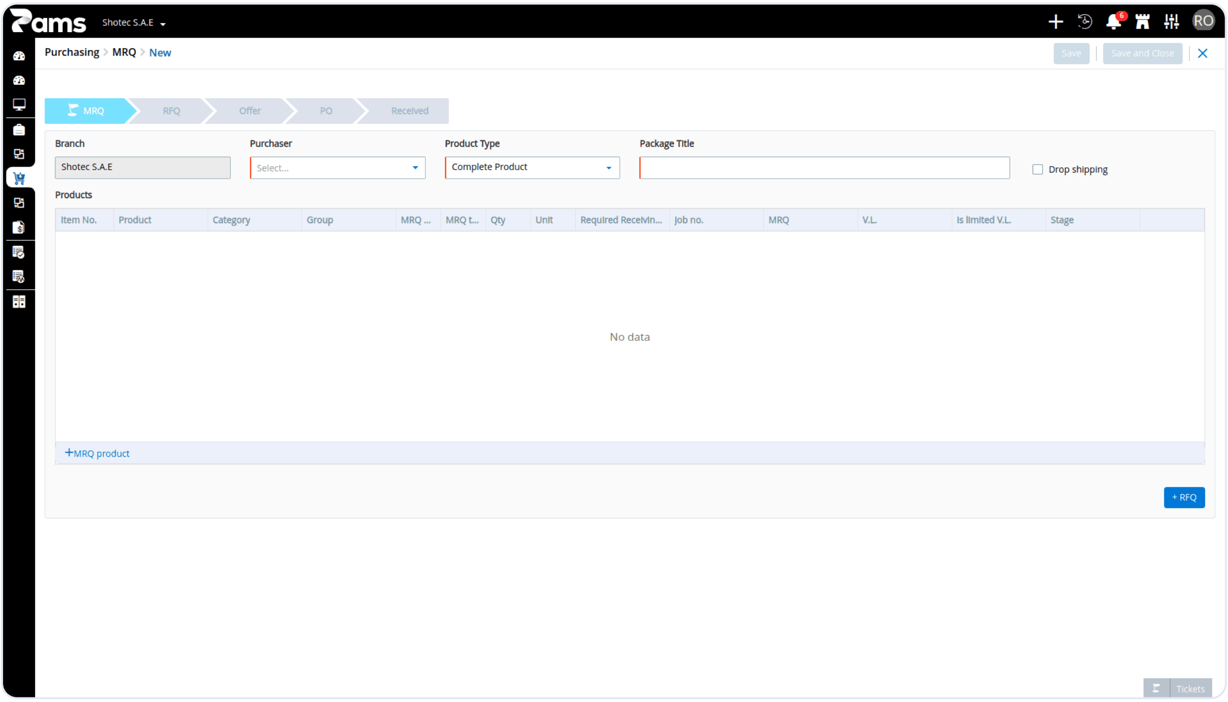
PAMS V2

RFQ

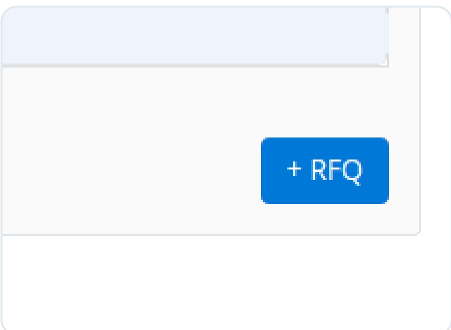
July 29, 2026

RFQ

Applications › Add new › Purchase Job



RFQ — Add new › Purchase Job › RFQ



Overview

Use RFQs (Requests for Quotation) to record procurement requests for a Purchase Job and organize the related purchasing information before progressing to a Direct Order or Project view. Purchasing officers can use this screen to create and save an RFQ record, attach supporting files, and review the related Contact, Direct Order, and Project stages.

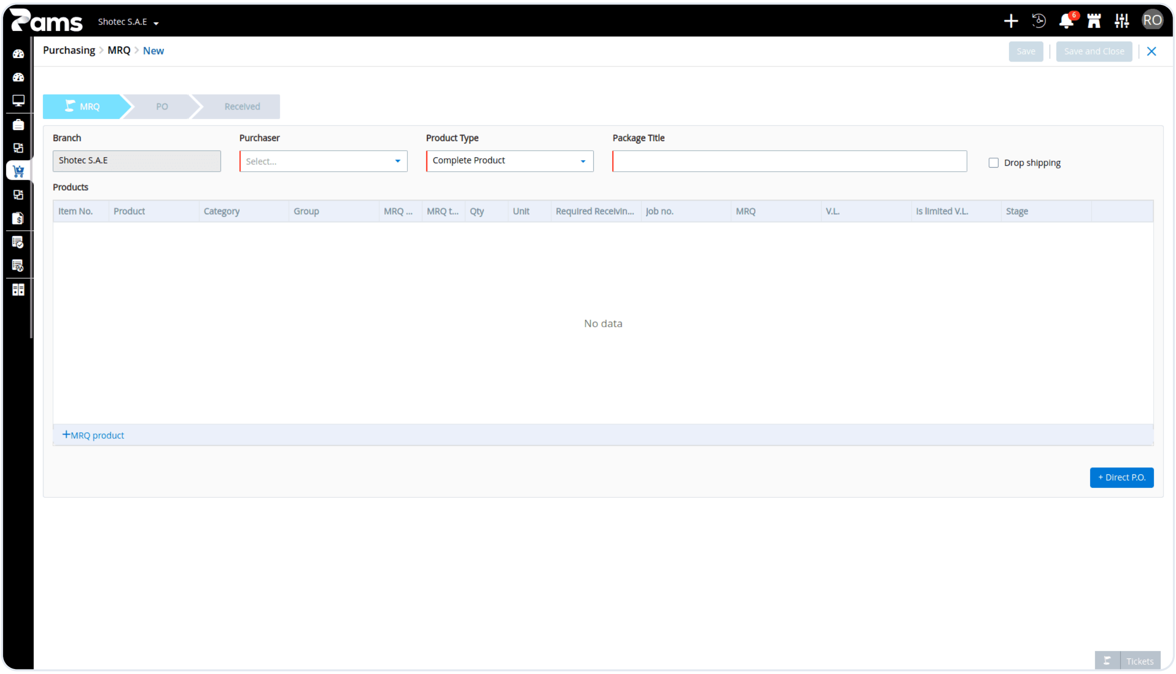
Open this feature from **Add new** > **Purchase Job** > **RFQ** when you need to start a new RFQ or work with an existing RFQ record.

> **Note:** The available RFQ screen does not show supplier, pricing, or approval fields. Record only the information and attachments available on the screen.

Workflow

1. Open **Add new** > **Purchase Job** > **RFQ**.

   Review the RFQ workspace before creating or updating a record. The screen includes the **Select...** field, the **files[]** field, and actions for creating, saving, attaching, and reviewing related information.

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2. Decide whether to create a new RFQ or work with an existing selection.

   - To start a new RFQ record, select **+ RFQ**.

- To choose from available entries, use **Select...** and select **Select** when the appropriate choice is available.
- If you are continuing work on a record already displayed, review its current information before making changes.

> **Tip:** Use **Select...** carefully when working on an existing RFQ. Confirm that the displayed record is the one you intend to update before saving changes.

3. Add supporting documentation when the RFQ requires files.

   Select **Attach** to add documentation to the RFQ. Use the **files[]** field to review the files associated with the record.

   If an on-screen confirmation is displayed after selecting or attaching a file, select **Ok** to confirm the current action.

4. Decide whether to keep the RFQ open or complete the current edit.

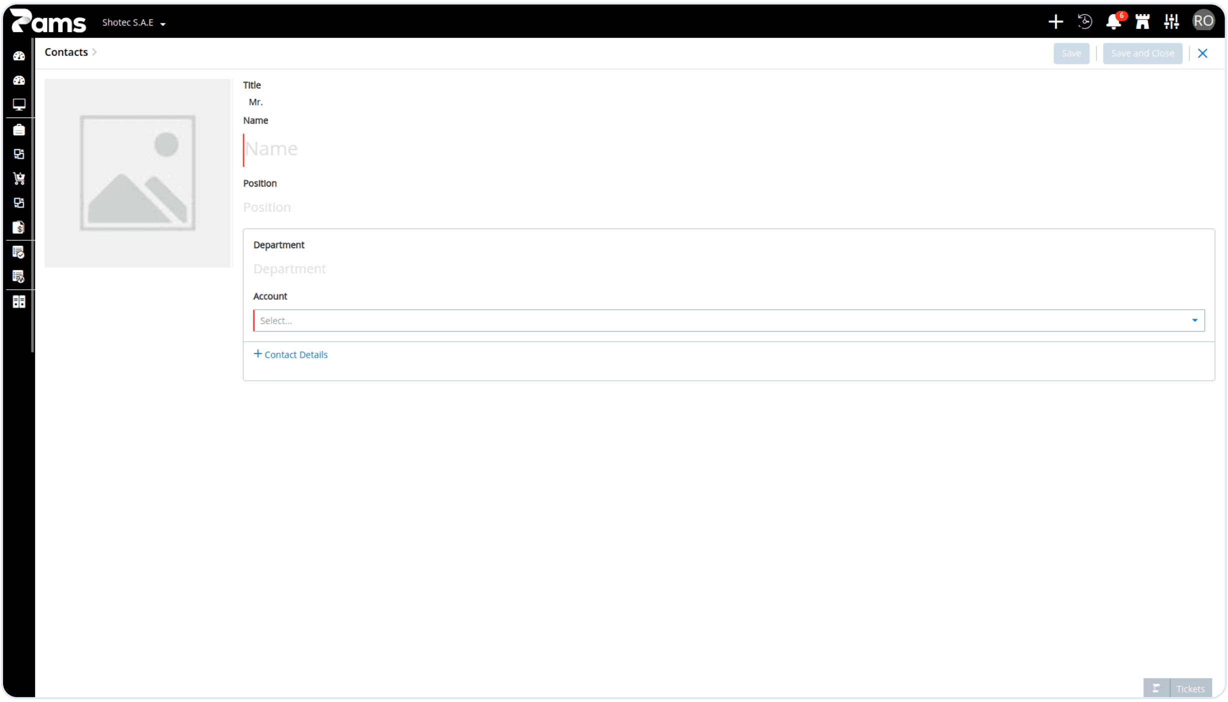
   - Select **Save** to save the RFQ and remain on the record. Choose this option when you need to continue reviewing the Contact, Direct Order, or Project information.
   - Select **Save and Close** to save the RFQ and close the current record. Choose this option when the information and attachments currently required have been recorded.

> **Warning:** Save the RFQ before leaving the screen. Changes that have not been saved are not confirmed by the available workflow actions.

5. Review related work when required.

   Select **Tickets** when you need to access the ticket-related action available from the RFQ screen. Use the RFQ tabs to review information held at the Contact, Direct Order, and Project stages.

Contact



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The **contact** tab is the first RFQ stage shown in the tab bar. Use this stage to review the contact-related portion of the RFQ record and the purchasing request information displayed for that record.

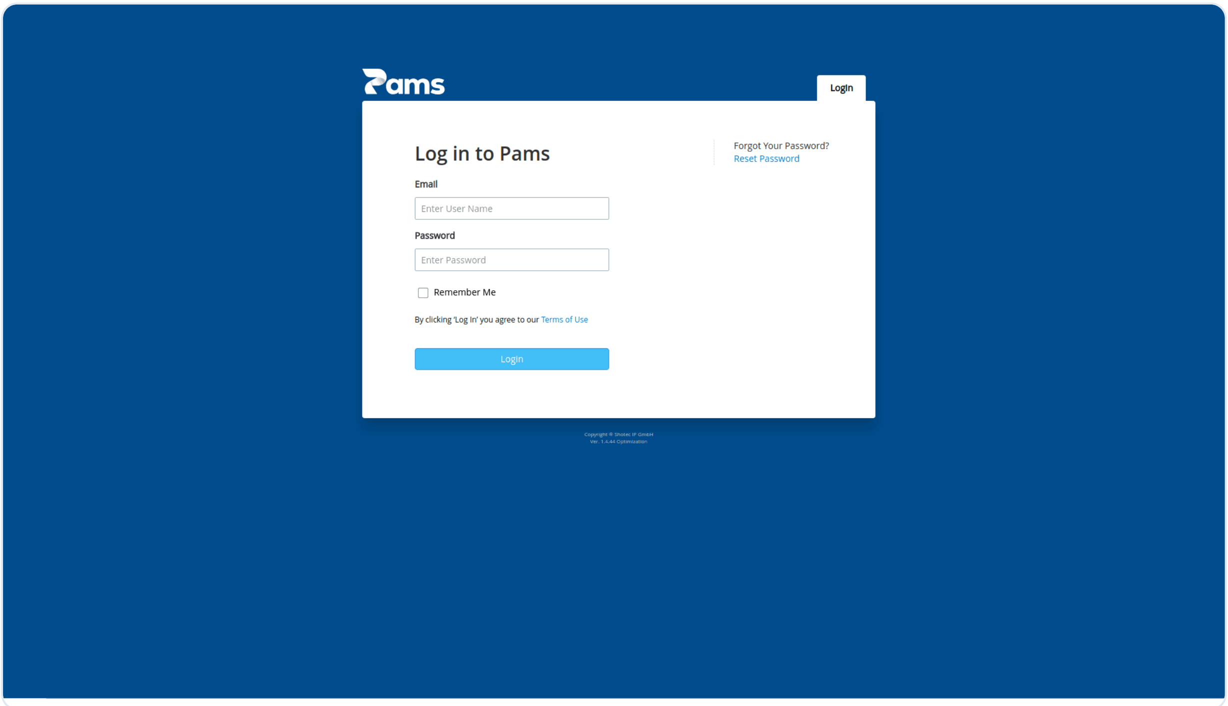
The RFQ workspace can display request-related entries with columns such as Item No., Product, Category, Group, MRQ Qty., MRQ type, Qty, Unit, and Required Re. These entries identify the kinds of product and quantity requirements associated with the RFQ. No action is provided in the available screen data to move a record into or out of the **contact** stage.

Direct order

The **direct order** tab is the next stage shown after Contact. Use it to review the Direct Order portion of the RFQ when a purchasing request needs to be considered alongside a direct purchasing order.

The displayed request information may include product, category, group, MRQ quantity and type, quantity, unit, and required details. No button or action in the available RFQ screen explicitly moves an RFQ from **contact** to **direct order** or out of the **direct order** stage.

Project



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The **project** tab is the final stage shown in the RFQ tab bar. Use it to review the project-related portion of the RFQ and the request information associated with the Purchase Job.

Review the product and quantity requirement entries shown for the RFQ, including the available Item No., Product, Category, Group, MRQ Qty., MRQ type, Qty, Unit, and Required Re information. The available screen does not provide a specific action for moving an RFQ into or out of the **project** stage.

Examples

A purchasing officer receives a request for materials needed for a Purchase Job.

1. The officer opens **Add new** > **Purchase Job** > **RFQ**.
2. The officer selects **+ RFQ** to begin a new RFQ record.
3. The officer uses **Select...** and **Select** where an available selection is required for the record.
4. The officer reviews the requirement entries shown on the RFQ, including the product, category, requested quantity, unit, and required details.
5. The officer selects **Attach** and adds the supporting request document. The document is then visible through **files[]**.

6. The officer selects **Save** to retain the RFQ while checking the **contact**, **direct order**, and **project** tabs.
7. After confirming that the current RFQ information is recorded, the officer selects **Save and Close** to finish the update.

The result is a saved RFQ record with its available request information and supporting files recorded in the Purchase Job workflow.

Tips

> **Tip:** Use **Save** when you need to continue working across the RFQ tabs; use **Save and Close** only when you have finished the current update.

> **Note:** Keep supporting documentation attached to the relevant RFQ through **Attach** so that it remains available in **files[]**.

> **Warning:** The Direct Order and Project tabs provide related stage views, but the available RFQ screen does not show a control for manually moving records between these stages.

Troubleshooting

Symptom	Likely cause	Fix
You cannot identify the RFQ record you need to update.	The current record has not been selected.	Use **Select...** and then **Select** to choose the appropriate available record.
A supporting document is not visible on the RFQ.	The file has not been attached or confirmed.	Select **Attach**, complete the available attachment action, confirm with **Ok** if prompted, and check **files[]**.
Changes are not retained after leaving the RFQ.	The record was not saved.	Select **Save** before continuing work, or select **Save and Close** when the update is complete.
You cannot find an action to move the RFQ between tabs.	No transition action is available on the provided RFQ screen.	Review the information in the relevant **contact**, **direct order**, or **project** tab; do not assume that tab selection changes the RFQ stage.

Related pages

- Direct Order
- Add new — Overview
- Add new — Learning Path
- Accounts
- Contact
- Call
- Task
- Payment
- Product
- Project
- Process