

Managing Order Exceptions

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Finding Orders That Need Attention

Use the Orders list as your starting point when you need to review orders that have not followed the expected delivery process. Review the order status, delivery information, and issue-note condition together. Looking at these details side by side helps you distinguish between an order that has been cancelled, an order with a delivery problem, and an order that only needs its issue note completed.

1. Open the **Orders** list in Pams.
2. Use the **Order Status** filter and select **Cancelled** to review orders that have been cancelled. This is useful when you need to confirm why an order stopped or whether its cancellation has been recorded correctly.
3. Clear the status filter, then use the available delivery status or delivery-exception indicator to find orders that were not delivered as expected. Focus on records whose delivery outcome needs review rather than orders that have already been delivered.
4. Filter for orders with an incomplete issue note. Include records where the issue note has not been completed or where required issue-note information is still missing.
5. Open the relevant order and compare the visible details before making changes.

Use the following details to decide which action is appropriate:

What to review	What it tells you
Order Number	Identifies the exact order you are reviewing.
Client	Confirms which customer is affected.
Order Status	Shows whether the order is active or Cancelled .
Delivery details	Shows the current delivery outcome or exception.
Goods Issue Note or issue-note information	Shows whether the delivery problem has been documented.

[SCREENSHOT: Orders list showing filters for Order Status, delivery status or delivery exception, and incomplete issue-note condition]

If the order has already been delivered but requires a formal delivery document, follow [Creating Delivery Notes](#). Use the exception workflow only when the delivery outcome or its recorded details need correction or follow-up.

Reviewing and Cancelling an Order

Cancel an order only after you have reviewed the order record and confirmed that cancellation is the correct outcome. The order record brings together the customer, ordered items, delivery information, and any existing issue-note details, so you can avoid cancelling the wrong record or losing the context needed by colleagues.

1. From the **Orders** list, open the affected order by selecting its **Order Number**.
2. Check the current **Order Status** before making any changes. If the record already shows **Cancelled**, do not repeat the cancellation action. Instead, review the recorded cancellation details and issue note.
3. Review the **Client** information and the order items. Confirm that the order belongs to the correct customer and that you are reviewing the correct products and quantities.
4. Review delivery-related information, including the delivery date, delivery destination, carrier information, and any existing **Goods Issue Note** details where they are shown.
5. Select the available order cancellation action, such as **Order cancellation**, to mark the active order as **Cancelled**.
6. Enter the **Cancellation Reason** when Pams requests it. Choose or enter the reason that reflects the actual reason for stopping the order. If a cancellation date is requested, verify that it matches the recorded decision.
7. Click **Save** or **Save and Close**.
8. Return to the **Orders** list and verify that the record now displays the **Cancelled** status.

[SCREENSHOT: Order record showing Order Status, Client, order items, delivery details, and the Order cancellation action]

A cancellation reason is particularly important when the same client, principal, sales team, or purchasing team may later review the order. Keep the reason focused on the order decision itself. If delivery work had already begun, also record the delivery

situation in the issue note so the cancellation does not leave an unexplained delivery exception.

Resolving Delivery Exceptions on an Order

A delivery exception means the recorded delivery outcome does not match what was expected for the order. Before changing any delivery information, compare the order's current delivery status with the actual result. This helps you record whether the delivery was delayed, incomplete, unsuccessful, or affected by another issue without changing the order status unnecessarily.

1. In the **Orders** list, open an order identified by the delivery status or delivery-exception indicator.
2. Review the order's delivery-related information. Compare the expected delivery date or planned delivery information with the actual outcome shown on the order.
3. Check the **Delivery Destination**, **Carrier**, ordered items, and quantities. These details help confirm whether the exception affects the full order or only part of the delivery.
4. Review any linked **Delivery Note** or **Goods Issue Note** information already shown on the order. Do not create a second explanation if an existing issue note already describes the same event; update it with the latest outcome instead.
5. Use the available delivery controls on the order to update the delivery status or delivery-exception information. Record the outcome that matches the actual delivery result.
6. Add or update the issue note. State what happened, what action was taken, and what still requires follow-up, if anything.
7. Click **Save** and reopen the order if needed to confirm that the updated delivery information remains visible.

[SCREENSHOT: Order record with delivery date, Delivery Destination, Carrier, delivery status, and issue-note area]

Use clear operational language in the issue note. For example, distinguish between an order that is awaiting a revised delivery arrangement and one that has been delivered only in part. This gives sales, warehouse, and customer-facing colleagues a shared record of the current position. For the delivery coordination process itself, see [Coordinating Sales Deliveries](#).

Completing Missing Issue Notes

Complete the issue note whenever an order has an unresolved delivery problem, a cancellation that needs context, or an exception that another colleague may need to understand later. An incomplete issue note can leave an order in the exception list even when the delivery status has been updated, because Pams still needs a usable explanation of what happened.

1. In the **Orders** list, use the incomplete issue-note condition to find the affected orders.
2. Open an order and locate the **Goods Issue Note** or issue-note section on the order record.
3. Read any existing text before editing. Keep useful information already entered, and add the missing facts rather than replacing a complete history with a short new note.
4. Record the exception in a clear sequence:
 - What happened to the order or delivery.
 - The current order or delivery status.
 - The action already taken.
 - The follow-up still required, if the matter remains open.
5. Check that the note matches the order record. For example, if the order shows **Cancelled**, the note should explain the cancellation context. If the order has a delivery exception, the note should describe the delivery outcome and follow-up.
6. Click **Save** or **Save and Close**.
7. Return to the **Orders** list and reapply the incomplete issue-note condition. Confirm that the order no longer appears as incomplete.

[SCREENSHOT: Goods Issue Note or issue-note section on an order record, showing completed exception details]

Write the note for the next person who opens the order. Avoid vague entries such as “delivery issue” or “follow up.” Instead, capture the relevant order and delivery facts visible on the record. If the issue resulted in a delivery document being created or corrected, use [Creating Delivery Notes](#) for the related delivery-note process.

Confirming That an Exception Is Fully Resolved

Before you finish reviewing an exception, confirm that the order record, delivery outcome, and issue note all tell the same story. A record is not fully resolved merely

because one field has changed. The **Order Status**, delivery details, and **Goods Issue Note** should provide a consistent explanation for anyone who opens the order later.

1. Open the order you have updated and check its **Order Status**.
2. For a cancelled order, confirm that the status displays **Cancelled**. Review the **Cancellation Reason** and any available cancellation date or cancellation details to make sure they provide the appropriate context.
3. For a delivery exception, confirm that the delivery status or delivery-exception information reflects the actual outcome. Check the delivery date, planned delivery information, **Delivery Destination**, and ordered items where relevant.
4. Read the issue note from beginning to end. Confirm that it explains the problem, the action taken, and whether follow-up is still required.
5. Click **Save** if you made any final changes.
6. Return to the **Orders** list and reapply the exception filters you used at the start of the review.
7. Confirm that completed records no longer appear as outstanding delivery exceptions or incomplete issue-note exceptions. A cancelled order may still appear when you filter specifically for **Cancelled** orders; this is expected.

[SCREENSHOT: Orders list after review, with resolved delivery and incomplete-note exceptions removed from the filtered results]

When several users work on the same order, the issue note is the shared record of the exception. Make sure it explains the current position without requiring someone to search through separate delivery information. If the order moves from exception handling into invoicing, continue with [Managing AR Invoices](#).

Fixing Common Order Exception Problems

Use the order record and the active list filters together when something does not appear as expected. Most exception-review problems come from a filter still being applied, an order still being in a status that cannot be changed, or an issue note that was edited but not saved.

- **An order does not appear in the expected exception list**
 - Return to the **Orders** list and review the active filters.
 - Clear filters that may be limiting the results, then apply the relevant **Order Status**, delivery status, delivery-exception indicator, or incomplete issue-note condition again.

- Search by **Order Number** or confirm the **Client** to make sure you are reviewing the intended record.
- Open the order directly and check whether its displayed status matches the filter you selected.
- **A cancellation cannot be completed**
 - Open the order and confirm its current **Order Status**.
 - Check whether the order is already **Cancelled** or whether it has moved beyond the stage where the available cancellation action can be used.
 - Review the cancellation form for required information, especially **Cancellation Reason** and any other visible cancellation details.
 - Enter the required information, then select **Save** or **Save and Close**.
- **An order still shows an incomplete issue note after editing**
 - Reopen the order and locate the **Goods Issue Note** or issue-note section.
 - Confirm that your changes are visible on the record rather than only in an unsaved form.
 - Review the note for missing information about the exception, its current status, and the action taken.
 - Save the order again, then return to the filtered **Orders** list and refresh your review by applying the incomplete issue-note condition again.

[SCREENSHOT: Orders list with filters cleared and an Order Number selected for troubleshooting]

Overview

Order exceptions in Pams help you keep the Orders and delivery record accurate when the normal order process changes. This includes orders with the **Cancelled** status, orders with a delivery exception, and orders whose **Goods Issue Note** or issue-note information is incomplete.

Use the **Orders** list to identify records that need attention. The most useful review points are the **Order Number**, **Client**, **Order Status**, delivery details, and issue-note condition. Together, these details show whether you need to cancel the order, correct the delivery outcome, or complete the exception record.

The exception workflow supports three related activities:

- Recording a cancellation through the available order cancellation action and **Cancellation Reason**.
- Updating delivery status or delivery-exception information so it reflects the actual outcome.
- Completing the **Goods Issue Note** or issue note so colleagues can see what happened and what follow-up is required.

[SCREENSHOT: Order record showing the relationship between Order Status, delivery details, and Goods Issue Note information]

Treat the issue note as part of the order record, not as an optional comment. When an order has been cancelled or delivery has not gone as planned, the issue note gives sales, delivery, and finance colleagues the context they need before they work with the same order. This is especially important when the order later appears in delivery review, invoicing, payment, or reporting activities.

For standard delivery-document work rather than exception handling, use [Creating Delivery Notes](#). For delivery planning and status coordination, use [Coordinating Sales Deliveries](#).

Prerequisites

Before reviewing order exceptions, make sure you can access the **Orders** list and open individual order records in Pams. You need to be able to view the **Order Status**, delivery-related details, and the **Goods Issue Note** or issue-note section for the orders assigned to your work.

Have the following information available before you make changes:

- The relevant **Order Number** or **Client** name, so you can locate the correct order.
- The actual delivery outcome, including whether the delivery was delayed, incomplete, unsuccessful, or otherwise different from the expected result.
- The reason for cancellation when you need to use the order cancellation action.
- The information needed for the issue note: what happened, the current status, action taken, and any required follow-up.
- Any existing **Delivery Note** or **Goods Issue Note** details that must remain consistent with the order record.

Confirm the order's current status before selecting a cancellation action. If the record already displays **Cancelled**, review the existing cancellation details instead of

attempting to cancel it again. Likewise, read any existing issue note before editing it so you preserve the history already recorded on the order.

If you need to create or update the delivery document connected with the order, complete that work through [Creating Delivery Notes](#) before returning to the exception review.