Configuring Sales Exception Reasons

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Identify Which Sales Exception Reason to Maintain

Pams uses four separate reason lists to record why a sales record did not proceed as expected. Select the list that matches the outcome you want users to record. Keeping these lists separate makes the resulting sales analysis clearer and prevents users from choosing a reason that belongs to a different stage of the sales process.

Reason list	Use it when users record
Lost Reasons	A sales Sales Job or Sales Job is marked as **Lost**.
Regret Reasons	An offer outcome is recorded as **Regretted To Offer**.
Cancellation Reasons	Sales activity is cancelled outside the specific Orders cancellation outcome.
Order Cancellation Reasons	A confirmed or active Orders is cancelled.

Use a **Lost Reason** when the Sales Job has been assessed and the team records it as a loss. For example, the reason may identify a commercial, timing, or client-related outcome that caused the Sales Job to be marked **Lost**.

Use a **Regret Reason** when the relevant outcome is **Regretted To Offer**. Keep these reasons focused on outcomes that your team wants to distinguish from a standard lost Sales Job. This distinction is important when sales managers review the offer pipeline and identify why offers did not turn into orders.

Use a **Cancellation Reason** for cancelled sales activity where Pams asks for a general cancellation outcome. Use an **Order Cancellation Reason** only when cancelling a Orders. Even where the business issue sounds similar, the two lists can support different analysis: one shows earlier sales-process cancellations, while the other shows cancellations after an order has reached the Orders stage.

[SCREENSHOT: The four sales exception reason lists—Lost Reasons, Regret Reasons, Cancellation Reasons, and Order Cancellation Reasons—shown in Sales Configuration.]

Consistent selection matters. If one user records “Price” while another records “High price,” “Pricing issue,” or “Client budget,” reports split one business issue across several labels. Agree on clear reason names, then ask users to select the closest approved value whenever they mark a Sales Job, offer, or Orders as an exception.

Open the Sales Exception Reason Configuration

You need administrator access in Pams to maintain the reason lists used across Sales Jobs, offers, and Orders. If you cannot open the Configuration area or cannot save a change, ask the person who manages Pams users, roles, and access to review your permissions.

1. Open **Configuration** in Pams.
2. Open the sales configuration area. Look for the reason lists named **Lost Reasons**, **Regret Reasons**, **Cancellation Reasons**, and **Order Cancellation Reasons**.
3. Choose the list that matches the sales outcome you are maintaining. Do not add a Orders cancellation reason under **Cancellation Reasons**, and do not add a loss-analysis reason under **Regret Reasons**.
4. Review the entries already shown in the selected list before starting a new record. Look for alternate spellings, singular and plural versions, or names that describe the same outcome.
5. Open an existing entry when you need to confirm its wording before adding a new one. Use the displayed **Reason Name** as the basis for comparison.
6. Start a new reason record only when the business outcome is not already covered by a clear existing entry. Enter the new wording and select **Save** or **Save and Close**.

[SCREENSHOT: A reason list in Configuration showing existing entries and the Reason Name field on a selected entry.]

Use the exact list name as your guide. The value becomes available only in the matching workflow. For example, an entry created in **Lost Reasons** is intended for the **Lost** outcome; it is not a replacement for a reason that should appear when a user cancels a Orders.

Before saving, read the full list as a sales user would. If “Client withdrew” and “Customer withdrawal” mean the same thing, keep one approved label instead of creating both. A concise list makes it faster for users to make a meaningful selection during time-sensitive sales updates.

For related configuration of the normal progression of a Sales Job, offer, and order, see Configuring Sales Lifecycle Statuses. Lifecycle statuses show where work stands; exception reasons explain why a record left the expected path.

Create and Maintain Lost and Regret Reasons

Maintain **Lost Reasons** and **Regret Reasons** as separate lists because Pams uses them for different sales outcomes. Write each **Reason Name** so a sales representative can choose it quickly and a sales manager can understand it later in analysis without opening the original Sales Job or offer.

1. In **Configuration**, open **Lost Reasons**.
2. Review the current entries. Search visually for a reason that already describes the outcome you need to capture.
3. Start a new Lost Reason record when no suitable entry exists.
4. Enter a short, specific value in **Reason Name**. Use wording that identifies the business outcome rather than a vague label such as “Other issue.”
5. Select **Save** or **Save and Close** to make the reason available when a Sales Job is marked **Lost**.
6. Return to the sales configuration area and open **Regret Reasons**.
7. Create a Regret Reason only for outcomes your team records as **Regretted To Offer**. Enter a distinct **Reason Name**, then select **Save** or **Save and Close**.

[SCREENSHOT: A Lost Reason record with the Reason Name field completed and the Save and Save and Close actions visible.]

When maintaining existing reasons, open the record and update **Reason Name** if the label is unclear or inconsistent. For example, replace an abbreviation that new sales team members may not understand with a plain-language description. Save the revised wording so future selections and reporting use the improved label.

Avoid changing a label so completely that its historical meaning becomes misleading. A reason used in older lost-sales analysis should continue to make sense when shown in past reports. If a new business situation needs a different label, add a separate reason instead of repurposing an older one.

Remove duplicate entries only after checking whether they represent truly identical outcomes. Where Pams provides a removal action for the selected entry, use it for an unused duplicate. If a duplicate has already been selected on Sales Jobs or offers, retain a meaningful label for historical analysis and direct users to use the preferred reason going forward.

Create and Maintain Cancellation Reasons

Cancellation reasons should show why a sales record stopped, while order-cancellation reasons should show why a Orders stopped after reaching the order stage. Maintaining both lists carefully gives your team useful separation between early sales cancellations and cancelled order commitments.

1. In **Configuration**, open **Cancellation Reasons**.
2. Review the existing **Reason Name** values and identify whether the reason you need is already available.
3. Start a new Cancellation Reason record for a general sales-process cancellation outcome.
4. Enter a concise, recognizable **Reason Name** and select **Save** or **Save and Close**.
5. Return to the sales configuration area and open **Order Cancellation Reasons**.
6. Create an entry in this list only when it should be selected while cancelling a **Orders**.
7. Enter the order-stage wording in **Reason Name**, then select **Save** or **Save and Close**.

[SCREENSHOT: The Cancellation Reasons and Order Cancellation Reasons lists shown side by side, with clearly different reason names.]

Use distinct wording when the same broad business issue needs different analysis at different stages. For example, your team may need one reason for a sales cancellation before an order is active and another reason for an order that was later cancelled. The names should make the stage clear when viewed in reports.

Keep each list focused. A long list of overlapping entries Inquiry users to choose whichever value looks closest, which weakens cancellation analysis. Avoid broad catch-all labels when a specific recurring reason is known. At the same time, do not create a new entry for every individual case. The purpose is to categorize repeatable business outcomes, not to reproduce every detail of a client conversation.

Use the record notes, comments, or related sales details where available to explain the unique circumstances of a cancellation. Reserve the selected reason for the consistent, reportable category. Review the two cancellation lists together so names remain clear and do not unintentionally duplicate one another.

Use Reason Values in Sales Analysis

Configured reason values appear when users record the matching sales exception. The selected value becomes part of the outcome recorded on the Sales Job, offer, or Orders, so it should reflect the main business reason rather than a temporary detail.

- When a user records a Sales Job as **Lost**, Pams presents the available **Lost Reasons**.
- When the sales outcome is **Regretted To Offer**, Pams uses the values from **Regret Reasons**.
- When users cancel applicable sales activity, Pams uses **Cancellation Reasons**.
- When users cancel a **Orders**, Pams uses **Order Cancellation Reasons**.

[SCREENSHOT: A sales outcome screen where a user selects a reason from the appropriate reason list before confirming the exception.]

The reason selected at the time of the outcome is what makes later analysis useful. A report can show that records were lost, regretted, or cancelled, but it can only show the underlying pattern if users select accurate, consistent reasons. If users choose a broad value for every exception, sales managers cannot reliably distinguish price pressure, timing, commercial conditions, client decisions, or other recurring outcomes represented in your approved list.

Standardize wording across the sales team. Choose one approved label for each common outcome and avoid near-duplicates. For example, if price-related losses are analyzed together, use one agreed **Lost Reason** rather than several variations that all mean the offer was not commercially competitive. Apply the same discipline to cancellation and order-cancellation values.

When reviewing Sales Jobs, offers, Orders, or sales performance, compare records using the same reason category. Do not combine a **Lost Reason** with an **Order Cancellation Reason** as though they describe the same stage. The categories answer different questions: losses and regrets help assess sales Sales Job outcomes, while cancellation lists help assess work that was stopped during the sales process or at the Orders stage.

Verify the Reason Lists Before Releasing Them

Before asking the sales team to use new or updated reasons, confirm that each value appears in the correct workflow and that the wording is clear enough for both daily use and later reporting.

1. Open a representative Sales Job, offer, or Orders that can be used to check the relevant outcome.
2. Start the matching action: use the **Lost** outcome for a Lost Reason, **Regretted To Offer** for a Regret Reason, the applicable cancellation action for a Cancellation Reason, or the Orders cancellation action for an Order Cancellation Reason.
3. Open the reason selection and confirm that the new or revised **Reason Name** appears in that list.
4. Check that the value does not appear in an unrelated exception workflow. If it does, review whether similarly named entries were created in more than one list.
5. Read each reason as it would appear in analysis. The label should be understandable without opening the original Sales Job, offer, or Orders.
6. Save only the configuration changes you intend to retain. If you used a live record for checking, do not record an incorrect exception outcome merely to test the list.

[SCREENSHOT: A reason-selection list on a Orders cancellation action, showing the approved Order Cancellation Reasons.]

Review the four lists regularly with the sales manager or the person responsible for sales analysis. Look for entries that are unused, unclear, duplicated, or no longer relevant to your current sales process. Consolidate future use around the preferred label and retire unused values where appropriate.

A reason can appear in more than one list only when it intentionally represents different outcomes. For example, a similarly worded reason may be appropriate both before and after the Orders stage, but the wording should still make the context clear enough for reporting.

Use this review to confirm that new names align with the terminology used by your sales team. Clear, stable labels protect the value of historical loss, regret, and cancellation analysis as the number of Sales Jobs and Orders grows.

Overview

Sales exception reasons give Pams a consistent way to capture why a Sales Job, offer, sales activity, or Orders did not follow its expected path. Rather than leaving important outcomes as unstructured comments, users select a value from one of four maintained lists: **Lost Reasons**, **Regret Reasons**, **Cancellation Reasons**, or **Order Cancellation Reasons**.

These lists support separate points in the sales workflow:

- **Lost Reasons** support analysis when a Sales Job is marked **Lost**.
- **Regret Reasons** support the **Regretted To Offer** outcome.
- **Cancellation Reasons** support applicable general sales cancellations.
- **Order Cancellation Reasons** support cancellations at the **Orders** stage.

The distinction matters because a lost Sales Job, a regret outcome, and a cancelled Orders do not represent the same business event. A Sales Job may be lost before it becomes an order, while an Order Cancellation Reason records why a Orders was stopped after the order stage was reached. Separating those outcomes helps sales managers review pipeline quality, offer results, and cancelled order patterns without mixing unrelated data.

[SCREENSHOT: Sales Configuration showing the four exception reason lists used in sales outcomes.]

The most useful reason lists are short, specific, and shared across the sales team. Each **Reason Name** should describe one recognizable business outcome. Users should be able to select it confidently during a Sales Job, offer, or Orders update, and managers should be able to understand it later in reports.

This configuration complements the statuses maintained in Configuring Sales Lifecycle Statuses. Statuses identify the current position or outcome of work; exception reasons add the explanation behind outcomes such as **Lost**, **Regretted To Offer**, and cancellation.

Prerequisites

Before maintaining sales exception reasons, make sure the following conditions are in place:

- You have administrator access to **Configuration** in Pams. Reason lists affect values available to sales users, so changes should be made by someone authorized to maintain shared sales configuration.

- Your team has agreed which business outcomes belong in each list: **Lost Reasons**, **Regret Reasons**, **Cancellation Reasons**, and **Order Cancellation Reasons**. Do not begin by copying every phrase previously used in comments or spreadsheets.
- You have reviewed the sales process used by your team, including the outcomes **Lost**, **Regretted To Offer**, cancelled sales activity, and cancelled **Orders**. This helps you place each reason in the correct list.
- You have checked the existing reason entries for duplicate names and near-duplicates. Review spelling, abbreviations, and wording variations before adding a new **Reason Name**.
- You know the reporting language your sales managers use. Reason labels should be understandable in Sales Job, offer, and Orders analysis without additional explanation.
- You have identified whether a reason is needed for general cancellation activity or specifically for a **Orders** cancellation. Create it in only the intended list unless your reporting process deliberately requires separate entries in both lists.

[SCREENSHOT: A configuration review showing existing Reason Name entries before a new reason is added.]

Where a new exception type affects an existing sales process, first review the current lifecycle setup in Configuring Sales Lifecycle Statuses. Add a reason only when the corresponding sales outcome already has a clear place in your team's workflow.