

Missed, regretted and cancelled jobs

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Use this page to find a sales job that left the normal path, identify the stage it left from, and check the recovery route available for that exit.

Missed, regretted and cancelled jobs

An exit state records that a job stopped progressing from Potential, Offer, or Order.

The list

labels tell you where to find the job; the compound stage names identify the stage it left.

If you need to...	Go to
Find a job that stopped at Potential	Assess Potential exits
Find a job that stopped at Offer	Assess Offer exits
Find a job that stopped at Order or was deleted	Assess Order and deleted exits
Open the relevant archived list	Find an exit list
Review the normal sales path	Sales jobs lifecycle
Open a saved sales job	Find sales job work
Work with the saved record	Sales job record

The exit states are grouped by the stage they leave:

Stage left	Exit state shown to the reader
Potential	Missed, Regretted to Offer, Cancelled Inquiries
Offer	Regretted to Offer, Cancelled Inquiries, Lost
Order	Rejected Orders, Cancelled Orders
No further stage	Deleted Inquiries

Before you start

- You can open the sales list.
- You know which exit state you need to find.
- For a recovery action, the job is saved and you have editing access.

The sales list displays the archived outcome links when its archived filter is available. The reactivation control is shown only when editing is allowed.

Find an exit list

The sales list groups the exit lists under **Archived**. Use the list that matches the job's exit state rather than searching the active **Potentials**, **Inquiries**, **Offers**, or **Orders** lists.

Steps

1. Open the sales list.
2. Select **Archived**.

The archived filters include **Delivered**, **Lost**, **Regretted to Offer**, **Cancelled Inquiries**, **Cancelled Orders**, **Rejected Orders**, **Missed**, and **Deleted Inquiries**.

3. Select the archived list that matches the job.

If you need to find...	Select
A missed job	Missed
A regretted offer	Regretted to Offer
A cancelled inquiry	Cancelled Inquiries
A cancelled order	Cancelled Orders
A rejected order	Rejected Orders
A lost offer	Lost
A deleted inquiry	Deleted Inquiries

4. Use the visible column headers to identify the job.

Job No.	File No.	Sales respon...	Vendor	Client	Job title	Estimated value	Inquiry date	Bid due date	Inquiry type	Inquiry stage
20 0347	L-LOC-0101	Amr Salah	Duechting Pum...	Petroshahd	loading and unl...	80,000.00 €			Lead	
J26.1356		Fatma2 Moham...	Alfa Laval	AAM	test	0.00 €			Lead	
J26.1406		Heba Said	Shotec S.A.E	6th October PP	ffffff	0.00 €			Lead	
J26.1410		Fatma2 Moham...	Alfa Laval	6th October PP	test	0.00 €			Lead	
J26.1411		Fatma2 Moham...	Alfa Laval	AAM	test	0.00 €			Lead	
J26.1520		Heba Said	ALFA LAVAL ME	6th October PP	hjghj	50.00 \$			Lead	
J26.2701		Abdelrahman A...	ACF	6th October PP	WALKER-E2E mi...	0.00 €			Lead	

Count: 7 80,043 €

The lists show **Refresh**, **Table Layout**, and **Settings**. The visible columns come from the saved list layout, so use the headers currently shown in the list.

Result: The matching exit list is open, and you can identify a job from its visible headers.

Assess Potential exits

A Potential exit is a job that stopped before it reached Offer. Use the compound stage name to separate a missed, regretted, or cancelled Potential.

Exit	General instruction	Recovery path
Potential exit	Select the matching archived list and use the generic identifying columns currently shown.	Open the job record to review its available recovery action.
Regretted Potential	Select the matching archived list and use the generic identifying columns currently shown.	Return the job to Potential.
Cancelled Potential	Select the matching archived list and use the generic identifying columns currently shown.	Return the job to Potential.

The Potential exits are separated by their reader-facing labels. **Missed** identifies a missed

Potential, **Regretted to Offer** identifies a regretted Potential, and **Cancelled Inquiries** identifies a cancelled Potential.

Steps

1. Select the list that matches the exit.

Exit	Select
A missed Potential	Missed
A regretted Potential	Regretted to Offer
A cancelled Potential	Cancelled Inquiries

2. Read the list headers and the exit-specific reason or date where it is shown.

3. Open the job record if you need to review its recovery action.

Result: You have identified the Potential exit and its list, then reviewed the available recovery action. Continue to [Assess Offer exits](#) for an Offer exit.

Assess Offer exits

An Offer exit is a job that stopped after it reached Offer and before it reached Order. The compound stage name distinguishes regret, cancellation, and loss.

Exit	General instruction	Recovery path
Regretted Offer	Select the matching archived list and use the generic identifying columns currently shown.	Return the job to Offer.
Cancelled Offer	Select the matching archived list and use the generic identifying columns currently shown.	Return the job to Offer.
Lost Offer	Select the matching archived list and use the generic identifying columns currently shown.	Return the job to Offer.

Steps

1. Select the list that matches the exit.

Exit	Select
A regretted Offer	Regretted to Offer
A cancelled Offer	Cancelled Inquiries

Exit	Select
A lost Offer	Lost

2. Read Regret reason, Cancel reason, or the lost-offer details where the selected list provides that column or the record provides that detail.
3. Open the job record if you need to use its recovery action.

Result: You have identified the Offer exit and its list, then reviewed the available recovery action. Continue to [Assess Order and deleted exits](#) for an Order or deleted exit.

Assess Order and deleted exits

An Order exit is a job that stopped after it reached Order. A deleted job is kept in a separate deleted list and does not use the recovery branch for the other exits.

Exit	General instruction	Recovery path
Rejected Order	Select the matching archived list and use the generic identifying columns currently shown.	Return the job to Order.
Cancelled Order	Select the matching archived list and use the generic identifying columns currently shown.	Return the job to Order.
Deleted inquiry	Select the matching archived list and use the generic identifying columns currently shown.	Do not use reactivation for this list.

Steps

1. Select the list that matches the exit.

Exit	Select
A rejected Order	Rejected Orders
A cancelled Order	Cancelled Orders
A deleted inquiry	Deleted Inquiries

2. Read the order or cancellation columns when they are shown.
3. Open the job record when you need to review the available record actions.

Result: You have separated the Order exits from Deleted and know that Deleted has no reactivation branch. Continue to [When exit information is missing](#) if the list does not provide the information you need.

Recover an archived job

Recovery returns eligible Potential, Offer, or Order work to the active stage that feeds the relevant working page. **Reactivate Job** is available outside an embedded record when you can edit the job and its stage is not Deleted.

Steps

1. Open the archived job outside an embedded record.
2. Select **Reactivate Job**.

The confirmation dialog opens with `You are about To reactivate this job`.

3. Select **Yes**.

PAMS displays `Job reactivated successfully`.

4. Confirm the active stage for the returned work.

Archived work	Active stage after reactivation
Cancelled or regretted Potential	Potential
Regretted, cancelled, or lost Offer	Offer
Rejected or cancelled Order work	Order

Result: The eligible archived work is returned to its active stage.

When an exit is recorded

An exit is recorded only after the corresponding active work has no remaining work that keeps the job in that stage.

Work being closed	Condition for recording the exit
Inquiry cancellation	No active Potential remains.

Work being closed	Condition for recording the exit
Inquiry regret	No active Potential or Inquiry remains.
Offer cancellation or regret	No active Offer remains.
Offer loss	Linked purchasing jobs and inquiries are also cancelled.
Order cancellation or rejection	No active Order remains.

Restore deleted work

Restore is available on a deleted job outside an embedded record when you can edit the job. It

sets the current stage to Potential and displays `Your request was completed successfully`.

Steps

1. Open the deleted job outside an embedded record.
2. Select **Restore**.
3. Confirm that the job returns to Potential.

Result: The deleted job returns to Potential and PAMS displays

`Your request was completed successfully`.

Warning: Ultimate Delete is available only on a deleted job outside an embedded record when you can edit the job.

When exit information is missing

The list uses the saved list layout, so work from the headers visible in the list.

Message	What to do
<code>Your request was completed successfully</code>	Continue after the requested action completes.
<code>An error occurred while processing your request</code>	Review the action and try again when the record is in the required state.
<code>Error loading accounts</code>	Check the account information before continuing.
<code>Forbidden characters detected. Please remove them and try again.</code>	Remove the forbidden characters and submit the value again.

What to do next

Use the page that owns the next part of the work:

1. Open [Sales jobs lifecycle](#) to place the exit against the complete sales path.
2. Open [Find sales job work](#) to locate another saved job or list.
3. Open [Sales job record](#) to work with record-level actions and details.
4. Open [Inquiries](#), [Offers](#), or [Orders](#) for the stage that the job left.
5. Open [Configuration: sales regret reasons](#),
[Configuration: sales cancellation reasons](#),
[Configuration: sales order cancellation reasons](#),
or [Configuration: sales lost reasons](#) for the related reason lists.

Result: You know which page owns the next action for the job's stage or record.