Help & Troubleshooting — How-to Tasks

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Send Inquiry to Suppliers

- **The Send Inquiry action is unavailable** → The ProcurementInquiry is not at **Procurement Inquiry Creation** → Open a ProcurementInquiry that is at the required stage.
- **You cannot send the inquiry** → Your user account does not have the required permission → Obtain access to `procurement.inquiry.send`.
- **The inquiry is not ready to send** → Required materials, services, quantities, or specifications require review → Update and review the ProcurementInquiry before selecting **Send Inquiry**.

Send Inquiry to Suppliers

Complete Procurement

Symptom	Likely cause	Fix
The **Complete Procurement** action is unavailable.	You do not have the required permission, or the ReceivingShipment is not at **Goods Receiving & Inspection**.	Sign in with access that includes `procurement.complete` and open a ReceivingShipment at the required stage.
The ReceivingShipment cannot be reverted after completion.	The Order has binding invoices.	Review the related Order and its invoices before completing procurement.
A received item cannot be deleted.	The item is labelled **Ready for Shipment** or **Delivered**.	Do not attempt to delete the item; continue processing the applicable receiving record.

Complete Procurement

Convert Offer to Purchase Order

- **The Create PO action is unavailable** → Your account may not have the required purchasing permission → Obtain the `procurement.order.create` permission.
- **The offer cannot be converted** → The ProcurementOffer is not at Supplier Offer Evaluation → Complete supplier offer evaluation before selecting **Create PO**.
- **The purchase order cannot be created from the offer** → The offer has no items → Add at least one item to the offer before converting it.
- **You need to return an Order to an earlier process stage** → The Order may have binding invoices → Resolve the binding invoice condition before attempting any reversal.

Convert Offer to Purchase Order

Initiate Goods Receiving

- **Receive Goods is not available** → The PurchaseOrder is not at **Purchase Order Creation** → Open a PurchaseOrder that has reached Purchase Order Creation.
- **You cannot initiate receiving** → Your account does not have the `warehouse.receiving.create` permission → Use an account with warehouse receiving creation access.
- **The application warns that received quantity exceeds order quantity** → The receipt quantity is greater than the order quantity → Review the receipt quantity and proceed only when the higher quantity is intended.
- **You need to reverse a delivered order** → A due invoice or binding invoices exist for the order → The order cannot be un-delivered or reverted in this condition.

Initiate Goods Receiving

Create Offer from Inquiry

- **Create Offer is unavailable** → Your user account may not have the required permission → Request access to `sales.offer.create`.
- **The Inquiry cannot be converted** → The Inquiry is not at **Customer Inquiry** → Use an Inquiry that is at the required workflow point.
- **The Offer cannot progress after creation** → The Offer is missing an item → Ensure that the Offer has at least one item before continuing.

Create Offer from Inquiry

Progress Order Status

- **The Order does not progress when you apply a status update** → A required approval or activation gate may still be incomplete → Complete the required approval and activation gates, then select **Status update** again.
- **The Order cannot be moved to Delivered** → The related Offer may not have completed its workflow through Ordered → Ensure that the Offer has progressed through Draft, Awaiting approval, Approved, Valid, and Ordered before progressing the Order.
- **You cannot update the Order status** → Your signed-in account may not have the required permission → Use an account with the `sales.order.update` permission.
- **You need to reverse a Delivered Order** → A due invoice or binding invoices may exist → Review the Order’s invoice status; an Order with binding invoices cannot be reverted, and an Order with a due invoice cannot be un-delivered.

Progress Order Status

Process Payment

- **Record Payment is not available** → The PaymentMilestone is not at Payment Milestone Setup, or you do not have the required payment-creation access → Use this task only when the PaymentMilestone is at Payment Milestone Setup and your role includes `invoices.payments.create`.
- **You cannot reverse the Delivered status** → A due invoice already exists → Continue with payment processing for the related PaymentMilestone.
- **You cannot revert the Order** → The Order has binding invoices → Keep the Order in its current lifecycle position and process the applicable payment.

Process Payment