

Sales job lifecycle

September 10, 2026

Sales job lifecycle

Sales job lifecycle at a glance

A sales job carries commercial work from an early opportunity through inquiry, offer, order, and delivery. A Potential is an early sales opportunity you record before Inquiry work.

```
stateDiagram-v2
    [*] --> Potentials
    Potentials --> Inquiries: Inquiry
    Inquiries --> Offers: Offer
    Offers --> Orders: Convert To Order
    Orders --> Delivered: Deliver Order
    Potentials --> Missed: Missed Opportunity
    Inquiries --> Regretted: Regret To Offer
    Offers --> Regretted: Regret To Offer
    Inquiries --> Cancelled: Inquiry Cancelled By Client
    Offers --> Lost: Lost job
    Orders --> Rejected: Reject Order Acceptance
    Orders --> CancelledOrder: Order Cancelled By Client
```

If you need to...	Go to
Find a saved job	Find sales job work
Create the opening record	Create a sales job
Work in Potentials	Potentials
Complete an Inquiry	Inquiries
Prepare an Offer	Offers
Move an Order toward delivery	Orders and From orders to delivered
Handle an exit	Missed, regretted and cancelled jobs

If you need to...	Go to
Read the record	Sales job record
Maintain related work	Sales job items , Sales job comments and tasks , Sales job activities and files , or Sales job contacts, guarantees, and history

The normal path is **Potentials, Inquiries, Offers, Orders**, then **Delivered**. The lifecycle exits are **Missed Opportunity, Regret To Offer, Inquiry Cancelled By Client, Lost job, Reject Order Acceptance, Order Cancelled By Client**, and the archived outcomes for rejected and deleted work.

Before you follow a sales job

Before you follow a sales job, make sure you can open the sales area and work with the record.

Prerequisites

- You are signed in.
- The record is saved before you use an existing-job stage action.
- You have edit access when an action changes the stage.
- Company setup determines whether **Order chance** is required.
- Your saved list layout determines the columns shown.

Starting situation	How to begin
General new job	Create a sales job
New Potential	Potentials
New direct order	Sales job variants
New instant job	Sales job variants

Direct-order and instant-job records do not follow the same Potential-to-Inquiry route as a target job.

Result: You know which access, record, job-type, and setup conditions affect the route.

Find the job and its current work list

The sales-job list groups work by the stage or outcome you need to review. The Inquiry list shows

Inquiry date, Inquiry type, and Inquiry stage.

Prerequisites

- You are signed in.
- You know whether you need Potential, Inquiry, Offer, Order, or archived work.

Steps

1. Open **Sales jobs**.
2. Select **Inquiries**.
3. Select the list tab for the work you need.
4. Read **Inquiry date, Inquiry type, and Inquiry stage**.
5. Select a job row to open its record.
6. Select the list tool you need:

If you need to...	Select
Reload the list	Refresh
Adjust the saved list layout	Table Layout
Open list settings	Settings

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Sales > Inquiries

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All

Potentials

Inquiries

Offers

Orders

Archived

Job Missing Custom...

Inquiry date	Inquiry type	Inquiry stage
09 Sep 2024	Opportunity	Draft
17 Sep 2024	Opportunity	Sent to principal
17 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Sent to principal
23 Sep 2024	Opportunity	Sent to principal
25 Sep 2024	Opportunity	Draft
25 Sep 2024	Opportunity	Draft
24 Sep 2024	Opportunity	Sent to principal
30 Sep 2024	Opportunity	Sent to principal
29 Sep 2024	Opportunity	Sent to principal
01 Oct 2024	Opportunity	Draft
12 Sep 2024	Opportunity	Sent to principal
02 Oct 2024	Opportunity	Sent to principal
03 Sep 2024	Opportunity	Sent to principal
18 Sep 2024	Opportunity	Draft
07 Oct 2024	Opportunity	Sent to principal
02 Oct 2024	Opportunity	Draft
03 Oct 2024	Opportunity	Draft
08 Oct 2024	Opportunity	Draft

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Tickets

Result: The selected list remains on screen, or the selected row opens the sales-job record.

Read the job's lifecycle position

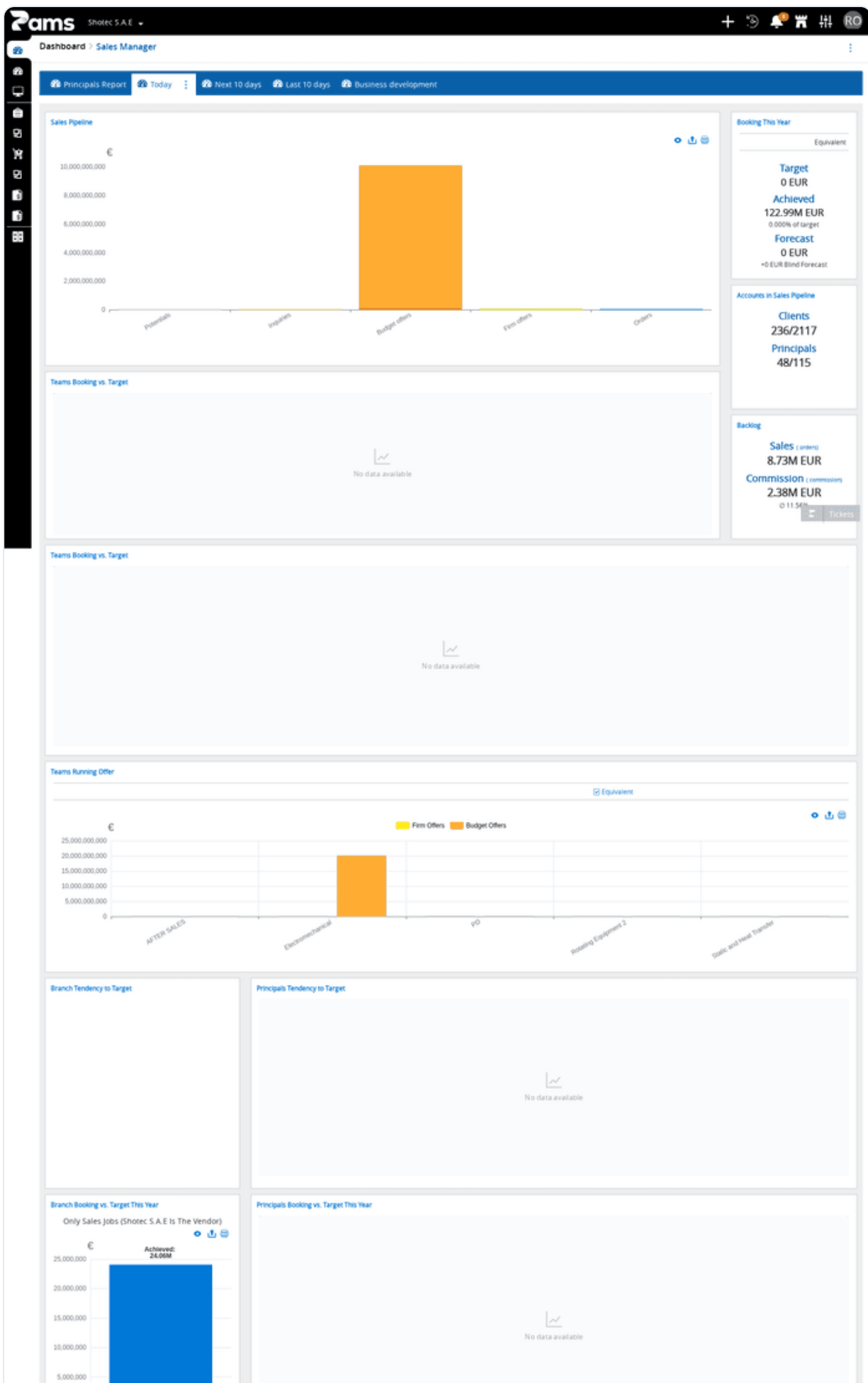
A sales-job record is the workspace for one job as it moves between commercial stages. The available controls depend on the job type, current stage, edit access, and related records.

Reader task	Control or field	Availability
Open early opportunity work	Potentials	Target jobs that are not direct orders or instant jobs
Open inquiry work	Inquiry	Not direct-order, instant-job, or missed-potential work
Move toward an offer	Offer	Applicable job type, readiness for offer, and permission to edit
Read offer scoring	Order chance	From Offer until before Order; required only where configured
Read the stage	Status	Active stage range with stage-specific conditions

Reader task	Control or field	Availability
Move toward an order	Convert To Order	A valid offer
Return to inquiry work	Back to Inquiry	Applicable Offer branch with edit access
Read order work	Order	Active Order-to-Delivered range
Reject an order	Reject Order Acceptance	Applicable Order branch with edit access
Cancel an order	Order Cancelled By Client	Applicable Order branch with edit access
Prepare shipment	Ready For Shipment Job	Applicable Order branch with edit access
Deliver an order	Deliver Order	Applicable Order branch with edit access
Return to offer work	Back to Offer	Applicable Order branch with edit access
Open project work	Project management	Principal access and project-management edit permission

The item area uses **Item Description**, **Unit**, and **Qty**. **Item Description** is required. **Qty** must be greater than 0 and no greater than 999,999.00. **Unit** is unavailable for package items or products.

On an active record, **Offer** and **Order** may be available. **Status** and **Regret To Offer** may not appear. Availability varies by record; **Project management** and **Delivered** may not appear on an active record.





Statuses of Jobs in Offer Stage (Firm Offers)

Jobs (Count)

Status	Count
Commercial Evaluation	~50
On Hold	~10
Technical Evaluation	~80
Waiting For Offer	~720
Waiting for Order	~20

Jobs (Value €)

Status	Value (€)
Commercial Evaluation	~1,500,000
On Hold	~6,500,000
Technical Evaluation	~3,500,000
Waiting For Offer	~2,000,000
Waiting for Order	~11,000,000

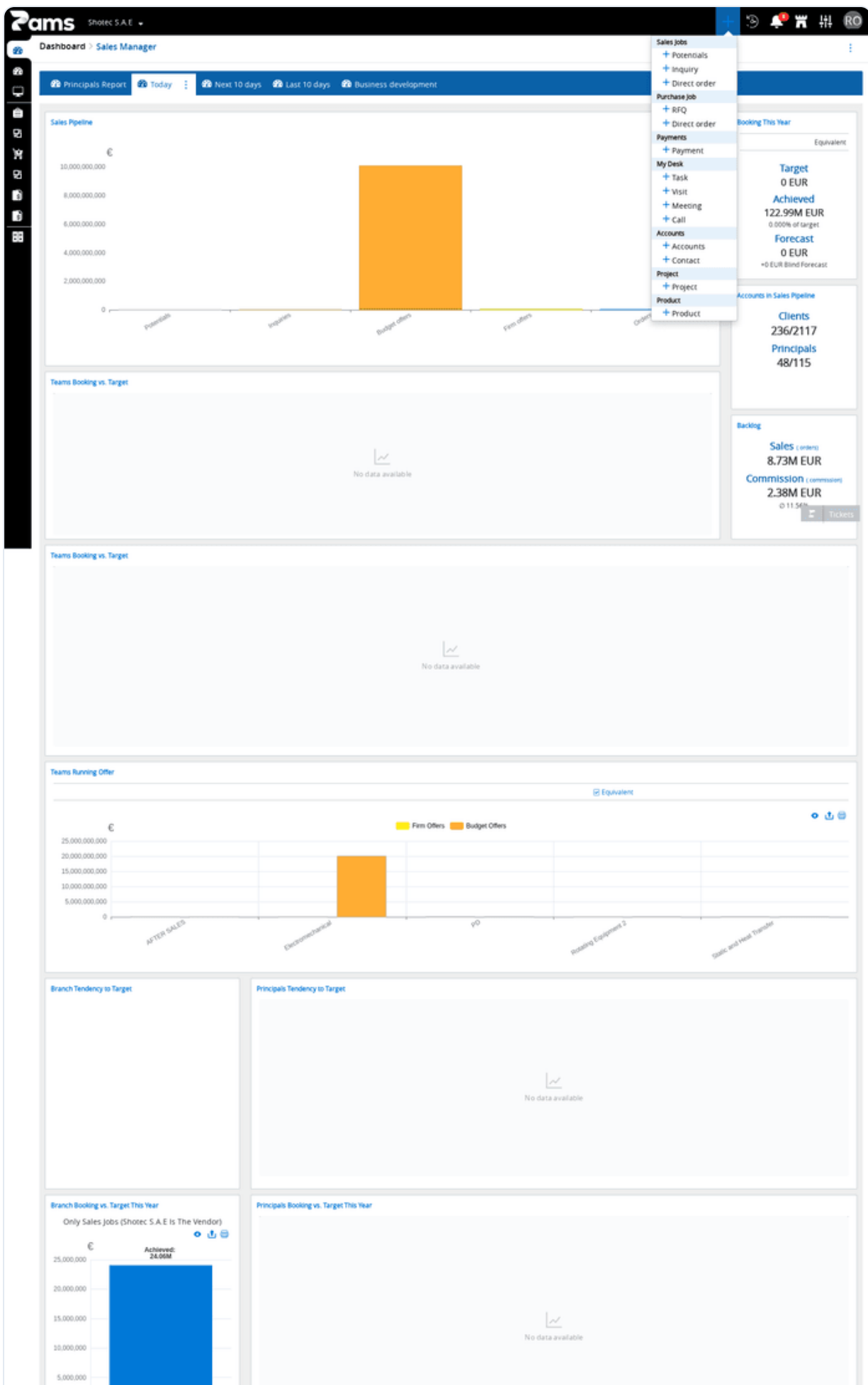
Statuses of Running Orders

Jobs (Count)

Status	Count
Deliver	~5
Job	~35
On Hold	~15
Processing	~320

Jobs (Value €)

Status	Value (€)
Deliver	~0
Job	~0
On Hold	~0
Processing	~28,000,000





Follow the happy path

The happy path moves one sales job from early opportunity work to delivery. Use the focused page for the fields and committing action at each handover.

Prerequisites

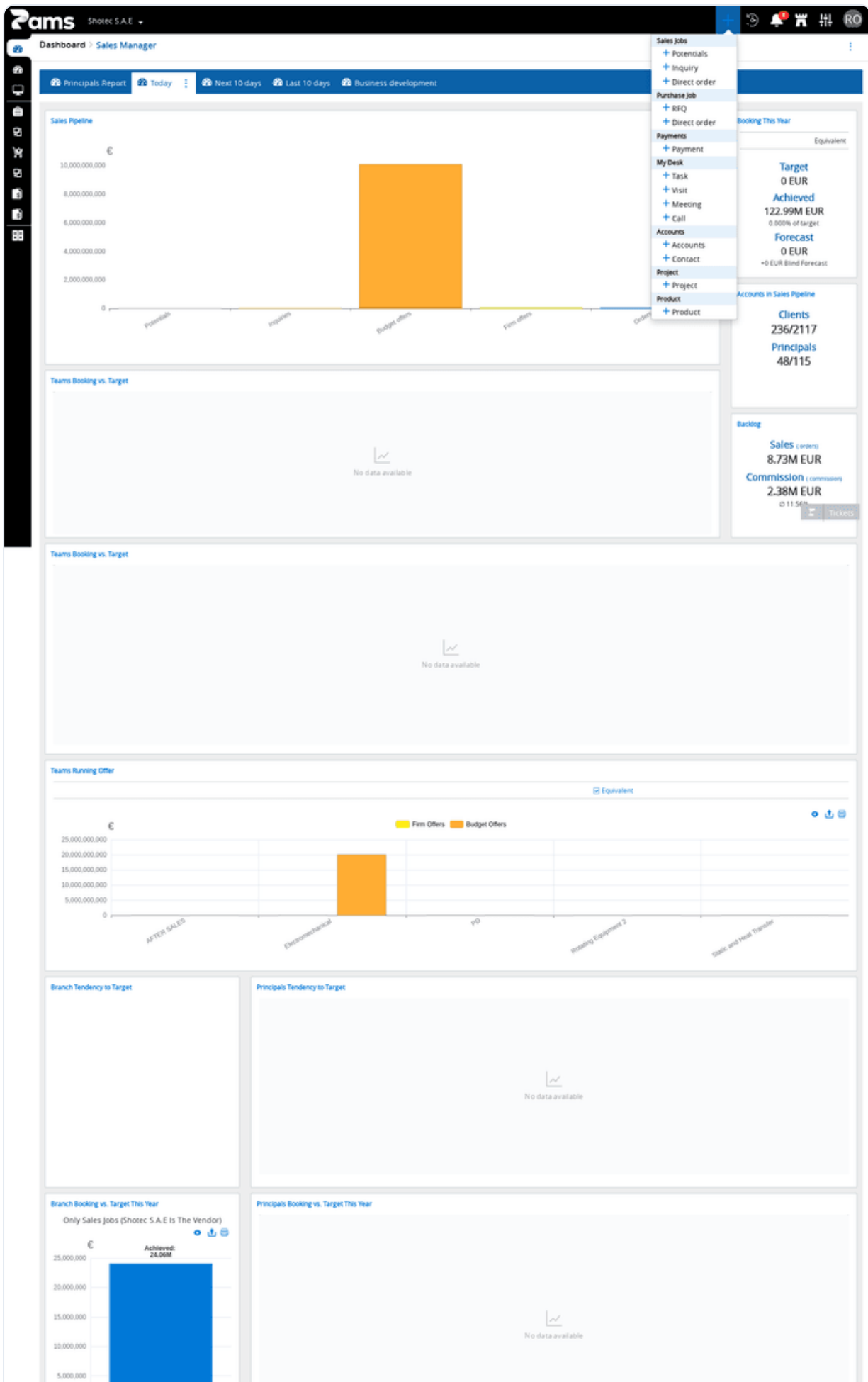
- You can open the saved sales-job record.
- The current stage and job type meet the next action's condition.
- You have edit access for a stage-changing action.

Steps

1. Select the stage you need:

If you need to...	Select	When
Work with early opportunity information	Potentials	The job is a target job, not a direct order or instant job.
Open inquiry work	Inquiry	The job is not a direct order, instant job, or missed potential.
Open offer work	Offer	The job type and readiness conditions allow offer work.

2. Select **Convert To Order** after a valid offer is available.
3. Select **Order** to review order work.
4. Select **Deliver Order** when the order conditions allow delivery.



An exit records why a job no longer follows the normal route. Choose the outcome that matches the job's current stage.

Prerequisites

- You know the current stage from the available stage controls.
- You have edit access for the outcome action.

Steps

1. Select the applicable outcome:

Current work	Control
Potential work that will not continue	Missed Opportunity
Inquiry or Offer work that is regretted	Regret To Offer

Current work	Control
Inquiry work cancelled by the client	Inquiry Cancelled By Client
Offer work that is lost	Lost job
Order work rejected by the client	Reject Order Acceptance
Order work cancelled by the client	Order Cancelled By Client

2. Open [Missed, regretted and cancelled jobs](#).

Result: The outcome branch is identified and its focused procedure is available.

When the route goes wrong

Use the exact message on screen to choose the next focused page.

Message	Next action
Custom fields saved successfully	Continue with the saved custom fields.
Job updated successfully	Continue with the updated job.
Job deleted successfully	Continue with archived outcome work.
Job regretted successfully	Continue with the regretted branch.
Job cancelled successfully	Continue with the cancelled branch.
Job missed successfully	Continue with the missed branch.
Job reactivated successfully	Continue with the reactivated job.
Converted to offer successfully	Continue in Offer work.
Converted to inquiry successfully	Continue in Inquiry work.
Converted To Regretted	Continue with the regretted branch.
Converted to cancelled	Continue with the cancelled branch.
Converted to lost	Continue with the lost branch.
Your request was completed successfully	Check the list or record area for the completed request.
An error occurred while processing your request	Review the current stage and focused action page.
Error saving custom fields	Reopen custom-field work on the record.
Error {{errorMsg}}	Follow the specific text shown in place of {{errorMsg}} .

Message	Next action
Check mandatory field(s)	Review the fields in the current work area.
Cannot be un-delivered – a due invoice already exists	Review the invoice state before attempting to change delivery.
All offers must be in draft status to revert to inquiry	Review the offer statuses before returning to Inquiry.
An account with this name already exists	Review the account name before saving the account-related work.
A project with this name already exists	Review the project name before saving the project-related work.
Please save opened inquiry first	Save the open Inquiry before continuing.
All inquiries must be in draft stage to revert to potential	Return only when the inquiries are in Draft.
One or more items has ZERO quantity	Review each item quantity and enter a value greater than 0.
One or more items has no unit	Review each item and select its applicable unit.

These messages belong to focused pages:

Message	Owning page
Required Receiving Date ; Required Receiving After	Purchase jobs — MRQ details
This field is required ; Invalid input. The value must be greater than 0 and cannot exceed 999,999.00 ; Invalid input. Please enter a non-negative value	Sales-job item, offer, order, purchasing, inquiry, and invoice panels
Please enter action for each milestone ; Please save opened cost sheet first	Sales-job offer cost calculation
Error: Vendor not saved yet ; Error: Client not saved yet ; You already have a contact with this name ; This Field Is Required	Sales-job account editing
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 ; Sales order is archived	Sales job items — BOM
This product is already included in BOM ; The first variant cannot be deleted ; An error occurred while connecting to your CRM	Product selection or details

Message	Owning page
system. ; Please select one product	
Package must have at least one item ; You cannot save without adding at least one product	Purchase-job package or MRQ details
Action not allowed ; One topic and at least one note is required ; Forbidden characters detected. Please remove them and try again.	Sales activities or related record work
Please enter at least one email ; Inquiry must have at least one item ; Offer must have at least one item ; Order must have at least one item ; Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted ; Please select one or more items to create a RFQ.	Purchase jobs — purchasing details
Required Offer Type ; Required Bid Due Date	Purchase jobs — purchasing inquiry
Error loading accounts	Sales-job delivery orders
Serial you have entered already exist and belong to same manufacturer ; There is error in serial you have entered ; Minimum: At least one serial	Sales-job reference list
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	L/G details

Continue the work

This page maps the route. Use the focused destination for the next action.

Continue with...	Open
List search and row opening	Find sales job work
Creation route	Create a sales job or Sales job variants
Record information	Sales job information and assessment
Items	Sales job items
Comments and tasks	Sales job comments and tasks
Activities and files	Sales job activities and files
Contacts, guarantees, and history	Sales job contacts, guarantees, and history
Potential, inquiry, offer, or order work	Potentials , Inquiries , Offers , or Orders

Continue with...	Open
Delivery work	From orders to delivered
Exit work	Missed, regretted and cancelled jobs

Result: You have a destination for the next sales-job action.