PAMS (V2 PIPELINE RUN)

Managing Offer Follow-Up

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Find Offers That Need Follow-Up

Use the **Offers** workspace to focus your time on customer proposals that still need a response. Start each follow-up review by looking for offers that are current, valid, and still awaiting a customer decision. This helps you avoid spending time on offers that have already been accepted, declined, or replaced by a revision.

1. Open **Offers** and display the list of customer offers.
2. Use the available **Offer Status** or **Status** filter to narrow the list. Focus on offers that remain open or are awaiting a response. Remove accepted and declined offers when you are planning follow-up work.
3. If the list includes date or activity columns, sort by the oldest follow-up date, due date, or most recent activity. Give priority to offers approaching their **Expiry Date** or offers with no recent customer activity.
4. Review the **Offer Date**, **Offer Number**, customer, and **Total Price** or offer amount before opening a record. These details help you identify the proposal and understand its commercial importance.
5. Open the offer record and check the customer, **Offer Status**, **Validity Period**, **Offer will be valid till**, and assigned **Owner** or **Salesperson Responsible**. Also review the existing **Activities**, comments, and notes before you contact the customer.

[SCREENSHOT: Offers list showing Status filters, customer offers, validity dates, and activity-related columns]

When you review an offer, distinguish between an offer that needs a simple reminder and one that needs a commercial decision. For example, an offer close to expiry may need a call to confirm whether the customer needs an extension. An offer with pricing questions may require a revised offer rather than another reminder.

For the steps used to create and prepare the customer-facing proposal itself, see Preparing Customer Offers. Use this follow-up process after the offer has been prepared and shared with the customer.

Update an Offer as Customer Responses Arrive

Update the **Offer Status** as soon as the customer gives a meaningful response. A current status keeps the offer list reliable for the sales team and prevents unresolved-offer views from becoming crowded with offers that have already reached a decision.

1. In **Offers**, find the relevant record by customer, **Offer Number**, or **Offer Date**, then open it.
2. Review the current **Offer Status** and the latest entry in **Activities** or the offer notes. Confirm that you are updating the correct offer, especially when the customer has received more than one offer or a revision.
3. When the customer accepts the offer, select the available status or action that records the offer as accepted. Save the change using **Save** or **Save and Close**.
4. When the customer declines, use the available action that records the offer as declined. Complete the required decline details before saving; see Close Declined Offers with a Decline Reason.
5. If the customer requests changes, needs internal approval, or asks for more time, keep the offer in an unresolved status where available. Record the request in the offer notes or in a new activity, including the agreed decision date.
6. Reopen or refresh the offer list and confirm that the offer appears under the correct status. Accepted or declined offers should no longer be included in the open follow-up work you are using.

[SCREENSHOT: Offer record showing Offer Status, Validity Period, Owner, and Save button]

Do not use an accepted or declined status to represent a temporary delay. If the customer says they will decide after a meeting, budget review, or principal approval, record that commitment and schedule the next activity instead. This preserves an accurate pipeline while showing the team what is still pending.

When a customer requests a commercial revision, make sure the new request is connected to the existing offer history. The earlier offer and its activities provide useful context for the revised pricing and final decision.

Schedule and Complete Customer Follow-Up Activities

A follow-up activity gives a named person a clear customer action and a due date. Create activities directly from the relevant offer so calls, emails, meetings, visits, and tasks remain connected to the customer proposal they concern.

1. Open the offer that requires follow-up and go to its **Activities** area.
2. Create a new activity and select the appropriate type, such as **Call**, **Meeting**, **Visit**, email-related activity, or **Task**. Choose the type that best reflects what you need to do next.
3. Set the **Due Date** to the date when the contact should take place. Use the agreed customer decision date when one is available rather than choosing a date without a clear purpose.
4. Select the responsible person in **Assign To**, **Assignee**, or **Salesperson Responsible**, depending on the fields shown on the activity. Assign the activity to the person who will actually contact the customer.
5. Enter a clear **Purpose**, **Subject**, or note. State what the activity should achieve, such as confirming receipt of the offer, answering pricing questions, checking the expected order date, or requesting a decision before the offer expires.
6. Save the activity. The activity should remain visible with the offer until it is completed or changed.
7. After the contact takes place, open the activity and mark it **Done (completed)**. Record the result before closing it.
8. If the customer agrees to another date, create the next activity immediately. Do not leave the offer without a due follow-up when a decision is still pending.

[SCREENSHOT: New activity linked to an offer, showing activity type, Assignee, Due Date, Purpose, and notes]

Use **Tasks** for work that needs completion by a team member, such as obtaining revised principal pricing. Use a **Call**, **Meeting**, or **Visit** when the primary purpose is customer contact. This makes the activity list easier to review and helps the offer owner see what has happened and what remains due.

Record Follow-Up Notes and Customer Commitments

Every customer contact should leave a useful record on the offer. Notes are most valuable when they explain what the customer said, what your team promised, and exactly what must happen next. Keep this information in the offer’s **Activities**, comments, or notes area so it remains available to all users working on the customer relationship.

1. Open the offer after each call, email, meeting, or visit.
2. Add or update the related activity with a brief factual outcome. State whether you reached the customer, whether they confirmed receipt of the offer, and whether a

decision is expected.

3. Record specific customer commitments, including a decision date, internal approval step, requested revision, required technical clarification, or request for an offer extension.
4. If the customer identifies a competing offer, record the available details in the notes. Include the competitor only when the customer has named one, and record any stated difference in price, delivery time, commercial terms, or technical requirements.
5. Capture commitments made by your own team as well. For example, note when you agreed to send a revised offer, confirm a delivery date, involve a Principal, or provide additional documents.
6. Save the note or complete the activity. Create the next activity with a **Due Date** whenever further action is required.
7. Before transferring ownership of an offer, review the activity history with the new **Owner** or **Salesperson Responsible**. Ensure outstanding customer commitments have a clear assignee and due date.

[SCREENSHOT: Offer activity history showing completed calls, meeting notes, open tasks, and customer commitments]

Write notes so another team member can act without needing a separate explanation. “Customer will decide next week” is less useful than “Customer expects internal approval by the stated decision date; follow up with the purchasing contact after approval.” Keep notes focused on the offer, the customer response, and the next commercial action.

Avoid storing important follow-up details only in personal email messages or private notes. The offer record is the shared history used when colleagues cover an absence, a sales owner changes, or management reviews the progress of a major Sales Job.

Close Declined Offers with a Decline Reason

Close an offer as declined when the customer has clearly decided not to proceed. Recording the decline promptly prevents unnecessary reminders and gives Pams meaningful information for offer reviews, sales reporting, and future pricing decisions.

1. Open the relevant customer offer from **Offers**.
2. Confirm that the customer has declined this specific offer rather than asking for a revision, an extension, or more time. Review the latest **Activities** and notes before making the status change.

3. Select the available action or **Offer Status** option that marks the offer as **Declined**.
4. Choose the most accurate **Decline Reason** from the available list. Select the reason that best reflects the customer’s stated decision, rather than choosing a general reason when a specific one applies.
5. Add a concise note in the offer notes or related activity when the reason needs context. Record useful facts that explain the outcome, such as a named competitor, a budget limitation, a delivery-time issue, a technical mismatch, or a cancelled customer requirement.
6. Save the decline using **Save** or **Save and Close**.
7. Return to the offer list and verify that the offer is no longer included in the open follow-up view. Keep the record available for later reporting and review.

[SCREENSHOT: Declined offer showing Decline Reason, notes area, Offer Status, and Save button]

Use the customer’s wording where possible. If the customer says the budget was not approved, record that instead of assuming price was the reason. If a competitor was selected, record the **Winner Name** or **Winner Price** only when those details are known and appropriate to record.

A declined offer remains valuable sales information. Its customer history, commercial notes, products, and decline reason can help your team understand recurring losses and prepare stronger offers in the future. For broader work on lost sales records, see Handling Lost Sales Records.

Resolve Missing Activities and Incorrect Offer Statuses

When an expected offer or activity is missing, first check the filters and the offer record itself. Most visibility issues result from a status, assignee, owner, or date selection that excludes the item from the current view.

1. If an offer does not appear in your follow-up list, clear or widen the list filters. Check **Offer Status**, **Owner**, **Salesperson Responsible**, and any date-related filter that may limit the results.
2. Search by the **Offer Number**, customer, or **Offer Date** to confirm that the offer exists and open the record directly.
3. On the offer record, verify whether the offer is still open. An offer marked **Accepted**, **Declined**, **Archived**, or another completed status may not appear in an unresolved-offer view.

4. If a scheduled activity is not visible to the assigned person, open the activity from the offer and review **Assign To**, **Assignee**, and **Due Date**. Correct the responsible person or date, then save the activity.
5. If an offer was marked **Declined** by mistake, use the status action available on the offer record to restore the correct working status. Add an activity note explaining that the status was corrected and state the confirmed customer position.
6. If no available **Decline Reason** accurately describes the loss, do not select a misleading reason. Follow your organization's approved process for handling missing reasons and add factual supporting details in the offer notes.
7. Review the offer's **Activities** after any correction. Make sure there is an open, assigned follow-up activity if the customer response is still pending.

[SCREENSHOT: Offer list with cleared filters alongside an offer record showing Owner, Offer Status, Activities, and Due Date]

Use the status shown on the offer record as the source of truth when a list view and a customer conversation appear to conflict. If the customer's position has changed, update the record, document the conversation, and set the next follow-up action. This keeps Pams aligned with the real sales situation rather than with an outdated list.

Overview

Offer follow-up in Pams connects customer responses, scheduled activities, commercial notes, and offer outcomes to the same customer proposal. It helps sales teams maintain a reliable view of what is still active, what needs customer contact, and why Sales Jobs were not won.

The follow-up workflow begins after you have prepared and shared a customer proposal. Use the offer record to review the offer's customer, **Offer Status**, **Offer Date**, validity details, commercial notes, and assigned responsibility. Then use **Activities** to plan and record calls, meetings, visits, email-related follow-up, and tasks connected to that offer.

The most important records to keep current are:

Item	What it tells the team	When to update it
Offer Status	Whether the offer is still open, accepted, declined, or otherwise resolved	When the customer gives a meaningful response
Activities	Who must take the next action and when it is due	Before and after each follow-up action

Item	What it tells the team	When to update it
Due Date	When the assigned person should contact the customer or complete work	Whenever a next action is agreed
Decline Reason	Why the customer did not proceed	When an offer is closed as declined
Offer notes	Customer feedback, commitments, requested changes, and commercial context	After each relevant contact

[SCREENSHOT: Completed offer record with Offer Status, activity history, customer notes, and decline information]

Consistent follow-up supports more than individual customer conversations. Managers can review open offers with confidence, colleagues can take over an offer without losing context, and sales teams can identify common reasons for declined offers. The record also supports later stages of the sales cycle when an accepted offer moves toward a Orders. For the next stage after customer acceptance, see Confirming Orders.

Prerequisites

Before managing offer follow-up, make sure you can access **Offers** and open the relevant customer offer records. You should already have a prepared offer that includes the customer and commercial details needed for a useful follow-up conversation.

- Complete the offer preparation process before beginning follow-up. If you still need to prepare the proposal, use Preparing Customer Offers.
- Confirm that the offer has a customer and that the offer can be identified by its **Offer Number**, **Offer Date**, or customer name.
- Review the offer's **Offer Status**, **Validity Period**, **Offer will be valid till**, and **Expiry Date** where shown. These dates determine how urgently the customer needs to respond.
- Check who is listed as the **Owner**, **Salesperson Responsible**, **Responsible**, or activity **Assignee** before contacting the customer. Follow-up should be assigned to the person responsible for the customer relationship or the agreed commercial action.
- Have the previous customer communication available so you can record an accurate outcome in **Activities** or offer notes. Record only confirmed customer statements and agreed next steps.

- Know whether the customer is deciding on the current offer, requesting a revision, requesting an extension, or declining. This distinction determines whether you update **Offer Status**, schedule another activity, or select a **Decline Reason**.
- If you need to involve a Principal, sub-supplier, or another sales team member before responding to the customer, create an assigned **Task** with a clear **Due Date** rather than leaving the request only in a note.

Use the offer record as the shared working place for follow-up. Keep the current status, activity outcome, notes, and next due action together so the full customer decision history remains visible to the people responsible for the offer.