

# Create Offer from Inquiry

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## Create Offer from Inquiry

### How-to Tasks

*Inquiry — Add new > Sales Jobs > Process*

## Overview

Use this task when a customer inquiry has been registered and is ready to be converted into an Offer. The action changes the Inquiry from **Customer Inquiry** to **Offer Preparation**, where the Offer can be prepared for the customer. Sales representatives perform this task as part of the Sales Offer to Order Workflow.

## Before you start

- Sign in to the application.
- Ensure that the Inquiry is at **Customer Inquiry**.

- You require the `sales.offer.create` permission to create an Offer.
- Open the required Inquiry in **Inquiry**.

## Steps

1. Open the Inquiry that is at **Customer Inquiry**.
2. In the inquiry panel, select **Create Offer**.
3. Continue working with the resulting Offer in **Offer Preparation**. Prepare the Offer before it progresses through its Offer lifecycle.

**Note:** An Offer progresses through **Draft, Awaiting Approval, Approved, Valid, and Ordered**. The Offer must clear this lifecycle before the job can progress to the next stage.

**Warning:** An Offer must contain at least one item.

**Tip:** To revert to the Inquiry, all offers must be in draft status.

## Troubleshooting

- **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.

## Result

The Inquiry is moved from **Customer Inquiry** to **Offer Preparation**.

## Related pages

- **Convert Offer to Order**
- [Progress Order Status](#)
- **How-to Tasks — Learning Path**

- [Configure Account Types](#)
- [Configure Activity Purpose](#)
- [Configure Cancellation Reasons](#)
- [Configure Cost Items](#)
- [Configure Delivery Terms](#)
- [Configure Guarantee Types](#)
- [Send Inquiry to Suppliers](#)
- [Convert Offer to Purchase Order](#)
- [Complete Procurement](#)
- [Initiate Goods Receiving](#)
- [\\*\\*Update Offer Status](#)
- [Complete Order\\*\\*](#)