

New Instant Job

ams

Shotec S.A.E

Sales Jobs

Orders

Job No. : New

Save

Save and Close

×

Order

Delivered

Status

Select...

Branch

Salesperson Responsible

Product Type

Job Title

Shotec S.A.E

Ramy Othman

Select...

End User

File Number

Select...

Client :

Vendor :

Order / Draft

Client

Vendor

Client Order No.

Vendor Order No.

Order Date

Order Activation Date

Select...

Select...

28 Jul 2026

28 Jul 2026

Delivery Time

Forecasted Delivery Date

Shipping Address

Delivery Term

Payment Method

Payment Period

Select...

Select...

Select...

Select...

Select...

Partial Delivery

L/C Number

External order no.

Item Description

Unit

Qty

Unit Price

Discount (%)

Item Price

Currency

1

Pieces

1.00

0.00

0.00%

0.00

EUR

Count: 1 + Item

Total Price

0.00 EUR

Backlog :

0.00 EUR

Equivalent Booking :

Tickets

Overview

Use New Instant Job in Sales to create and maintain an immediate job entry when you need to record the job directly rather than following a separate quotation workflow. Sales representatives, account managers, and project-related users can select the required item or value, attach supporting files, and save the entry for later review in the draft view.

The available screen shows a draft-stage tab labelled Client : Vendor : Order / Draft. No separate confirmation, approval, or invoicing action is available on this screen.

Workflow

1. On the New Instant Job form, begin the entry by choosing the required value in **Select....** Use **Select** to apply the available selection.

New Instant Job

If a confirmation prompt is displayed, choose **Ok** to accept the selection or **Cancel** to leave it unchanged.

Note: The screen does not identify the business object represented by **Select....** Select the value required by your organisation's job-entry process, rather than assuming that it represents a specific customer, supplier, product, or order.

2. Decide whether the job requires supporting documentation.

- To add documentation, select **Attach** and add the required file. Review the **files** area to confirm that the file is present.
- If no document is required, continue without attaching a file.

Pams Shotec S.A.E.

Sales Jobs > Orders > Job No.: New

Please Solve the Following Issues :
 - Product type is required
 - Client is required
 - Vendor and client is the same. It is not possible.
 - Job title is required
 - Vendor is required

Branch: Shotec S.A.E. Salesperson Responsible: Ramy Othman Product type: Select... Job title: Select...
 End User: Select... File Number:

Client: Select... Vendor: Select... Order / Draft

Client Order No.: Vendor Order No.: Order Date: 28 Jul 2026 Order Activation Date: 28 Jul 2026
 Delivery Time: Select... Forecasted Delivery Date: Shipping Address: Select... Delivery Term: Select... Payment Method: Select... Payment Period: Select...
 L/C Number: External order no.:

☐ Partial Delivery

Item Description	Unit	Qty	Unit Price	Discount (%)	Item Price	Currency
+ Item						

Total Price: 0.00 EUR
 Backlog: 0.00 EUR
 Equivalent Booking: 0.00 EUR

Buttons: Save, Save and Close, Tickets

New Instant Job

Use attachments for records such as customer instructions, supplier information, job-related correspondence, or other supporting material only when these documents are relevant to the entry.

3. Decide whether to keep working on the entry or finish it now.

- Select **Save** to retain the current entry and continue working on the same screen.
- Select **Save and Close** to retain the entry and close the form when no further changes are required.
- Select **Cancel** if you do not want to continue with the current entry.

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Tip: Use **Save** before opening related actions or making additional changes. This keeps the current selection and any attached files available on the record.

4. Decide whether the entry should remain available.

- If the entry is no longer required, select **Delete**.
- If the entry is still needed, leave it saved in the draft view.

The screen also provides **Tickets**. Use this action only when your established business process requires ticket-related work; the available screen does not specify the ticket action's result.

Warning: Deleting an entry removes it from the current workflow. Review the selected value and attached files before choosing **Delete**.

Client : Vendor : Order / Draft

This tab contains instant job records in the Client : Vendor : Order / Draft stage. Use it to review draft entries and the visible line values associated with them, including quantities, numeric amounts or percentages, and currency values where shown.

The available controls do not identify a button that moves a record into or out of this tab. Save the entry using **Save** or **Save and Close** so that it can remain available in the draft view.

Examples

A sales representative receives an urgent request that needs to be recorded immediately.

1. The representative opens the New Instant Job form and uses **Select...** to choose the appropriate available value for the job.
2. The representative uses **Select** and, where prompted, confirms the selection with **Ok**.
3. The customer's written request is available as a file named `Customer_Request_2026-07-28.pdf`. The representative selects **Attach** and verifies that the file appears in **files[]**.
4. Because the representative needs to check the entry again before leaving the screen, they select **Save** rather than **Save and Close**.
5. After reviewing the draft entry in Client : Vendor : Order / Draft, the representative keeps the record available for subsequent work.

If the request was entered in error, the representative returns to the record and selects **Delete** rather than retaining an incorrect draft.

Tips

Tip: Attach supporting files while creating the entry so that the draft record retains its related documentation in one place.

Note: The visible draft tab includes values such as quantities and currency amounts. Review the displayed values before relying on the draft record for follow-up work.

Warning: No confirmation or approval button is provided on the available screen. Do not treat saving a record as evidence that a separate commercial, purchasing, warehouse, finance, or Job Profitability process has been completed.

Troubleshooting

Symptom	Likely cause	Fix
The required value is not applied to the entry.	The selection was not completed or was cancelled.	Use Select... , apply the available choice with Select , and choose Ok if a confirmation prompt is shown.
A supporting document is missing from the record.	The file was not attached or was not retained before leaving the form.	Select Attach , confirm that the file appears in files[] , then select Save or Save and Close .
The entry is no longer visible for continued work.	The form may have been cancelled or the record may have been deleted.	Create the entry again if it was cancelled. If it was deleted, re-enter the required selection and attachments.
The record still appears as a draft.	No stage-transition control is available on the provided screen.	Retain the record in Client : Vendor : Order / Draft and follow your organisation's established process for any work that must occur outside this screen.

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