

From orders to delivered

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Sales handoff

Sales handoff

A sales handoff is the sales-job work where you confirm the commercial order, activate it, prepare its shipment, and record delivery. The completion stage follows the delivery work.

The order panel owns confirmation, activation, shipment readiness, delivery, and corrections;

the operational area owns the detailed receiving, inspection, stock, and delivery-note work

that follows.

```
stateDiagram-v2
    Record --> Confirmation: Send confirmation
    Confirmation --> Active: Activate
    Active --> Shipment: Prepare shipment
    Active --> Complete: Deliver
    Shipment --> Complete: Deliver
    Complete --> Active: Reverse delivery
```

Use this page when you already have a saved order and need to move it through the order-owned

handoff. Use [Sales jobs lifecycle](#) for the wider sales-job journey, and [Warehouse fulfillment flow](#) when the detailed Warehouse work begins.

If you need to...	Go to
Find an existing Order	Find and open the Order
Identify Order fields and actions	Understand the Order panel
Confirm and activate an Order	Confirm and activate the Order

If you need to...	Go to
Prepare shipment or start delivery	Prepare shipment and deliver the Order
Reverse or correct an Order	Correct the Order and handle problems
Continue receiving, inspection, stock, or delivery-note work	Warehouse fulfillment flow
Create or locate a Warehouse delivery note	Delivery notes

Before you start

Note: A field marked configurable is required only where your company configuration makes it mandatory.

Prerequisites

- You have a saved sales job with an Order.
- You can edit the sales job and the Order is new or has unsaved changes when you need to use **Save**.
- You have the customer and supplier references needed for the Order fields.
- You know the Order's current stage. **Request Pricing Confirmation** is available for a Draft Order that has not already been released or requested. **Activate Order** is available at Awaiting Activation or Consider As Awaiting Activation.
- The shipment path depends on the supplier relationship. **Ready for shipment** is available for the supplier route at Valid; **Deliver Order** is available for a non-supplier Valid Order or a supplier Ready for Shipment Order.

Find and open the Order

The Orders list is the working list for sales jobs at the Order stage. Use it to identify the record, then open the record before you change the Order panel.

Prerequisites

- You can access Sales jobs and know which saved Order you need.

Steps

1. In the application menu, select **Sales**.
2. Select **Sales jobs**.
3. Select **Orders**.
4. Open `/sales/list/orders/view` .
5. Select the list tab that matches the work you need to locate.

If you need to...	Select
Work with current Order records	Orders
Search across sales-job work	All
Review earlier sales stages	Potentials, Inquiries, or Offers
Find finished or left-route work	Archived
Review jobs missing a customer survey	Job Missing Customer Survey

6. Identify the row from **Job No.**, **File No.**, `Sales responsible` , **Vendor**, **Client**, **Job title**, `Order date` , and `Forecasted Delivery Date` .
7. Select the row to open the sales-job record.

Result: The sales-job record opens with the Order panel available when the job is at the Order stage.

Select the client, vendor, or stage title bar to expand the collapsed Order panel before using its menu or panel **Save**.

Understand the Order panel

The Order panel is the part of the sales-job record where you maintain order references, dates, delivery terms, payment information, and order items. The record also shows the current Order stage and its available actions.

The panel fields are:

Field	What it records	Requirement or rule
Client Order No.	The reference printed on the customer's order	Required only where company configuration makes it mandatory
Vendor Order No.	The reference assigned by the vendor	Required only where company configuration makes it mandatory
Order Date	The date shown on the customer order	Required only where configured; it cannot precede the Offer Date
Order Activation Date	The date the Order becomes active	Required only where configured; it is between the Order Date and today
Delivery Time	The agreed delivery period	Required only where configured; its minimum is 1 and its maximum is the configured period limit
Forecasted Delivery Date	The date you expect delivery	Required only where configured
Shipping Address	Where the goods are to arrive	Address used for shipment
Delivery Term	The agreed delivery condition	Required only where configured
Payment Method	How the customer pays	Required only where configured
Payment Period	The agreed payment interval	Required only where configured
Partial Delivery	Whether the delivery can be split	Visible on the opened Order panel
L/C Number	The L/C reference	Required only where configured
External order no.	The reference used by an external system	Required only where configured

The item grid contains `Item Description` , `Unit` , `Qty` , `Unit Price` , `Item Price` , `Currency` , `Discount limit (%)` , `Discount (%)` , and `Tax (%)` . Enter a quantity with its unit: the Order can show `One or more items has ZERO quantity` or `One or more items has no unit` when an item row is incomplete.

Order confirmation validates `Client` , `Vendor` , at least one item, item descriptions, quantities, prices, discounts, tax, and the form.

The record header shows `Client` and `Vendor` . The Order menu contains **Order amendment** and **Enable Editing** when their stage and permission conditions are met.

An order with invoices cannot add an item and locks Qty , Item Price , Discount (%) , and Tax (%) . The screen can display Can not be done.. this order has outstanding invoice(s) .

Confirm and activate the Order

After the Order fields and items are ready, move the Order from pricing or approval into activation.

Prerequisites

- The Order panel is open.
- The Order is saved before you use actions that require an existing Order.
- The Order has at least one item with a quantity and unit.

Steps

1. Complete the configured Order fields and item rows.
2. Select **Save** when the Order is new or has unsaved changes.
3. If the Order is Draft and pricing has not been released or requested, select **Request Pricing Confirmation**.
4. If your process uses a pricing calculation, select **Calculation Sheet**.
5. If approval is required, select **Request approval**.
6. If you are an approver, select **Approve**.
7. Select **Consider Order As Confirmed To Client** when the Order is ready for client confirmation.
8. When the Order stage is Awaiting Activation or Consider As Awaiting Activation, select **Activate Order**.

Selecting **Consider Order As Confirmed To Client** displays Order Submitted to Client .

Selecting **Activate Order** opens Confirm activation date, where you enter **Order Activation Date**. The date cannot be earlier than **Order Date**.

After a valid activation date, the dialog closes and the order updates to its next applicable activation state.

If a save or action is refused, use the exact message in [Correct the Order and handle problems](#). A successful save can show

Custom fields saved successfully , Job updated successfully , Or
Your request was completed successfully .

Result: The Order remains on the record with its updated fields, and an activation-ready

Order presents **Activate Order** when its stage permits activation.

Prepare shipment and deliver the Order

Shipment readiness is the branch between an activated Order and delivery. A supplier Order

uses **Ready for shipment** before **Deliver Order**; a non-supplier Valid Order can use **Deliver Order** directly.

The delivery scenario covers thirty-eight actuators first, followed by two replacements.

Prerequisites

- The Order is saved and has no unsaved Order changes.
- The Order is Valid for the direct-delivery route or Ready for Shipment for the supplier route.
- You are allowed to edit the sales job and the Order belongs to the permitted branch.

Steps

1. Choose the shipment path for the Order.

If the Order is...	Select
A supplier Order at Valid	Ready for shipment
A non-supplier Order at Valid	Deliver Order
An own-company supplier Order at Ready For Shipment	Deliver Order

2. Select **Ready for shipment** for the own-company supplier route.
3. Select **Deliver Order** when the delivery action is available.
4. In Delivering this order, enter **Delivered On**.
5. Select **OK** to confirm the delivery.

The opened Order record displays **Deliver Order** when the Order is Valid on the non-supplier

route or Ready for Shipment on the supplier route. The delivery action is controlled by the supplier branch and the Order stage.

Delivered On is required and cannot be later than today. Delivery also requires that you

belong to the job branch and that delivery is allowed.

Selecting **Ready for shipment** does not open a date dialog.

External-supplier delivery displays Order updated successfully. A draft invoice was created. Check the Invoices tab for details. Partial delivery leaves the job short of completion; the

job reaches completion only when completed orders equal active orders.

Result: The order reaches completion when all active orders are complete, or remains short of completion when delivery is partial.

Correct the Order and handle problems

Use the correction actions when an Order needs editing, must be moved back from a later stage,

or stops with a validation or permission message.

Steps

1. Open the Order action menu.
2. Select the correction that matches the Order's current stage.

If the Order is...	Select
An editable order that is not rejected or cancelled	Enable Editing
Valid or Ready for Shipment	Order amendment
Valid after activation	Not activated yet
Ready for Shipment on the supplier route	Not ready for shipment yet

3. Select **Not delivered yet** when delivery must be reversed.

Use the message table to decide what to correct:

What you see	What to check
This field is required	Complete the field marked as required.
Invalid input. The value must be greater than 0 and cannot exceed 999,999.00	Enter a value within the displayed numeric range.
Invalid input. Please enter a non-negative value	Enter zero or a positive value.
Check mandatory field(s)	Complete the configured mandatory fields.
One or more items has ZERO quantity	Enter a quantity greater than zero for each item.
One or more items has no unit	Select a unit for each item.
Order must have at least one item	Add an item before saving the Order.
Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted	Keep those items in the Order.
Cannot be un-delivered – a due invoice already exists	Do not reverse delivery while a due invoice exists.
This order has binding invoices. It cannot be reverted.	Do not reverse delivery while binding invoices exist.
This action is only allowed if you belong to that branch	Use an Order in a branch where you are allowed to act.
An error occurred while processing your request	Check the Order values and try the permitted action again.
Error saving custom fields	Review the custom fields and save them again.
Error: Vendor not saved yet	Save the Vendor before saving the Order.
Error: Client not saved yet	Save the Client before saving the Order.

The delivery action can also show This action is only allowed if you belong to that branch. Or

Cannot be converted to delivered because the PM process is ongoing. . The first means the job belongs to another branch; the second means the delivery check declined the action.

Result: The Order is edited, amended, reversed, or ready for the next permitted action.

Out of scope

The message `Please enter action for each milestone` is outside this handoff.

Continue after delivery

The completed-delivery view contains completed delivery work. The operational area handles receiving, inspection, stock, issue, and delivery-note work after the sales-order handoff.

Steps

1. Open the sales-job list view that contains the completed work.
2. Select `Delivered`.
3. Use the visible list headers to locate the completed Order.
4. Open [Warehouse fulfillment flow](#) for receiving, inspection, and stock work.
5. Open [Delivery notes](#) for the Warehouse delivery-note procedure.

The list routes open their corresponding views. The available columns depend on the saved list layout, so use the headers shown in your view.

Result: The completed-delivery view is open, and you know whether to continue in the sales-job record or in the operational delivery workflow.