

Managing Tender Opportunities

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Creating a Tender Sales Job

Open the tender Sales Job workspace in Pams when you receive a new tender invitation, request for proposal, or bid request. A tender Sales Job gives your team one place to keep the tender title, customer details, Bid Due Date, supporting documents, Contacts, Activities, and related Offer records.

1. Open **Market Projects** and select **New Tender Sales Job**.
2. Enter a clear tender title in **Title**. Include the customer name, tender subject, or reference number where this helps your team identify the Sales Job in lists.
3. Select the customer or contracting organization in **Client** or **Account**. Use the existing company record rather than entering a different spelling of the same organization.
4. Set the initial **Status** to **Draft** while you are collecting the tender information. A Draft tender can be saved before the commercial and technical response is complete.
5. Assign the internal **Owner** or **Responsible** person who will coordinate the tender. This person should be able to follow the Bid Due Date, obtain pricing, prepare documents, and record important updates.
6. Click **Save** to keep the tender Sales Job open for further work, or select **Save and Close** if you want to return to the tender list.

Use the **Description** field to record a short explanation of the Sales Job. For example, describe the requested project, the main product or service scope, and any important commercial context already known. Keep this summary brief enough that a colleague can understand the tender without opening every attachment.

Field	What to enter
Title	A recognizable tender name or reference
Client or Account	The customer or contracting organization
Status	Draft when the tender is first created

Field	What to enter
Owner or Responsible	The team member coordinating the response

[SCREENSHOT: New Tender Sales Job form showing Title, Client or Account, Status, Owner, Description, Save, and Save and Close]

Do not wait for every document or pricing detail before creating the tender Sales Job. Saving the Draft record early ensures the Bid Due Date and ownership are visible in Pams while the bid is being prepared.

Recording Tender Requirements and Bid Deadlines

A tender Sales Job is only useful when the bid team can see exactly what the contracting organization expects. Record the tender requirements in Pams as soon as you review the request documents, then update them whenever a clarification, addendum, or revised Bid Due Date is issued.

1. Open the tender Sales Job and go to the **Requirements** section.
2. Record the requested scope, required deliverables, quantities, technical conditions, and commercial conditions. Use **Description**, **Technical Notes**, and **Commercial Notes** where these fields are available.
3. Enter the official submission deadline in **Bid Due Date**. This is the external deadline stated by the contracting organization and should reflect the latest confirmed tender document.
4. Review the requirement notes against the attached request documents before sharing the tender internally. Make sure mandatory submission conditions, such as required forms, technical documents, or delivery conditions, are clearly captured.
5. Create internal follow-up work through **Tasks**, **Activities**, or **Calendar** reminders when the team needs earlier preparation dates. Keep the contractual submission date in **Bid Due Date** rather than replacing it with an internal target.
6. Click **Save** after each meaningful update.

When a tender clarification changes the scope, document the change in the requirement notes and add an **Activity** explaining what changed. Include the clarification date, the source document, and the effect on the bid. For example, note whether the change affects the requested Items, delivery expectations, technical response, or pricing.

Use the most recent written requirement as the working version. If an earlier document contains information that is no longer valid, retain it as an **Attachment** for

reference but clearly note in the tender record which issue or date is current.

[SCREENSHOT: Tender Sales Job showing Requirements, Technical Notes, Commercial Notes, Bid Due Date, and attached tender documents]

A complete requirements section prevents the team from preparing an Offer based on outdated assumptions. Before moving into pricing or proposal preparation, confirm that the scope and Bid Due Date in Pams match the current tender invitation.

Adding Tender Contacts and Supporting Documents

Tender work often involves several people at the customer or contracting organization, along with a large set of request documents. Add the relevant **Contacts** and **Attachment** records to the tender Sales Job so questions, clarifications, and submission instructions remain connected to the same bid.

1. Open the tender Sales Job and locate the **Contacts** area.
2. Add the contact person who issued the tender, receives clarification questions, or receives the final bid. Select an existing **Contact** when one is already available in Pams.
3. Verify the selected contact's **Full Name**, **Email**, **Phone**, and related **Account** or **Client** details before relying on the record for tender communication.
4. Use the tender **Note** or **Description** to state which person is the primary tender contact when several contacts are listed. This makes the correct communication route clear to all team members.
5. Add each tender document as an **Attachment**. Choose **From PC** for documents stored on your computer or **From Cloud** for documents available from connected cloud storage.
6. Click **Save** after adding Contacts or Attachments.

Attach the documents that define how the bid must be prepared and submitted. These may include the request for proposal, specifications, drawings, addenda, pricing schedules, bid forms, delivery instructions, and submission requirements. Keep the original files attached even when your team also extracts key details into the Requirements section.

Name uploaded files so that the current issue is immediately recognizable. Include the document subject and issue date or revision identifier in the file name where available. This helps the team distinguish an original request from a later clarification or replacement document.

[SCREENSHOT: Tender Sales Job with Contacts list and Attachment area, showing a primary tender contact note and several versioned tender documents]

If a revised document replaces an earlier version, keep both Attachments but update the tender Notes or Activity record to identify the document the team must use for the current Offer. This preserves the tender history while avoiding confusion during final review.

Preparing and Comparing Tender Offers

Create an **Offer** when the tender response is ready to move from requirements gathering into commercial and technical preparation. Keeping each Offer linked to the tender Sales Job allows your team to review the bid details alongside the Bid Due Date, tender documents, Contacts, and Activity history.

1. Open the tender Sales Job and create or open the related **Offer**.
2. Confirm the **Offer Date**, **Offer Type**, **Currency**, and **Validity Period** before entering the proposal details.
3. Add the proposed **Items**, quantities, **Unit Price**, and **Total Price**. Check that the commercial response covers the tender requirements recorded in the Sales Job.
4. Use **Technical Notes** for technical response details and **Commercial Notes** for payment terms, delivery conditions, exclusions, or other commercial points relevant to the tender.
5. Save the Offer and return to the tender Sales Job to confirm that the proposal remains associated with the correct tender record.
6. Before the bid is sent, review the tender **Bid Due Date**, the current Attachments, the selected Contacts, and the Offer details together.

Use **Revision** when the tender requires a revised response or when the team updates the proposal after a clarification. The **Offer Number**, **Offer Date**, and revision information help distinguish an earlier proposal from the current version. Do not overwrite an earlier proposal without preserving the information needed to understand what changed.

When comparing possible responses, open each related Offer and review its **Items**, **Offer Price**, **Validity Period**, and Notes against the same tender requirements. This is especially important if the team has prepared alternative commercial or technical responses.

[SCREENSHOT: Tender Sales Job with a related Offer showing Offer Number, Offer Date, Items, Offer Price, Validity Period, Technical Notes, and Commercial Notes]

The final Offer should match the latest tender documents. If the requirement scope, requested delivery date, or submission condition changes, update the tender Sales Job first, then revise the Offer so both records remain aligned.

Tracking Tender Progress and Activity History

Keep the tender **Status** and **Activities** current throughout the bid process. This makes it possible for the Owner, sales team, and management to see whether the tender is being prepared, has been submitted, has been awarded, or has been closed without searching through emails or separate files.

1. Open the tender Sales Job whenever a meaningful event occurs.
2. Update **Status** or **Stage** to reflect the current position of the tender. Use the available status values consistently across your team.
3. Add an **Activity** for important events, such as a clarification request, a customer call, a tender meeting, a document amendment, bid submission, or award notification.
4. Choose the appropriate activity type, such as **Call**, **Meeting**, or **Visit**, and complete fields such as **Subject**, **Activity Purpose**, **Due Date**, **Assignee**, and **Comment**.
5. Record the outcome of the event in **Comment**, **Description**, or **Note** so another team member can understand the decision or agreed action.
6. Click **Save** after updating the tender or its Activity record.

Use the tender activity history to capture the facts that matter to the bid. For example, record when a clarification was requested, which document was amended, whether a deadline was extended, and when the final Offer was submitted. If the tender is awarded, record the award notification and any next action required. If it is not awarded, record the available reason in the tender notes or Activity details.

Review **Last Modifications**, **Created By**, and **Last Modification By** when you need to understand who changed the tender record. These details, together with the Activities and Attachments, provide a clear working history for the Sales Job.

[SCREENSHOT: Tender Sales Job showing Status, Activities, Comments, Last Modifications, and an activity entry for bid submission]

Update the tender promptly after external communication. A current Status and meaningful Activity entries help prevent missed deadlines, duplicated follow-up, and uncertainty about the latest customer instruction.

Resolving Missing Information Before Bid Submission

Use the tender Sales Job as the final review point before sending a bid. Missing scope details, unclear deadlines, incomplete Contacts, or absent Attachments can lead to an Offer that does not meet the tender conditions. Resolve these gaps in Pams before the bid is submitted.

1. Open the tender Sales Job and review the **Requirements** section. Confirm that the scope, requested deliverables, mandatory conditions, and any technical or commercial instructions are recorded in **Description**, **Technical Notes**, or **Commercial Notes**.
2. Check **Bid Due Date** against the latest tender Attachment. If the date is unclear or a revised date was issued, update **Bid Due Date** and add an **Activity** or **Comment** explaining the clarification.
3. Review the **Contacts** area. Confirm that the tender includes the person responsible for clarification questions or bid submission, and identify the primary contact in the tender **Note** when several contacts are listed.
4. Open the related **Offer** and verify the **Items**, **Offer Price**, **Currency**, **Validity Period**, and Notes against the tender requirements.
5. Check the **Attachment** area for the current request document, specifications, addenda, required forms, and submission instructions.
6. Click **Save** after correcting any missing information.

Use the following review points to identify what is incomplete:

If this is missing	Review in Pams
Tender scope or mandatory conditions	Requirements , Description , Technical Notes , Commercial Notes
Confirmed tender deadline	Bid Due Date and the latest Attachment
Correct recipient for questions or submission	Contacts , Contact Name , Email , Note
Current proposal content	Related Offer , Items , Offer Price , Validity Period
Tender documents and amendments	Attachment and Activities

If the team cannot confirm a requirement from the available tender documents, do not treat an assumption as a confirmed condition. Record the open point in an **Activity** or **Comment** so the Owner can obtain clarification and preserve the response in the tender history.

Overview

Tender Sales Jobs in Pams provide a focused workspace for managing a bid from initial tender receipt through preparation, submission, award, or closure. Each tender Sales Job brings together the details that are most likely to change during a competitive bid: the **Title**, **Client** or **Account**, **Bid Due Date**, requirements, **Contacts**, **Attachments**, related **Offer** records, and **Activities**.

Use the tender Sales Job as the shared source for the bid team rather than keeping deadline updates, customer questions, and document versions in separate places. The **Requirements** section captures the requested scope and mandatory submission conditions. **Bid Due Date** records the customer's formal deadline. **Attachments** keep the request documents, specifications, and addenda with the Sales Job. **Contacts** identify the people involved in tender communication.

The related **Offer** is where the team prepares the commercial and technical response. Offer details such as **Items**, **Offer Price**, **Currency**, **Validity Period**, **Technical Notes**, and **Commercial Notes** should be reviewed against the tender record before submission. When the bid changes, use **Revision** and retain the earlier proposal details so the tender history remains understandable.

The tender **Status**, **Stage**, and **Activities** give the team a current view of progress. Record calls, meetings, clarification requests, document amendments, submission events, and award notifications using **Activities** and **Comment** fields. Use **Last Modifications** and the activity history when you need to check what changed and who made the update.

Tender management supports the work that happens before a project moves into detailed delivery and purchasing activity. When an awarded Sales Job becomes a project with cost tracking needs, use [Tracking Project Job Costs](#) to manage the job-costing work separately from the tender preparation history.

Prerequisites

Before creating a tender Sales Job, gather the tender information that you can confirm from the invitation and its supporting documents. Pams allows you to save a tender as

Draft before every detail is available, but the following information will help you create a useful record from the start:

- A recognizable tender name or reference to enter in **Title**.
- The customer or contracting organization to select in **Client** or **Account**.
- The official tender submission date for **Bid Due Date**.
- The tender request, specifications, instructions, addenda, or other source documents to add as **Attachments**.
- The contact person or people involved in tender communication, including their **Contact Name**, **Email**, and **Phone** where available.
- A basic understanding of the requested scope, deliverables, technical requirements, commercial conditions, and required bid documents.
- The internal **Owner** or **Responsible** person who will coordinate the tender response.
- Any available pricing information needed to prepare an **Offer**, including proposed **Items**, quantities, **Currency**, **Unit Price**, and **Validity Period**.

If the customer or contracting organization already exists in Pams, select the existing **Client**, **Account**, and **Contact** records. This keeps the tender connected to the company's previous sales activity and avoids duplicate contact information.

Keep the original tender invitation available when entering the record. Use it to confirm the **Bid Due Date**, identify mandatory tender forms, and compare the final Offer against the customer's stated requirements. When the invitation includes later clarifications or addenda, attach them to the same tender Sales Job and record the change through an **Activity** or **Comment**.