Managing Inquiry Lists

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Open Inquiries in Sales List and Table Views

Use the inquiry collection in **Sales Jobs** to review the sales inquiries your team is working on. This is the working area for finding inquiries by client, principal, responsible salesperson, current stage, bid due date, and other sales information without opening each record first.

1. In Pams, open **Sales Jobs** from the sales area.
2. Locate the inquiries you want to review. Depending on your current selection, the results may include active inquiries, completed work, or other Sales Jobs records.
3. Choose the available list view when you want to scan inquiries one row at a time. Each row represents one inquiry and shows the fields included in your current view.
4. Choose the available table view when you need to compare several inquiries side by side. The table layout is especially useful when reviewing values across columns such as **Client**, **Principal**, **Inquiry Stage**, **Salesperson Responsible**, **Bid Due Date**, or **Expected Order Date**.
5. Move between the list and table view as your review task changes. For example, use the table view to identify inquiries approaching their **Bid Due Date**, then use the list view to open those inquiries in sequence.

[SCREENSHOT: Sales Jobs inquiry results shown in a table view with columns for Client, Principal, Inquiry Stage, Salesperson Responsible, and Bid Due Date]

Changing between list view and table view changes only how Pams displays the inquiry results. It does not change the inquiry itself, its **Inquiry Stage**, its **Client Inquiry Number**, or any other saved information. This lets you switch layouts freely while preparing for follow-up, reviewing a sales pipeline, or comparing inquiries assigned to different salespeople.

If you need to create a new inquiry or update the information captured when it was first entered, use Creating Sales Inquiries before returning to **Sales Jobs** for list-based review.

Filter the Inquiry Records You Need

Filters help you reduce a large inquiry list to the records that need attention. Apply filters before opening records individually, especially when reviewing upcoming bids, inquiries for one principal, or work assigned to a particular salesperson.

1. Open the filter controls in the **Sales Jobs** list or table view.
2. Select the field you want to use for the first filter. Useful fields can include **Client**, **Principal**, **Inquiry Stage**, **Salesperson Responsible**, **Bid Due Date**, **Expected Order Date**, **Inquiry Type**, and **Market Segment**.
3. Choose the value or date range that matches your review need. For example, filter by a specific **Principal** when preparing a principal-focused review, or by **Salesperson Responsible** when checking an individual workload.
4. Review the results after applying the filter. In table view, compare the visible columns across the narrowed result set. In list view, scan the resulting inquiry rows and open only the records that need follow-up.
5. Add another filter condition when one condition still shows too many inquiries. Combining **Principal** with **Inquiry Stage**, or **Salesperson Responsible** with **Bid Due Date**, can produce a more focused working list.
6. Remove or change a filter condition when expected inquiries do not appear. Return to a broader list before applying a different combination of fields.

For example, a sales manager may filter **Inquiry Stage** to review inquiries at the same point in the sales cycle, then add **Principal** to focus only on inquiries connected to one represented manufacturer. A salesperson may instead filter **Salesperson Responsible** and review **Bid Due Date** to identify the next inquiries requiring action.

[SCREENSHOT: Filter controls on the Sales Jobs inquiry results with fields for Principal, Inquiry Stage, and Bid Due Date]

Keep the active filters in mind while reviewing results. A filtered list is useful only when its conditions still match the question you are trying to answer.

Group Inquiries for Sales Review

Grouping organizes the inquiries currently displayed into related sections. Unlike filtering, which removes records from the view, grouping keeps the displayed inquiries together and arranges them under a shared value. Use grouping when you want to review patterns across the sales pipeline without opening every inquiry.

1. Open the grouping controls while viewing inquiries in **Sales Jobs**.

2. Select the field that should organize the results. Choose a field that suits the review you are conducting, such as **Principal**, **Client**, **Inquiry Stage**, **Salesperson Responsible**, **Inquiry Type**, or **Market Segment**.
3. Review the groups that appear in the list or table. Each group represents inquiries sharing the selected field value.
4. Expand a group to see its individual inquiry rows. This is useful when you identify a group that needs attention, such as inquiries under one **Principal** or inquiries at the same **Inquiry Stage**.
5. Collapse groups that are not relevant to your current review. This keeps the screen focused on the inquiries you need to discuss, assign, or follow up.
6. Change the grouping field when a different perspective would be more useful. For example, group by **Principal** for a principal relationship review, then group by **Salesperson Responsible** when reviewing team workloads.

[SCREENSHOT: Inquiry table grouped by Inquiry Stage, with groups expanded and collapsed]

Use grouping together with filters for more precise sales reviews. You might filter inquiries to one **Market Segment** and then group the remaining results by **Principal**. Or, filter by an approaching **Bid Due Date** and group by **Salesperson Responsible** to see who needs to act on each inquiry.

Grouping changes the organization of the displayed results only. It does not change the **Inquiry Stage**, **Client**, **Principal**, or other saved details in the inquiry records. If the grouped layout becomes difficult to read, select a different grouping field or remove grouping and return to the standard list or table view.

Review Inquiry Details from the Results

After filtering or grouping inquiries, use the results to decide which records need a closer review. The list and table views help you identify inquiries by their visible fields; opening an inquiry lets you review the full information recorded for that sales Sales Job.

1. Scan the filtered or grouped results for rows that need follow-up. Look for values such as an approaching **Bid Due Date**, a particular **Inquiry Stage**, an assigned **Salesperson Responsible**, or a specific **Principal** or **Client**.
2. Select the inquiry row or table entry you want to examine.
3. Review the inquiry details shown on the inquiry record. Confirm the key sales information that is relevant to your review, including **Client**, **Principal**, **Inquiry**

Type, **Client Inquiry Number**, **Expected Order Date**, **Bid Due Date**, **Description**, and **Commercial Notes**, where available.

4. Check the inquiry's current **Inquiry Stage** before deciding whether the inquiry needs action, continued review, pricing work, or another sales activity.
5. Use **Back to Inquiry** when it is available to return to your inquiry results after reviewing the record.
6. Continue opening records from the same filtered or grouped results until you have reviewed the inquiries that require attention.

[SCREENSHOT: An inquiry record opened from Sales Jobs, showing Client, Principal, Inquiry Stage, Bid Due Date, and Commercial Notes]

Use the list view when you want to review inquiry records in sequence. This is useful when working through inquiries assigned to you or checking every inquiry within one **Inquiry Stage**. Use the table view when your decision depends on comparing several records at once, such as comparing **Expected Order Date**, **Project Value**, **Principal**, or **Salesperson Responsible** across a focused set of inquiries.

Return to the existing inquiry results rather than opening a separate **Sales Jobs** screen whenever possible. This keeps the filters and grouping you already applied available for the next record, so you do not need to rebuild the same review list.

Export the Current Inquiry Results

Export the inquiry results only after you have applied the filters and grouping needed for your review. This helps ensure the exported information represents the same inquiry set you checked in **Sales Jobs**, rather than a broader list containing unrelated records.

1. In **Sales Jobs**, apply the filters that define the inquiries you need. For example, select a **Principal**, **Inquiry Stage**, **Salesperson Responsible**, date range, or **Market Segment**.
2. Apply grouping if it helps you review the result set before exporting. Grouping can help you confirm that the visible inquiries are organized as expected by **Client**, **Principal**, or **Inquiry Stage**.
3. Review the inquiry rows in the list or table view. Confirm that the visible records are the inquiries you intend to export.
4. Start the export action from the inquiry list or table view.
5. Select the fields needed for sales analysis or follow-up. Choose fields that match the purpose of the export rather than including every available field.

6. Complete the export, then review the exported results against the filtered inquiry list in Pams.

For a principal review, include fields such as **Principal**, **Client**, **Inquiry Stage**, **Bid Due Date**, and **Expected Order Date**. For a workload review, focus on **Salesperson Responsible**, **Inquiry Stage**, **Client**, **Priority**, and **Bid Due Date**. For Sales Job analysis, consider **Project Value**, **Currency**, **Market Segment**, **Inquiry Type**, and **Expected Order Date**.

[SCREENSHOT: Inquiry export field selection showing sales fields such as Client, Principal, Inquiry Stage, Salesperson Responsible, and Bid Due Date]

Before relying on the exported results, compare several records with the current inquiry list or table in **Sales Jobs**. If a record is missing or an unexpected record appears, return to the active filters first. The export should reflect the inquiry results you deliberately narrowed for that review.

Resolve Common List, Grouping, and Export Issues

Most inquiry list issues can be resolved by checking the current view, filters, and grouping before changing any inquiry record. Start in **Sales Jobs** and review the fields currently visible in your list or table.

1. If expected inquiries are missing, open the active filter controls. Check whether a selected **Principal**, **Client**, **Inquiry Stage**, **Salesperson Responsible**, **Bid Due Date**, or **Expected Order Date** is excluding the inquiry you expect to see.
2. Remove one filter condition at a time and review the results after each change. This helps identify which condition is narrowing the inquiry list too far.
3. If grouped results are difficult to review, collapse groups that are unrelated to the current task. Then expand only the group for the relevant **Principal**, **Client**, **Inquiry Stage**, or **Salesperson Responsible**.
4. Change the grouping field when the current organization does not support the review. For example, change from **Client** to **Inquiry Stage** when you need to compare progress through the sales pipeline.
5. If an export contains the wrong inquiries, return to the list or table view and confirm the visible inquiry results before exporting again. Check both the active filters and the fields included in the export.
6. If list view and table view appear to show different information, confirm which fields are displayed in each view. A field may be visible in one layout but not in the other, even though both layouts are showing the same inquiry records.

[SCREENSHOT: Sales Jobs inquiry results with an active filter and grouping shown, highlighting where to check the current review context]

Do not assume a missing inquiry has been deleted or changed simply because it is not visible. First check the active **Inquiry Stage**, date, **Principal**, and salesperson filters. Likewise, do not change an inquiry record merely to make it appear in a report or export; adjust the inquiry list controls so the results reflect the review you need.

Overview

Sales Jobs provides the working list for reviewing sales inquiries after they have been created. The inquiry list is most useful when your team needs to find a specific inquiry, compare active Sales Jobs, identify approaching bid deadlines, or prepare a focused review by client, principal, or salesperson.

The list and table views support different types of review:

Review need	Useful view	Fields to focus on
Work through inquiries one at a time	List view	**Client**, **Inquiry Stage**, **Bid Due Date**
Compare several Sales Jobs	Table view	**Principal**, **Project Value**, **Expected Order Date**
Review a salesperson's workload	List or table view	**Salesperson Responsible**, **Priority**, **Inquiry Stage**
Prepare a principal-focused review	Table view	**Principal**, **Client**, **Bid Due Date**, **Offer Status**

Filters control which inquiry records are displayed. Grouping organizes the displayed results into sections, such as all inquiries for one **Principal** or all inquiries at the same **Inquiry Stage**. These tools can be used together: filter first to limit the inquiry set, then group the remaining records to make the review easier to conduct.

Opening an inquiry from the results gives you access to its full recorded details, including information such as **Client Inquiry Number**, **Description**, **Commercial Notes**, **Expected Order Date**, and **Bid Due Date**. Returning through **Back to Inquiry**, when available, helps you continue reviewing the same filtered or grouped list.

Exporting is intended for the inquiry set currently being reviewed. Check the active filters, visible records, and selected fields before exporting so the output supports a clear sales follow-up, pipeline discussion, or principal-related review.

Prerequisites

Before working with inquiry lists in **Sales Jobs**, make sure you have the information needed to recognize the inquiries you are reviewing. You do not need to change an inquiry to filter, group, review, or export it, but knowing the relevant sales details will help you choose useful list controls.

- Have one or more inquiries available in **Sales Jobs**. If you need to enter a new inquiry first, follow Creating Sales Inquiries.
- Know the purpose of your review. For example, you may need to review inquiries for a **Principal**, check a **Salesperson Responsible**, identify inquiries by **Inquiry Stage**, or focus on an approaching **Bid Due Date**.
- Identify the fields that matter for the review. Common choices include **Client**, **Principal**, **Inquiry Type**, **Market Segment**, **Expected Order Date**, **Project Value**, and **Priority**.
- Decide whether you need a sequential review or a comparison. Use list view when opening inquiries individually; use table view when comparing fields across several inquiries.
- If you plan to export, decide which fields should appear in the output before opening the export action. Select only fields that support the intended sales analysis or follow-up.
- Keep any active filter or grouping context in mind before opening an inquiry record. Use **Back to Inquiry** where available to return to the same focused results.

When your review shows that an inquiry is no longer viable, continue with Handling Lost Sales Records to record it as **Lost** with the appropriate **Lost Reason** and **Lost Comment** rather than leaving it in the ordinary inquiry review list.