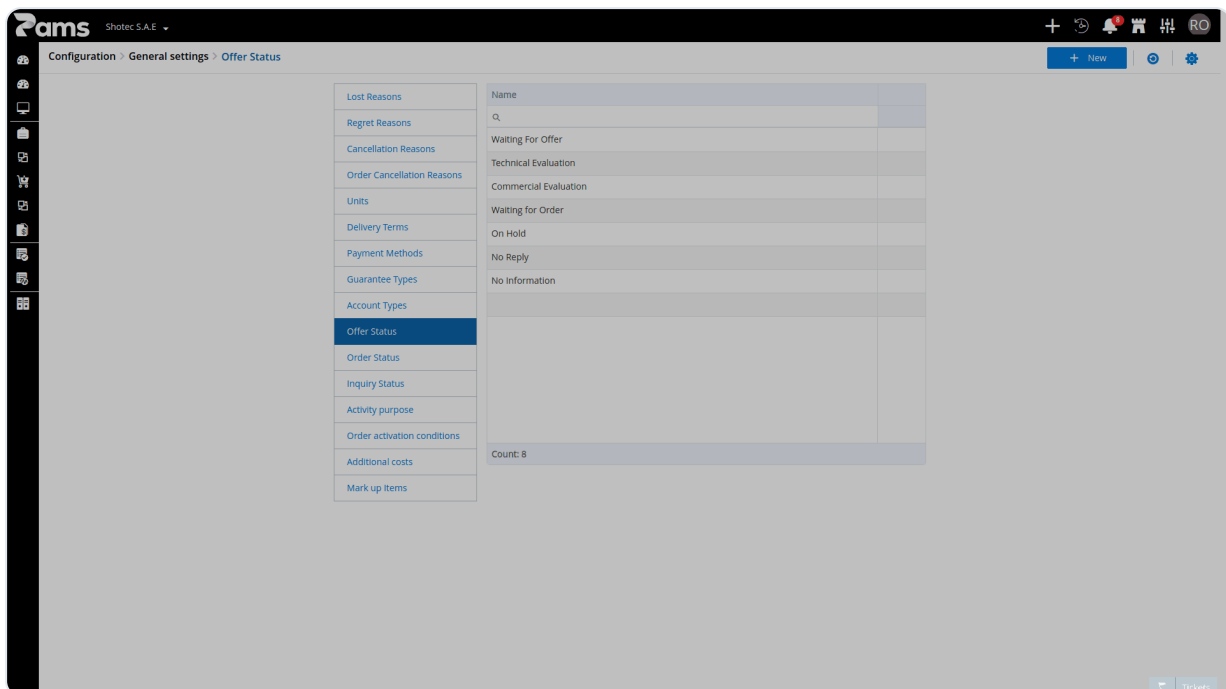


Configure Offer Status

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Configure Offer Status

Administrator Guide > Configuration > General Settings*Offer Status — Configurations > General Settings > Offer Status*

Overview

Use **Offer Status** to review and begin maintaining the status records used to classify Offers. This configuration is relevant to administrators who support the sales process, where an Offer progresses through Draft, Awaiting approval, Approved, Valid, and Ordered before the job can proceed to an Order.

The screen currently displays configured Offer Status records, including statuses used during offer preparation and evaluation. Use this page when a new Offer Status record is required or when you need to review the existing configuration.

Before you start

- Sign in to the application before opening the configuration.
- Ensure that you have access to **Configurations** and **General Settings**.

Steps

1. Navigate to **Configurations > General Settings > Offer Status**.
2. Review the existing Offer Status records displayed on the page. These records represent statuses available for Offers during the sales process.
3. To begin creating an Offer Status record, select **New**.
4. Complete the available configuration details for the new Offer Status record and apply the required entry rules before finalizing the record.

Tips & cautions

Note: An Offer must clear the Draft, Awaiting approval, Approved, Valid, and Ordered status sequence before it can support progression to an Order.

Warning: An Offer awaiting approval requires action by the manager before it can proceed.

Warning: All offers must be in draft status to revert to inquiry.

Troubleshooting

- Cannot open **Offer Status** → The user is not signed in or does not have access to the configuration area → Sign in and verify access to **Configurations > General Settings**.
- Cannot continue after selecting **New** → Required entry rules have not been met → Complete the required configuration details and use only the accepted format where applicable.
- Offer cannot proceed to the next business stage → The Offer has not completed its approval and validity sequence → Ensure that the Offer progresses through Draft, Awaiting approval, Approved, Valid, and Ordered.

Result

The **Offer Status** configuration page is open, and a new Offer Status record can be started by selecting **New**.

Related pages

- [Configure Margin Items](#)
- [Configure Order Activation Conditions](#)
- **Configuration — Learning Path**
- [Configure Account Types](#)
- [Configure Activity Purpose](#)
- [Configure Cancellation Reasons](#)
- [Configure Cost Items](#)
- [Configure Delivery Terms](#)
- [Configure Guarantee Types](#)
- [Configure 2 Factor Authentication](#)
- [Configure Account Managers](#)
- [Configure Attachment Categories](#)
- [Configure Branches](#)
- [Configure Flags](#)
- [Configure Frequent Currencies](#)