Configuring Sales Lifecycle Statuses

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Map Your Sales Lifecycle to Status Groups

Before changing any status values, agree how your sales team moves work from an **Inquiry** to an **Offer** and then to a **Orders**. Statuses should help users understand the current business position of a record at a glance, without having to open comments, activities, or related documents.

Use each status group for a different part of the sales lifecycle:

Sales record	Use its status to show	Keep separate from
Inquiry	The progress of incoming sales interest and qualification	Offer preparation and order processing
Offer	The progress of a Offers or commercial offer	The customer’s committed order and delivery work
Orders	The processing condition of a confirmed customer order	The likelihood of prospective business
Order Chance	The potential or progress of a possible sale	The operational condition of an existing Orders

An **Inquiry Stage** should show what is happening while the team is reviewing customer interest, requirements, and commercial potential. Once the work is ready to become a Offers, users should recognize that they need to continue in the offer-related workflow rather than leave the record in an inquiry-only status.

An **Offer Status** should show whether the team is preparing an offer, has issued it, is following it up, or has stopped pursuing it. After the customer commits, the **Order Status** should take over and reflect the customer order lifecycle.

Keep **Order Chance** separate from **Order Status**. An order chance helps sales users describe prospective business before, or while assessing whether, a customer commitment is likely. An order status describes work on a Orders after the customer commits.

Review your current labels with sales representatives and administrators. Flag labels that have the same meaning, are no longer used, or are unclear without explanation. For commercial rules such as delivery, payment, and commission-related terms, use Configuring Sales Commercial Terms rather than creating status labels to carry that information.

[SCREENSHOT: Sales Configuration showing the separate lists for Inquiry Stage, Offer Status, Order Status, and Order Chance statuses]

Prepare the Status Values You Need

Prepare the complete set of status names before editing the lists in **Sales Configuration**. This gives the sales team a shared vocabulary and avoids creating similar labels later, such as two versions of “In Progress” with different meanings.

For **Inquiry Stage**, identify the conditions users need to distinguish while qualifying inbound sales interest. Your list may need labels for an inquiry that has just been received, is being reviewed, needs further information, is actively being qualified, or is closed. Keep each label focused on the condition of the Inquiry, not on an individual action such as “Call customer.”

For **Offer Status**, agree on labels that describe Offers progress. Include the stages that matter before an offer becomes a Orders: preparation, active customer review, follow-up, revision, expiry, and offers that are no longer being pursued. If your team uses approvals, ensure the wording clearly distinguishes an offer awaiting review from an offer that has been sent to the customer.

For **Order Status**, list the stages used after customer commitment. These should reflect the order-handling lifecycle, such as an order awaiting activation, being processed, ready for shipment, delivered, cancelled, or otherwise closed. Use the terminology already understood by the teams handling Orders, Delivery Notes, and invoicing.

For **Order Chance**, define labels that sales users can apply consistently to prospective business. These labels should express the current potential of the Sales Job or the confidence in expected business, rather than describe delivery or invoicing progress.

When reviewing candidate labels, test each one with these questions:

- Can a sales representative choose this value without asking for clarification?
- Does it describe one clear business condition?

- Does it belong only to an Inquiry, Offer, Orders, or Order Chance?
- Would two users apply it in the same situation?

Write down the agreed meaning beside each label. This reference is especially useful when new sales representatives, account managers, or administrators join the team.

Configure Inquiry and Offer Statuses

Use **Sales Configuration** to align the status lists that sales users select while working with **Inquiries** and **Offers**. Make changes carefully, because these labels should remain understandable in existing records as well as newly created ones.

1. Open **Configuration**, then open **Sales Configuration**. Locate the settings for **Inquiry Stage**.
2. Review the existing Inquiry Stage values. Compare each label with the list your team prepared. Keep labels that remain clear and actively used. Update labels that do not match your team's terminology, and remove redundant or obsolete values from the list where appropriate.
3. Add the Inquiry Stage values needed for qualifying customer interest. Use short, business-focused names that show the Inquiry's condition. Avoid using a sales representative's name, a temporary reminder, or a detailed explanation as a status label.
4. Click **Save** after completing the Inquiry Stage list. Reopen the list and read the labels in their displayed order to confirm that users can identify the correct choice quickly.
5. In **Sales Configuration**, open the settings for **Offer Status**. Review the existing values before adding new ones.
6. Create or update Offer Status values to distinguish offers in preparation, offers that are active with the customer, offers being followed up, and offers no longer being pursued. Use a separate value for an expired offer if your team needs to identify offers whose validity period has passed.
7. Click **Save**. Read the Inquiry Stage and Offer Status lists together. A user should be able to see when an Inquiry has reached the point where offer-related work begins, and when an Offer has moved beyond active Offers work.

[SCREENSHOT: Inquiry Stage and Offer Status lists in Sales Configuration, with clear separate values for qualification and Offers progress]

Do not use an Offer Status to describe a confirmed Orders. Once the customer has committed, continue status tracking through the Orders workflow.

Configure Order and Order-Chance Statuses

Configure **Order Status** values for committed customer business, then configure **Order Chance** values for the sales potential of prospective business. Keeping these lists separate prevents operational teams from confusing a likely Sales Job with an order that is already being processed.

1. In **Configuration > Sales Configuration**, open the settings for **Order Status**.
2. Review every existing Order Status against the way your team handles a **Orders**. Retain labels that clearly show the order's current condition. Update wording that is unclear, and remove values that duplicate another order condition or no longer match your process.
3. Add the Order Status values required for your customer order lifecycle. Use labels that support the handoff from confirmed order through processing, shipment-related work, delivery, cancellation, or closure. Sales representatives, purchasing users, warehouse users, and finance users should be able to understand the order's condition from the selected value.
4. Click **Save** and review the displayed list. Ensure that each Order Status describes the Orders itself, not the probability of winning the work.
5. Open the settings for **Order Chance** in **Sales Configuration**.
6. Add or update Order Chance values that sales users can apply when tracking potential business. These values should communicate the Sales Job's current prospect or sales progress. Agree on what evidence is needed before a user selects each value, such as customer engagement, commercial alignment, or an expected order decision.
7. Click **Save**. Compare the Order Status and Order Chance lists side by side. If the same label appears in both lists but means the same thing, rename or remove the overlapping value so each list has one clear purpose.

For example, a status that means "ready for shipment" belongs in **Order Status**, because it relates to a customer order being processed. A status that means a potential sale is progressing belongs in **Order Chance**, because it relates to prospective business rather than order fulfillment.

[SCREENSHOT: Order Status and Order Chance settings, illustrating separate operational and sales-potential labels]

Standardize Status Names Across Sales Records

Use a consistent naming approach across **Inquiry Stage**, **Offer Status**, **Order Status**, and **Order Chance**, while keeping the four lists distinct. Consistency helps sales users choose values correctly when moving between **Inquiries**, **Offers**, **Orders**, and sales performance discussions.

Choose short labels that describe a clear business condition. A status should answer "Where is this record in its lifecycle?" rather than "What should one person do next?" For example, a label that describes a record as being reviewed is a lifecycle condition. A label that describes an individual follow-up task belongs in **Tasks** or **Activities**, not in a status list.

Apply these naming rules when reviewing the four status groups:

- Use a label only once when it has one meaning in one lifecycle stage.
- Avoid labels that could apply to any record type without context, especially vague terms such as "In Progress."
- Use related wording where the business meaning is genuinely related, but do not treat an Inquiry, Offer, and Orders as interchangeable.
- Keep the customer commitment point clear: an Offer is still a Offers; a Orders represents committed customer business.
- Keep Order Chance focused on prospective business, not order processing, shipment, delivery, or invoicing.

Maintain a short internal reference that records the intended meaning of every configured value. For each label, note the status group where it belongs, when users should select it, and who agreed the definition. When administrators later add, rename, or remove a label, they can check that reference before changing **Sales Configuration**.

Also review any lists used in reports, dashboards, and sales meetings. If sales managers refer to "active offers" or "delivered jobs," make sure the configured status names support the same shared language without forcing users to interpret several nearly identical labels.

[SCREENSHOT: A status-definition reference showing the status group, label, and agreed business meaning for each configured value]

Verify Statuses in the Sales Lifecycle

After saving the four status lists, verify them in the sales screens where users make daily updates. This confirms that the labels are clear in context and that the team can distinguish inquiry qualification, offer progress, order processing, and Sales Job potential.

1. Open an existing **Inquiry**, or create an Inquiry for testing. Locate the **Inquiry Stage** field and review the available values. Confirm that each option is understandable and that users can identify the correct stage for a newly received or reviewed inquiry.

2. Open an existing **Offer**, or prepare an Offer linked to an Inquiry. Review the **Offer Status** field. Confirm that the available labels describe Offers progress, including preparation, active customer consideration, follow-up, revision, expiry, or offers no longer being pursued where those values are part of your agreed list.

3. Open a **Orders** and review the **Order Status** field. Confirm that the options describe the order-processing lifecycle after the customer commits. The list should support the work performed before delivery and invoicing without using sales-likelihood language.

4. Review the **Order Chance** field or record used by your sales team. Confirm that its values show the potential or progress of prospective business. Check that none of these choices duplicates an operational order condition such as shipment readiness or delivery.

5. Ask a sales representative and an administrator to select statuses for a small set of real records. Compare their choices. If they interpret a label differently, return to **Sales Configuration**, update the wording, and click **Save**.

Use this review to identify records carrying old or unclear values. Where needed, update those records to the approved terminology so list views, reports, and sales discussions use the same lifecycle language.

Overview

Sales lifecycle statuses give Pams users a shared way to describe the condition of work across **Inquiries**, **Offers**, **Orders**, and **Order Chance** tracking. They are not commercial terms, customer notes, or personal reminders. Each status value should communicate one business condition that a sales representative, account manager, sales manager, or administrator can understand from the selected field.

The four status groups support different decisions:

- **Inquiry Stage** helps the team manage qualification of incoming customer interest.
- **Offer Status** shows how a Offers is progressing before the customer commits.
- **Order Status** supports processing of a confirmed Orders through the customer order lifecycle.
- **Order Chance** helps sales users communicate the potential of prospective business without implying that an order is already being processed.

Clear statuses improve the quality of Sales Jobs, Offers, Orders, and sales reporting because users can filter, review, and discuss records using the same agreed terms. They also reduce the need to interpret free-text comments when checking whether an offer remains active, an inquiry needs qualification, or an order has reached a particular processing condition.

Configure statuses as a controlled set of shared values in **Sales Configuration**. Avoid adding a new value for an unusual one-off situation. Instead, use the existing status that best represents the lifecycle condition and record additional context in the relevant notes, comments, or Activities.

Commercial conditions such as **Payment Method**, **Payment Period**, **Delivery Term**, **Commission (%)**, and **Margin** are managed separately. If you need to review those settings, see Configuring Sales Commercial Terms.

Prerequisites

Before working in **Configuration > Sales Configuration**, make sure the people responsible for sales administration agree on the current sales lifecycle. Status labels affect how users describe records in **Sales Jobs**, **Inquiries**, **Offers**, and **Orders**, so they should not be changed by one person without alignment from the relevant sales and operational teams.

Prepare the following before editing **Inquiry Stage**, **Offer Status**, **Order Status**, or **Order Chance**:

- Access to **Configuration** and **Sales Configuration** in Pams.
- A reviewed list of the status labels currently used by sales representatives and administrators.
- Agreement on the handoff point from an **Inquiry** to an **Offer**, and from an Offer to a **Orders**.

- Agreement on which labels describe a confirmed order's processing condition and which labels describe the potential of prospective business.
- A decision about obsolete, duplicate, or unclear labels that should be renamed, replaced, or removed.
- A short definition for every new or changed label, including when users should select it.

Review existing **Sales Jobs**, **Offers**, and **Orders** before making broad changes. If users currently rely on a label with a local or historical meaning, agree on its replacement before removing it from the configuration list. This avoids confusion when managers review existing records or when sales representatives update work already in progress.

Coordinate status naming with the teams that use connected workflows. For example, order-processing labels should be recognizable to users handling **Delivery Notes**, **Invoices**, and customer follow-up. However, do not add delivery, payment, or commission detail to an Order Chance label; those details belong to the relevant sales, delivery, invoice, or payment record.

After completing lifecycle status configuration, continue with Configuring Sales Exception Reasons to set up the reasons users select when sales work is lost, regretted, cancelled, or rejected.