PAMS FRESH GENERATION

Regret reasons

September 10, 2026

Regret reasons

Regret reasons at a glance

A regret reason is a named explanation for a sales opportunity that is regretted before it
continues through the sales flow. PAMS uses this list to name why the opportunity was regretted.

The sales flow includes regretted sales stages alongside inquiry, offer, order, and delivered
stages. A regret reason helps colleagues understand why an opportunity stopped before an offer
was submitted.

The regret-reasons list covers the **Name** field, available maintenance actions, the conditions
that change those actions, and the messages associated with saving and deleting a reason.

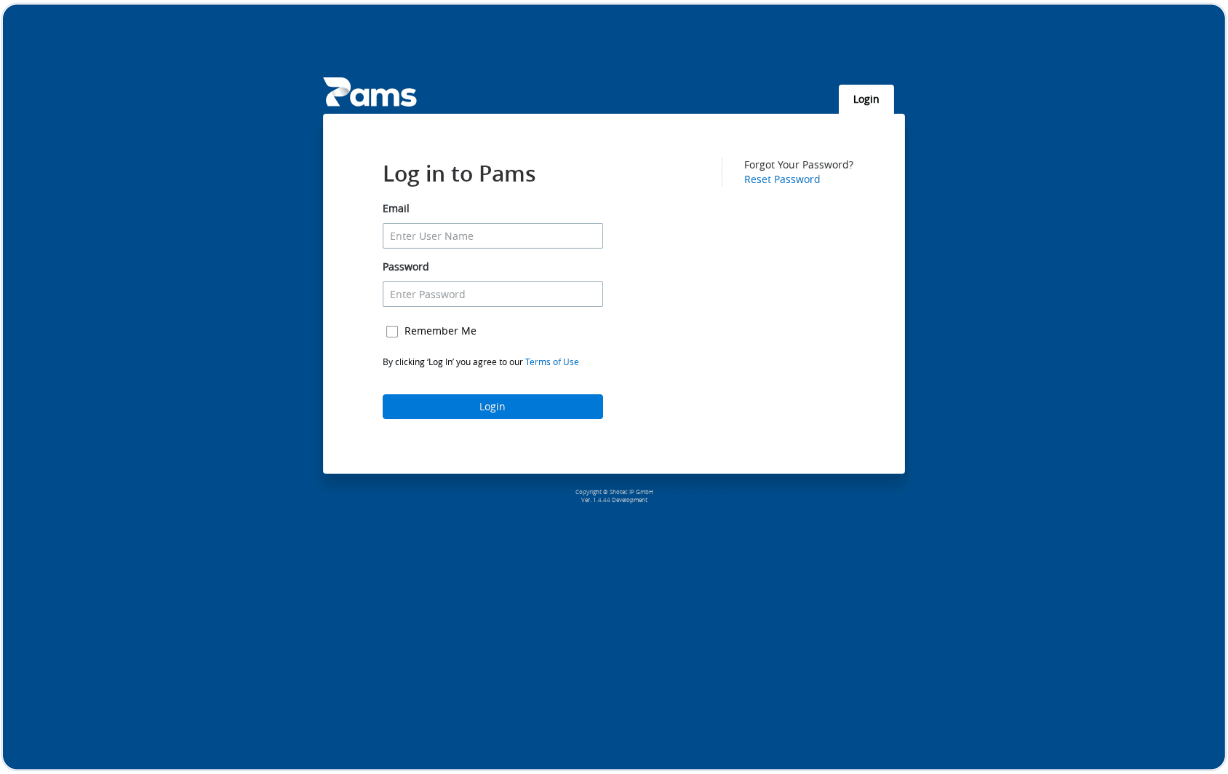
If you need to…	Go to
Read the purpose and scope of regret reasons	Regret reasons at a glance
Reach the configuration list	Find the regret reasons list
Add or change a reason	Add or maintain a regret reason
Understand the field and list actions	Understand the list and form
Fix a validation or save problem	When maintenance does not work
Review regretted sales records	Missed, regretted and cancelled jobs
Maintain lost reasons	Lost reasons
Maintain cancellation reasons	Cancellation reasons

If you need to…	Go to
Maintain order-cancellation reasons	Order cancellation reasons

Before you start

Before maintaining the list, review existing values so that each name remains distinct and useful to the people reviewing sales outcomes.

The list and its actions depend on the configuration access available to your account. **New** is shown only when new-item creation is allowed and the new-item control is not hidden. Row editing is available only when editing is allowed, and the delete menu is available only when deletion is allowed.



The list's columns come from the configuration for this reference entity. Work from the headers and fields visible in your own list when you review or maintain a reason.

Prerequisites

- You can open the sales configuration area.
- You know the reason name you want to add or change.
- You have confirmed that the new, edit, or delete action is available before starting that task.

Find the regret reasons list

After checking your access, open the sales configuration list for names assigned to regretted sales
opportunities.

Prerequisites

- You can open the configuration area.

Steps

1. Select **Configuration**.
2. Select **Sales**.
3. Select **Regret Reasons**.
4. Use the neighbouring sales reference lists when you need a different sales reason list:

If you need…	Open
Reasons for lost sales work	Lost reasons
Reasons for sales cancellations	Cancellation reasons
Reasons for order cancellations	Order cancellation reasons

Result: You are on the sales regret reasons configuration list.

Understand the list and form

After opening the list, use the configured fields to review or maintain a selected reason and the
configured columns to review the list.

Area	What you use it for
List	Review the configured regret-reason values.
Name	Enter the text that identifies the regret reason.

Area	What you use it for
New-item form	Add a reason when **New** is available.
Edit form	Change a selected reason with the edit control in the row's action column.
Delete menu	Review the confirmation message for a selected reason.
Export options	Choose a list export when export is available.

The **Name** field is a text box and is required. The list configuration shows **Name** as the
visible data field. Paging, column headers, row filters, and header filters are disabled in this
configuration.

Only **Name** is visible in the form for this list. The other configured fields are hidden and
non-editable. The **Name** field appears in the new or edit form when the selected reason and form
configuration allow it.

The action column contains controls for editing and deleting. To change a reason, select the edit
control in the row's action column. To remove a reason, select the delete control in the row's
action column, then review `Are you sure you want to delete this item?`. Use **Save** to commit a
new or edited reason, **Cancel** to leave the form without saving, and **Export** to open list
export options.

Add or maintain a regret reason

After reviewing the list, add, change, remove, or export a regret reason.

Prerequisites

- You are on the regret reasons configuration list.
- For a new value, **New** is available.
- For a change, the edit control in the row's action column is available.
- For removal, the delete control in the row's action column is available.

Steps

1. Choose the maintenance action that matches your task:

If you need to…	Select
Add a new reason	**New**
Change an existing reason	The edit control in the row's action column
Remove an existing reason	The delete control in the row's action column
Export the list	**Export**

2. For a new or edited reason, enter the reason text in **Name**.
3. Select **Save** to validate and save the new or edited reason.
4. If the form does not pass validation, correct **Name** and select **Save** again.
5. Choose the additional action that matches your task:

If you need to…	Action
Review the deletion choice	Read `Are you sure you want to delete this item?`, then choose **Delete** or **Cancel**.
Leave the form or confirmation dialog	Select **Cancel**.
Open the export choices	Select **Export**.

6. If you opened the export choices, select **Export** in the export dialog.

Result: The selected form, confirmation menu, or export choices are the current surface.

Handle access and setup variations

If an action is unavailable after you review the list, check your account access and the configuration used for the reference list.

What you are trying to do	What to check on screen
Add a reason	Check whether **New** is available.
Change a reason	Check whether the row's edit action is available.
Delete a reason	Check whether the row's delete menu is available.
Read the list	Work from the columns shown for your configuration.
Export the list	Check whether **Export** is available.

The configured list can provide its own column set, so use the fields and headers that appear in
your list rather than expecting every reference list to look the same. Use only the actions that
appear for regret reasons.

When maintenance does not work

After checking the available action, use the message you see to decide what to check next.

What you see	What it means	What to do
`Name is required`	**Name** has no value.	Enter a reason in **Name**, then select **Save**.
`Forbidden characters detected. Please remove them and try again.`	The value contains characters rejected by the form.	Remove the rejected characters from **Name**, then select **Save**.
`Data saved Successfully`	A new reason was saved.	Return to the list and review the saved value.
`Data updated Successfully`	An edited reason was saved.	Return to the list and review the updated value.
`Are you sure you want to delete this item?`	A confirmation asks whether to remove the selected reason.	The confirmation menu provides **Delete** and **Cancel**.

If the list shows a different set of columns, work from the columns displayed for that reference
list.

What to do next

After resolving a maintenance issue, use regret reasons in the sales flow as named explanations
for regretted opportunities.
When you need to review the sales records in that outcome, open Missed, regretted and cancelled
jobs. When you need to maintain a neighbouring reason
list, use Lost reasons, Cancellation reasons,
or Order cancellation reasons.