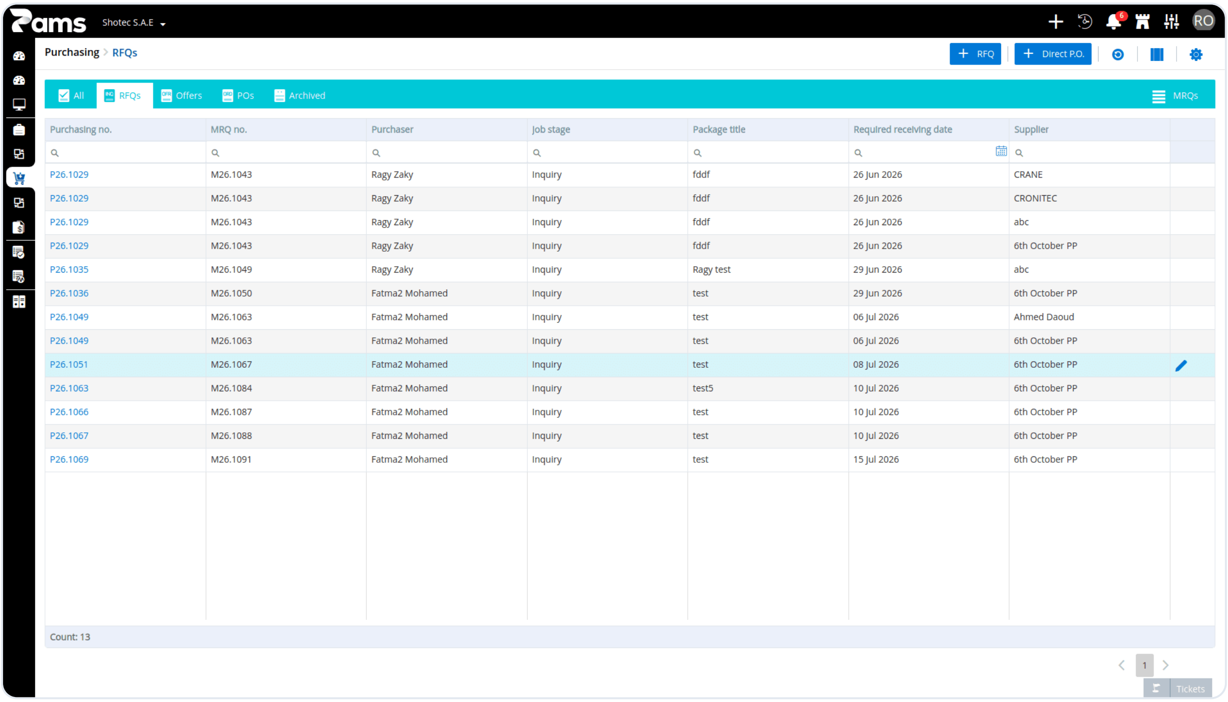
PAMS V2

Purchasing

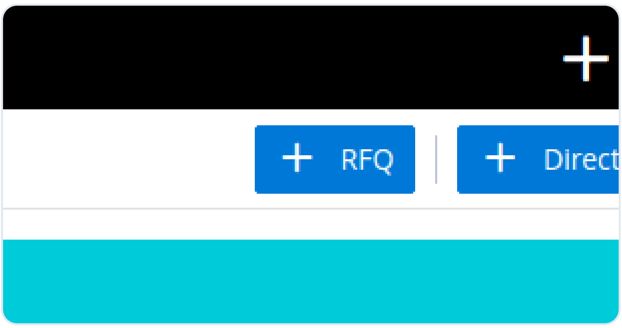
July 30, 2026

Purchasing

Applications › Purchasing



Purchasing — Purchasing



Overview

The Purchasing application provides a central workspace for reviewing purchasing records and starting new procurement activity. Purchasing officers, project managers, account managers, warehouse managers, and finance users can use it to locate RFQs, direct purchase orders, offers, and purchase orders associated with jobs and packages. Use this workspace when you need to begin a purchasing request, review purchasing activity, or adjust the list layout used to monitor records.

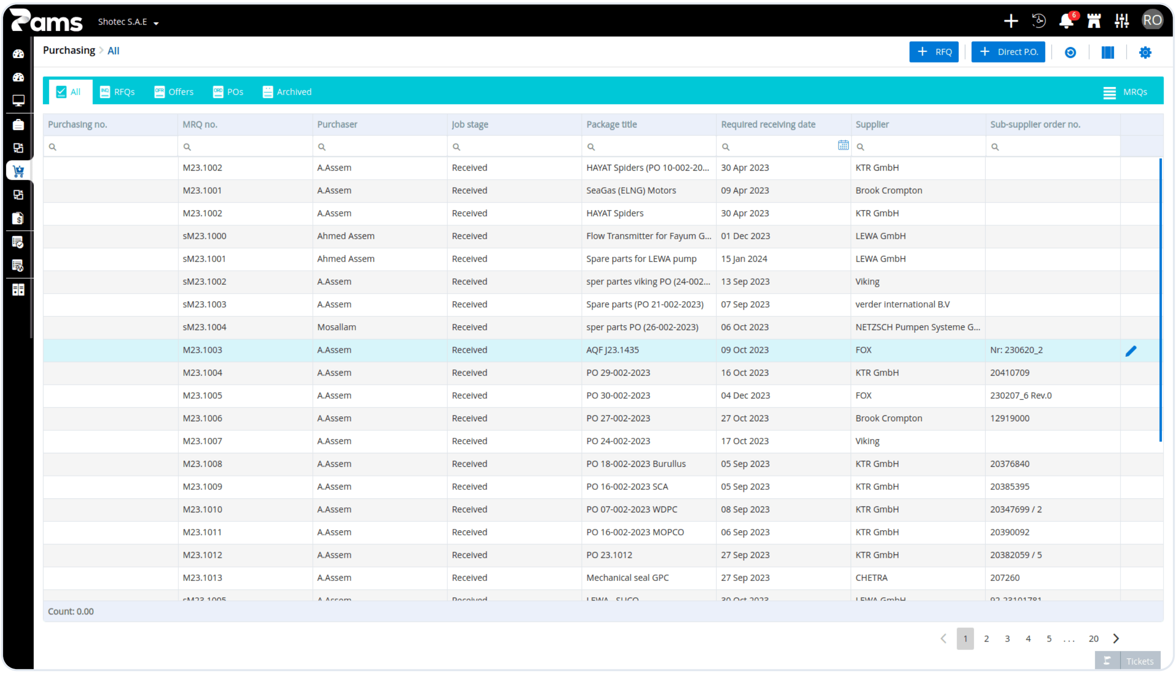
Settings

Before working with purchasing records, select or create a list layout that displays the information relevant to your role. The available layout controls affect how the Purchasing list is displayed; they do not change the purchasing records themselves.

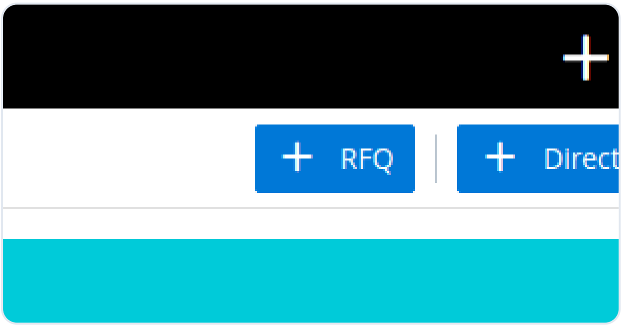
Setting or control	Use
Layout name	Identifies the layout you are creating or editing.
Standard Layout	Selects the standard list layout.
Add Layout	Starts a new layout.
Columns Chooser	Opens the column selection control for the list layout.
Save	Saves a new layout or saved changes.
Update Current	Updates the layout currently in use.
Delete Current	Deletes the layout currently in use.
Delete	Deletes the selected layout.
Cancel	Cancels the current layout action.
Refresh (icn-update)	Refreshes the displayed Purchasing list.
Layout (icn icn-layoout)	Opens the layout-related control.

> **Note:** Use a clear and role-specific **Layout name** so that purchasing users can identify the correct list view before reviewing RFQs, offers, or POs.

1. Open **Purchasing** from the application navigation.



Purchasing — Purchasing



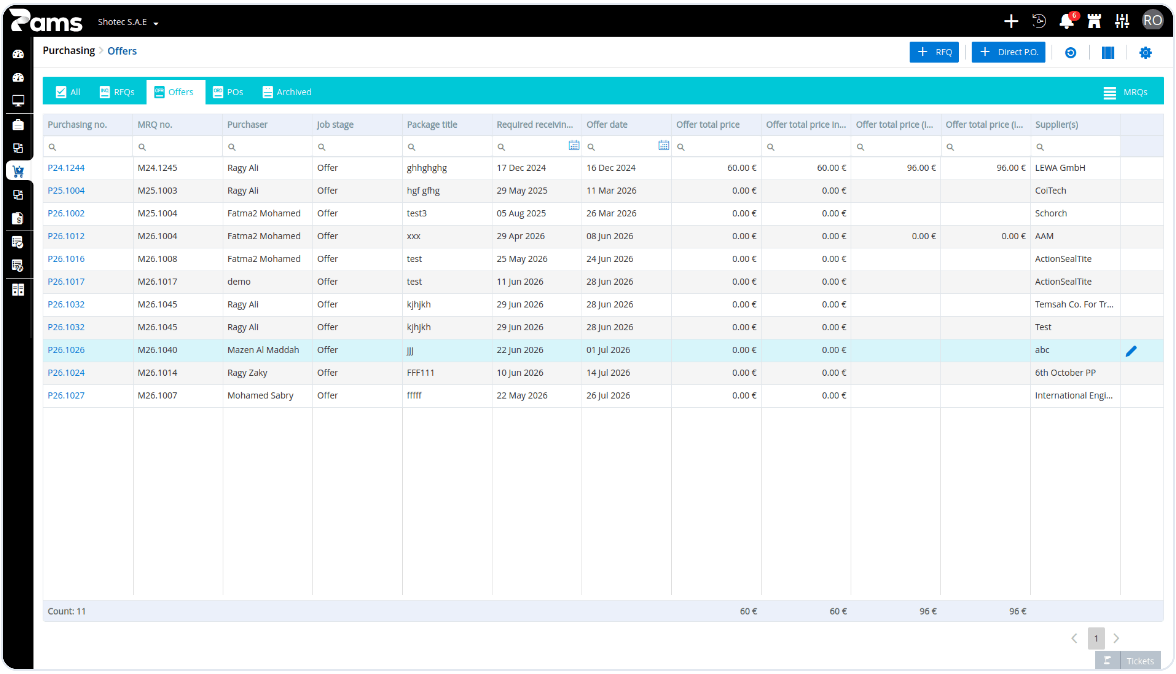
2. Decide whether the standard view is sufficient.
    - To use the default list presentation, select **Standard Layout**.
    - To work with an existing or alternative layout, use **Layout (icn icn-layoout)** and select the required layout.
3. When you need a different set of list columns, select **Columns Chooser**. Enter a descriptive **Layout name**, then select **Save** to retain the new layout.
    - To change an existing layout, select **Update Current**.
    - To abandon unsaved changes, select **Cancel**.
    - To remove an obsolete layout, select **Delete Current** or **Delete**, as appropriate.

> **Warning:** Deleting a layout removes that saved layout choice. Confirm that the layout is no longer needed before selecting **Delete Current** or **Delete**.

Workflow

Use the Purchasing workspace to choose the appropriate purchasing starting point, then review records in the relevant tab. The available screen provides separate entry actions for an RFQ and a direct purchase order, as well as tabs for all records, archived records, offers, and POs.

1. Review the current Purchasing list before creating or opening a purchasing item. Use **Search** to find records by the information displayed in the list, such as purchasing number, RFQ number, purchaser, job, stage, package title, or required receipt date.



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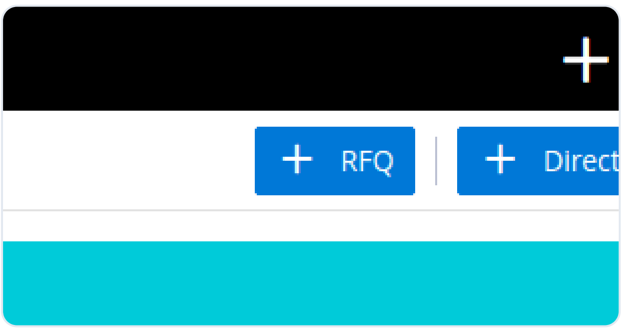
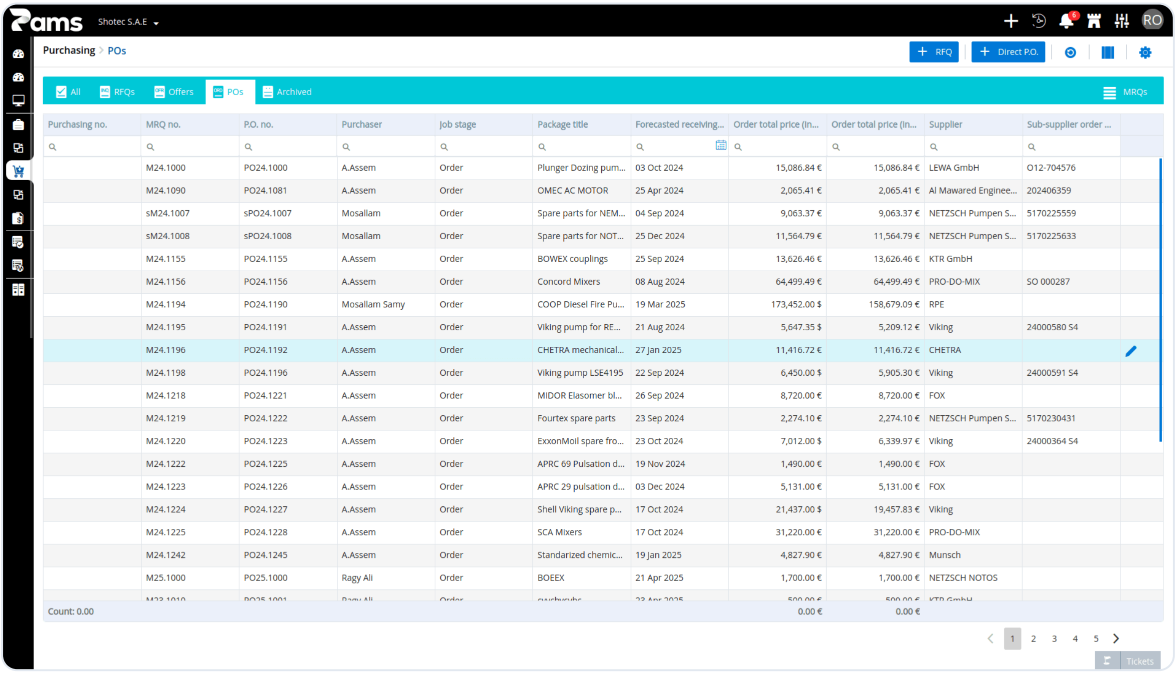


2. Decide how to start the purchasing activity.

    - Select **RFQ** when you need to begin a Request for Quotation process for supplier pricing or commercial offers.
    - Select **Direct P.O.** when you need to begin a purchase order directly, without first using the RFQ workflow.



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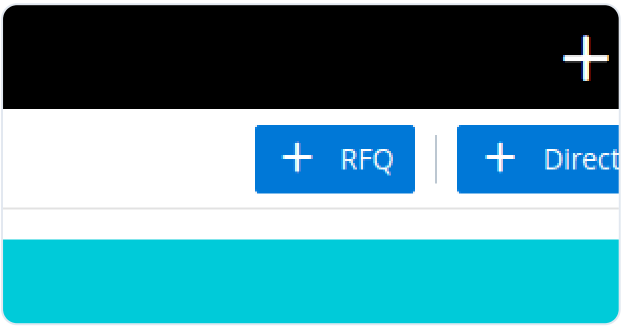
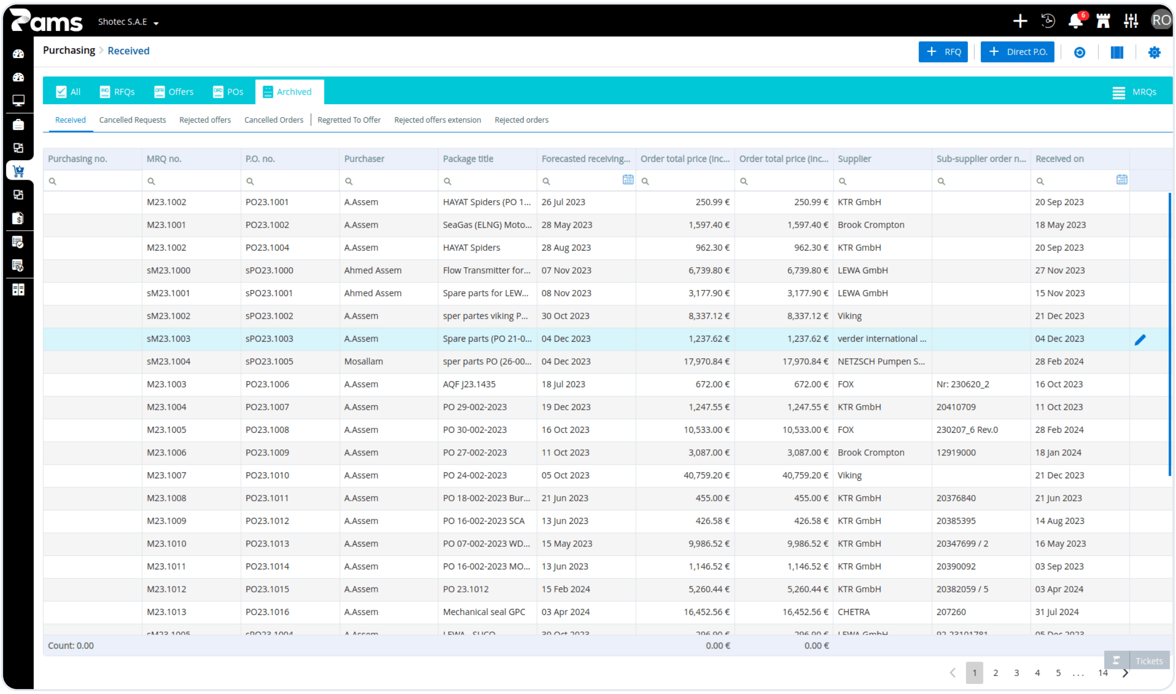


3. Decide which record group you need to review. Select the appropriate tab:

    - **All** for the complete visible Purchasing record list.
    - **Archived** for archived records.
    - **Offers** for offer records.
    - **POs** for purchase order records.



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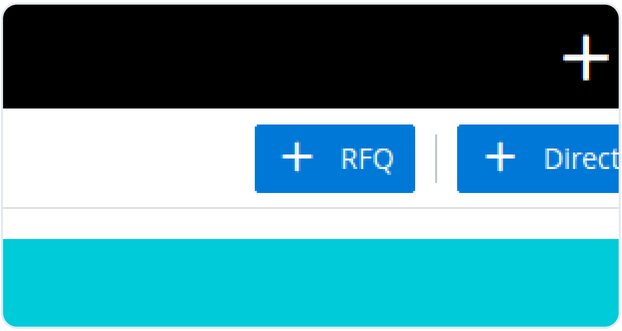

4. Refresh the list when you need to review the latest displayed information. Select **Refresh (icn-update)**, then use **Search** again if necessary to narrow the refreshed results.

> **Tip:** Search before starting a new RFQ or direct purchase order to reduce the risk of creating duplicate purchasing activity for the same job, package, or required receipt date.

All

The **All** tab contains the general Purchasing list. It displays purchasing records with information such as purchasing number, RFQ number, purchaser, job, stage, package title, and required receipt date. Use this tab as the primary review point when you need to locate purchasing activity across the available records rather than within a single record group.

Select **All** to return to this complete list view. The available screen does not identify a separate action that moves records into or out of this tab.

Archived

The **Archived** tab contains archived Purchasing records. Use it when a purchasing item is no longer being reviewed in the active list but must still be located or checked by its purchasing reference, purchaser, job, package title, or required receipt date.

Select **Archived** to review these records. The available controls do not specify an archive or restore action, so record movement into or out of this tab is not documented from this screen.

Offers

The **Offers** tab contains purchasing offer records. Use it to review supplier offer-related purchasing activity and identify records using the list information, including the RFQ number, purchaser, job, stage, package title, and required receipt date.

Select **Offers** to view this record group. The available screen does not provide a control that identifies how an RFQ becomes an offer or how an offer moves to another tab.

Purchase Orders

The **POs** tab contains purchase order records. Use it when you need to review purchase orders that are already represented in the Purchasing workspace, including their purchasing number, purchaser, related job, stage, package title, and required receipt date.

Select **POs** to review purchase order records. You can start a direct purchase order by selecting **Direct P.O.**, but the available screen does not provide a specific control that moves an existing record into or out of the **POs** tab.

Examples

A project manager needs supplier pricing for a crane package required for a job in late June.

1. Open **Purchasing** and select **All** to check whether purchasing activity already exists for the job and package.
2. Enter the job reference or package title in **Search**. Review the displayed purchasing number, RFQ number, purchaser, job, stage, package title, and required receipt date to identify any related records.
3. If no appropriate RFQ is found, select **RFQ** to start the Request for Quotation process for the crane package.
4. Return to the Purchasing list and select **Offers** when you need to review offer-related records for the request.
5. When the purchasing activity is represented as a purchase order, select **POs** to review it with the other purchase order records. Use **Refresh (icn-update)** if the list does not show the latest available information.

Tips

> **Tip:** Use **Standard Layout** when you need a predictable list presentation for daily review.

> **Note:** The Purchasing list can include both RFQ-related and purchase-order-related references. Check the purchasing number and RFQ number together when identifying the correct record.

> **Warning:** The available Purchasing screen does not show approval, confirmation, receipt, or invoicing controls. Do not assume that selecting a tab changes a record's purchasing status.

Troubleshooting

Symptom	Likely cause	Fix
The required purchasing record is not visible.	The record may be in a different tab or the list may need refreshing.	Check **All**, **Archived**, **Offers**, and **POs**, then select **Refresh (icn-update)**.

Symptom	Likely cause	Fix
The list contains too many records to review efficiently.	No search criteria have been applied.	Enter a relevant purchasing number, RFQ number, purchaser, job, package title, or date-related value in **Search**.
The list does not show the information needed for review.	The current layout may not include the required columns.	Select **Columns Chooser**, adjust the layout as required, enter a **Layout name**, and select **Save** or **Update Current**.
A layout change should not be retained.	The layout action is still in progress.	Select **Cancel** before saving or updating the layout.

Related pages

- Purchasing — Overview
- Purchasing — Learning Path