Common Issues & Solutions

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How to Use This Guide

Use this guide when something in PAMS CRM does not look right, cannot be saved, or is unavailable. Start with the symptom that best matches your issue.

Before changing a record, check that you are working in the correct branch and have opened the intended record. If another user may be working on the same information, confirm the change with them first.

Sign-In and Access Issues

You cannot sign in to PAMS CRM

Symptom: Your sign-in details are not accepted, or you cannot access your company site.

Possible cause: The password may be incorrect, the user account may be inactive, or you may be using the wrong company site.

Solution:

1. Check that you entered the correct email address and password.
2. Use the password reset option if you cannot remember your password.
3. Confirm that you are signing in to the correct company site.
4. Ask your PAMS CRM administrator to confirm that your user account is active and assigned the appropriate role.

A menu, button, or record type is missing

Symptom: Another user can open an area or complete an action that you cannot see.

Possible cause: Your role, branch access, or company subscription does not include that area or action.

Solution:

1. Confirm that you are working in the correct branch.

2. Ask your manager or PAMS CRM administrator which role you have been assigned.
3. Ask the administrator to review whether your role includes the required access.
4. If the feature is unavailable for all users, ask the administrator to check the company subscription plan.

See Roles, Users, and Subscription Plans.

You cannot approve a record

Symptom: You can view a sales offer, purchase order, invoice, or letter of guarantee, but cannot approve it.

Possible cause: You may not be set up as an approver, your approval amount may be too low, or the record may require a different approval type.

Solution:

1. Check whether the record is waiting for approval and whether it identifies the required approver.
2. Ask the PAMS CRM administrator to confirm that your user account is active and has approval responsibility.
3. Ask the administrator to review your sales, purchase, invoice, or letter-of-guarantee approval limits.
4. If necessary, send the record to an approver with the correct authority.

See Configuring Approval Processes.

Missing Records and List Issues

A record is missing from a list

Symptom: You cannot find an inquiry, order, lead, task, invoice, or another record that you expect to see.

Possible cause: A filter, search term, grouping, date range, branch selection, or saved list view may be hiding the record.

Solution:

1. Check the selected branch.
2. Clear the current search text.
3. Review active filters, including status, owner, date, client, and branch filters.

4. Check whether the list is grouped or sorted in a way that places the record elsewhere.
5. Change to a broader list view, such as all active or all records, if available.
6. Search using another detail, such as the record number, account name, contact, or project.

For inquiry list checks, see Managing Inquiry Lists.

You opened the wrong recent record

Symptom: A record shown in Recently Opened is not the record you intended to work with.

Possible cause: Recently Opened shows records you viewed before; it does not confirm that they are current or assigned to you.

Solution:

1. Check the record number, account, project, and branch before making changes.
2. Return to the relevant list and search for the correct record.
3. Use filters to narrow the list before opening another record.

A list shows unexpected totals or groups

Symptom: List totals, grouped rows, or visible columns do not match what you expect.

Possible cause: The list layout may have been changed, or filters and grouping may still be active.

Solution:

1. Review active filters and clear any that are no longer needed.
2. Check the grouping choices and remove grouping if it is not useful.
3. Review visible columns and use a suitable saved layout, if available.
4. Export only after confirming that the displayed list contains the intended records.

See Managing Inquiry Lists.

Saving and Data Entry Issues

PAMS CRM does not let you save a record

Symptom: You select **Save**, but PAMS CRM asks for more information or does not complete the save.

Possible cause: Required information is missing, a required value is not suitable for the selected status, or a company rule requires information at this stage.

Solution:

1. Read the message shown by PAMS CRM carefully.
2. Check the highlighted fields and complete the missing information.
3. Confirm that the selected status is appropriate for the stage of work.
4. If a field is required too early in the process, ask the PAMS CRM administrator to review the required-field setting.
5. Save again after making the correction.

See Configuring Dynamic Validation.

The wrong field is required

Symptom: PAMS CRM asks users to complete a field that does not appear to be relevant.

Possible cause: A required-field rule may have been set against the wrong field or applied at the wrong point in the process.

Solution:

1. Do not enter inaccurate information only to continue.
2. Note the record type, field name, and status where the issue occurs.
3. Ask the PAMS CRM administrator to review the required-field settings and compare the selected field with the label shown on the record.

See Configuring Dynamic Validation.

A custom field causes confusion or duplicate entry

Symptom: Users enter the same information in both a standard field and a custom field, or do not know which field to use.

Possible cause: A custom field may duplicate information already captured by PAMS CRM.

Solution:

1. Check whether an existing field already captures the required information.

2. Agree with your team which field should be used going forward.
3. Ask the PAMS CRM administrator to review, rename, remove, or stop using the duplicate custom field.
4. Update any team guidance so users enter information consistently.

See Configuring Custom Fields.

Sales, Leads, Inquiries, and Offers

A duplicate lead appears to exist

Symptom: More than one lead appears to refer to the same prospect or potential opportunity.

Possible cause: The lead may have been entered more than once using different names, contacts, or descriptions.

Solution:

1. Search the leads list using the prospect name, organization name, contact name, and potential requirement.
2. Open the possible duplicate records and compare their details.
3. Confirm which lead should remain active with the responsible salesperson or manager.
4. Update or close the duplicate record according to your company process, rather than continuing work in both records.

See Creating and Tracking Leads.

An inquiry should no longer remain open

Symptom: An inquiry is still active even though the client has declined, cancelled, or moved forward with an order.

Possible cause: The inquiry outcome was not updated after the commercial decision.

Solution:

1. Open the inquiry and confirm the business outcome.
2. If the opportunity is no longer being pursued, mark it as lost or cancelled according to your company process.
3. If it resulted in a sales order, confirm that the related quotation and order are correctly linked.

4. Save the updated status so reports and follow-up lists remain accurate.

See Creating Sales Inquiries.

Client, account, or contact details are missing or incorrect on an offer

Symptom: The offer shows the wrong customer details, or customer details are blank.

Possible cause: The related inquiry may contain incomplete or incorrect customer information.

Solution:

1. Open the related inquiry.
2. Review the client, account, and contact details.
3. Correct the available information in the inquiry.
4. Return to the offer and confirm that it now reflects the correct details before sending it to the customer.

See Preparing Customer Offers.

An order cannot be changed or does not appear in an exception list

Symptom: You cannot update an order as expected, or an order seems to be missing from the list you are reviewing.

Possible cause: The order may be in a status that does not allow the change, an active filter may hide it, or a note may not have been saved.

Solution:

1. Open the order and check its current status.
2. Confirm whether the order is still at a stage where changes are allowed.
3. Save any issue note or exception note after editing it.
4. Review the active list filters and clear them if necessary.
5. Ask the responsible manager before changing an order that has already progressed to delivery, invoicing, or another later stage.

See Managing Order Exceptions.

Procurement and Material Issues

A material requisition is linked to the wrong project or sales order

Symptom: The material requisition shows an incorrect project or sales order.

Possible cause: The wrong source reference was selected when the material requisition was created.

Solution:

1. Open the material requisition.
2. Confirm the intended project or sales order with the requester.
3. Correct the source reference before materials are issued or purchasing work begins.
4. Review all material lines to ensure they belong to the corrected requirement.
5. Save the material requisition.

See Managing Material Requisitions.

A purchase order has incorrect items, prices, or supplier details

Symptom: A purchase order does not match the approved requirement, supplier offer, or project need.

Possible cause: Information may have been copied incorrectly, changed after approval, or entered without checking the source requirement.

Solution:

1. Compare the purchase order with the approved purchasing or project requirement.
2. Review the supplier, products, quantities, prices, currency, taxes, delivery details, and payment milestones.
3. Correct the purchase order before it is sent or approved, where your company process allows.
4. If the order has already been sent or approved, follow your company's change or approval process before making further updates.

See Creating Purchase Orders.

Warehouse and Delivery Issues

PAMS CRM does not allow goods to be issued or a delivery note to be completed

Symptom: You cannot issue goods, mark a delivery as complete, or finish a delivery note.

Possible cause: Delivery lines may be incomplete, required delivery information may be missing, or the related stock and shipment details may not be ready.

Solution:

1. Open the delivery note and review every delivery line.
2. Confirm the product, quantity, source order, and delivery information.
3. Complete any missing required details.
4. Check that the related shipping order and stock are ready for the delivery step.
5. Try the action again after saving the corrected information.

See Creating Delivery Notes.

Stock quantity does not match the expected quantity

Symptom: Available stock appears lower or higher than expected.

Possible cause: Goods may still be in receiving, inspection, storage, transfer, production, or shipment processing rather than available stock.

Solution:

1. Check whether the goods have been received.
2. Check whether they are waiting for inspection or quality control.
3. Confirm whether they have been assigned to a warehouse location.
4. Review open shipping orders, goods issue notes, transfers, returns, production orders, and assembly activity.
5. Ask the warehouse team to confirm the physical quantity before making stock-related changes.

Invoice and Payment Issues

An invoice cannot be approved, sent, or completed

Symptom: An invoice remains at an early stage or the next action is unavailable.

Possible cause: Required invoice information may be missing, the invoice may be waiting for approval, or the assigned approver may not have sufficient authority.

Solution:

1. Open the invoice and check for missing customer, amount, currency, tax, due-date, or supporting details.

2. Check the invoice status and approval information.
3. Ask the assigned approver to review the invoice.
4. If no suitable approver is available, ask the PAMS CRM administrator to review approval responsibility and limits.

See Configuring Approval Processes.

A payment does not appear against the expected invoice

Symptom: A payment was recorded, but the invoice still appears unpaid or overdue.

Possible cause: The payment may not have been allocated to the invoice, may have been allocated to a different invoice, or may require review because of currency differences.

Solution:

1. Open the payment record and confirm the payer, amount, date, and currency.
2. Review the invoice allocation details.
3. Confirm that the payment has been allocated to the intended invoice.
4. If the payment uses a different currency, ask the finance team to confirm the allocation and amount.
5. Save the corrected allocation and check the invoice status again.

Display and Dashboard Issues

A dashboard does not show the expected figures

Symptom: A dashboard total, chart, or widget does not match your expectation.

Possible cause: The dashboard may be using a different branch, time period, filter, or status group than the information you are comparing it with.

Solution:

1. Check the selected branch.
2. Check the dashboard time period.
3. Review any filters applied to the dashboard or widget.
4. Confirm whether the widget includes open, delivered, invoiced, paid, lost, or cancelled records.
5. Compare the figures with the related list using the same branch and time period.

A dashboard widget is missing

Symptom: A widget that another user has is not visible on your dashboard.

Possible cause: Your dashboard layout may be different, the widget may not be available for your role, or your company may not use that feature.

Solution:

1. Check whether the widget is available when you edit or personalize the dashboard.
2. Confirm that you are using the correct dashboard tab.
3. Ask the PAMS CRM administrator whether the widget is available for your role and subscription.

When You Still Need Help

If the issue continues after these checks:

1. Record the name or number of the affected record.
2. Note the branch, current status, and action you were trying to complete.
3. Take note of the message shown by PAMS CRM.
4. Tell your manager or PAMS CRM administrator what you have already checked.
5. Submit a support ticket if your company uses PAMS CRM support tickets for assistance.