Confirming Sales Orders

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Reviewing an Accepted Offers Before Confirmation

Before you select **Confirm**, open the accepted Offers in **Sales > Orders > Offers** and review the commercial details with the customer’s acceptance in hand. This review matters because confirmation turns the Offers into a **Orders**, creating the delivery and invoicing commitments that your team will follow.

Locate the Offers and make sure its status is still **Offers**. Do not use this process for a record that is already a **Orders** or has been cancelled. Review the document header carefully:

What to review	Why it matters
Customer	Confirms that the order will be recorded for the correct customer.
Customer reference	Keeps the customer’s purchase reference connected to the order.
Offers validity date	Confirms that the accepted Offers was still valid when accepted.
Delivery Date	Sets the expected timing for the customer commitment.
Payment terms	Confirms when and how the order amount is expected to be paid.

Next, review every entry in **Order Lines**. Check that the selected **Product**, description, ordered quantity, **Unit Price**, **Tax (%)**, and **Discount (%)** match the accepted offer. Read the description as well as the product name, especially where the customer accepted specific commercial or technical wording.

Check the Offers total against the agreed amount. If the Offers includes a discount, confirm that it appears on the correct order line and that the total still matches the customer’s acceptance. Also review delivery and shipping details before confirmation so the future delivery document is based on the correct destination and timing.

[SCREENSHOT: An accepted Offers showing the Customer, customer reference, Delivery Date, payment terms, Offers total, and Order Lines.]

If any item, price, tax, discount, or delivery detail differs from the accepted Offers, correct and agree it before confirming. For guidance on preparing the original customer offer, see Preparing Customer Offers.

Confirming the Accepted Offers

When the Offers has been checked and the customer has accepted its terms, use **Confirm** to create the sales commitment in Pams. Confirming should happen only after the customer, order lines, total amount, delivery details, and payment terms have been reviewed.

1. Open the accepted record from **Sales > Orders > Offers**.
2. Confirm that the document status is **Offers**. Review the **Customer**, customer reference, **Delivery Date**, payment terms, and total amount one final time.
3. Review the entries in **Order Lines**. Make sure the products, descriptions, quantities, **Unit Price**, **Tax (%)**, and **Discount (%)** reflect the accepted Offers.
4. Select **Confirm** on the Offers form. Pams changes the record from **Offers** to **Orders**.
5. Look at the document header after confirmation and record the generated Orders number. Use this number when discussing the order with the customer, delivery team, purchasing team, or finance team.
6. Check that the status now shows **Orders**. This confirms that the Offers is no longer only an offer; it is the agreed customer commitment.

[SCREENSHOT: A Offers form with the Confirm button, followed by the same document showing the Orders status and Orders number.]

Use **Cancel** instead of **Confirm** if the customer declines the Offers or if the Offers must not create delivery or invoicing commitments. Do not confirm a Offers merely to reserve a number or test a workflow. A confirmed Orders is the record that teams use to prepare delivery and billing activity.

If the customer's acceptance includes changes to products, quantities, prices, or dates, update and agree those details before selecting **Confirm**. If the change is a new commercial request rather than a revision to this Offers, prepare a separate Offers instead.

Reviewing the Commitments Created by the Orders

A **Orders** is the operational record of what your team has committed to provide and what the customer has committed to pay. After confirmation, review the Orders as the shared source for delivery, invoicing, and customer follow-up.

Start with **Order Lines**. Each line shows the agreed product, description, quantity, **Unit Price**, **Tax (%)**, and **Discount (%)**. These lines are the reference for the quantities that must be fulfilled and the values that must be billed. If an order contains several products, review each line individually rather than relying only on the total amount.

Then review the order-level commitments:

- Check the **Delivery Date** to confirm the expected delivery timing.
- Review shipping information and the delivery destination so the order is prepared for the correct location.
- Confirm the customer reference remains visible. This helps your team match the Pams Sales Order to the customer's own purchasing documents.
- Review payment terms and the total amount. Together, these show the amount and payment commitment created by the confirmed order.
- Keep the original Offers details available as the commercial context behind the Orders.

[SCREENSHOT: A confirmed Orders showing Order Lines, Delivery Date, shipping details, payment terms, customer reference, and total amount.]

Use the Orders number in internal communication about delivery dates, customer requests, and billing progress. It provides one reference point for the products and terms agreed with the customer.

If you represent a Principal on this deal, the confirmed order can also support your wider Principal Relationship Management work by keeping the sale connected to the correct commercial commitment. Do not change terms casually after confirmation: delivery and invoice documents may rely on the information shown on the Orders.

When a confirmed order needs a change, first review whether delivery or invoicing activity has already begun. The linked documents are essential for understanding what has already been committed or processed.

Following Delivery and Invoice Commitments

Once a Offers becomes a **Orders**, use the linked **Delivery** and **Invoices** buttons on the order to follow the customer commitments created from it. These buttons keep delivery and billing activity connected to the original Orders, rather than requiring you to search for related documents separately.

1. Open the confirmed **Orders** and select the **Delivery** button.
2. Review the delivery document created for the ordered products. Compare the products and quantities with the Orders **Order Lines** so the fulfillment activity matches what the customer ordered.
3. Use the delivery document to monitor the quantities that must be prepared, shipped, or otherwise fulfilled. Review the delivery details and destination before the order moves forward.
4. Return to the Orders when it is ready to be billed. Select **Create Invoice** to begin the invoice process under the configured invoicing policy.
5. Open the **Invoices** button on the Sales Order to review invoice documents linked to that order. Use this view to keep billing follow-up tied to the same customer commitment.
6. Return to the **Delivery** and **Invoices** buttons whenever you need to check whether the order has delivery activity, invoice activity, or both.

[SCREENSHOT: A confirmed Orders with Delivery and Invoices buttons visible near the document header.]

The Orders remains the best place to check the full chain of work: agreed products and pricing in **Order Lines**, the delivery obligation in **Delivery**, and customer billing activity in **Invoices**. If the Orders contains several lines, compare each line with the linked delivery and invoice documents before responding to customer questions.

For delivery coordination after confirmation, continue with Coordinating Sales Deliveries. When the delivery is ready to be documented for the customer, see Creating Delivery Notes. For billing guidance, see Managing AR Invoices.

Updating a Confirmed Orders When Terms Change

A confirmed **Orders** represents an accepted customer commitment. Before you change it, review the request with the customer and check whether delivery or invoicing has already started. Changes to products, quantities, pricing, delivery information, or payment terms can affect the work already planned from the order.

1. Open the confirmed **Orders** and review the current **Order Lines**, **Delivery Date**, shipping information, payment terms, and total amount.
2. Select the **Delivery** button and review any linked delivery document. Check whether quantities have already been prepared, shipped, or otherwise fulfilled.

3. Select the **Invoices** button and review whether an invoice has already been created for the Orders.
4. Compare the requested change with the confirmed details. Pay particular attention to the product description, quantity, **Unit Price**, **Tax (%)**, **Discount (%)**, delivery destination, and payment terms.
5. Communicate the revised quantity, price, delivery date, or other term with the customer before making the change. Keep the Orders aligned with the agreement that the customer has accepted.
6. Update the relevant information only after the revised terms have been agreed. Recheck the order total and the affected **Order Lines** after the update.

[SCREENSHOT: A Orders showing Order Lines and the Delivery and Invoices buttons used to check existing follow-up documents before a change.]

If the customer is asking for a separate product, separate delivery, or a new commercial proposal, create a new Offers rather than changing the existing confirmed order. This preserves a clear record of the original commitment and keeps separate offers from being mixed into one Orders.

For a change that affects the delivery process, check the linked Delivery document immediately after the update. For a change that affects billing, review the linked invoice documents before further invoice action. Where an order must be cancelled, rejected, or otherwise handled outside the normal confirmation path, use the process in Managing Order Exceptions.

Resolving Confirmation and Follow-Up Issues

When confirmation or follow-up does not proceed as expected, begin with the Orders or Offers status and then review the information that drives delivery and invoicing. Avoid creating duplicate Offers or duplicate orders while investigating; first locate the existing record by its Offers or Orders number.

If **Confirm** is unavailable, check the document status:

- A record in **Offers** can be reviewed for confirmation.
- A record already marked **Orders** has already been confirmed.
- A cancelled record should not be confirmed unless it has been returned to the appropriate working state.

If a confirmed order shows incorrect products, quantities, prices, discounts, or taxes, compare **Order Lines** with the accepted Offers before delivery or invoicing is processed. Confirm that the **Product**, description, quantity, **Unit Price**, **Tax (%)**, and **Discount (%)** match the agreed offer. Also review the **Customer**, customer reference, **Delivery Date**, shipping information, payment terms, and total amount.

If no delivery activity appears after confirmation, return to the Orders and review the order lines and delivery information. Confirm that the order contains products requiring fulfillment and that the delivery details have been entered correctly. Use the **Delivery** button on the Sales Order to look for the linked delivery document.

If you cannot continue with billing, open the Orders and review its invoicing status, delivered quantities, and payment terms before selecting **Create Invoice**. Then use the **Invoices** button to check whether an invoice document already exists for the order.

[SCREENSHOT: A Orders with its status, Order Lines, Delivery button, and Invoices button highlighted for issue checking.]

Where the issue involves a customer cancellation, rejection, or an order that should not continue, do not use normal confirmation steps to work around it. Follow Managing Order Exceptions so the Orders and related documents remain accurate.

Overview

In Pams, confirming a Offers changes an accepted commercial offer into a **Orders**. The Orders becomes the working record for the customer commitment: it shows what was ordered, the agreed prices and taxes, the planned delivery details, the expected payment terms, and the total amount.

The normal order workflow begins with a Offers that has been accepted by the customer. From **Sales > Orders > Offers**, you open the record, check its commercial details, and select **Confirm**. Pams then changes the status from **Offers** to **Orders** and displays a Orders number in the document header.

After confirmation, the Orders connects the next customer-facing activities:

- The **Delivery** button opens the delivery activity linked to ordered products and quantities.
- The **Invoices** button shows invoice documents connected to the Orders.
- **Create Invoice** starts the customer billing process when the order is ready to be invoiced.

- The Orders number gives sales, delivery, and finance teams one shared reference for the customer commitment.

[SCREENSHOT: The Orders workflow from Offers to Orders, then Delivery and Invoices.]

Confirmation is not simply an administrative status change. It is the point at which the agreed Offers becomes the reference for fulfillment and billing. For this reason, verify the **Customer**, customer reference, **Order Lines**, **Delivery Date**, shipping details, payment terms, and total amount before selecting **Confirm**.

The Orders also preserves the history of the accepted Offers. When a customer asks about a product quantity, a delivery date, or an invoice amount, open the confirmed Orders first and use its linked **Delivery** and **Invoices** buttons to follow the related activity. This keeps commercial, delivery, and invoice conversations based on the same agreed order.

Prerequisites

Before confirming a Offers in Pams, make sure you have an accepted Offers that is ready to become a **Orders**. The record must be available in **Sales > Orders > Offers** and still show the **Offers** status. Do not begin with a record that already shows **Orders** or has been cancelled.

Have the customer’s acceptance available so you can compare it against the Offers. The acceptance should support the products, quantities, prices, delivery timing, and payment terms shown in Pams. Use the following review points before you select **Confirm**:

Required review	Check in the Offers
Correct customer	**Customer** and customer reference
Correct products and quantities	**Order Lines**
Correct commercial amounts	**Unit Price**, **Tax (%)**, **Discount (%)**, and total amount
Delivery commitment	**Delivery Date** and shipping information
Payment commitment	Payment terms and total amount

Make sure each **Order Lines** entry is complete and agreed. Review the product and description as well as the quantity and price. This is particularly important when a Offers contains multiple items, discounts, or different tax percentages.

If the customer has requested a change before acceptance, update the Offers and make sure the revised version is the one being accepted. If the request is a separate offer rather than a revision, create a new Offers so the commercial record stays clear.

You should also know who will follow the order after confirmation. The confirmed Orders may require delivery coordination through **Delivery** and later customer billing through **Create Invoice** and **Invoices**. Keep the Orders number available for internal follow-up once confirmation is complete.

After you confirm the order, proceed to Coordinating Sales Deliveries to follow the delivery commitment created from the Orders.