Creating Sales Inquiries

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Preparing to Record a Customer Inquiry

A sales inquiry gives your team one place to capture what a customer needs before you prepare Pricing Offers or an Offer. If the request began as a Inquiry, make sure it has been qualified first. For guidance on that earlier step, see Creating and Tracking Inquiry.

Before opening a new Inquiry, confirm that the customer's company is already available as a **Client** record. Selecting an existing Client keeps the Inquiry connected to the correct account, Contacts, addresses, and previous sales history. If the request came from a specific person, identify the correct **Contact** for that Client as well.

Collect the details below from the customer's request, email, call, or meeting before you begin:

Detail to confirm	Why it matters in the Inquiry
Requested Product or service	Defines what you need to price, source, or discuss with a Principal or Sub-supplier.
Quantity and Unit	Makes the requested scope clear for every item.
Delivery Date or delivery expectation	Helps your team assess whether the requested timing is achievable.
Client Inquiry Number	Lets you match the Pams record to the customer's own request or correspondence.
Currency and commercial expectations	Keeps the request aligned with the customer's budget, pricing expectations, and payment requirements.

Also confirm that the Client has the commercial information needed for the proposed sale, including the applicable **Currency**, Pricing details, **Payment Period**, **Shipping Address**, and **Invoicing Address**. Review the selected address carefully when the Client has more than one location.

An Inquiry normally begins in **Draft**. Once the request is complete enough for active sales work, it moves into follow-up and can lead to a Pricing Offers or Offer. The request is then closed when it results in a Orders, is marked **Lost**, or is cancelled. Keeping this lifecycle accurate gives sales teams a dependable view of active customer demand.

[SCREENSHOT: A Draft Inquiry showing the Client, Contact, Currency, Client Inquiry Number, and delivery details.]

Creating a New Sales Inquiry

Create a new Inquiry as soon as you have enough information to identify the Client and understand the request. Saving an early Draft is preferable to keeping customer requirements only in an email or personal notes, because the Inquiry becomes the shared sales record for follow-up, Pricing, and Offers.

1. Open **Sales > Inquiries** in Pams and select **New Inquiry**. Pams opens a new form in **Draft** status.
2. In the **Client** field, select the customer company that submitted the request. Confirm that you have selected the correct Client before continuing, especially if similarly named companies appear in the list.
3. Select the appropriate **Contact** for the person who sent the request or will receive the Offers. Use the customer's named buyer, project contact, or commercial contact rather than leaving the request connected only to the company when a Contact is known.
4. Complete the main Inquiry details. Enter the **Inquiry Date**, choose the **Salesperson Responsible**, and select the required **Currency**. Review the available Pricing information and make sure it matches the commercial basis expected by the Client.
5. Enter the customer's request number in **Client Inquiry Number**. Use the same reference shown in the customer's RFQ, email subject, tender document, or purchase request. This makes it easier to find the Inquiry later and to match it with customer communication.
6. Record the **Expected Order Date** or the date by which the customer expects a response. If a bid deadline applies, capture that timing clearly so the sales team can prioritize the request.
7. Click **Save** to keep the Inquiry as a Draft, or click **Save and Close** if you will return to it later.

After saving, review the form header before adding items. The Client, Contact, Currency, Salesperson Responsible, and Client Inquiry Number should all match the customer request. Correcting these details at the Draft stage prevents inaccurate information from carrying into Pricing Offers and Offers.

[SCREENSHOT: The New Inquiry form with the main header fields completed before item lines are added.]

Capturing Products, Quantities, and Delivery Requirements

Use the item or requirement lines in the Inquiry to describe exactly what the Client is asking for. Each requested Product or service should have its own line. Separate lines make it easier to review quantities, pricing expectations, delivery requirements, and later Offers details without mixing unrelated items together.

1. Add a new requirement line and select the requested **Product**. Choose the Product record that most closely represents the customer's need. If the request is for a service, use the appropriate service item where one is available.
2. Review and complete the **Description**. Keep the standard Product description where it is correct, then add any customer-specific details needed to identify the requested version, configuration, material, model, or scope.
3. Enter the requested **Quantity** and select the correct **Unit**. Make sure the Unit matches the customer request. A quantity may be correct but commercially misleading if it is recorded with the wrong unit.
4. Record the requested **Delivery Date** or delivery expectation for that line. Use separate delivery information when different Products are needed at different times, such as an urgent first delivery followed by later quantities.
5. Enter available commercial expectations, including the customer's target price, budget information, or stated unit-price expectation. Use **Unit Price** or **Offer Price** where these fields are part of the Inquiry. These values help the sales team assess whether the request is commercially viable before preparing a Offers.
6. Use the line description, **Technical Notes**, or **Commercial Notes** to record requirements that do not fit a standard Product line. This may include specifications, packaging, quality standards, requested substitutions, special inspection needs, or handling instructions.
7. Review all lines, then confirm the totals and **Currency** before clicking **Save**.

Do not combine multiple items into one broad description when quantities, delivery dates, or specifications differ. Clear requirement lines provide a reliable starting point for Pricing, Principal discussions, supplier coordination, and customer Offers.

[SCREENSHOT: Inquiry requirement lines showing Product, Description, Quantity, Unit, Delivery Date, and pricing information.]

Recording Commercial Context and Customer Communications

The Inquiry should capture not only what the Client wants to buy, but also the commercial conditions and communication history that affect the sale. Record these details while the request is current. This prevents important context from being lost when another salesperson, pricing colleague, or manager reviews the Inquiry.

Start by recording the source of the request. Select the available inquiry source for requests received through a website, phone call, email, trade event, or a sales representative referral. Source information helps your team understand which channels produce active Sales Jobs and supports later pipeline reporting.

Set the request's **Priority** and confirm the **Expected Order Date**. Use Priority to make urgent customer requirements visible among other active Inquiries. The Expected Order Date should reflect the date the Client expects to decide or the date by which a response is needed.

Review the commercial and delivery details with the Client:

- Confirm the **Shipping Address** for the proposed delivery location.
- Confirm the **Invoicing Address** when it differs from the delivery location.
- Record the agreed **Payment Period** or other payment requirement.
- Confirm the relevant **Delivery Term** and any delivery-time expectation.
- Check that the selected **Currency** matches the customer's request.

Use **Commercial Notes**, **Technical Notes**, and **Note** fields to record details that influence how you respond. For example, record known competitor information, price limitations, required approvals, requested delivery commitments, agreed call outcomes, and promises made to the Client. Keep internal working details separate from customer-facing wording.

Add supporting documents through **Attachment**. Attach the customer's RFQ, specification sheet, email, drawings, tender documents, or other files that explain the request. Name files clearly so colleagues can identify the latest customer document without opening every attachment.

[SCREENSHOT: An Inquiry with Commercial Notes, Technical Notes, Shipping Address, Payment Period, and attached RFQ documents.]

Following Up on an Inquiry and Creating a Offers

Once the Draft has complete customer and requirement details, move it into active follow-up. Active Inquiries need a clear owner, a planned customer contact, and current information so that the request does not remain unattended while the customer waits for a response.

1. Open the saved Inquiry and change it from **Draft** to the active Inquiry status used by your sales team. Confirm that **Salesperson Responsible** identifies the person accountable for the next action.
2. Add an **Activity** for the next customer contact. Use the available call, meeting, visit, task, or reminder options, and set a **Due Date**. Describe the purpose clearly, such as confirming a specification, validating quantities, discussing delivery time, or obtaining a target price.
3. Update the Inquiry whenever the Client clarifies the request. Revise the Product lines, **Quantity**, **Unit**, **Delivery Date**, **Expected Order Date**, **Commercial Notes**, and **Technical Notes** as needed. Save each material change so the Inquiry remains the current sales record.
4. When the requirements are ready for pricing, select **Create Offers** or the available action that creates a **Pricing Offers** from the Inquiry. Use the conversion action rather than re-entering the request manually.
5. Open the new Pricing Offers and verify that it carries the correct **Client**, Contact, Product lines, quantities, Currency, delivery information, and commercial details. Correct any missing or inaccurate information before using the Offers to prepare an Offer.

Continue recording customer contact through Activities until the request progresses to a Offers, Offer, Orders, or a closed outcome. If the customer changes the requested scope after a Offers is created, update the Inquiry first and then review the related Pricing Offers so both records remain aligned.

Closing Inquiries and Correcting Common Entry Problems

Close an Inquiry when it has reached a clear business outcome. An Inquiry that results in a Orders should be treated as successful through the related Offers and order workflow. An Inquiry that the Client no longer intends to pursue should be marked **Lost** or cancelled rather than left among active sales work.

When recording a lost result, select a meaningful **Lost Reason** and enter a **Lost Comment** where needed. Use the reason that best reflects the customer's decision, such as price, lead time, product availability, competitor selection, or no customer response. Accurate loss details help managers review sales performance and identify recurring obstacles in the pipeline. For detailed handling of unsuccessful records, see Handling Lost Sales Records.

Use the following checks when an Inquiry cannot move forward as expected:

- **A Offers cannot be created:** Confirm that a **Client** is selected and that every requirement line includes a valid **Product**, **Quantity**, and **Unit**. Review the selected **Currency** before creating the Pricing Offers.
- **Pricing or currency is wrong:** Update the pricing information and **Currency** on the Inquiry before generating a new Offers or revising the existing one. Then verify the values on the Pricing Offers.
- **The wrong Client or Contact was selected:** Correct the **Client** and **Contact** while the Inquiry remains editable. Review the **Shipping Address**, **Invoicing Address**, Currency, and any related Offers afterward, because these details may have been copied from the original selection.
- **The Client has cancelled the request:** Record the cancellation details, including **Inquiry Cancelled By Client** where applicable, rather than using Lost when the request was formally withdrawn.

Avoid deleting an Inquiry merely because details need correction. Keeping the record and its communication history gives your team a clearer account of what the Client requested, what was offered, and why the Sales Job did or did not proceed.

Overview

In Pams, an Inquiry is the working sales record for a qualified customer request. It sits between Inquiry qualification and the commercial response: you capture the Client's requested Products, quantities, delivery needs, pricing expectations, and communication details, then use that information to create a Pricing Offers or Offer.

A well-maintained Inquiry connects the main parts of the customer sales cycle:

- The **Client** and **Contact** identify who requested the sale.
- Requirement lines document the requested **Product**, **Description**, **Quantity**, **Unit**, delivery requirements, and commercial expectations.
- **Currency**, **Payment Period**, **Shipping Address**, **Invoicing Address**, and **Delivery Term** establish the commercial context for the response.
- **Activities**, reminders, and **Salesperson Responsible** keep customer follow-up visible and assigned.
- Attachments, **Commercial Notes**, and **Technical Notes** preserve the RFQ, specifications, commitments, and customer constraints.
- A Pricing Offers or Offer can be created from the Inquiry, reducing repeated data entry and helping the sales records remain consistent.

Use **Draft** while you are still assembling the request. Move the Inquiry into active follow-up when the sales team is ready to respond. Keep it current whenever the Client changes the scope, quantity, deadline, or delivery expectation. When the commercial process ends, record the final outcome through the related Orders, **Lost** status, or cancellation details.

The quality of the Inquiry affects every later record. Clear Product lines help Pricing teams prepare an accurate commercial response. Complete delivery and payment details reduce late corrections to Offers. Meaningful Lost Reasons make inquiry reporting more useful. Accurate ownership and Activities make it easier for a sales manager to see which requests need attention.

[SCREENSHOT: The Inquiry lifecycle from Draft through active follow-up, Pricing Offers or Offer, Orders, Lost, or cancellation.]

Prerequisites

Before creating an Inquiry, gather the information that Pams needs to make the request usable for sales follow-up and Pricing. You do not need to have every final commercial answer before saving a Draft, but the basic customer, requirement, and timing details should be available.

Prepare the following:

- An existing **Client** record for the customer making the request. Select the correct company, particularly when your sales database includes related companies or similarly named accounts.

- The relevant customer **Contact**, including the person who sent the RFQ or will discuss the Offers.
- The customer's reference number, RFQ number, or request identifier for **Client Inquiry Number**.
- A clear list of requested Products or services, including **Quantity** and **Unit** for each item.
- Delivery expectations, such as a requested **Delivery Date**, required receiving date, or customer deadline.
- The commercial basis for the request, including the required **Currency**, target price or budget where known, **Payment Period**, and applicable **Delivery Term**.
- The correct **Shipping Address** and **Invoicing Address**, especially when delivery and billing locations differ.
- Any RFQ, specification sheet, email, drawings, or other customer documents to add through **Attachment**.
- Customer constraints or commitments to capture in **Commercial Notes**, **Technical Notes**, or **Note** fields.

If you need to create or correct the customer company before recording the request, use the Client and Contact records first so the Inquiry can be linked to the correct people and addresses. If the Product is not available in the list, resolve the Product record before finalizing the requirement lines.

After you have created several Inquiries, continue with Managing Inquiry Lists to review, filter, and monitor active requests across the sales pipeline.