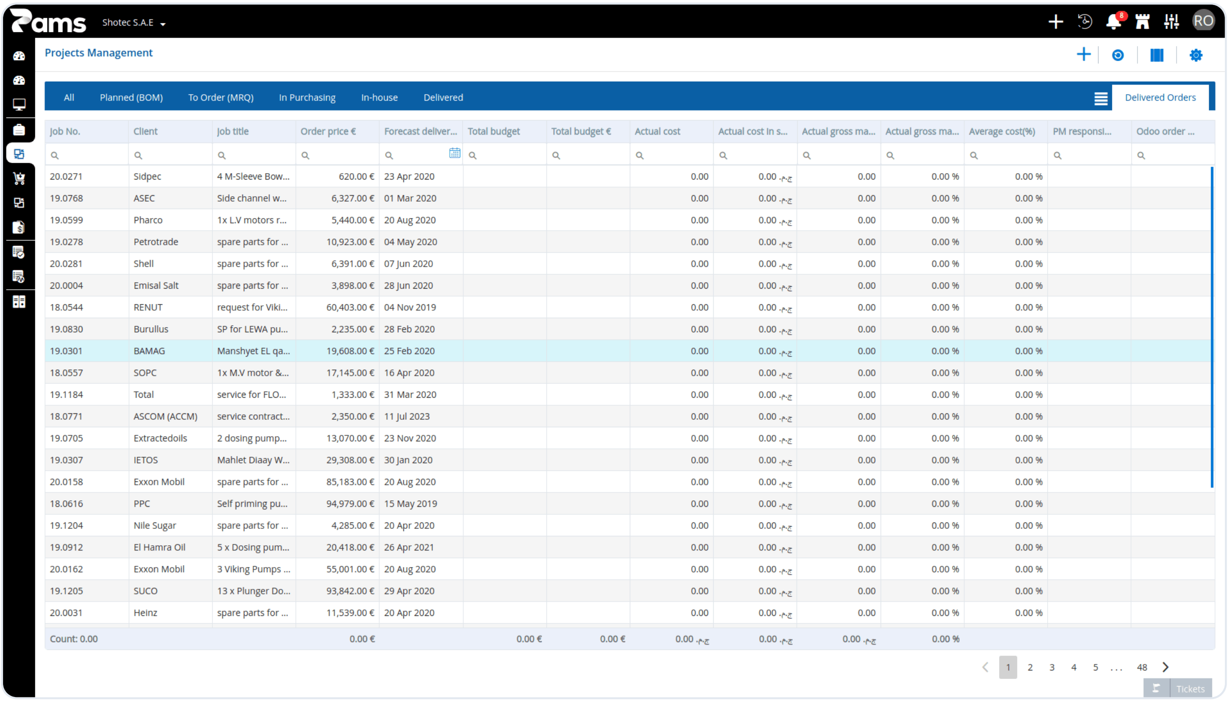
Progress Order Status

August 17, 2026

Progress Order Status

How-to Tasks



delivered orders

Overview

Use this task to progress a confirmed Order from Order Confirmation through the applicable Order statuses until it reaches Delivered. Sales representatives and sales managers use the status update in the order status component after the required approval and activation gates are complete. The Offer must have completed its workflow through Ordered before the job proceeded as an Order.

Before you start

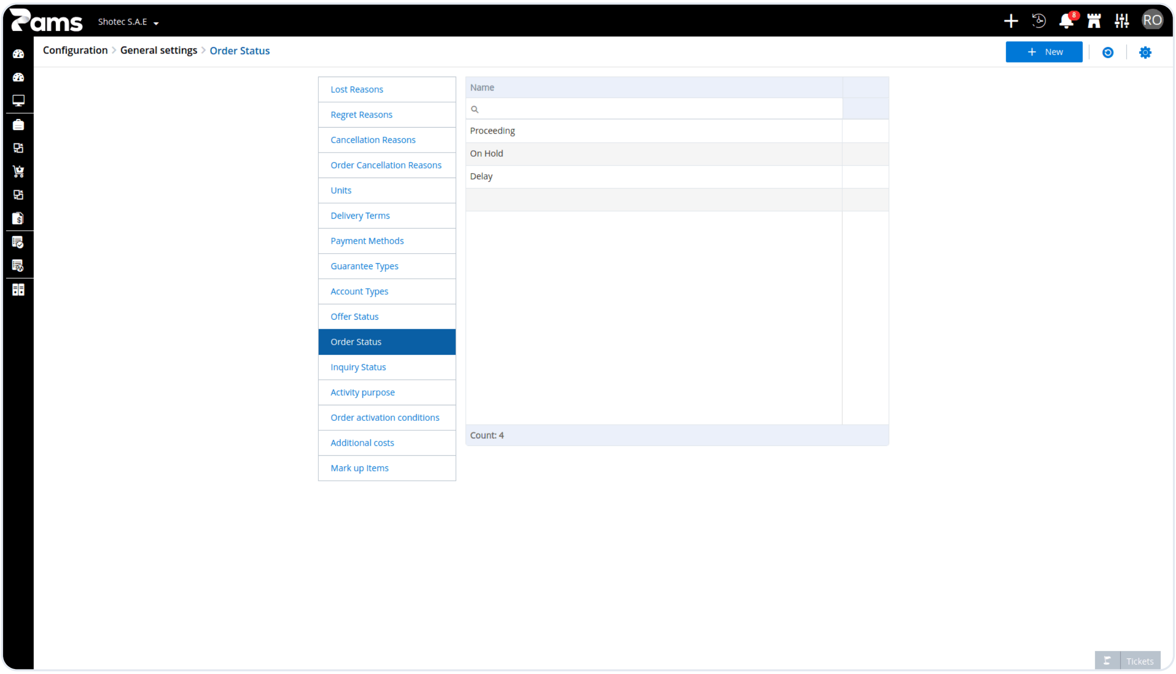
Ensure that the following conditions are met:

- The Order is at Order Confirmation.
- You are signed in and have the `sales.order.update` permission.
- Required approval and activation gates have been completed.
- The related Offer has progressed through Draft, Awaiting approval, Approved, Valid, and Ordered.
- The Order progresses through Draft, Awaiting approval, Approved, Awaiting activation, Valid, Ready for shipment, and Delivered.

> **Note:** An Offer awaiting approval must be acted on by the manager before it can continue through its workflow.

Steps

1. Open the confirmed Order that is at Order Confirmation.
2. In the order status component, select **Status update** to apply the next applicable Order status.



Order Status — Configurations › General Settings › Order Status

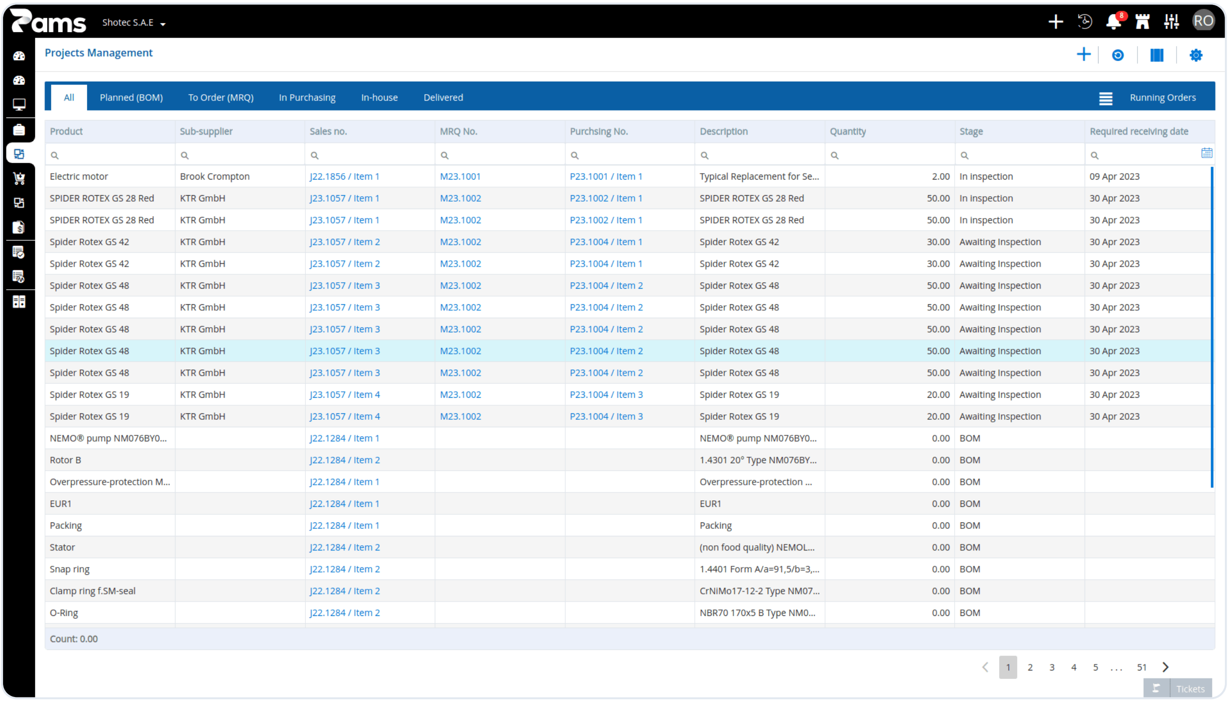
3. Continue to select **Status update** as each required gate is completed. Progress the Order through the documented status sequence:
    1. Draft
    2. Awaiting approval

3. Approved
4. Awaiting activation
5. Valid
6. Ready for shipment
7. Delivered

4. After the Order reaches Delivered, open the delivered orders view to monitor the fulfilled Order.

all

The **all** tab shows Orders at the Delivered stage. Use the visible job, client, job title, order price, forecast delivery date, and total columns to identify the delivered Order and monitor fulfillment records.



delivered orders

Tips & cautions

> **Warning:** Items labeled Ready for Shipment or Delivered cannot be deleted.

> **Warning:** Do not plan to reverse a Delivered Order when a due invoice already exists. The application cannot un-deliver the Order in this situation.

> **Note:** An Order with binding invoices cannot be reverted.

Troubleshooting

- **The Order does not progress when you apply a status update** → A required approval or activation gate may still be incomplete → Complete the required approval and activation gates, then select **Status update** again.
- **The Order cannot be moved to Delivered** → The related Offer may not have completed its workflow through Ordered → Ensure that the Offer has progressed through Draft, Awaiting approval, Approved, Valid, and Ordered before progressing the Order.
- **You cannot update the Order status** → Your signed-in account may not have the required permission → Use an account with the `sales.order.update` permission.
- **You need to reverse a Delivered Order** → A due invoice or binding invoices may exist → Review the Order's invoice status; an Order with binding invoices cannot be reverted, and an Order with a due invoice cannot be un-delivered.

Result

The confirmed Order is progressed through its applicable statuses and is available at the Delivered stage for fulfillment monitoring.

Related pages

- Create Offer from Inquiry
- **Close Invoice
- 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**