PAMS FRESH GENERATION

Orders

September 10, 2026

Orders

Find an Order, review its fields, and choose the state-dependent action that confirms, activates,
progresses, amends, rejects, cancels, or returns it.

Orders

An Order is the Sales jobs stage after Offers and before Delivered. Use it when an offer has
become an order and you need to confirm the order, progress its fulfilment, or correct its
status.

The order path is:

```
stateDiagram-v2
    Offer --> Order: Order
    Order --> Valid: Activate Order
    Valid --> ReadyForShipment: Ready for shipment
    Valid --> Delivered: Deliver Order
    ReadyForShipment --> Delivered: Deliver Order
    Order --> Rejected: Reject Order Acceptance
    Order --> Cancelled: Cancelled order
    Order --> Offer: Back to Offer
```

If you need to…	Go to
Review or change an order after an offer	Understand the order panel
Confirm, activate, ship, or deliver an order	Confirm, activate, and progress an order
Correct, reject, cancel, or return an order	Amend, reject, cancel, and return an order
Work on the item lines	Sales job items
Continue after the order reaches delivery	From orders to delivered

If you need to…	Go to
Configure activation conditions	Sales order activation conditions

Before you start

An order action is available only when the saved order, its stage, your access, and the relevant
feature settings satisfy that action's conditions.

Have this ready	Why it matters
A saved order with no unsaved changes	The order actions require an existing record and, for most actions, a saved panel.
A new order or unsaved order changes	**Save** is available for a new order or when the order has changes, when editing is allowed and the record is not read-only.
The order's current stage	The available action changes between Draft, Awaiting Approval, Approved, Awaiting Activation, Valid, Ready for Shipment, Delivered, Rejected, and Cancelled.
The client, vendor, order dates, delivery terms, payment terms, and order references	These values are the information the order panel validates or carries forward.
Permission to edit or validate the order	**Activate Order** checks permission; other actions also require editing access and, where applicable, the order's branch.
The required feature subscription	**Payment Milestone** and **Order Activation Conditions** appear only when their features are subscribed.
Your company's required-field configuration	Client and vendor order numbers, dates, delivery and payment fields, the L/C number, and the external order number can be required by configuration.

With the order saved and its stage, access, and required settings ready, find it in the Orders
list.

Find and open an order

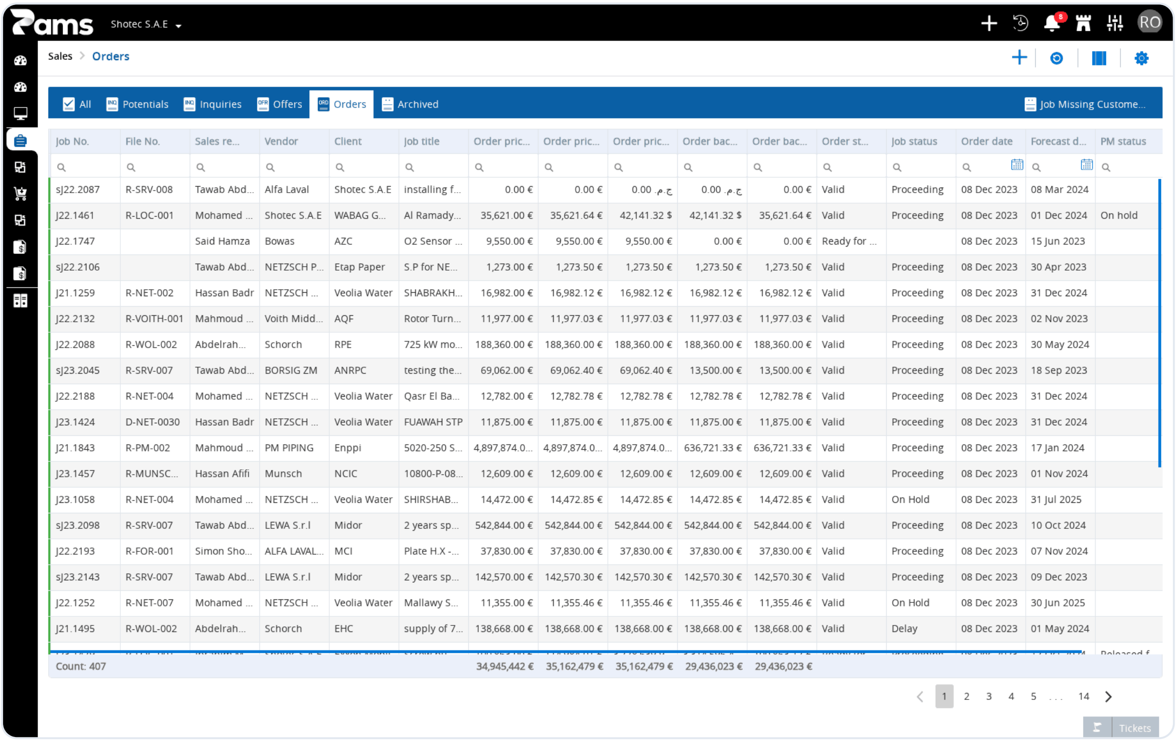
Use the Orders list to locate an existing order.

Prerequisites

- You know enough of the job number, client, vendor, or job title to recognise the row.

Steps

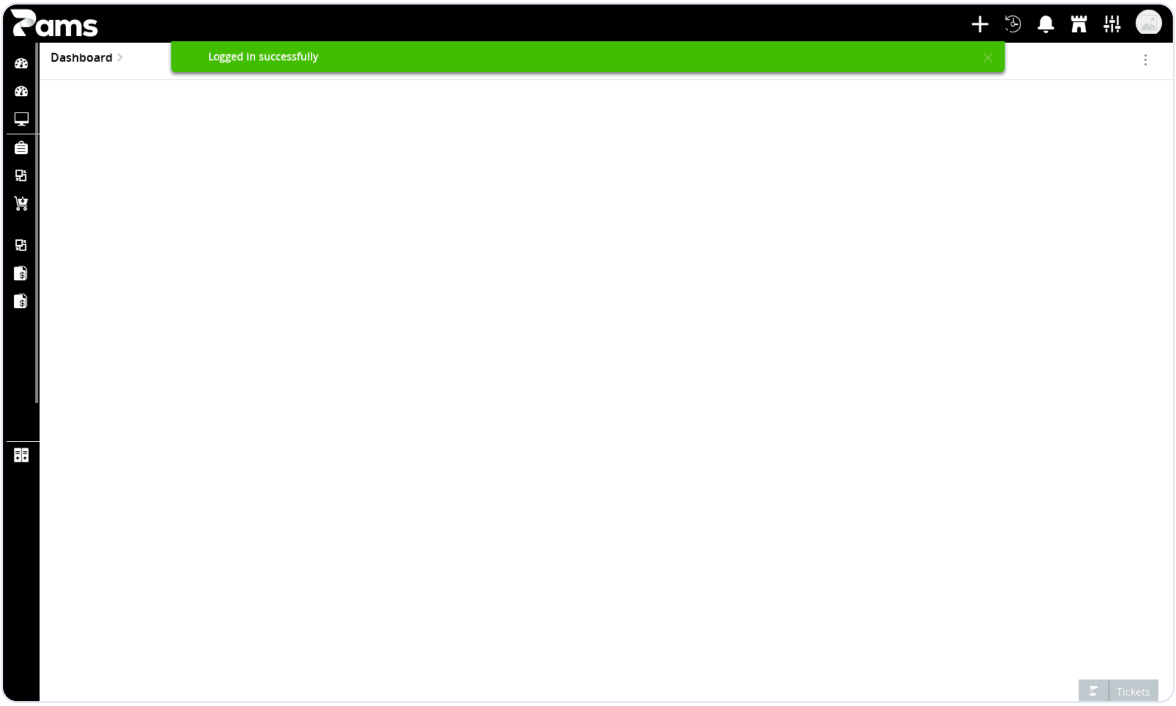
1. Open the Orders list at `/sales/list/orders/view`.



2. Identify the row from the visible headers.

Use this information	Header
Job reference	**Job No.**
Internal file reference	**File No.**
Responsible salesperson	**Sales responsible**
Counterparties	**Vendor** and **Client**
Work description	**Job title**
Financial and delivery position	**Order price (€)**, **Order price (incl. tax)**, **Order backlog**, and **Order backlog (€)**
Process position	**Order stage** and **Job status**
Dates and project-management position	**Order date**, **Forecast delivery date**, and **PM status**

3. Select the order row.



4. Select the list tool you need.

If you need to…	Select
Reload the current rows	**Refresh**
Work with the saved list layout	**Table Layout**
Open list settings	**Settings**

Result: The selected order record opens.

Understand the order panel

The order panel is where you review the counterparties, dates, delivery and payment terms,
references, items, and order-specific tools before selecting a state action.

The panel is available when the job is at Order or a later stage and the selected order is open.

Order fields

Field	What to check	Requirement or rule
Client	The customer for the order	Select the applicable account.
Vendor	The supplying party	Select the applicable vendor.

Field	What to check	Requirement or rule
Client Order No.	The customer's reference	Required only where your company configures it.
Vendor Order No.	The vendor's reference	Required only where your company configures it.
Order Date	The order date	Required in Draft when the rule applies; it cannot precede the offer date.
Order Activation Date	The date the order becomes active	Required only where your company configures it; it cannot precede **Order Date** or be later than today.
Delivery Time	The delivery period	Required only where your company configures it; the value starts at 1 and cannot exceed the configured maximum.
Delivery-time unit	The unit paired with **Delivery Time**	Required only where your company configures it.
Forecasted Delivery Date	The forecast date	Its minimum is the offer date.
Delivery Term	The agreed delivery term	Required only where your company configures it.
Payment Method	The payment method	Required only where your company configures it.
Payment Period	The payment period	Required only where your company configures it; the value starts at 1 and cannot exceed the configured maximum.
Payment-period unit	The unit paired with **Payment Period**	Required only where your company configures it.
L/C Number	The letter-of-credit reference	Required only where your company configures it.
External order no.	The external system's order reference	Required only where your company configures it; it is shown when the supplier-side condition allows it.
Percentage	The amount subject to commission in the commissions popup	Required there; it cannot be below 0 or above the order total price.
Delivered On	The delivery date in the delivery dialog	Required; it cannot be later than today.

The panel also contains a partial-delivery switch, commission and margin popup fields, activation
condition switches and date, a local-currency rate, and a company-configured custom-field area.
The item area uses columns selected by the current layout, so work from the headers visible in
your order panel rather than assuming a fixed item-column set.

Supporting order tools

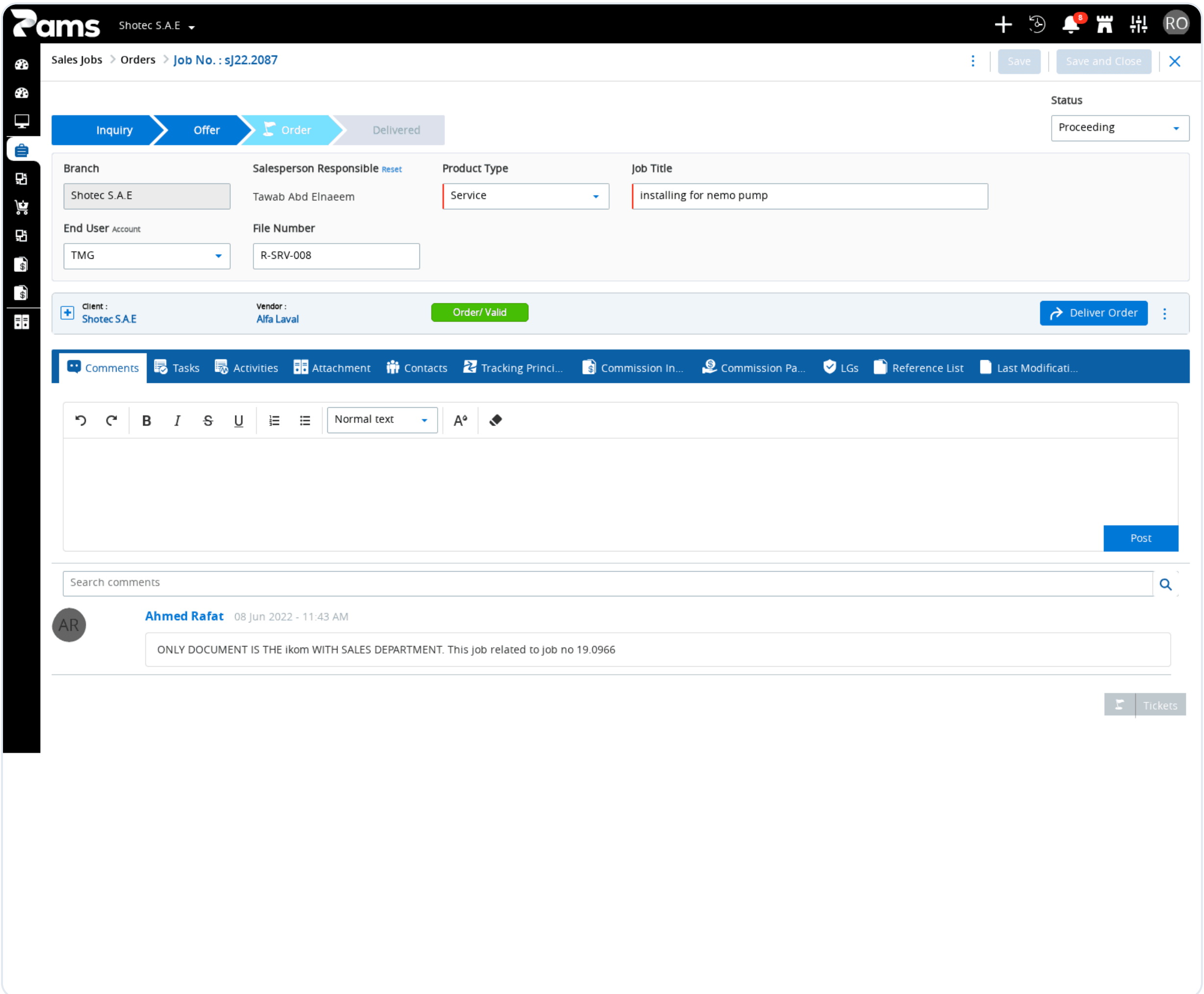
If you need to…	Select
Review payment milestones	**Payment Milestone**
Review activation requirements	**Order Activation Conditions**
Add the configured activation conditions when the list is empty	**Insert activation conditions**
Format a comment	**Undo**, **Redo**, **Bold**, **Italic**, **Strikethrough**, **Underline**, **Ordered List**, **Bullet List**, **Font Color**, or **Clear Formatting**
Add the comment	**Post**

The opened record also shows these tabs:

Work area	Tabs
Sales stages	**Inquiry**, **Offer**, **Order**, **Delivered**
Collaboration	**Comments**, **Tasks**, **Activities**, **Attachment**, **Contacts**, `Tracking`
Financial and history	`Principal Invoices` , **Commission Invoices**, **Commission Payments**, **LGs**, **Reference List**, **Last Modifications**

The visible record actions include **Save**, **Save and Close**, and **Deliver Order**.

In the opened record, **Product Type**, **Job Title**, and **File Number** carry required markers. **Status** and **Branch** do not carry required markers.



Result: You can open the order action menu and choose the action for the order's stage.

Confirm, activate, and progress an order

When the order is ready for its next state-dependent action, choose the control that matches its
current stage. The applicable control depends on the order stage, supplier relationship, branch,
approval process, and mail permission.

Prerequisites

- The order is saved and has no unsaved changes.
- You know the current value shown in the order's stage control.
- You have the permission and feature access required by the selected action.

Steps

1. Open the order action menu.
2. Select the action that matches the order's current condition.

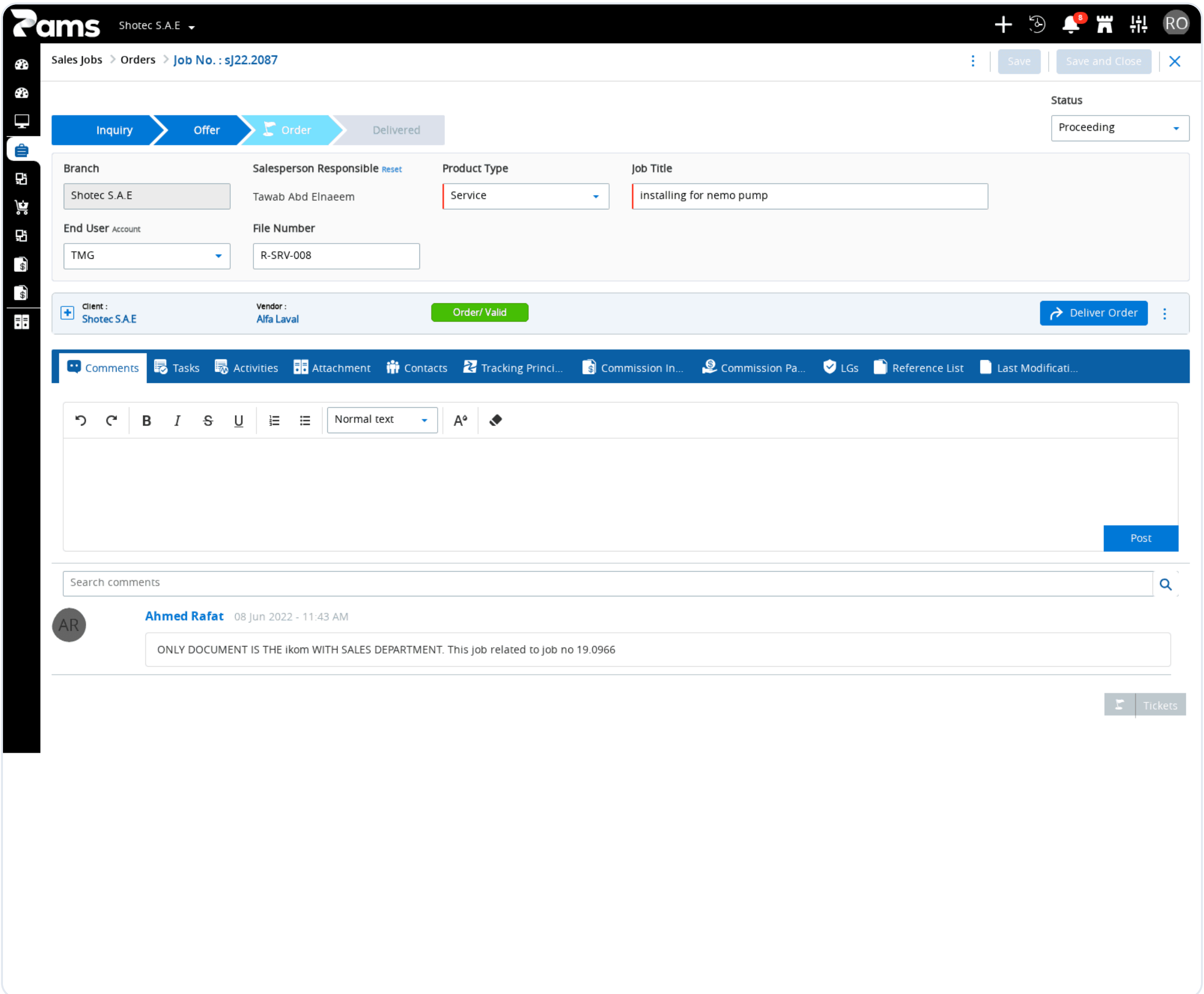
If the order is…	Select
Approved, or at the supplier-side stage that permits client confirmation	**Send order confirmation to client**
At the same confirmation stage when sending mail is unavailable	**Consider Order As Confirmed To Client**
Awaiting Activation or Consider As Awaiting Activation	**Activate Order**
Valid on the own-company supplier route	**Ready for shipment**
Valid on the external-supplier route	**Deliver Order**
Ready for shipment on the own-company supplier route	**Deliver Order**

3. Complete the dialog for the selected action.

If you selected…	Complete this dialog
Activate Order	Review **Confirm activation date**. Enter an **Order Activation Date** that is not earlier than **Order Date**.
Deliver Order	Review `Delivering this order`. Enter **Delivered On** as a date no later than today.

4. If the order has no item, add an item before saving; the blocked action message is `Order must have at least one item`.
5. If a required field is empty, complete it; the required-field message is `This field is required `.
6. Enter a quantity within the permitted range.
7. Select **Save**.
8. Enter a non-negative value in the discount or tax field.
9. Select **Save**.
10. If payment milestones are open, enter the action for every milestone after the message `Please enter action for each milstone `.

Result: The selected order action opens its applicable dialog or advances the order through
the corresponding order route. Confirmation uses `Order Submitted to Client`. A completed
delivery uses `Order updated successfully. A draft invoice was created. Check the Invoices tab for details`.



Amend, reject, cancel, and return an order

Use these branches when the order needs correction, approval reversal, rejection, cancellation,
or a return to the offer stage.

Prerequisites

- The order is open and saved.
- The current order stage satisfies the selected branch.

- You understand whether the action changes the order's route or only reverses a previous action.

Steps

1. Open the order action menu.
2. Select one action from the table.

If you need to…	Select when…
Create an amendment	The order is Valid or Ready for shipment. Select **Order amendment**.
Re-enable editing	Editing is allowed and the order is Approved, Awaiting Activation, Consider As Awaiting Activation, Delivered, or Valid, but not Rejected or Cancelled. Select **Enable Editing**.
Reject order acceptance	The order is Draft, Awaiting Approval, or Rejected Approval and is not awaiting cancellation or rejection approval. Select **Reject Order Acceptance**.
Reverse a rejection	The order is Rejected, or is awaiting rejection approval without advanced approval. Select **Consider as not rejected**.
Cancel an order	The order is not Ready for shipment, Delivered, Rejected, awaiting cancellation approval, awaiting rejection approval, or already Cancelled. Select **Cancelled order**.
Reverse a cancellation	The order is Cancelled, or is awaiting cancellation approval without advanced approval. Select **Consider As Not Cancelled**.
Reverse activation	The order is Valid. Select **Not activated yet**.
Reverse shipment readiness	The order is Ready for shipment on the supplier route. Select **Not ready for shipment yet**.
Reverse delivery	The order is Delivered on the supplier route. Select **Not delivered yet**.
Return to the offer	The job is not a direct or instant job and the order is Draft, Awaiting Approval, or Rejected Approval. Select **Back to Offer**.

Result: The order remains in its current record while the selected amendment, rejection,
cancellation, reversal, or return route is applied according to its stage. The corresponding
messages include `Order Returned to Draft`, `Order Rejected`, `Order Cancelled`, `Order Considered as Not Rejected`, and `Order Considered as Not Cancelled`.

When an order action does not work

Use this table to match the exact message to the correction required.

Message	What to do
`Order must have at least one item`	Add at least one order item.
`Please enter action for each milstone`	Complete the action for every payment milestone.
`This field is required`	Complete the field carrying the required marker.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Enter a quantity within the permitted range, then select **Save**.
`Invalid input. Please enter a non-negative value`	Enter a non-negative discount or tax value, then select **Save**.
`Order Submitted to Client`	The confirmation route has submitted the order to the client. Continue with the stage shown in the order record.
`Order Approved Successfully`	The approval action completed. Continue with the next action shown for the new stage.
`Order Saved Successfully`	The order save completed.
`Order Updated Successfully`	The order update completed.
`Order updated successfully. A draft invoice was created. Check the Invoices tab for details`	Open Invoices to review the draft invoice.
`Order Returned to Draft`	The order is back in Draft. Review it before selecting another action.
`Order Rejected`	The order is in the rejected route. Use the order stage and archived lists to continue.
`Order Cancelled`	The order is in the cancelled route. Use the order stage and archived lists to continue.
`Order Considered as Not Cancelled`	The cancellation reversal completed. Review the order stage before continuing.
`Order Considered as Not Rejected`	The rejection reversal completed. Review the order stage before continuing.
`This order has binding invoices. It cannot be reverted`	Do not use a reversal action while binding invoices prevent it.

Message	What to do
`This job has binding invoices. You may not be able to edit all fields`	Review which fields remain editable before changing the order.
`You don't have permission`	Ask for the permission required by the action.
`This action is only allowed if you belong to that branch`	Use an order in your branch or ask the responsible branch to perform the action.
`An error occurred while processing your request`	Review the order values and retry the permitted action.

Messages raised by other areas belong with their owning pages. Use General error messages
for the application-wide catalogue, then continue with the relevant page:

Owning area	Related page
Sales job information, items, and variants	Sales job information and assessment, Sales job items, Sales job variants
Offers and offer costing	Offers
Purchasing and procurement	Purchase jobs procurement chain
Activities	Tasks and activities
Accounts and projects	Accounts and Projects
Bill of materials and product selection	Project management workspace and Products
Contacts, serial references, and letters of guarantee	Contacts overview, Reference list data, and L/G lifecycle

The full out-of-scope message inventory includes `Custom fields saved successfully`, `Job updated successfully`, `Job deleted successfully`, `Job regretted successfully`, `Job cancelled successfully`, `Job missed successfully`, `Job reactivated successfully`, `Converted to offer successfully`, `Converted to inquiry successfully`, `Converted To Regretted`, `Converted to cancelled`, `Converted to lost`, `Error saving custom fields`, `Cannot be un-delivered - a due invoice already exists`, `All offers must be in draft status to revert to inquiry`, `Error {{errorMsg}}`, `An account with this name already exists`, `A project with this name already exists`, `Check mandatory field(s)`, `Please save opened inquiry first`, `All inquiries must be in draft stage to revert to potential`, `One or more items has ZERO quantity`, `One or more items has no unit`, `Please save opened cost sheet first`, `There is a maximum discount that exceeds the negotiation margin.`, `Your request was completed successfully`, `Error: Vendor not saved yet`,

`Error: Client not saved yet`, `This Field Is Required`, `Forbidden characters detected. Please remove them and try again.`, `You already have a contact with this name`, `Just '_''-''.' And '&' Characters Accepted`, `Sales order is archived`, `Booked quantity for this job is greater than the required BOM quantity`, `You cannot edit or delete the product after the purchase package is created`, `Cannot be deleted. Product is in purchasing`, `You cannot edit the product after the PO is created`, `This product is already included in BOM`, `The first variant cannot be deleted`, `An error occurred while connecting to your CRM system.`, `Please select one product`, `You cannot save without adding at least one product`, `One of products has no quantity`, `Action not allowed`,
`Check validation`, `Please enter at least one email`, `No remaining items. All items have been selected`, `Package must have at least one item`, `Inquiry must have at least one item`, `Offer must have at least one item`, `Please select one or more items to create a RFQ.`, `Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted`, `Error loading accounts`,
`Serial you have entered already exist and belong to same manufacturer`, `There is error in serial you have entered`, `Minimum: At least one serial`, `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`, `There is a pending increase you can edit`, `One topic and at least one note is required`, and `There is no topic to print`.

Result: You can match an order message to the field, stage, permission, invoice, or owning
page that requires the next action.

Continue after the order

Delivered is the Sales jobs stage after Order. Detailed delivery and fulfilment work continues
in the warehouse flow rather than in the order panel.

Prerequisites

- The order is ready for the next stage or the action route has finished.

Steps

1. Review the order stage shown in the record.
2. Open the page for the next part of the order journey.

If you need to…	Open
Continue the sales hand-off toward Delivered	From orders to delivered

If you need to…	Open
Continue with detailed fulfilment	Warehouse fulfilment flow

Result: You continue with the page that owns the next part of the order journey.