PAMS FRESH GENERATION

Offer status

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Offer status

Overview

Offer Status is the company reference list for the statuses that can be assigned to sales
offers. Maintain its names and order in the sales configuration area so the list used for offers matches the way your company describes its work.

If you need to…	Go to
understand the list and its fields	Understand the list and form
add, change, or remove a status	Maintain Offer Status entries
use the list tools or handle access variations	Use list tools and handle access variations
resolve a validation or deletion message	When an Offer Status operation goes wrong
maintain another sales reference list	Order status, Inquiry status, Lost reasons, or Regret reasons

Before you start

Prerequisites

- You have access to the configuration area and the Offer Status list.
- Your subscription includes this configuration area. When it does not, the page shows the
  subscription-upgrade surface instead of the list.
- To add an entry, **New** must be available. To change an entry, an edit control must be
  available on the intended row. To remove an entry, a delete control must be available on the
  intended row.

- Have the status name ready before you open the add form. The form contains one visible field, **Name**.
- The list layout can determine which columns appear, so work from the column headers you can see on your screen.

The page can keep a status only when its validation group is valid. Deleting is available only when more than one row exists; the page keeps at least one item in the list.

> **Important:** Keep at least one status in the list. The page blocks deletion when it would leave the list empty.

Find the Offer Status list

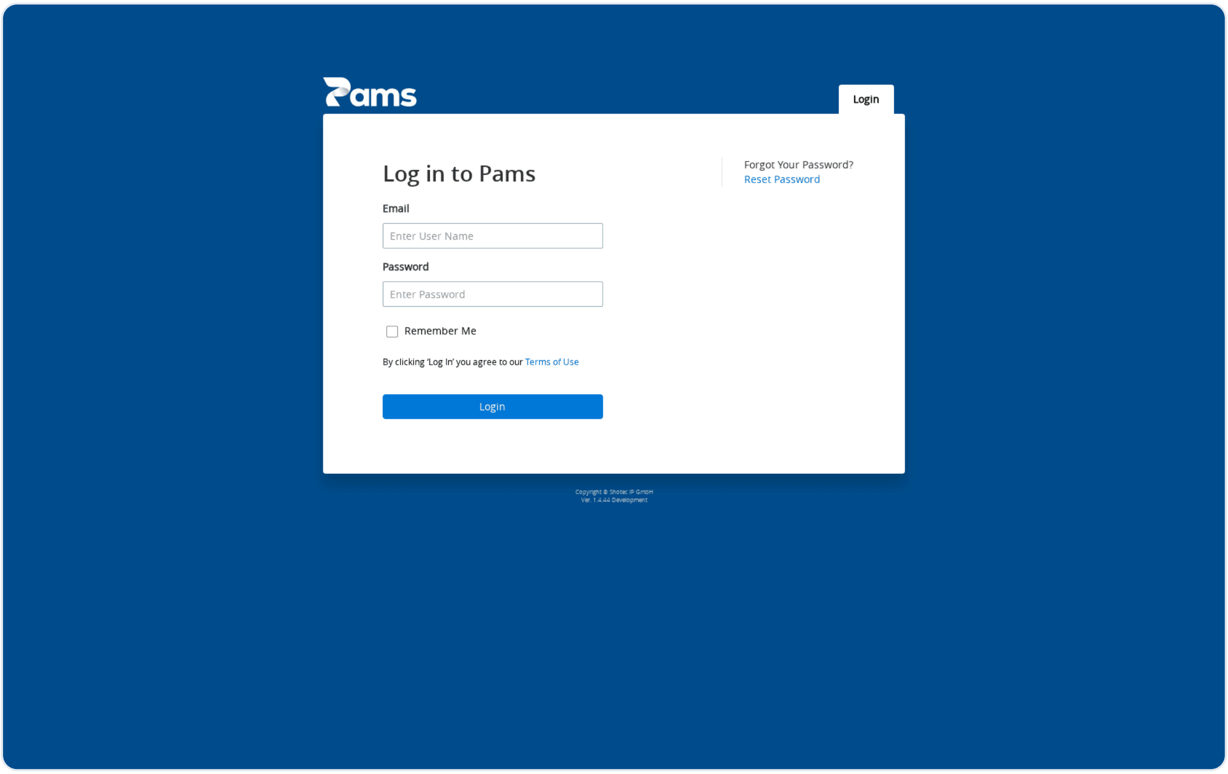
Use the shared configuration screen to reach this sales reference list. The same screen exposes sibling lists, so check the page title and selected list name before you change a value.

Prerequisites

- You can open the configuration area.

Steps

1. Open **General settings** from the configuration menu.
2. Select **Offer Status** from the sales reference-list choices.
3. Check that the page title says **Offer Status**.
4. Check that the list contains the **Name** column.
5. Check the selected sibling list before changing an entry.



The list can show **No data** when no rows are available.

If navigation returns you to the sign-in surface, use this alternative:

Steps

1. Complete the sign-in recovery and reopen the list:

Action	Control
Enter your address	**Email**
Enter your password	**Password**
Sign in	**Login**
Open the configuration list	**General settings**
Select the list	**Offer Status**

Result: The Offer Status list opens after sign-in.

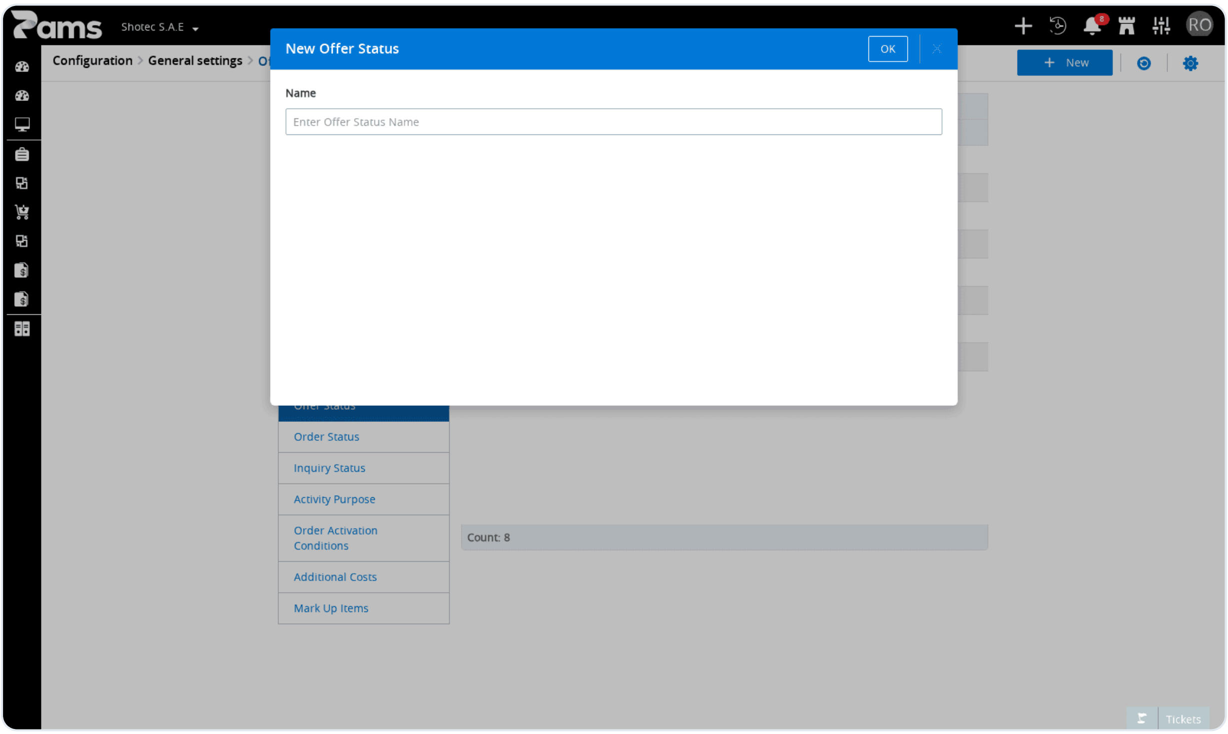
Result: You are on the Offer Status list and can distinguish it from the neighbouring sales
reference lists.

Understand the list and form

The list holds the company’s status names, and its add/edit form contains the one visible value
you maintain: **Name**.

Area	What you use	What to expect
List	**Name**	Visible text column; filtering is enabled and sorting and editing are disabled.
List	`DisplayOrder`	Hidden ordering value.
List	`OfferStatusID`	Hidden identifier value.
List	`CompanyID`	Hidden company value.
Add/edit form	**Name**	Text box and first form field; its required marker follows the configured column rule.
Grid	Column headers, paging, built-in add, update, delete, and column chooser	These list features are disabled; use **New**, the edit control, or the delete control instead.

The visible column set depends on the list setup available to your company. Use the headers you
see rather than looking for hidden identifiers. The form includes no other visible Offer Status
field.



Maintain Offer Status entries

Add a value when the list needs a new status, edit its name when the wording changes, or delete it
when it is no longer needed.

Prerequisites

- You are on the Offer Status list.
- For an add, **New** is available.
- For an edit, an edit control is available on the intended row.
- For a delete, a delete control is available on the intended row and the list contains more than one row.

Steps

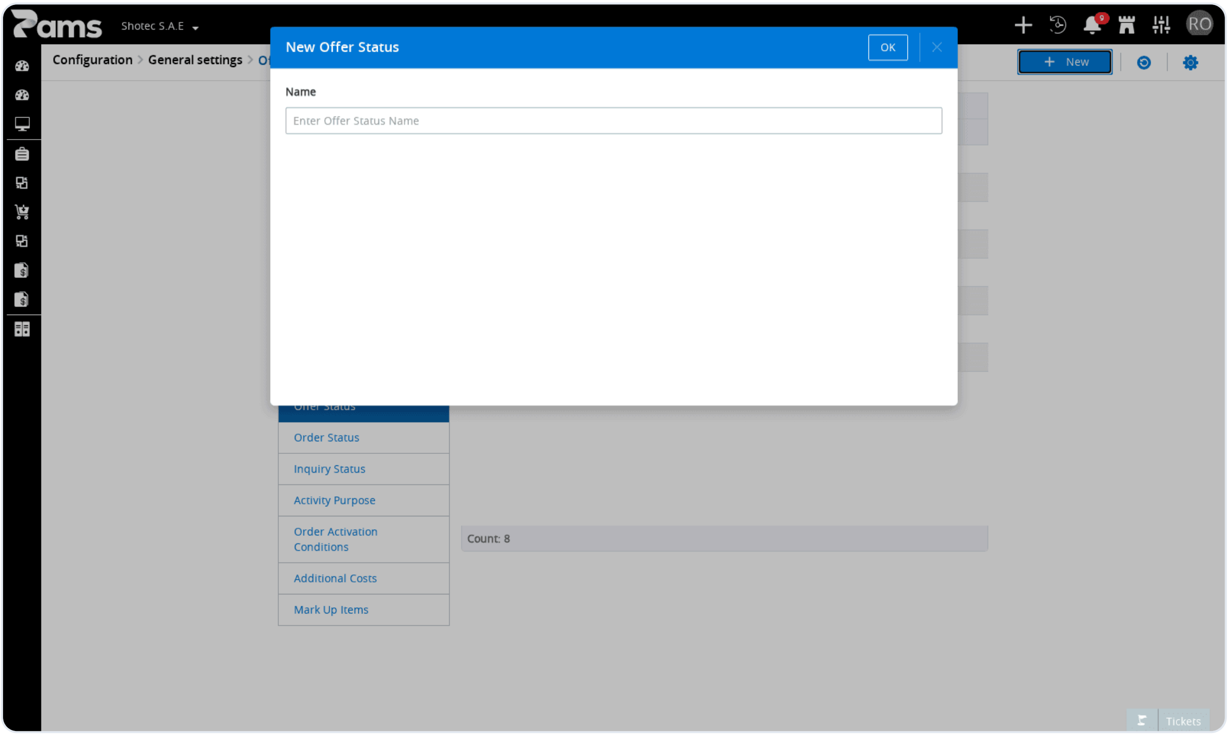
1. Choose one action:

If you need to…	Select
add a status	**New**
edit a status	the edit control in the intended row
start removing a status	the delete control in the intended row

2. For an add or edit, enter the status name in **Name**.
3. For an add or edit, select **OK** in the form header.
4. When `Are you sure you want to delete this item?` appears, choose one action:

If you need to…	Select
keep the row	**Cancel**
remove the row	**Delete**

The add dialog is titled `New Offer Status` and displays **Name**. Its submit control is **OK**.



The form checks the configured required rule before sending a save request. Correct any message shown for the field before trying again.

After a successful add, the page shows `Data saved Successfully`. After a successful edit, it shows `Data updated Successfully`. After a successful deletion, it shows `Data Deleted Successfully`.

Result: The selected add, edit, or delete action is complete when its corresponding result message appears and the list returns to its updated state.

Use list tools and handle access variations

The shared configuration screen changes its available actions according to access, subscription, rows, and the list setup. Check the control that is actually available before choosing an action.

What you see	What it means	What to do
New is visible	Adding is available on this screen.	Select **New** to open the add form.

What you see	What it means	What to do
An edit control is visible	Editing is available for that row.	Select the edit control in the intended row.
A delete control is visible	Deleting is available for that row.	Select the delete control in the intended row.
Export is available	The list can open its export choices.	Select **Export**, choose the required list format, then confirm the export.
The upgrade surface appears	The subscription branch is active.	Contact your PAMS administrator about access to this configuration area.
The list shows **No data**	No rows are available on the current screen.	Check the selected list and list setup before selecting an edit or delete control.

The export modal is titled **Exporting List:** and provides **Export** and the choices **Export to**
Excel and **Export to PDF**. When several rows are listed, select the edit control in the row you
intend to change.

Prerequisites

- You are on the Offer Status list or its sign-in surface.

Steps

1. Select **Export** when you need a file of the list.
2. Choose the required export option in **Exporting List:**.
3. If the sign-in surface appears, complete the sign-in recovery in Find the Offer Status list.
4. Open **General settings**.
5. Select **Offer Status**.

Result: You use only the actions available for your access and current list, and you know
which screen state to correct before selecting an edit or delete control again.

When an Offer Status operation goes wrong

Use the exact message to choose the next action.

Message	What to do
`Name is required`	Enter a value in **Name**.
`Field is required`	Enter a value in the required form field, then select **OK**.
`Just '_' '-' And '.' Characters Accepted`	Remove characters outside the accepted name pattern, then try again.
`Are you sure you want to delete this item?`	Select **Cancel** to keep the row or **Delete** to continue removing it.
`Related to Saved data, Can't be deleted`	Keep the row and review the saved data that refers to it.
`Failed to Delete`	Check the row and your access, then retry the delete action.
`Must have at least one item`	Keep at least one row in the list.
`Forbidden characters detected. Please remove them and try again.`	Remove forbidden characters from the filter value, then apply the filter again.

The add form can also show `Name is required` when its configured required rule is active. The
page does not send the save request while the validation group is invalid.

Continue with related configuration

The shared configuration host groups Offer Status with other sales reference lists. After you
finish here, choose the list that matches the next reference value you need to maintain.

Prerequisites

- You have finished the Offer Status change or decided which related list you need.

Steps

1. Select the related list in the table below.

If you need to maintain…	Go to
order statuses	Order status
inquiry statuses	Inquiry status
reasons for lost sales	Lost reasons

If you need to maintain…	Go to
reasons for regretted sales	Regret reasons
cancellation reasons	Cancellation reasons
order cancellation reasons	Order cancellation reasons

Result: You are ready to continue with the related sales reference list that matches your
next configuration task.