PAMS (V2 PIPELINE RUN)

Error Messages

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Error Messages

Use this guide when PAMS CRM displays a message that prevents you from saving, opening, sending, approving, or completing a record.

Error wording may vary based on the record you are working with and your company's settings. Read the message carefully, then use the matching section below.

If the issue affects a specific business record, do not create a duplicate record while trying to resolve it. Open the existing record first and check its details, status, and related information.

Access and Sign-In Messages

"Access denied" or "You do not have permission"

What it means

Your user account does not have permission to view, create, edit, approve, or complete the selected record or action. Access can depend on your role, branch, and assigned responsibilities.

How to resolve

1. Confirm that you are signed in with the correct PAMS CRM account.
2. Check that you are working in the correct branch.
3. Ask your manager or PAMS CRM administrator to confirm your role and branch access.
4. If you need to approve a record, ask the administrator to confirm that you are set up as an approver with the required approval value.

For help with approval access, see Configuring Approval Processes.

"Your account is inactive"

What it means

Your PAMS CRM user account has been deactivated and cannot be used until it is made active again.

How to resolve

1. Contact your PAMS CRM administrator.
2. Ask them to check your user record and activate it if you still need access.
3. Once your account has been activated, sign out and sign in again.

“Invalid username or password”

What it means

The sign-in details entered do not match an active PAMS CRM account.

How to resolve

1. Re-enter your username and password carefully.
2. Check that Caps Lock is not turned on.
3. Use the password reset option if available.
4. If you still cannot sign in, contact your PAMS CRM administrator to confirm your account is active and your email address is correct.

“Your session has expired”

What it means

You have been signed out after a period without activity.

How to resolve

1. Sign in to PAMS CRM again.
2. Return to the record you were working on.
3. Check whether your latest changes were saved before continuing.
4. When entering a long record, save regularly to avoid losing work.

Required Information Messages

“This field is required” or “Please fill in the required fields”

What it means

Information needed to save or move the record forward is missing. Required fields may change depending on the record type, branch, or workflow stage.

How to resolve

1. Review the fields marked as required on the record.
2. Complete each missing field with the correct information.
3. Save the record again.
4. If a required field is not relevant or cannot yet be completed, ask your manager or administrator whether the requirement should apply at this stage.

For help with required-field settings, see Configuring Dynamic Validation.

“Please select a value”

What it means

A selection is required from a list, such as a Client, Principal, Product, Currency, Warehouse, Payment Method, or Sales Responsible.

How to resolve

1. Open the field’s selection list.
2. Search for and select the correct existing value.
3. If the value does not appear, confirm the spelling and active branch.
4. Ask the relevant administrator to create or activate the missing value if needed.

Do not enter a replacement value in another field just to save the record.

“Invalid date” or “Please enter a valid date”

What it means

The date is incomplete, incorrectly entered, or not allowed for the selected record.

How to resolve

1. Enter the date again using the date picker where available.
2. Check that the delivery, expiry, invoice, activity, or due date is appropriate for the record.
3. Review related dates. For example, a delivery date should not be earlier than the order date.
4. Save the record again.

“Value must be greater than zero”

What it means

A quantity, price, amount, percentage, or similar value cannot be zero or negative for this action.

How to resolve

1. Review the value entered.
2. Enter the correct quantity or amount.
3. If the line should not be included, remove it rather than entering zero.
4. Save the record again.

Duplicate Record Messages

“A record with this information already exists”

What it means

PAMS CRM has found a possible duplicate record, such as an Account, Contact, Product, Lead, Invoice, or reference number.

How to resolve

1. Cancel or pause the new record.
2. Search for the existing record using the name, account, contact, reference number, or document number.
3. Open the matching record and update it if necessary.
4. Create a new record only if you confirm that it is genuinely separate.

For lead-specific guidance, see Creating and Tracking Leads.

“Duplicate invoice number” or “Invoice number already exists”

What it means

An invoice with the same supplier or customer invoice number may already have been entered.

How to resolve

1. Search the invoice list using the invoice number.
2. Check the supplier or customer, invoice date, currency, and amount.

3. If the invoice already exists, update the existing record instead of creating another one.
4. If the same number is valid for different accounts, ask the finance team to confirm the correct process before proceeding.

For purchase invoice checks, see Managing AP Invoices.

Record Status Messages

“This record cannot be edited”

What it means
The record may be approved, completed, cancelled, closed, delivered, invoiced, or otherwise locked from further changes.

How to resolve

1. Review the current status shown on the record.
2. Check whether a correction action, reopening action, or related adjustment is available.
3. Do not create a replacement record unless your team’s process requires it.
4. Ask the record owner, manager, or approver for help if the status needs to be changed.

For order-related issues, see Managing Order Exceptions.

“The record must be approved before continuing”

What it means
The selected record requires approval before it can be sent, activated, completed, booked, invoiced, or processed further.

How to resolve

1. Review the record for missing or incorrect details.
2. Save any corrections.
3. Submit the record for approval if that action is available.
4. Contact the assigned approver.
5. If no approver is available, ask your PAMS CRM administrator to check the approval setup.

For more information, see Configuring Approval Processes.

“The record is already approved”

What it means

The record has already completed the approval step. PAMS CRM may prevent changes that would affect approved values.

How to resolve

1. Confirm whether a change is still needed.
2. Check whether the record can be returned for correction or reopened.
3. Ask the responsible approver or manager to advise on the correct correction process.
4. Avoid changing related records to work around the approved record.

“The record is closed, cancelled, lost, or completed”

What it means

The record has reached an end stage and cannot continue through its normal workflow.

How to resolve

1. Confirm that the status was selected correctly.
2. Review the record history and related records.
3. Reopen the record only when your company process allows it.
4. If the record should remain closed, create follow-up work only where needed, such as a task, activity, replacement inquiry, or return record.

For inquiry status guidance, see Creating Sales Inquiries.

Sales and Commercial Messages

“Client is required” or “Account is required”

What it means

The sales record needs a linked customer account before it can be saved or processed.

How to resolve

1. Search for the existing Client or Account.
2. Select the correct account from the list.

3. If the client does not exist, create it through your approved account-creation process.
4. Confirm that the selected account is the intended customer before saving.

For offer information issues, see Preparing Customer Offers.

“Contact is required”

What it means

A customer contact must be linked to the inquiry, offer, order, activity, or other record.

How to resolve

1. Select an existing contact from the linked Client or Account.
2. Check that the contact’s email address and phone number are current if they will be used for communication.
3. Create a new contact only if the person is not already listed.
4. Save the record again.

“Sales Order cannot be activated”

What it means

The Sales Order is missing information or has not reached the required approval or commercial stage.

How to resolve

1. Open the Sales Order and review its status.
2. Check the Client, delivery details, products, quantities, prices, taxes, currency, and payment information.
3. Confirm that any required approval has been completed.
4. Review linked offers or inquiries for missing commercial information.
5. Save the corrections and try the activation action again.

For related order troubleshooting, see Managing Order Exceptions.

“Price cannot be empty” or “Unit price is required”

What it means

A product or service line needs a selling or purchase price before the record can be saved, approved, or processed.

How to resolve

1. Open the affected line.
2. Enter or select the correct price.
3. Check the currency, unit, quantity, discount, and tax details.
4. Confirm that the final total is correct before saving.

“Margin is below the allowed limit”

What it means
The price or cost on the record results in a margin below the limit set by your company.

How to resolve

1. Review the purchase cost, additional costs, sales price, discount, and currency.
2. Correct any value that was entered incorrectly.
3. Discuss the required selling price or discount with your manager.
4. Submit the record for approval if an exception is permitted.

Purchasing and Procurement Messages

“Supplier is required” or “Vendor is required”

What it means
A procurement inquiry, supplier offer, purchase order, or purchase invoice needs a linked supplier account.

How to resolve

1. Search for the supplier in the account list.
2. Select the correct supplier.
3. Confirm the supplier’s branch, currency, payment details, and contact information where relevant.
4. If the supplier is missing, ask the responsible team to create the account before continuing.

“Purchase Order cannot be created”

What it means
The source requirement, supplier information, product lines, approval status, or

commercial information may be incomplete.

How to resolve

1. Check the linked purchasing requirement, material requisition, or procurement package.
2. Confirm the supplier, products, quantities, prices, currency, and delivery terms.
3. Check whether approval is required before the order can be created.
4. Correct missing details and try again.

For detailed guidance, see Creating Purchase Orders.

“Received quantity exceeds ordered quantity”

What it means

The quantity entered for receipt is greater than the quantity remaining on the source purchase or procurement order.

How to resolve

1. Review the ordered quantity and any quantities received previously.
2. Enter only the quantity physically received and still outstanding.
3. Check whether the goods were received under another shipment or order.
4. If an over-delivery is valid, ask the purchasing team how it should be recorded before continuing.

“Purchase invoice cannot be approved”

What it means

The purchase invoice may be incomplete, outside the user’s approval value, or missing linked purchasing information.

How to resolve

1. Check the supplier, invoice number, date, amount, currency, and tax details.
2. Review any linked Purchase Order or receipt.
3. Confirm that the invoice total matches the approved supporting documents.
4. Submit the invoice to an approver with the required authority.

For purchase invoice troubleshooting, see Managing AP Invoices.

Warehouse and Delivery Messages

“Insufficient stock” or “Stock is not available”

What it means

The requested quantity is not available in the selected warehouse, branch, or storage location.

How to resolve

1. Check the product, warehouse, and requested quantity.
2. Review stock already reserved for other orders, jobs, transfers, or production work.
3. Check whether incoming goods are awaiting receipt, inspection, or storage.
4. Use another approved warehouse or arrange purchasing if stock is not available.
5. Do not issue stock from a different location unless the movement is recorded correctly.

“Warehouse is required” or “Storage location is required”

What it means

PAMS CRM needs to know where goods will be received, stored, issued, transferred, or shipped from.

How to resolve

1. Select the correct warehouse.
2. Select the storage location if required.
3. Confirm that the location is appropriate for the product and branch.
4. Save the record and continue.

“Delivery Note cannot be completed”

What it means

The Delivery Note may have missing delivery lines, quantities, customer details, shipping information, or linked shipment details.

How to resolve

1. Open the Delivery Note.
2. Check the products, quantities, and linked Sales Order or Shipping Order.
3. Confirm the delivery address, recipient details, and delivery date.
4. Check that the goods have been issued correctly where required.

5. Save the record and try to complete it again.

For detailed delivery guidance, see Creating Delivery Notes.

“Issued quantity exceeds available quantity”

What it means
You are trying to issue more products than are available for the selected stock movement.

How to resolve

1. Check the available quantity in the selected warehouse and location.
2. Reduce the issued quantity to the amount available.
3. Check whether stock is reserved, under inspection, or stored in another location.
4. Create a transfer, receipt, or purchasing request if additional stock is needed.

File, Email, and Communication Messages

“File upload failed”

What it means
PAMS CRM could not attach the selected file. The file may be too large, unavailable, unsupported, or already open on your device.

How to resolve

1. Check that the file opens correctly on your device.
2. Close the file if it is open in another program.
3. Try attaching it again.
4. Use a smaller version of the file if it is unusually large.
5. Rename the file clearly and avoid using unclear or repeated names.
6. If the issue continues, try again later or ask your PAMS CRM administrator for help.

“Email could not be sent”

What it means
PAMS CRM could not send the email activity. Recipient details, email connection, attachments, or required email content may need attention.

How to resolve

1. Check that at least one recipient has been selected.
2. Confirm that each email address is correct.
3. Enter a subject and message if they are required.
4. Check any attachments and remove files that do not upload correctly.
5. Confirm that your Microsoft 365 email account is connected if your company uses it for PAMS CRM emails.
6. Save the activity and try sending again.

"Recipient email address is invalid"

What it means

One or more email addresses are incomplete or incorrectly entered.

How to resolve

1. Review each recipient in the **To**, **CC**, and **BCC** fields.
2. Correct or remove the invalid address.
3. Select the contact from PAMS CRM where possible instead of typing the address manually.
4. Send the email again.

Lists, Searches, and Export Messages

"No records found"

What it means

The current list does not contain records matching the selected search words, filters, date range, branch, status, or grouping.

How to resolve

1. Clear the search text.
2. Review active filters and remove filters that are no longer needed.
3. Check the selected branch and date range.
4. Try searching with fewer words or a reference number.
5. Check whether the record may be in a different status, such as closed, cancelled, delivered, or completed.

For inquiry list issues, see Managing Inquiry Lists.

“Export failed” or “Unable to download file”

What it means

PAMS CRM could not prepare or download the requested list, report, or document.

How to resolve

1. Reduce the number of records by applying a date range or filter.
2. Remove unnecessary grouping or columns if the list is very large.
3. Try the export again.
4. Check that your device allows downloads.
5. If the issue happens with one specific record or report, check that the record contains the required information.

Configuration Messages

“Custom field already exists”

What it means

A custom field with the same or a very similar purpose may already be available.

How to resolve

1. Search the existing custom fields before creating another one.
2. Review the relevant PAMS CRM record for an existing standard field that already captures the information.
3. Use or update the existing field where appropriate.
4. Create a new custom field only when the information has a clear and separate business purpose.

For guidance, see Configuring Custom Fields.

“This field cannot be made required”

What it means

The selected field may not be available for mandatory information settings, or it may not apply to the selected record type.

How to resolve

1. Confirm that you selected the exact field shown on the relevant PAMS CRM form.

2. Check that the field is available at the stage where users need to save the record.
3. Review existing mandatory-field settings for duplicate or conflicting requirements.
4. Save the corrected setting and test it using an appropriate record.

For more information, see Configuring Dynamic Validation.

When an Error Is Not Listed

If you cannot find the message in this guide:

1. Write down the full message exactly as shown.
2. Note the record type, reference number, and action you were trying to complete.
3. Check whether required information, approval, branch access, or record status is preventing the action.
4. Save any completed work before leaving the record.
5. Contact your PAMS CRM administrator or support team with the message and record details.

Do not share passwords, payment card details, or other sensitive information when reporting an error.