Sales — Learning Path

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Learning Paths › Sales

This learning path is for sales users who need to organize incoming sales work, turn qualified inquiries into offers, and follow project orders through planning and ordering. After completing it, learners can use Sales work-status views to prioritize their workload, process an inquiry and submit its offer for approval, and update a project order toward planned and ordering stages.

Learning objectives

- By the end of this path you can prioritize sales work by reviewing inquiries, offers, and orders.
- By the end of this path you can create and process a new sales inquiry into an offer.
- By the end of this path you can save an offer, mark it as sent to the principal, and apply for booking approval.
- By the end of this path you can locate a project order and update its status to support planning and ordering.
- By the end of this path you can distinguish active sales work from excluded or completed outcomes when reviewing records.

Prerequisites

- Access to the **Sales** app and the Sales jobs workspace.
- Permission to create and process sales jobs, save records, and apply approval for booking.
- Access to the **All, Iquiries, Offers**, and **Orders** work-status views.
- Familiarity with opening a Sales record from a list and working with its available actions.

Module 1: Organize the active sales pipeline

Goal: Learn to use work-status views to focus on the sales records that need attention now.

Lesson 1.1: Prioritize inquiries, offers, and orders

You need to decide where to spend your time at the start of the day: new customer work, offers awaiting progress, or confirmed orders. Start in **All** to review the overall workload, then use **Iquiries** to focus on inquiry-stage work. Move to **Offers** for offers that need follow-up, and review **Orders** for work that has progressed to an order. Use these views as a work-status sequence rather than treating every record as equally urgent.

Practice task: Open **All**, then compare the records visible in **Iquiries, Offers**, and **Orders**.

Lesson 1.2: Separate active work from closed or excluded outcomes

You are reviewing pipeline results and need to avoid treating closed outcomes as active follow-up work. Use **Lost** and **Delivered** to review outcomes that are no longer in the active inquiry-to-order flow. When investigating exceptions, use **Cancelled Requests, Regretted to offer, Rejected Orders, Cancelled Orders**, and **Deleted Inquiries**. Return to the active Iquiries, Offers, and Orders views when choosing current work.

Practice task: Review one active view and one excluded or completed view, then identify which view you would use for today's follow-up work.

Module 2: Convert an inquiry into an approvable offer

Goal: Create a sales inquiry, process it into an offer, and submit the offer for booking approval.

Lesson 2.1: Create and process a new sales inquiry

A customer opportunity needs to enter the sales process as a sales job. From Sales jobs, use **Add New > Sales Jobs > Process** to begin the workflow. You can also begin from **New Iquiry**. Work in the resulting Sales and use **Save** to retain the inquiry work. Processing the inquiry prepares it to become an offer rather than leaving it only as an initial request.

Practice task: From Sales jobs, start a new sales job using **Add New > Sales Jobs > Process** and save the record.

Lesson 2.2: Send an offer to the principal and request booking approval

After processing the inquiry, you need to formalize the offer and send it through the approval path. In the Sales record, use **Consider As Sent To Principal** when the offer has been sent to the principal. Select **Go to offer** to work with the offer record, then use **Apply Approval for Booking** to submit it for booking approval. Review the offer from **Offers** so that your follow-up reflects its offer-stage status.

Practice task: Open an offer through **Go to offer**, mark it **Consider As Sent To Principal**, and use **Apply Approval for Booking**.

Module 3: Progress project orders toward fulfillment

Goal: Monitor project orders and update their progress from planning into the ordering stage.

Lesson 3.1: Find a project order that requires action

A project-based sale has reached the order stage and must be reviewed before downstream work can proceed. Open **Orders** and select the relevant **Projects-Management record**. Use the record to understand that the order is now being handled as project work, rather than as an unprocessed inquiry or an offer awaiting action.

Practice task: From **Orders**, open a Projects-Management record for an order that requires review.

Lesson 3.2: Update an order for planning and purchasing readiness

You need to move a reviewed project order into the appropriate next operational stage. In the Projects-Management record, use **Status update**. Select **Planned (BOM)** when the order is ready for bill-of-materials planning, or select **To Order (MRQ)** when it is ready to move into the ordering request stage. Return to **Orders** to continue monitoring the order alongside the rest of the active order workload.

Practice task: Open a project order and use **Status update** to set it to either **Planned (BOM)** or **To Order (MRQ)**.

Final assessment

1. You begin the day with a large sales workload and want to focus only on records that are currently offers requiring follow-up. Which view should you use, and why?
2. A customer opportunity has not yet been entered into the sales workflow. What action sequence do you use to start and retain the new sales job?
3. An inquiry has been processed and its offer has been sent to the principal. What two actions move the offer into the booking approval process?
4. A project order is ready for bill-of-materials planning. Where do you open the order, and which status should you select?
5. A colleague asks you to investigate an order that was cancelled rather than an active order. Which view should you use instead of the active Orders view?

Answers

1. **Use **Offers. It isolates offer-stage work so you can prioritize offer follow-up over inquiries or orders.
2. **Use Add New > Sales Jobs > Process, then Save.** This starts the sales job workflow and retains the new inquiry record.
3. **Use Consider As Sent To Principal, then Go to offer and Apply Approval for Booking.** The first records that the offer was sent; the latter actions open the offer and submit it for approval.
4. **Open the record from Orders as a Projects-Management record, then use Status update > Planned (BOM).** This progresses the project order into its planning stage.
5. **Use **Cancelled Orders. Cancelled orders are excluded outcomes and should not be reviewed as active orders.