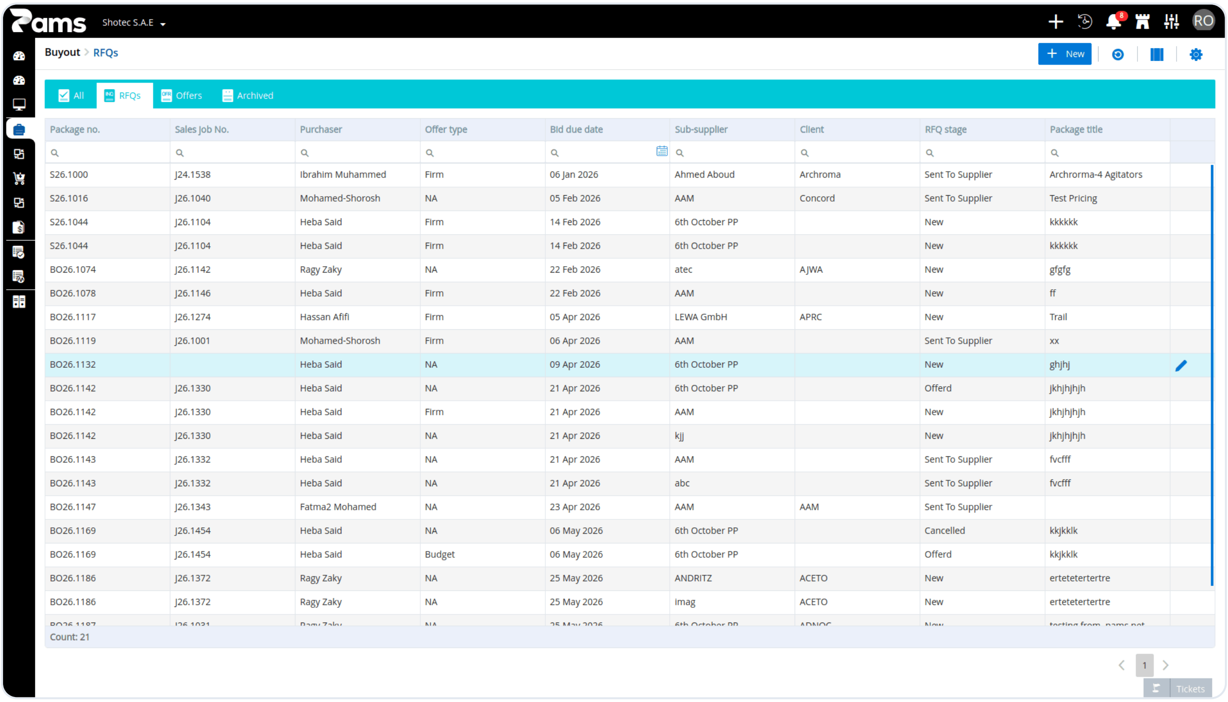
PAMS V2

Convert Offer to Purchase Order

August 17, 2026

Convert Offer to Purchase Order

How-to Tasks



Buyouts — Sales › Pricing Quotation

Overview

Use this task to convert a selected supplier offer into a purchase order. Purchasing officers perform this action after receiving and evaluating supplier offers and selecting the preferred pricing and terms. The ProcurementOffer must be at **Supplier Offer Evaluation** before you create the purchase order.

This action moves the procurement process from supplier offer evaluation to **Purchase Order Creation**, where the selected offer becomes the basis for the next procurement activity.

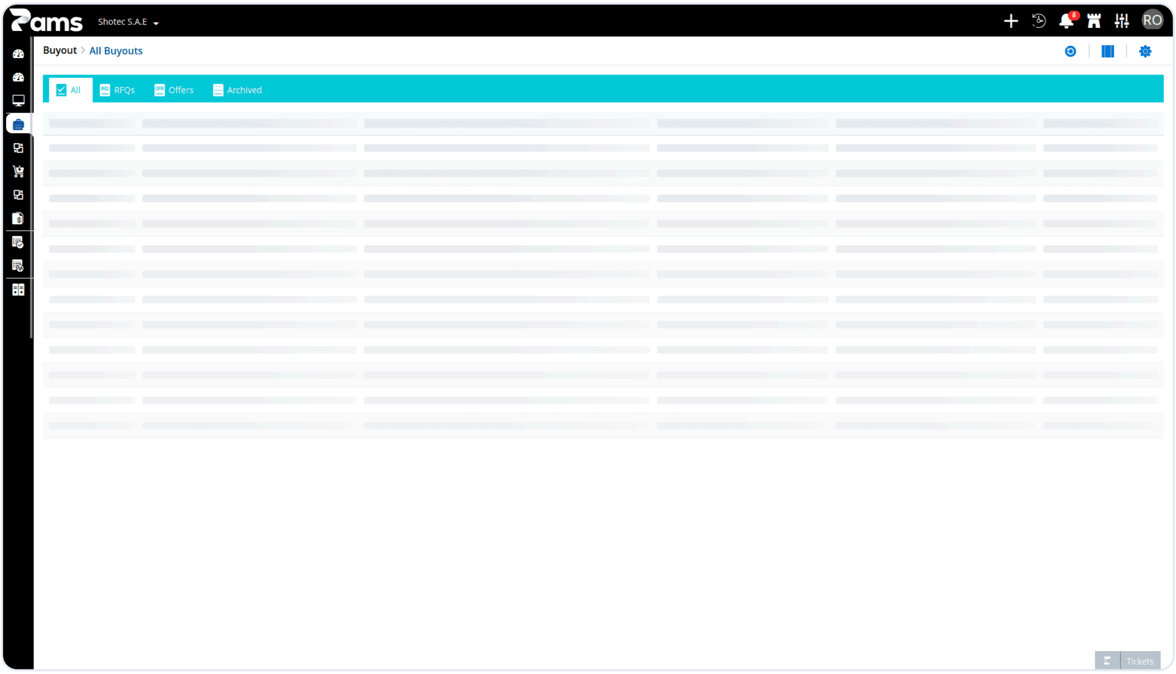
Before you start

- Ensure that the ProcurementOffer is at **Supplier Offer Evaluation**.
- Ensure that you have selected the supplier offer that will be used for the purchase order.
- You must have the `procurement.order.create` permission.
- Ensure that the offer contains at least one item.

> **Note:** A procurement record progresses through Offer, Order, and Delivered. This task creates the purchase order from the selected offer; it does not complete delivery.

Steps

1. Open the ProcurementOffer that you have evaluated and selected for purchasing.



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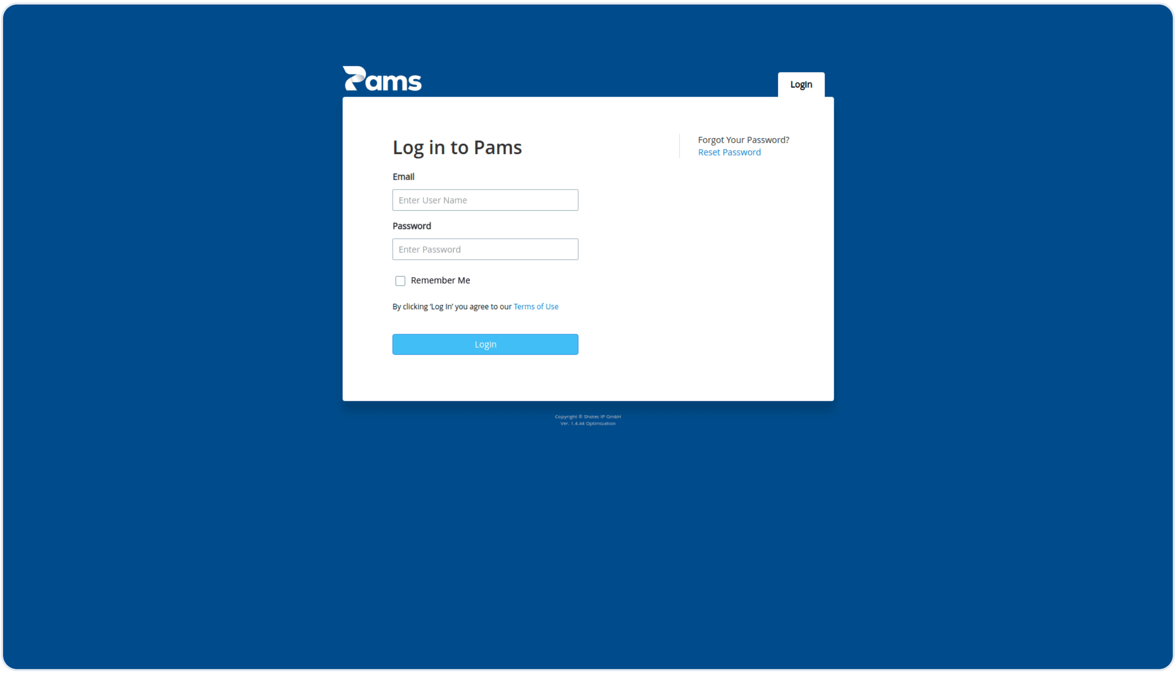
2. Review the supplier offer information, including the package number, sales job number, purchaser, offer type, bid due date, and supplier details, to confirm that you are converting the intended offer.
3. Confirm that the ProcurementOffer is at **Supplier Offer Evaluation** and that the selected offer is ready to be converted.
4. Select **Create PO**.



Procurement record

5. Continue in **Purchase Order Creation** to create the purchase order from the selected supplier offer.

> **Warning:** Create the purchase order only for the supplier offer selected during the evaluation. The conversion begins the procurement Order process.

Tips & cautions

> **Tip:** Use the **All** view to locate supplier offer records and review their offer-related details before starting the conversion.

> **Note:** An offer must contain at least one item before it can be used in the procurement process.

> **Warning:** A procurement Order with binding invoices cannot be reverted.

Troubleshooting

- **The Create PO action is unavailable** → Your account may not have the required purchasing permission → Obtain the `procurement.order.create` permission.

- **The offer cannot be converted** → The ProcurementOffer is not at Supplier Offer Evaluation → Complete supplier offer evaluation before selecting **Create PO**.
- **The purchase order cannot be created from the offer** → The offer has no items → Add at least one item to the offer before converting it.
- **You need to return an Order to an earlier process stage** → The Order may have binding invoices → Resolve the binding invoice condition before attempting any reversal.

Result

The selected ProcurementOffer moves from Supplier Offer Evaluation to Purchase Order Creation.

Related pages

- Send Inquiry to Suppliers
- Complete Procurement
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- Getting Started with Procurement
- Procurement
- Initiate Goods Receiving
- **Update Offer Status
- Complete Order
- Convert Offer to Order**
- Create Offer from Inquiry
- Progress Order Status
- **Close Invoice
- Setup Payment Milestones**
- Process Payment