

Process Job

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Job

This process manages a job from Potential through Offer and Order to Delivered. The team responsible for the job advances it through the offer and order status gates and uses the available job actions when the job must leave the normal path.

Process flow

```
flowchart LR
    n0["n0[\"Potential\"]"] --> n1["n1[\"Offer\"]"]
    n1 --> n2["n2[\"Order\"]"]
    n2 --> n3["n3[\"Delivered\"]"]
    n0 -.-> x0["x0[\"MissedPotential\"]"]
    n0 -.-> x1["x1[\"RegrettedPotential\"]"]
    n0 -.-> x2["x2[\"CancelledPotential\"]"]
    n1 -.-> x3["x3[\"RegrettedOffer\"]"]
    n1 -.-> x4["x4[\"CancelledOffer\"]"]
    n1 -.-> x5["x5[\"LostOffer\"]"]
```

Job lifecycle stages

Potential

At Potential, the record is a job at the start of the lifecycle. The next lifecycle stage is Offer.

A Potential job can leave the path through **Cancel inquiry**, **Cancel job**, **Cancel items**, or **Reactivate items**, which move it to CancelledPotential. **Cancel inquiry**, **Cancel items**, and **Reactivate items** are available only while there are no active sales after the Potential stage.

Offer

At Offer, the record is a job with an offer in progress. Before the job can continue through the offer gate, the offer runs through these statuses in order:

Draft → AwaitingApproval → Approved → Valid → Ordered

The next lifecycle stage is Order.

From Offer, **Cancel items**, **Cancel offered job**, and **Cancel single offer** move the job to CancelledOffer. **Cancel items** and **Cancel single offer** are available only while there are no active sales after the Offer stage.** **Loss items**, **Lost offered job****, and **Lost single offer** move the job to LostOffer. **Loss items** and **Lost single offer** are available only while there are no active sales after the Offer stage.

Order

At Order, the record is a job with an order in progress. The order runs through these statuses in order:

Draft → AwaitingApproval → Approved → AwaitingActivation → Valid → ReadyForShipment → Delivered

Update items moves the job from Order to Delivered only while there are no active sales after the Order stage.

Delivered

At Delivered, the record is a delivered job. It has completed the stated lifecycle path.

Leaving the lifecycle path

A job can leave from Potential as MissedPotential, RegrettedPotential, or CancelledPotential. These exits apply while the job is still at Potential; after it reaches Offer, the Potential exits are no longer the applicable path exits.

From Offer, a job can become RegrettedOffer, CancelledOffer, or LostOffer. These exits remain available at the Offer point; after the job reaches Order, the Offer exits are no longer the applicable path exits.

From Order, a job can leave as RejectedOrder or CancelledOrder.

Delete job moves the job to Deleted. Deleted is the destination for a deleted job.

Related process pages

Use the following pages for related order, offer, delivery, and configuration work:

- [Project Orders List](#)
- [Orders](#)
- [New Direct Order](#)

- [Direct Order](#)
- [Direct Order](#)
- [Transfer Order](#)
- [Transfer Order](#)
- [Production Order](#)
- [Shipping Order](#)
- [Delivered Orders](#)
- [Configure Offer Status](#)
- [Configure Order Activation Conditions](#)
- [Configure Order Status](#)
- [Convert Offer to Purchase Order](#)