Offers

September 10, 2026

Offers

Use this page to prepare a priced Offer, move it through approval and client delivery, revise it when needed, and return it to an earlier sales stage or continue to an Order.

Offers

An Offer is the priced sales proposal between an Inquiry and an Order. It carries the commercial terms and item values that the next stage uses.

The sales-job path is Potentials → Inquiries → Offers → Orders, followed by completion. An Offer can
also leave the active path through regret, cancellation, or loss.

If you need to…	Go to
Find an existing Offer	Find sales job work and then Find and open an Offer
Enter prices, dates, terms, or items	Price and save an Offer
Request approval or send the proposal	Approve and send an Offer
Change the proposal or choose an exit	Revise, close, or return an Offer
Continue after the Offer	What happens next
Work on the preceding request	Inquiries
Work on the accepted commercial commitment	Orders

Before you start

Prerequisites

Have ready	Why it matters
The Inquiry context, including the client, vendor, requested items, responsible person, product type, commercial terms, and relevant dates	These details feed the Offer and the later Order.

- Have permission to edit the sales job. The Offer action area is available only for an editable saved record with no unsaved Offer changes.
- Confirm that the sales job is at the Offer stage or one of its Offer outcomes. The Offer
  panel covers the Offer through Lost Offer stages.
- Confirm which fields your company requires. Offer No., Offer Type, Bid Due Date, Offer
  Date, Validity Period, Delivery Time, Delivery Term, Payment Method, and Payment Period
  are required only where company configuration marks them required.
- Use the available **Offer Type** choice.
- Have the approval role and mail permission needed for the action you intend to take.

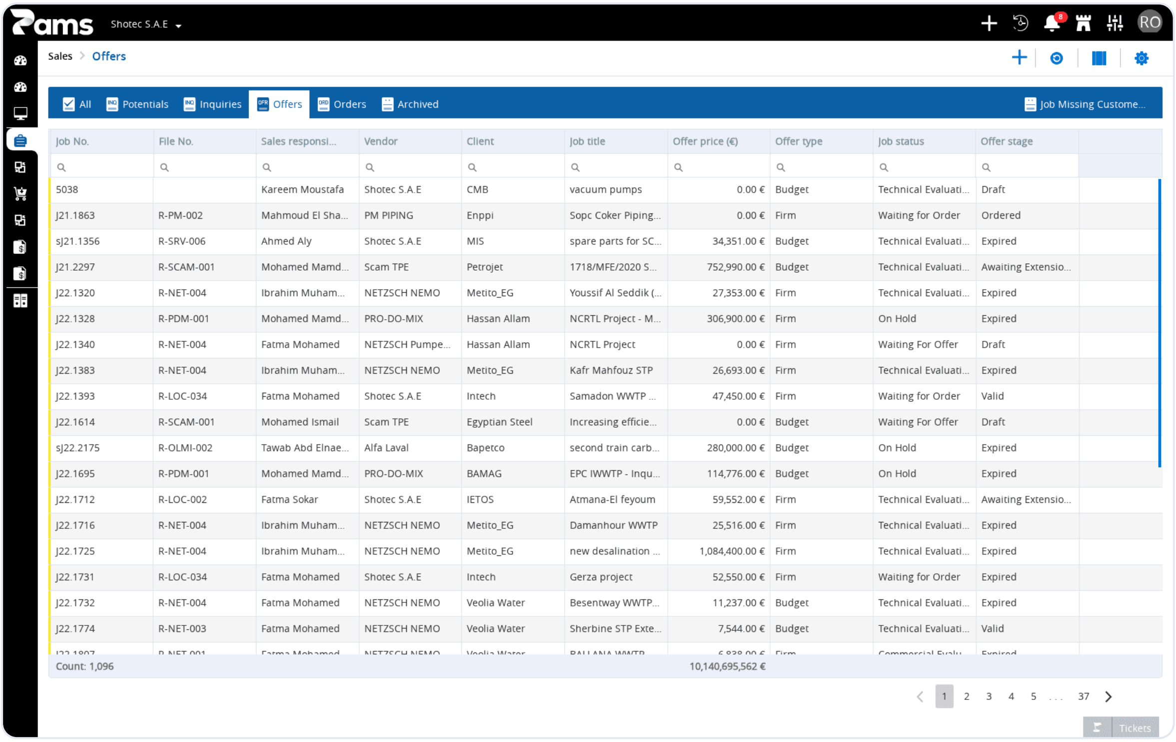
Choice	Reader action
Offer Type	Select an available value.

Find and open an Offer

Use the Offers list when you need to locate work already in the Offer stage or an Offer outcome.

Steps

1. Open the Sales jobs list at `/sales/list/offers/view`.
2. Select **Offers**.
3. Use the visible headers **Job No.**, **File No.**, **Sales responsible**, **Vendor**, **Client**, **Job title**, Offer price (€), **Offer type**, Job status, and **Offer stage** to identify the record.



4. Select the record row to open its sales-job workspace.

The list also provides icon buttons titled **Refresh**, **Table Layout**, and Settings. On the Offers route, `Show archived` is absent. Use the Find sales job work page for the shared list-navigation procedure.

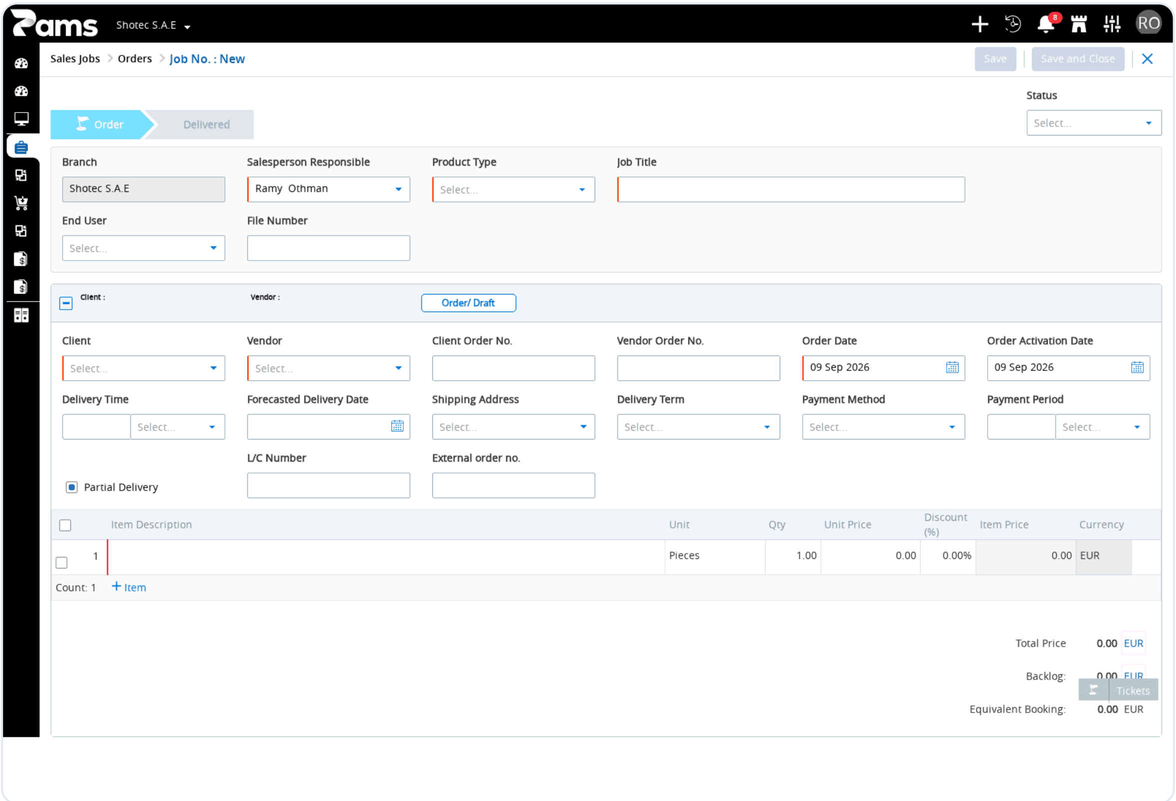
Result: The selected sales job opens with its Offer panel available when the record and
stage conditions allow it.

Open the Direct order entry from the Offers list

This route creates an Order record rather than an Offer. Use it only when your work belongs
in the Order entry flow.

Steps

1. Select **Add new**.
2. Select **Direct order**.
3. Confirm that **Save** and **Save and Close** are available on the Direct order page.



4. Use the Create a sales job page for the Direct order procedure.

Result: The Direct order entry page is open with **Save**, **Save and Close**, its order fields, and its item grid.

Understand the Offer workspace

An Offer workspace is the sales-job record around one Offer panel: the panel contains the commercial information, the item rows, the panel actions, and links to related Offer work.

The Offer panel appears when the subscription is included, the sales job is in the Offer through Lost Offer range, and the Offer is open. The panel action area requires an editable saved record with no unsaved Offer changes.

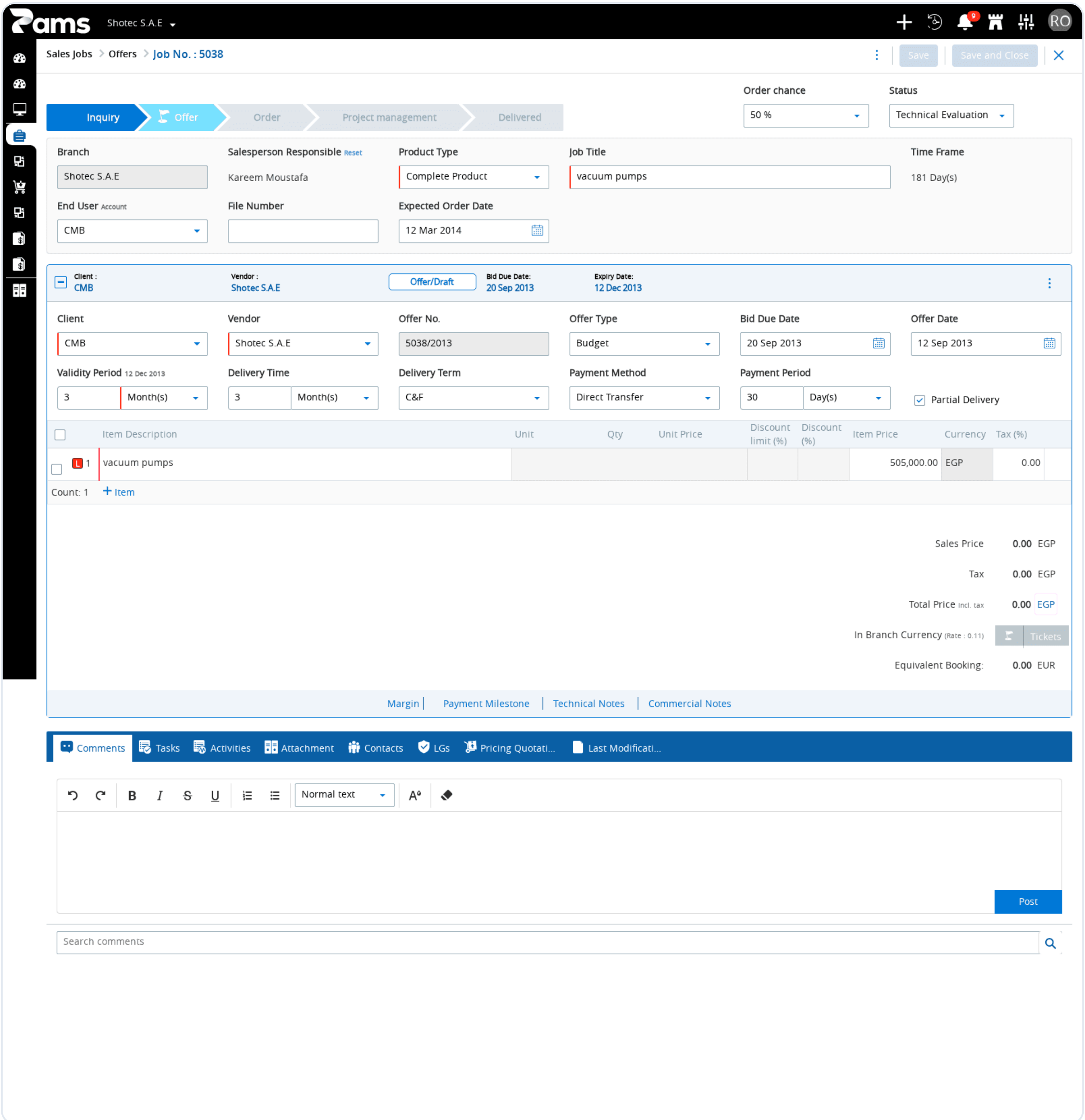
Area	What you use it for
Offer No.	Identify the proposal number
Offer Type	Choose an available value
Bid Due Date	Record the deadline; it cannot precede the Inquiry Date

Area	What you use it for
Offer Date	Record the proposal date; it cannot precede the Inquiry Date
Validity Period	Set the validity period within the allowed company range
Delivery Time	Set the delivery period from 1 through the allowed company maximum
Delivery Term	Choose a delivery term from the values available to your company
Payment Method	Choose a payment method from the values available to your company
Payment Period	Set the payment period from 1 through the allowed company maximum
Item grid	Enter the item description, quantity, unit, unit price, discount, and calculated item value
Offer links	Open **Calculation Sheet**, **Margin**, **Commissions**, **Payment Milestone**, **Technical Notes**, or **Commercial Notes** when each link is available

Use the headers displayed in your Offer grid when you enter item values. The panel also
contains selectors beside Validity Period, Delivery Time, and Payment Period whose labels
are not shown in the panel template.

The Offer panel can contain company-configured fields. If a field is not present in your workspace, continue with the fields and links displayed for your company.

Use the Offers list headers described in Find and open an Offer
when you identify an Offer from this workspace.



Price and save an Offer

Use this procedure to prepare the proposal from the Inquiry information or update an existing
Offer.

Enter the Offer details

Prerequisites

- The Offer is open in an editable saved sales-job workspace.
- You have the proposal date, bid deadline, validity period, delivery terms, payment terms,

and item values.

Steps

1. In **Offer No.**, enter the proposal number when your company requires one.
2. In **Offer Type**, select an available value.
3. In **Bid Due Date**, enter a date on or after the Inquiry Date.
4. In **Offer Date**, enter a date on or after the Inquiry Date.
5. In **Validity Period**, enter a value within the allowed company range.
6. In **Delivery Time**, enter a value from 1 through the allowed company maximum.
7. In **Delivery Term**, select a delivery-term record from the list. Each option is identified
by its displayed Code.
8. In **Payment Method**, select a payment-method record from the list. Each option is identified
by its displayed Code.
9. In **Payment Period**, enter a value from 1 through the allowed company maximum.

Result: The Offer panel contains the commercial information needed for pricing and review.

Add item values and related commercial work

Steps

1. In the item grid, enter the item description and a positive quantity for each row.
2. Select the unit for each item row.
3. Enter the unit price for each item row.
4. Enter the discount for each item row.
5. Select the link that matches the related work you need:

If you need to…	Select…
Review the saved supplier Offer's cost calculation	**Calculation Sheet**
Review the margin view	**Margin**
Review commissions for a non-supplier user	**Commissions**
Review payment milestones when the feature is available	**Payment Milestone**

6. Select **Technical Notes** or **Commercial Notes** for the corresponding Offer notes.

Result: The Offer contains its item values and any related calculation, margin, commission, milestone, or note work you opened.

Save the Offer

Steps

1. Select **Save** in the Offer panel.
2. Confirm that the Offer remains open and that its changes are displayed.

Result: The saved Offer remains in the workspace and the application displays `Job updated successfully` after a successful update.

Approve and send an Offer

Approval and client delivery depend on the Offer stage, the approval process, your approval
permission, mail permission, and the Send Email feature.

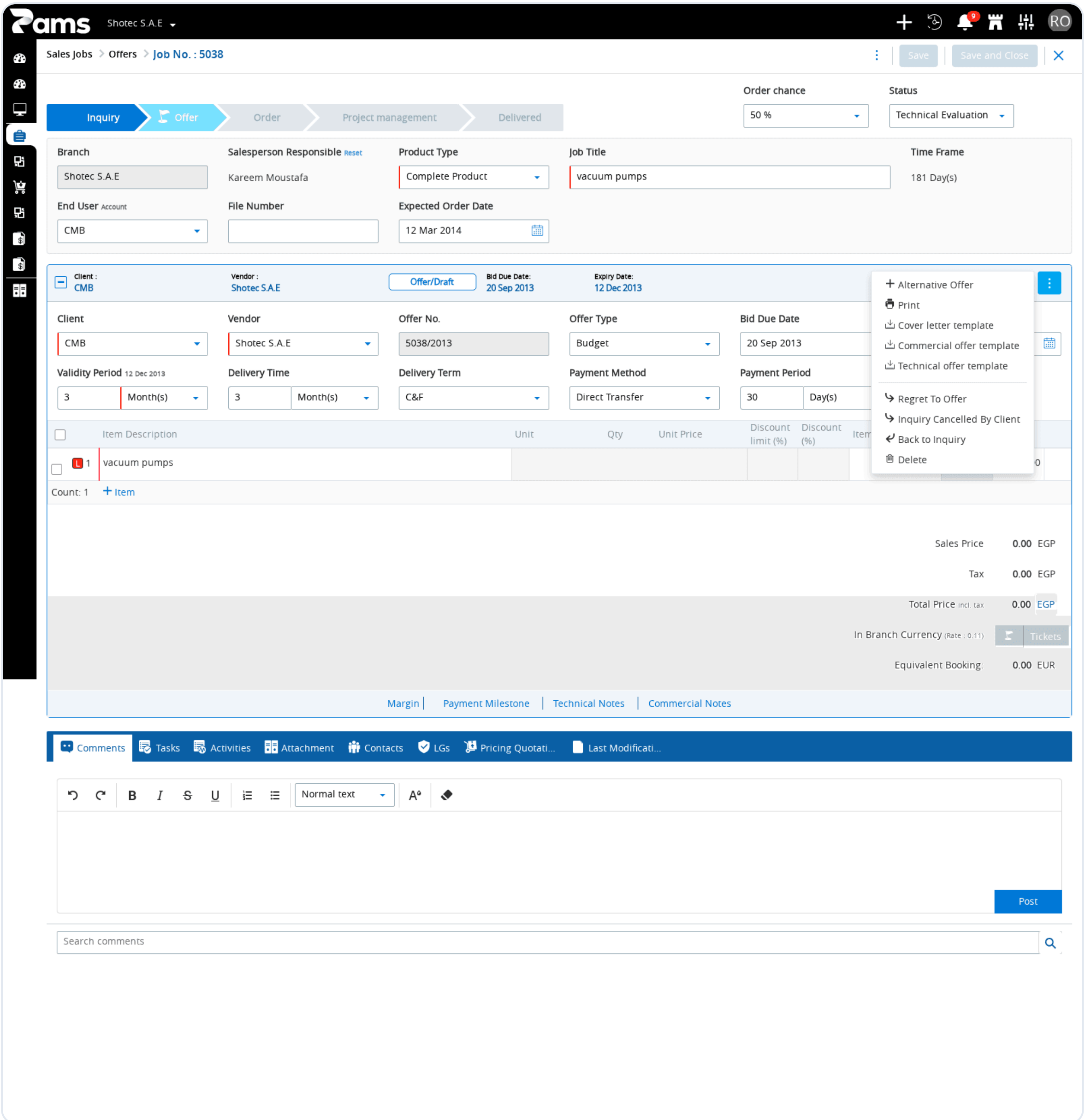
If the Offer is…	Use…
Awaiting approval and you cannot approve it	**Cancel approval request**
Awaiting approval and you can approve it	**Approve** or **Reject approval request**
Approved and you need to reverse approval	**Consider as not approved**
Eligible for client delivery and mail is available	**Send offer to client** or **Re-send offer to client**
Eligible for submission when mail is unavailable	**Consider Offer As Sent To Client**

Prerequisites

- The Offer is saved with no unsaved changes.
- The Offer stage and your role match one of the rows in the table.

Steps

1. Check the stage shown on the Offer panel.
2. Open the Offer action menu.



3. Select the action that matches the Offer stage and your permission.

4. Confirm the resulting stage or client-delivery state shown on the Offer panel.

Result: The Offer is submitted for approval, approved, sent to the client, marked as sent without mail, or left unchanged when the required branch is unavailable.

Revise, close, or return an Offer

Use the Offer action menu for a revision, alternative proposal, validity extension, regret,
cancellation, loss, reversal, return to Inquiry, or conversion to Order.

If you need to…	Select…
Convert an eligible Offer to the next sales stage	**Order**
Extend an expired or approval-pending validity period	**Extend offer validity**
Prepare a revised proposal	**Revision**
Prepare an additional proposal	**Alternative Offer**
Edit an approved-or-later Offer when editing is allowed	**Enable Editing**
Close an Offer as regretted	**Regret**
Reverse a regretted result when allowed	**consider as not regretted**
Record that the client cancelled the request	**Inquiry Cancelled By Client**
Reverse a cancellation when allowed	**Consider As Not Cancelled**
Close an Offer as lost	**Lost**
Reverse a lost result when allowed	**Consider As Not Lost**
Return a draft Offer to the preceding stage	**Back to Inquiry**
Remove a draft or rejected-approval Offer	**Delete**

Prerequisites

- The Offer is saved and its current stage matches the action you need.
- The relevant feature, permission, and approval conditions are available.

Steps

1. Check **Offer stage** in the Offer panel or list row.
2. Open the Offer action menu.
3. Select the applicable action from the table.
4. Confirm that the Offer panel or list shows the resulting stage.

Result: The Offer follows the selected revision, exit, reversal, return, or Order path. An eligible Offer can continue to the Order workspace.

When Offer work goes wrong

Use the message text below to choose the correction route. Messages belonging to another
page are grouped under that page so you do not correct the wrong record type.

Offer and Offer-related messages

What you see	What to do
`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 greater than 0 and no higher than 999,999.00.
`Invalid input. Please enter a non-negative value`	Enter 0 or a positive value.
`Please enter action for each milstone`	Enter an action for every payment milestone.
`Please save opened cost sheet first`	Save the open cost sheet before continuing with the Offer action.
`There is a maximum discount that exceeds the negotiation margin.`	Review the discount and negotiation margin in the cost calculation.
`Job updated successfully`	The Offer update completed.
`Job deleted successfully`	The Offer deletion completed.
`Job regretted successfully`	The Offer regret action completed.
`Job cancelled successfully`	The Offer cancellation action completed.
`Job reactivated successfully`	The record was reactivated.
`Converted to lost`	The Offer moved to the lost outcome.
`An error occurred while processing your request`	Review the Offer fields and action conditions, then retry the applicable action.
`All offers must be in draft status to revert to inquiry`	Return every Offer to Draft before selecting **Back to Inquiry**.
`Check mandatory field(s)`	Complete the fields marked as required.
`One or more items has ZERO quantity`	Enter a positive quantity for every item row.
`One or more items has no unit`	Select a unit for every item row.
`Offer must have at least one item`	Add at least one item to the Offer.
`Offer converted to order successfully`	Continue in the Order workspace.
`Offer updated successfully`	The Offer update completed.
`Please Solve the Following Issues :`	Correct each field listed below the summary.
`Bid Due Date is required`	Return to the Inquiry and enter **Bid Due Date** before converting it to an Offer.

If a zero-price confirmation appears, read the full prompt before choosing an option: `Offer price zero | Your Offer Price Is Zero! | Are you sure you want to deliver free of charge?`

Messages owned by the Inquiries page

`Converted to offer successfully` belongs to Inquiry work. `Please save opened inquiry first`
belongs to Inquiry work. `Converted to inquiry successfully` belongs to Potential work. Use
Inquiries for that correction route.

If you see `All inquiries must be in draft stage to revert to potential`, return to the Potential work and keep each Inquiry in Draft before selecting the return action.

This message belongs to the Potential context: `All inquiries must be in draft stage to revert to potential`.

Message	Owning context	Reader action
`All inquiries must be in draft stage to revert to potential`	Potential work	Keep each Inquiry in Draft before selecting the return action.

Messages owned by Orders and purchasing pages

`Cannot be un-delivered – a due invoice already exists`, `Sales order is archived`, and the following messages belong to purchasing or Order work. Use Orders or the relevant purchasing page.

Message	Owning page
`Booked quantity for this job is greater than the required BOM quantity`	Orders
`You cannot edit or delete the product after the purchase package is created`	Orders
`Cannot be deleted. Product is in purchasing`	Orders
`You cannot edit the product after the PO is created`	Orders
`No remaining items. All items have been selected`	Purchase jobs
`Order must have at least one item`	Orders

Message	Owning page
`This action is only allowed if you belong to that branch`	Purchase jobs
`Please enter at least one email`	Purchase jobs
`Inquiry must have at least one item`	Purchase jobs
`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	Orders
`Please select one or more items to create a RFQ.`	Purchase jobs

Messages owned by other pages

- Account and contact work: `Custom fields saved successfully`, `An account with this name already exists`, `Error: Vendor not saved yet`, `Error: Client not saved yet`, `This Field Is Required`, `Forbidden characters detected. Please remove them and try again.`, and `You already have a contact with this name`.
- Files and products: `Just '_'‘-''.' And '&' Characters Accepted`, `This product is already included in BOM`, `The first variant cannot be deleted`, `An error occurred while connecting to your CRM system.`, and `Please select one product`.
- Materials requisitions: `Package must have at least one item`, `You cannot save without adding at least one product`, and `One of products has no quantity`.
- Activities and invoices: `Action not allowed`, `Check validation`, `One topic and at least one note is required`, and `There is no topic to print`.
- Delivery and reference work: `Error loading accounts`, `Serial you have entered already exist and belong to same manufacturer`, `There is error in serial you have entered`, and `Minimum: At least one serial`.
- Letters of Guarantee: `You don’t have permission`, `LG still needs confirmation`, `LG has one or more extensions or deductions and cannot be reverted to the requested stage`, `Please choose a date after the current expiry date`, and `There is a pending increase you can edit`.
- Other shared job outcomes: `Custom fields saved successfully`, `Job missed successfully`, `Converted To Regretted`, `Converted to cancelled`, `Error saving custom fields`, `Cannot be un-delivered – a due invoice already exists`, `Error {{errorMsg}}`, `A

`project with this name already exists`, `Your request was completed successfully`, and `Package must have at least one item`.

Messages owned by Material requisition and Purchasing inquiry pages

`Required Receiving Date`, `Required Receiving After`, `Required Offer Type`, and `Required Bid Due Date`
belong to Material requisition details or Purchasing inquiry pages, not the Offer panel.

What happens next

An eligible Offer continues to an Order. The **Order** action is available for Offers in Valid, Considered as valid, or Expired states. Conversion moves the sales job to Order and
opens the first Order panel. Use Orders for the next stage.

Returning a draft Offer with **Back to Inquiry** sends the work back to the Inquiry stage. Use Inquiries to continue the preceding request.

If the Offer is lost, regretted, or cancelled, continue with the corresponding outcome procedure in Missed, regretted, and cancelled jobs.