

July 29, 2026

Process

Applications › Add new › Sales Jobs

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Sales Jobs > Inquiries > Job No. : New

Save Save and Close

Inquiry

Offer

Order

Delivered

Inquiry Type

Lead

Inquiry

Status

Evaluation

Branch

Salesperson Responsible

Product Type

Job Title

Time Frame

Shotec S.A.E

Ramy Othman

Select...

6 Month(s)

End User

Estimated Value

In Branch Currency (Rate:1)

File Number

Expected Order Date

Select...

0.00 EUR

28 Jul 2026

New Inquiry

Inquiry

Client

Vendor

Client Inquiry Number

Inquiry Date

Bid Due Date

Requested Offer Type

Select...

Select...

28 Jul 2026

Firm

Item Description

Unit

Qty

1

Pieces

1.00

Count: 1 + Item

Equivalent Booking :

0.00 EUR

Contact to Decision Makers

Budget Availability

Chance In Competition

Calculated Rating

Order chance

Select...

Select...

Select...

0 %

Select...

Inquiry — Add new › Sales Jobs › Process

Overview

The Process workspace is used to work with Inquiry records within Sales Jobs. Sales representatives and project teams use it when they need to record an inquiry, maintain its related selections and files, and review the associated task information. Use this workspace from **Add new > Sales Jobs > Process**.

The available controls allow you to save the record, attach files, make a selection, and access related actions such as **Lead**, **Inquiry**, and **Tickets**. The screen does not display a separate status field; therefore, save the record when its current information is complete.

Workflow

1. Open the Process workspace from **Add new > Sales Jobs > Process**. Review the Inquiry record before making changes.

Inquiry — Add new > Sales Jobs > Process

2. Decide whether you need to update the record information or leave it unchanged.
 - To choose an available value, use **Select...** and confirm the selection with **Ok**.
 - To abandon the current selection or entry without confirming it, use **Cancel**.
 - Use **Select** when the screen requires you to apply the selected item.

Note: The available screen information does not identify the business meaning of individual values in **Select...** Confirm that you are selecting the

intended record before saving.

3. Decide whether supporting documents are required for the inquiry.
 - To add a file, select **Attach** and add the required document to **files[]**.
 - Use attachments for documents that must remain available with the Inquiry record, such as customer correspondence, specifications, or supporting commercial information.
 - If no supporting file is required, continue without adding an attachment.
4. Decide whether to continue working on the Inquiry record or complete the current update.
 - Select **Save** to retain the current information and remain on the Inquiry screen.
 - Select **Save and Close** to retain the current information and close the record.
 - Select **Delete** only when the Inquiry record should be removed.

Warning: Use **Delete** only after confirming that the record is no longer required. The screen provides no separate approval or recovery stage for this action.

5. Use the available related actions only when they match your current work:
 - Select **Lead** to access the available lead-related action.
 - Select **Inquiry** to access the available inquiry-related action.
 - Select **Tickets** to access the available ticket-related action.

The supplied screen information does not show how these actions change the Inquiry record or move it to another stage. Save the record before leaving the current work where necessary.

Task

Pams Shotec S.A.E.

My Desk > Task > New

Task Purpose: Enter...

Priority: High

Owner: Ramy Othman

Start Date: 28 Jul 2026

Due Date: 29 Jul 2026

Task Progress: 0%

Assign To: Select...

Follow: 0 Follower(s)

Buttons: Save, Save and Close, X

Inquiry — Add new > Sales Jobs > Process

Navigation icons: +, Refresh, Notifications (6), Home

Buttons: Save, Save and Close

The Task tab contains task-related entries associated with the Inquiry record. The visible entries include a unit expressed in Pieces and a quantity value, allowing you to review the task information recorded for the inquiry.

No control is provided in the available screen information that explicitly moves a record into or out of the Task tab. Use this tab to review the task-related information shown for the current Inquiry record, then return to the record actions when you need to save, attach files, or access related work.

Examples

A sales representative receives an inquiry for materials required for a Sales Job and needs to retain the customer's supporting document with the inquiry.

1. The representative opens **Add new > Sales Jobs > Process** and reviews the Inquiry record.
2. The representative uses **Select...** to choose the required available value and selects **Ok** to confirm it.
3. The customer has sent a supporting document. The representative selects **Attach** and adds the file to **files[]**.
4. The representative opens the Task tab to review the task-related entry. The entry shows a quantity expressed in Pieces, confirming that task information is available for review.
5. After checking the entry and attachment, the representative selects **Save** to keep the record open for further work. If no further work is required, the representative selects **Save and Close** instead.

Tips

Tip: Use **Save** while you are still reviewing selections, attachments, or task information. Use **Save and Close** only when the current update is complete.

Note: Review the Task tab before closing the Inquiry record when task quantities are relevant to the Sales Job.

Warning: Select **Cancel** when you do not want to confirm the current selection. Selecting **Ok** confirms the selected value.

Troubleshooting

Symptom	Likely cause	Fix
A selected value does not appear to be applied.	The selection was not confirmed.	Use Select... , choose the required value, and select Ok . Then use Save or Save and Close .
A supporting document is not available on the Inquiry record.	The file was not attached to files[] .	Select Attach , add the file, and save the record.

Symptom	Likely cause	Fix
The Inquiry update is lost after leaving the screen.	The record was not saved.	Select Save to retain the update, or select Save and Close to retain it and close the record.
A task quantity needs to be checked.	The task-related information is displayed on a different tab.	Open the Task tab and review the entry shown in Pieces and its quantity.

Related pages

- [Direct Order](#)
- [Add new — Overview](#)
- [Add new — Learning Path](#)
- [Contact](#)
- **Call**
- [Task](#)
- **Payment**