Preparing Customer Offers

August 18, 2026

Check the Inquiry Before Creating an Offer

Start with the original Inquiry rather than creating an unrelated Offer. This keeps the customer request, product requirements, and commercial discussion connected to the Sales Job.

1. Open the relevant Sales Job, then open the related **Inquiry**. Check the **Client** and **Account** details first. Make sure the selected Client is the company that requested the offer and that the Account information is correct.
2. Review the contact information shown with the inquiry. Confirm that **Contact Name**, **Email**, **Phone**, and any other available contact details identify the person who will receive or discuss the Offer. If the inquiry involves several people, identify the main commercial contact before preparing the Offer.
3. Check each requested item. Compare the customer's request with the product details already recorded in the inquiry, including the item description, required **Quantity**, **Sales Unit**, delivery requirements, and any requested technical scope.
4. Review key dates and conditions, especially **Bid Due Date**, **Required Bid Due Date**, **Delivery Date**, **Required Receiving Date**, and **Delivery Term** where they appear. These details affect the validity and delivery commitments you include in the Offer.
5. Open the inquiry's **Attachment** area and review every customer-provided file. Specifications, drawings, product lists, scope documents, and reference material may affect the product selection, technical description, and commercial terms.

If pricing has not yet been prepared, complete that work first using Using the Pricing Tool. Use the approved figures from the relevant **Pricing Offers** when you prepare the customer Offer.

[SCREENSHOT: An Inquiry screen showing the Client, Contact Name, requested items, dates, and Attachment area.]

Do not copy prices, payment conditions, or delivery details from another customer's Offer without confirming that they apply to the current Client and Inquiry.

Create an Offer from the Customer Inquiry

Create the Offer from the existing Inquiry whenever the action is available. Doing this preserves the relationship between the customer request and the commercial response.

1. From the open **Inquiry**, select **Create Offer** or **New Offer**, depending on the action shown on your screen. Pams opens a new Offer linked to the Inquiry.
2. Review the details brought into the Offer. Check the **Client**, **Account**, **Contact Name**, and related Inquiry information. Update the contact only when the person receiving the Offer differs from the person recorded on the Inquiry.
3. Confirm **Salesperson Responsible**. This should show the person managing the customer relationship and responsible for the commercial response.
4. Set the **Offer Date** to the date the Offer is being prepared. Then complete **Offer will be valid till** or the available **Validity Period** field. The validity date tells the customer how long the pricing and conditions remain open for acceptance.
5. Review **Offer Type** if it is displayed. Use the offer type that matches the approved commercial approach, such as the required type for the current Inquiry.
6. Click **Save** to retain the initial Offer record. Keep the Offer in **Draft** while you add products, prices, taxes, terms, and supporting files. Use **Save and Close** only when you have finished the current editing session.

A saved Draft lets you return to the Offer from the Sales Job or related Offer list without losing the inquiry link or the customer details already entered.

[SCREENSHOT: A new Draft Offer showing Client, Contact Name, Salesperson Responsible, Offer Date, and Offer will be valid till.]

Add Requested Products and Quantities

Build the Offer line by line so the customer can clearly see every product, service, and charge included in the proposed scope.

1. In the Offer’s item area, add a new line for each requested product. Use the **Product** field to select the matching item from **Products**. Select the existing Product record whenever one is available instead of typing a substitute description.
2. Enter the requested **Quantity** for each item. Check the **Sales Unit** or **Unit** shown on the line and make sure it matches the unit used in the Inquiry. A quantity of 10

boxes is not the same as a quantity of 10 individual units, so review both fields together.

3. Read the item description before moving on. Use **Item Description**, **Description**, **Technical Notes**, or **Commercial Notes** where available to make the offered scope clear. Add only details that the customer needs to understand what is included, such as dimensions, model information, technical requirements, or the agreed scope.

4. Add separate lines for products that are optional or separately chargeable. This can include freight, installation, service, or another distinct item. Separate lines make the **Total Price** easier to understand and allow the customer to identify optional amounts.

5. Review the full list of lines against the Inquiry and its attachments. Check that no requested Product is missing, duplicated, or entered with an incorrect Quantity.

Use a clear order for the lines: main products first, then related items or separate charges. This makes the printed commercial offer easier for the customer to review.

[SCREENSHOT: Offer item lines showing Product, Item Description, Quantity, Sales Unit, Unit Price, Discount, and Tax (%).]

Set Prices, Discounts, and Commercial Terms

Complete the commercial information carefully before presenting the Offer. The values on the Offer should match the approved Pricing Offers and the terms agreed for the Client.

1. Open each item line and enter or confirm the **Unit Price**. Check the **Currency** shown in the Offer and ensure it matches the agreed customer currency. Review the price against the approved pricing work; do not rely on an old Offer for a different Client or different quantity.

2. Apply **Discount (%)** only when an approved discount or negotiated concession applies. Check the resulting amount on the line after entering the discount. A discount should be visible on the Offer rather than hidden in an altered Unit Price when the commercial arrangement requires it to be shown.

3. Review **Tax (%)** for every line. Confirm that the tax treatment is appropriate for the Product and the transaction. Then review the values displayed for the item amounts and the final **Total Price**.

4. Complete the commercial conditions in the available fields. Review **Payment Method**, **Payment Period**, **Down Payment (%)**, **Delivery Term**, **Delivery Time**, and **Delivery Date** where they apply to the Offer.
5. Add agreed conditions in **Terms and Conditions**, **Commercial Notes**, or **Note**, depending on the fields available on your Offer. Include only the commercial commitments that the customer needs to accept, such as payment arrangements, delivery scope, or Offers limitations.
6. Recheck **Offer will be valid till** before saving. The validity date should give the customer a clear decision period while protecting your pricing from remaining open beyond the agreed timeframe.

Click **Save** after reviewing all amounts and conditions. The Offer should show a complete, consistent commercial proposal before it is printed or shared.

Attach Supporting Documents and Review the Offer

Use the Offer's **Attachment** area to keep the documents supporting the commercial proposal together with the Offer record.

1. Open the Offer and locate the **Attachment** area. Add documents that explain or support the items and terms in the Offer, such as product specifications, technical drawings, scope documents, or customer reference files.
2. Review each file name before uploading it. Use meaningful names that let colleagues and customers distinguish documents quickly. For example, identify whether a file is a product specification, technical drawing, commercial document, or customer reference document.
3. Check the Offer header before you create a customer-facing document. Confirm the **Client**, **Contact Name**, **Offer Date**, **Offer will be valid till**, **Currency**, and **Salesperson Responsible**.
4. Review every item line. Compare the **Product**, **Quantity**, **Sales Unit**, **Unit Price**, **Discount (%)**, and **Tax (%)** with the approved pricing and the original Inquiry. Then check the displayed **Total Price**.
5. Read the **Commercial Notes**, **Technical Notes**, and available **Terms and Conditions** as the customer will read them. Remove incomplete notes, internal working comments, or wording that does not belong in the customer Offer.
6. Confirm that every attachment intended to accompany the Offer is present. Remove or avoid attaching internal-only working files before using **Print** or the

available **Commercial offer template**.

[SCREENSHOT: A completed Offer with item lines, total, validity date, commercial notes, and uploaded attachments.]

A final review at this stage prevents common issues such as omitted products, expired validity dates, missing drawings, or mismatched totals.

Fix Common Offer Preparation Issues

Use the Offer and related Inquiry together to resolve issues before the customer receives the commercial document.

1. If the **Client**, **Account**, or **Contact Name** is missing or incorrect, return to the related **Inquiry** and review the customer information there. Correct the available details, then return to the Offer and confirm the customer information is accurate before continuing.
2. If you cannot select a requested item in the **Product** field, compare the customer request with the available entries in **Products**. Check the product name, model information, and description so you do not select a similar but incorrect item. Do not replace a catalog Product with unclear free-text wording when the requested item needs a proper Product record.
3. If the amount is wrong, review each line in order. Check **Quantity**, **Sales Unit**, **Unit Price**, **Discount (%)**, and **Tax (%)**. A wrong unit or quantity can change the total even when the Unit Price is correct. Also confirm the Offer **Currency** before reviewing the final **Total Price**.
4. If the total does not match the approved pricing, compare the lines against the relevant **Pricing Offers**. Check whether freight, service, installation, or optional items were added as separate lines and whether they should be included in the customer total.
5. If a supporting file is absent, open the Offer's **Attachment** area and upload the required file again. Confirm its name makes clear what it contains and that it is the correct version for this Offer.
6. If the validity period is wrong, update **Offer will be valid till** before printing the Offer. Do not leave an outdated validity date from an earlier Draft.

Use **Save** after each correction, then perform the same header, line, total, and attachment review before creating the customer-facing document.

Overview

A customer Offer is the commercial response to a recorded **Inquiry**. In Pams, it brings together the customer details, requested Products, quantities, prices, taxes, delivery expectations, payment conditions, and supporting documents needed for the customer to evaluate the proposal.

The Offer should remain connected to the original Inquiry so your sales team can see why it was prepared and what the customer requested. This is especially important when an Inquiry includes detailed specifications, a required **Bid Due Date**, customer drawings, or a particular **Delivery Term**.

A complete Offer normally contains the following information:

Offer area	What you review
Customer details	**Client**, **Account**, **Contact Name**, and **Salesperson Responsible**
Commercial dates	**Offer Date**, **Offer will be valid till**, and relevant delivery dates
Item lines	**Product**, **Quantity**, **Sales Unit**, **Unit Price**, **Discount (%)**, and **Tax (%)**
Conditions	**Payment Method**, **Payment Period**, **Delivery Term**, and available notes or terms
Supporting material	Files in the **Attachment** area that support the offered scope

Prepare the commercial values in the pricing workflow before entering them into the Offer. The Offer is where you present the approved proposal in customer-facing form; it is not the place to guess at product scope, pricing, taxes, or delivery commitments.

Keep the Offer in **Draft** until the header, lines, totals, conditions, and attachments have all been checked. Once the Offer accurately reflects the Inquiry and approved pricing, use the available **Commercial offer template** or **Print** action to prepare the customer-facing document.

Prerequisites

Before preparing a customer Offer, make sure you have the information needed to complete the Offer without leaving unresolved gaps. Gather and confirm the following items from the related Sales Job and Inquiry:

- A recorded **Inquiry** linked to the correct **Client** and **Account**.
- A confirmed **Contact Name** for the person who will receive or discuss the Offer.

- Clear item requirements, including Product details, requested **Quantity**, and the correct **Sales Unit** or **Unit**.
- The approved prices from the relevant **Pricing Offers**. If pricing is still being prepared, return to Using the Pricing Tool before creating the final Offer.
- The correct **Currency**, applicable **Tax (%)**, and any approved **Discount (%)**.
- The intended **Offer Date** and **Offer will be valid till** date.
- Agreed commercial details, such as **Payment Method**, **Payment Period**, **Down Payment (%)**, **Delivery Term**, **Delivery Time**, and delivery commitments where applicable.
- Customer-provided files or internal sales material that must be included in the Offer's **Attachment** area, such as specifications, drawings, or scope documents.

Check that each requested item can be selected from **Products** before you begin entering the Offer lines. If the item information is unclear, return to the Inquiry and its attachments rather than using an uncertain Product selection.

Also review the expected offer type and any required customer conditions before setting the Offer to anything beyond **Draft**. A clear, complete Draft gives you a reliable record for review and makes later offer follow-up easier. After the Offer is prepared, continue with Managing Offer Follow-Up to track customer responses and keep the Sales Job moving.