

Process an inquiry into an offer and submit the offer for approval

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Save a sales inquiry, send it to the principal, open the related Offer, and submit an itemized Offer to the approval gate.

Before you start

- Access to Sales > Sales jobs and Add New > Sales Jobs > Process.
- An inquiry is available or is being created.
- The Offer contains at least one item before submission for approval.

Steps

1. **Add New > Sales Jobs > Process** on [Sales jobs](#) — Opens the sales-job process for a new or existing inquiry.

The screenshot shows the Pams software interface with a table of inquiries. The table has three columns: Inquiry date, Inquiry type, and Inquiry stage. The 22nd Sep 2024 row is highlighted in blue.

Inquiry date	Inquiry type	Inquiry stage
02 Jul 2024	Opportunity	Sent to principal
15 Aug 2024	Opportunity	Sent to principal
20 Aug 2024	Opportunity	Draft
20 Aug 2024	Opportunity	Sent to principal
25 Aug 2024	Opportunity	Sent to principal
09 Sep 2024	Opportunity	Draft
17 Sep 2024	Opportunity	Sent to principal
17 Sep 2024	Opportunity	Sent to principal
22 Sep 2024	Opportunity	Draft
23 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Draft
25 Sep 2024	Opportunity	Draft
25 Sep 2024	Opportunity	Draft
24 Sep 2024	Opportunity	Sent to principal
30 Sep 2024	Opportunity	Sent to principal
29 Sep 2024	Opportunity	Sent to principal
01 Oct 2024	Opportunity	Draft
12 Sep 2024	Opportunity	Sent to principal
02 Oct 2024	Opportunity	Sent to principal

2. **Save on Sales job** — Retains entered or updated sales-job information.
3. **Consider As Sent To Principal on Sales job** — Records that a New inquiry has been sent and moves it to Sent To Principal.
4. **Go to offer on Sales job** — Opens the related Offer.
5. **Apply Approval for Booking on Offer** — Submits the Offer to the approval gate.

Result

Submits the Offer to the approval gate. Confirm this on **Offer**.

Screens involved

Sales > Sales jobs · Add New > Sales Jobs > Process · Offer