do not need confirmed pricing, quantities, delivery dates, or final commercial terms to create a Inquiry. Do not enter assumptions as confirmed facts. Use **Description** or **Note** to distinguish what the prospect has stated from what still needs to be clarified.

Before selecting **New Inquiry**, use the search control in the **Inquiry** list to look for the prospect, organization, or existing Sales Job. If a matching Inquiry exists, add the new information to that record instead of starting a duplicate.

For consistent team follow-up, agree on clear Inquiry titles and update the Inquiry’s assigned owner, status or stage, and activities after each meaningful customer interaction. When the Sales Job has enough confirmed information to be handled formally, continue with Creating Sales Inquiries.