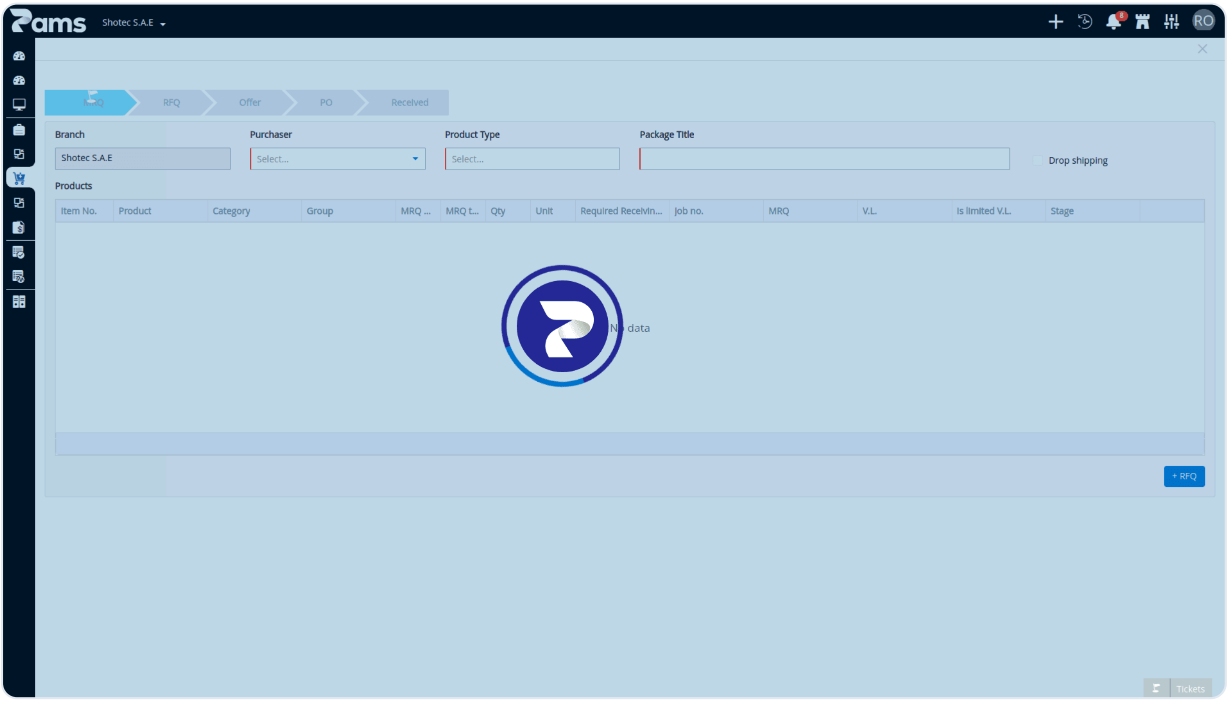
Send Inquiry to Suppliers

August 17, 2026

Send Inquiry to Suppliers

How-to Tasks



Procurement record

Overview

Use this task to send a ProcurementInquiry to suppliers when the record is at **Procurement Inquiry Creation**. Sending the inquiry generates a PDF for the supplier inquiry and moves the ProcurementInquiry to **Supplier Offer Evaluation**, where supplier offers can be evaluated.

Purchasing officers perform this task after required materials or services have been identified and the inquiry is ready to be issued.

Before you start

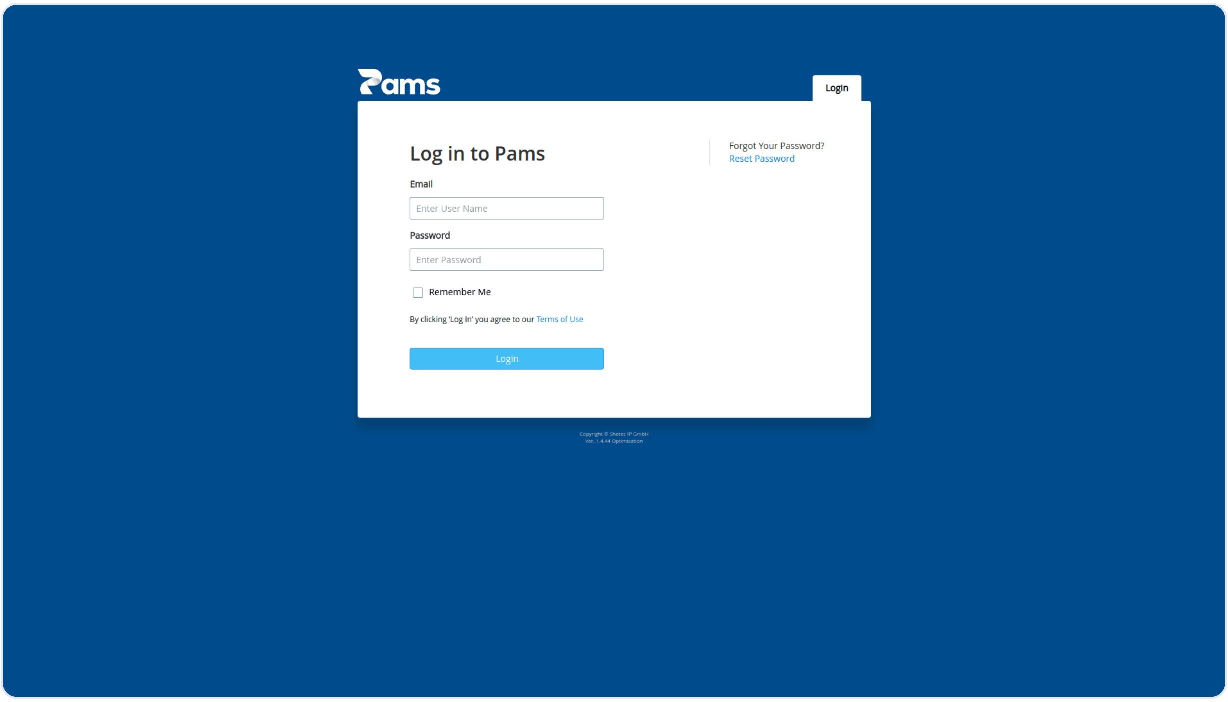
- Ensure that the ProcurementInquiry is at **Procurement Inquiry Creation**.
- Ensure that you have the `procurement.inquiry.send` permission.
- Review the required materials or services and their specifications in the ProcurementInquiry before sending it to suppliers.

Steps

1. Open **Purchasing**, and then open the ProcurementInquiry that is at **Procurement Inquiry Creation**.
2. Review the inquiry details for the required materials or services. Confirm that the listed items and quantities are ready to be included in the supplier inquiry.
3. Select **Send Inquiry**.
4. Generate the inquiry PDF when prompted by the send process. The PDF is used for the supplier inquiry.
5. Complete the send process. The ProcurementInquiry moves to **Supplier Offer Evaluation** for review of supplier offers.

All

The **All** view displays procurement records, including item-related details such as item number, product category, group, requested quantity, quantity unit, and required information. Use this view to locate the relevant ProcurementInquiry before opening it and sending the inquiry.



Procurement record

Tips & cautions

> **Tip:** Review all required materials or services before selecting **Send Inquiry**, because the inquiry PDF is generated as part of the send process.

> **Warning:** You cannot send the inquiry unless the ProcurementInquiry is at **Procurement Inquiry Creation** and you have the required `procurement.inquiry.send` permission.

> **Note:** After the inquiry is sent, continue the procurement process in **Supplier Offer Evaluation** to evaluate supplier offers.

Troubleshooting

- **The Send Inquiry action is unavailable** → The ProcurementInquiry is not at **Procurement Inquiry Creation** → Open a ProcurementInquiry that is at the required stage.
- **You cannot send the inquiry** → Your user account does not have the required permission → Obtain access to `procurement.inquiry.send`.

- **The inquiry is not ready to send** → Required materials, services, quantities, or specifications require review → Update and review the ProcurementInquiry before selecting **Send Inquiry**.

Result

The ProcurementInquiry is sent with a generated PDF and is moved to **Supplier Offer Evaluation**.

Related pages

- Convert Offer to Purchase Order
- Complete Procurement
- **How-to Tasks — Learning Path**
- Procurement — Overview
- 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