

Process Procurement

August 17, 2026

Procurement

Process flow

flowchart LR

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

Procurement process

Procurement users manage a procurement record from an early potential through offer and order handling to delivery. The main path is **Potential, Offer, Order, and Delivered**.

Progressing a procurement record

Potential

A procurement record in **Potential** is being considered before it becomes an offer. Its next main-path stage is **Offer**. **The record can leave this stage for CancelledPotential through Cancel items, Cancell single inquiry, or Reactivate items. Condition:** each of these actions is available only while there are no active sales after the Potential stage.

Offer

An **Offer** is the procurement record at the offer stage. The next main-path stage is **Order**. **A record can be placed in Offer by Reactivate job or Back to offer. From Offer, Cancel items, Cancel single offer, and Reactivate items** move the record to

CancelledOffer. Denied extension single offer moves it to **ExtensionRejected**.

Condition: each of these actions is available only while there are no active sales after the Offer stage.

Order

An **Order** is the procurement record being fulfilled. Its next main-path stage is **Delivered**. **Deliver single order** and **Un deliver items** move the record to **Delivered**. **Cancel single order** moves it to **CancelledOrder**. **Condition:** each of these actions is available only while there are no active sales after the Order stage.

Delivered

A **Delivered** record is a procurement order that has reached delivery.

Leaving the procurement path

The following statuses take a record out of the main Potential-to-Delivered path:

- From **Potential**, a record can leave as **MissedPotential**, **RegrettedPotential**, or **CancelledPotential**.
- From **Offer**, it can leave as **RegrettedOffer**, **CancelledOffer**, **RejectedOffer**, or **ExtensionRejected**.
- From **Order**, it can leave as **RejectedOrder** or **CancelledOrder**.
- A record can also leave the path as **Deleted**. **The declared turn-back destination is Offer**. **Reactivate job** and **Back to offer** place a record in Offer. The path does not identify a separate turn-back destination for Potential, Order, Delivered, or any of the exit statuses.

Related procurement pages

For procurement setup and record management, see [Getting Started with Procurement](#), [Procurement — Overview](#), [Procurement](#), and [Procurement List](#).

For related order work, see [Orders](#), [Direct Order](#), [Direct Order](#), [New Direct Order](#), [Project Orders List](#), [Production Order](#), [Shipping Order](#), [Transfer Order](#), [Transfer Order](#), and [Delivered Orders](#).