

Sales Jobs

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Sales > Inquiries

All

Inquiries

Offers

Orders

Archived

Job Missing Custom...

Inquiry date	Inquiry type	Inquiry stage	
Q	Q	Q	
02 Jul 2024	Opportunity	Sent to principal	
15 Aug 2024	Opportunity	Sent to principal	
20 Aug 2024	Opportunity	Draft	
20 Aug 2024	Opportunity	Sent to principal	
25 Aug 2024	Opportunity	Sent to principal	
09 Sep 2024	Opportunity	Draft	
17 Sep 2024	Opportunity	Sent to principal	
17 Sep 2024	Opportunity	Sent to principal	
22 Sep 2024	Opportunity	Draft	📄✎🗑
23 Sep 2024	Opportunity	Sent to principal	
23 Sep 2024	Opportunity	Sent to principal	
23 Sep 2024	Opportunity	Draft	
25 Sep 2024	Opportunity	Draft	
25 Sep 2024	Opportunity	Draft	
24 Sep 2024	Opportunity	Sent to principal	
30 Sep 2024	Opportunity	Sent to principal	
29 Sep 2024	Opportunity	Sent to principal	
01 Oct 2024	Opportunity	Draft	
12 Sep 2024	Opportunity	Sent to principal	
02 Oct 2024	Opportunity	Sent to principal	

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Overview

A job reaches the **Order** stage only after its Offer progresses through **Draft, Awaiting Approval, Approved, Valid**, and **Ordered**. A job reaches **Delivered** only after its Order progresses through **Draft, Awaiting Approval, Approved, Awaiting activation, Valid, Ready for shipment**, and **Delivered**.

Before you start

- Ensure that you have access to **Sales** and **Sales jobs**.
- To progress an Offer, ensure that the Offer contains at least one item.
- If an Offer is **Awaiting Approval**, a manager must act on the approval before the Offer can continue.

Steps

1. In the navigation bar, select **Sales**, and then select **Sales jobs**.
2. Select **all** to review the available sales-job records. Use the displayed **Inquiry date**, **Inquiry type**, and **Inquiry stage** information to identify the inquiry you need to follow.



Sales jobs — Sales > Sales jobs

3. Select **offers** to review jobs that are at the Offer stage. When you need to work with the related Offer, select **Go to offer**.
4. Progress the Offer through **Draft**, **Awaiting Approval**, **Approved**, **Valid**, and **Ordered**. When the Offer is **Ordered**, the job can proceed to the Order stage.
5. Select **orders** to review jobs at the Order stage. Follow the related Order through **Draft**, **Awaiting Approval**, **Approved**, **Awaiting activation**, **Valid**, **Ready for shipment**, and **Delivered**.

6. When the Order reaches **Delivered**, the sales job has completed its normal sales lifecycle.

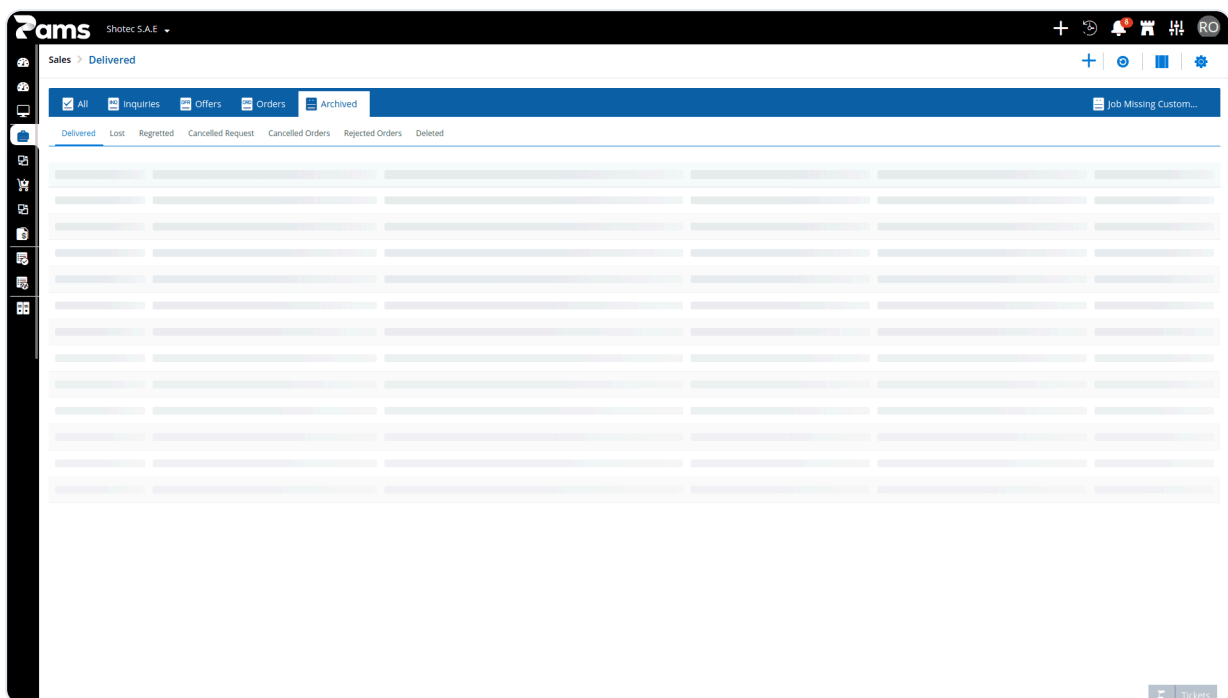
All

The **all** view provides a consolidated list of sales-job inquiries. Review the inquiry date, inquiry type, and inquiry stage to identify records that require sales follow-up or progression to an Offer.

For an inquiry that must be sent onward, use **Consider As Sent To Principal** to mark it as **Sent To Principal**. The inquiry progression is **New**, **Sent To Principal**, **Offered**, and **Ordered**.

Archived

The **archived** view contains archived sales-job records. Use this view when you need to review sales jobs that are no longer being worked through the active views.



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Offers

The **offers** view contains sales jobs at the Offer stage. Use it to review Offer-related work and open the related Offer by selecting **Go to offer**.



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An Offer must clear its approval and validity lifecycle before it can become **Ordered**. Use **Apply Approval For Booking** when approval for booking is required. You can use **Extend Offer Validity** when the Offer validity needs to be extended.

Orders

The **orders** view contains sales jobs at the Order stage. Use it to monitor related Orders as they progress toward **Delivered**.



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An Order that is **Ready for shipment** or **Delivered** contains items that cannot be deleted. A Delivered Order cannot be changed back to an earlier delivery status when a due invoice already exists.

Tips & cautions

Note: All Offers must be in **Draft** status before they can be reverted to an inquiry.

Warning: You cannot revert an Order when it has binding invoices.

Warning: You cannot un-deliver an Order when a due invoice already exists.

Troubleshooting

Symptom	Likely cause	Fix
The Offer cannot proceed beyond approval.	The Offer is Awaiting Approval .	Have the manager complete the required approval.
The Offer cannot be progressed.	The Offer has no items.	Add at least one item to the Offer.

Symptom	Likely cause	Fix
The Order cannot be reverted.	The Order has binding invoices.	Continue working from the current Order status.
An item cannot be deleted.	The item is Ready for shipment or Delivered .	Do not delete the item at these statuses.

Result

You have used **Sales jobs** to review sales-job inquiries and track their progression through Offer, Order, and Delivered status.

Related pages

- [Sales — Overview](#)
- [Getting Started with Sales](#)
- [Sales — Learning Path](#)
- [Pricing Quotation](#)
- [Sales](#)
- [Buyouts](#)
- [List](#)
- [Letters Of Guaranties](#)
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