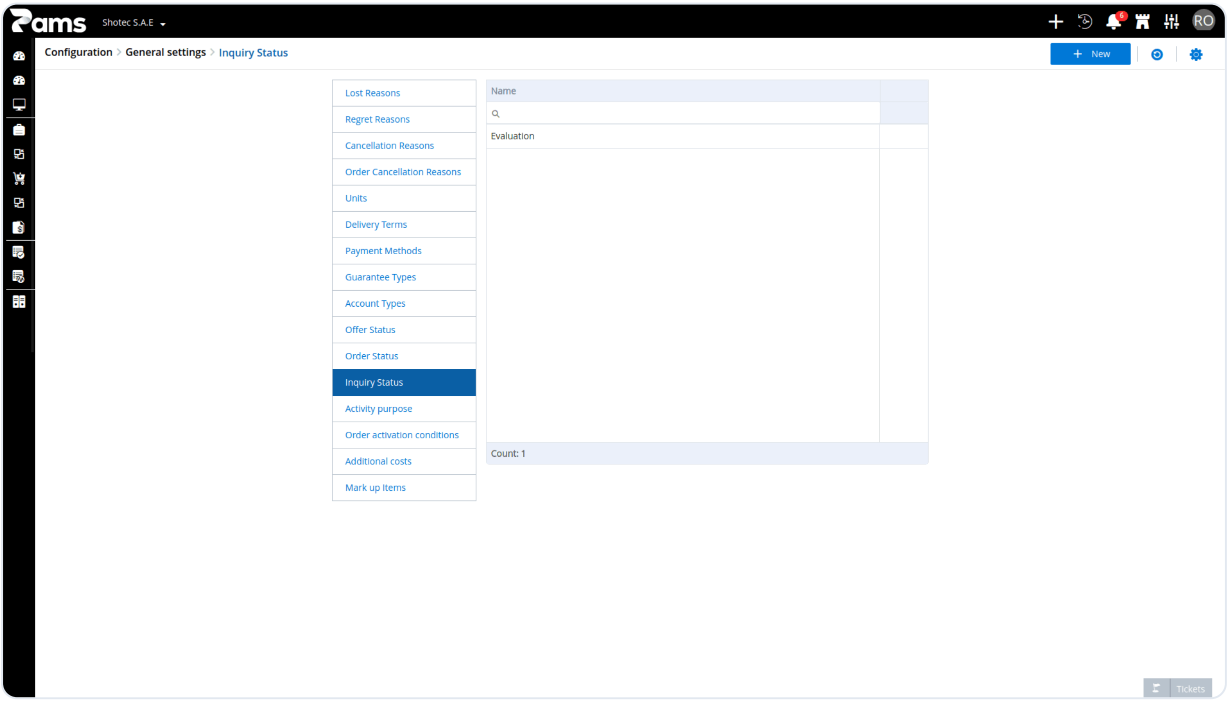
PAMS V2

Inquiry Status

July 29, 2026

Inquiry Status

Applications › Configurations › General Settings



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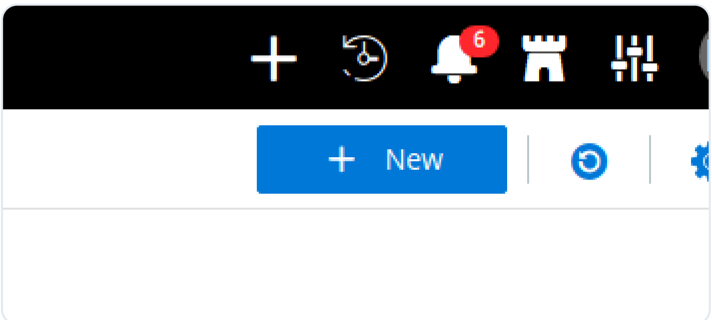


Overview

Inquiry Status is used to maintain the status and reason information that supports sales inquiry follow-up and reporting. Sales representatives, account managers, and project-related users can review the available inquiry status records and the related cancellation and regret reason categories when assessing an inquiry outcome.

Use this page when you need to locate an existing status or reason record, add a new record, review the available configuration categories, or export the displayed information.

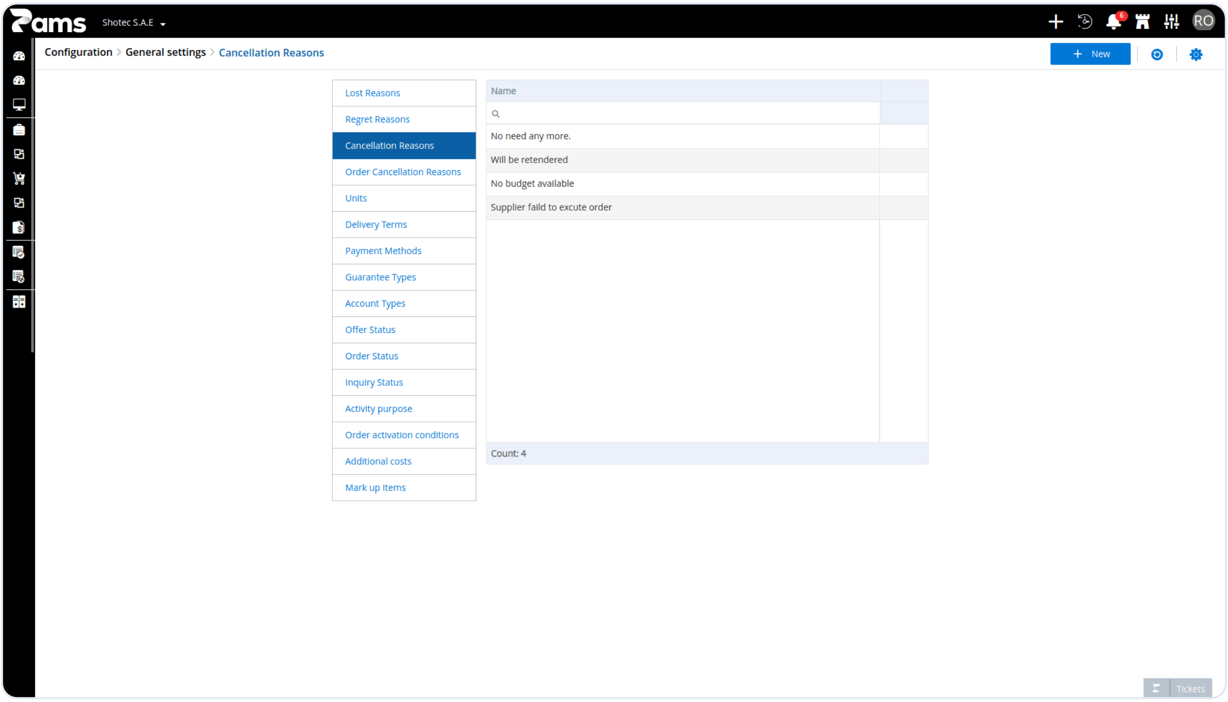
Settings

Open **Configurations > General Settings > Inquiry Status** to work with the available inquiry status configuration records. The page provides tabs for cancellation reasons, general settings, order cancellation reasons, and regret reasons.

Use **Search** and **Apply filter** to limit the records displayed before reviewing or exporting them. The screen also provides **New** for creating a new record and **Export** for exporting the current results.

> **Note:** The available tabs separate different reason and setting categories. Review the correct tab before adding or searching for a record so that you work in the intended category.

Cancellation Reasons



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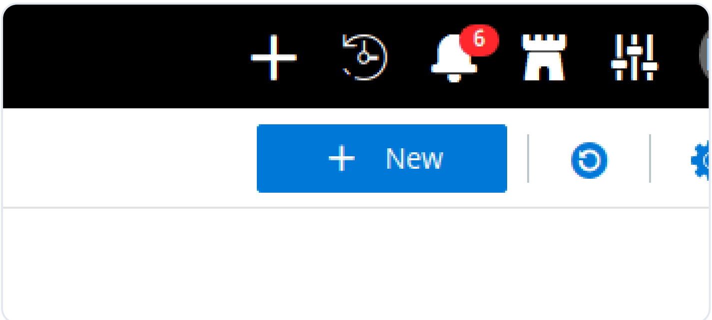
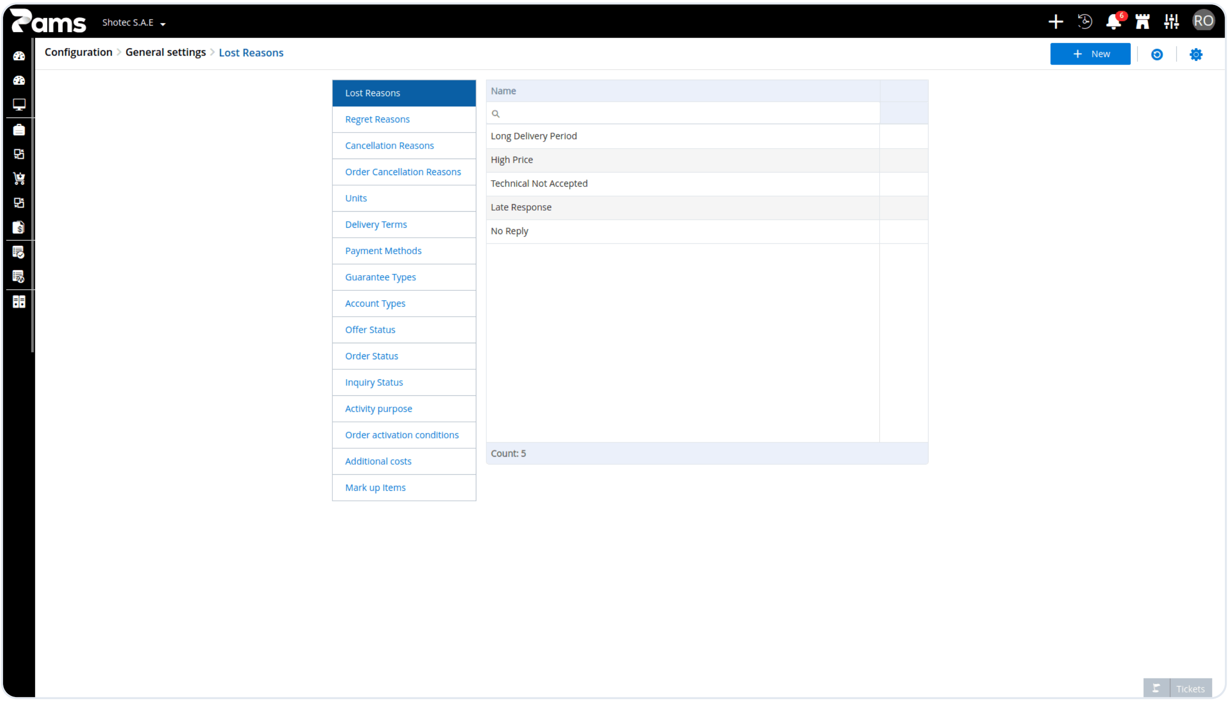


The **cancellation reasons** tab contains records used to identify why an inquiry was cancelled. Use this tab to review the cancellation reason records available to users when they record an inquiry cancellation.

You can use **Search** to locate a reason record and **Apply filter** to refine the displayed list. Select **New** when you need to create a cancellation reason record. The available controls do not identify a confirmed transition that moves records into or out of this tab.

General Settings



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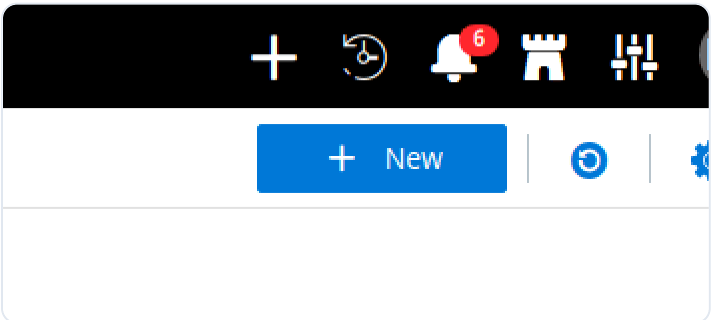
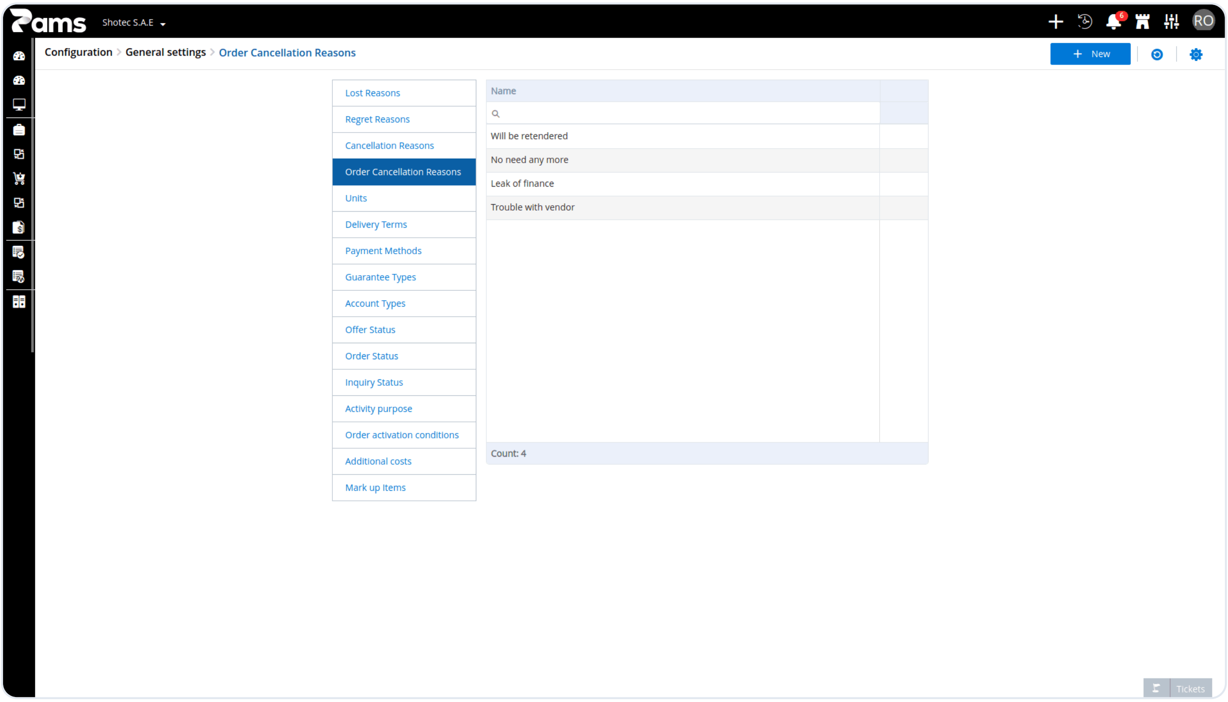


The **general settings** tab contains the general inquiry status configuration records. Use this tab to review the status records currently available for inquiry processing and to add a new status record where required.

The list can be searched and filtered using **Search** and **Apply filter**. The screen shows the current number of records, allowing you to confirm whether the expected configuration records are present. The available controls do not identify a confirmed transition that moves records into or out of this tab.

Order Cancellation Reasons



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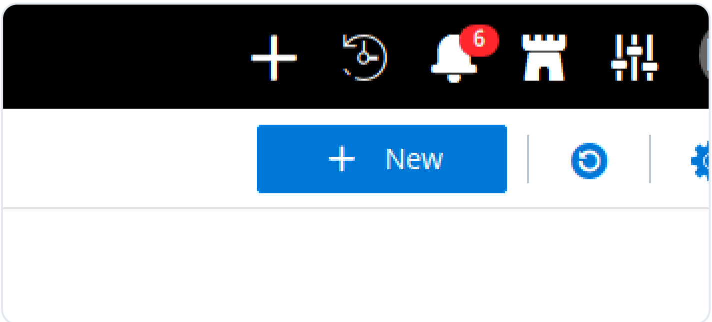
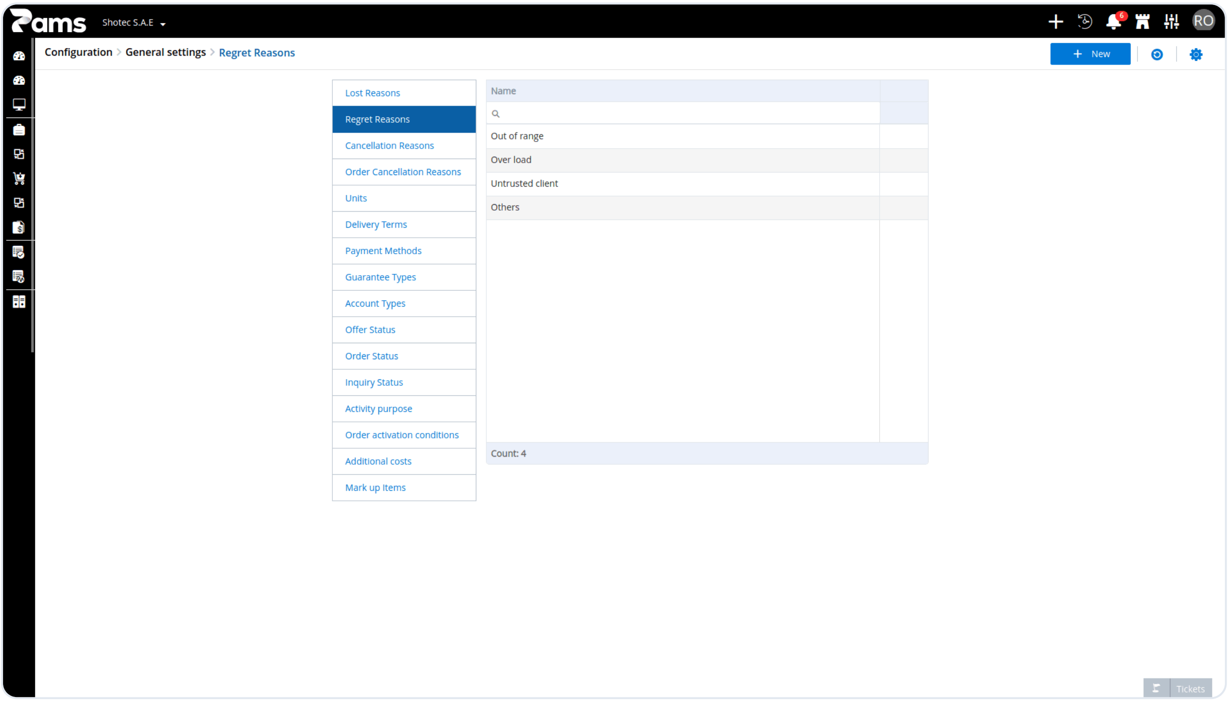


The **order cancellation reasons** tab contains records for order cancellation reasons. Use this category when reviewing or maintaining the reason records associated with cancelled orders rather than general inquiry cancellations.

Use **Search** and **Apply filter** to find a particular record. Select **New** to add a record in this category. The available controls do not identify a confirmed transition that moves records into or out of this tab.

Regret Reasons



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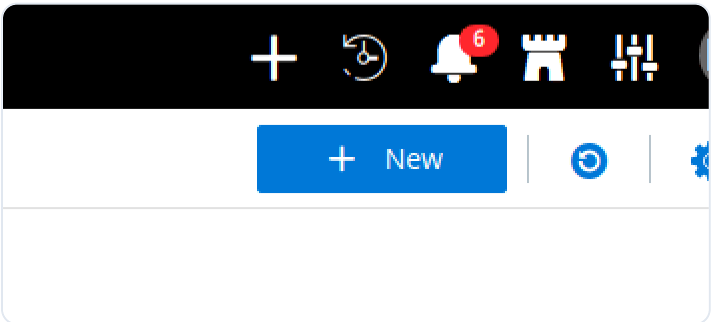

The **regret reasons** tab contains records used to identify regret outcomes. This category allows users to review the available regret reason records separately from cancellation reason records.

Use **Search** to find an existing record and **Apply filter** to narrow the list. Select **New** when a new regret reason record is required. The available controls do not identify a confirmed transition that moves records into or out of this tab.

Workflow

1. **Decide which category applies to the record.**
   Select the appropriate tab: **cancellation reasons**, **general settings**, **order cancellation reasons**, or **regret reasons**. Choose the category that corresponds to the type of status or reason you need to review or maintain.

2. **Decide whether an existing record already meets the requirement.**
   Enter a search term in **Search**, then select **Apply filter** to display matching records. Review the returned list and the record count before creating another entry.

   If you find the required record, retain it for use in the relevant inquiry or order process. If no suitable record is displayed, proceed to create one.

   > **Tip:** Search before creating a record. This helps avoid maintaining duplicate cancellation or regret reasons with similar names.

3. **Create a record when no suitable record exists.**
   Select **New** from the required tab. Complete the fields presented for the new record using the approved wording for your organisation's inquiry or order outcomes.

   Select **Ok** to confirm the entry. Select **Cancel** instead if you decide not to retain the new record.

4. **Decide whether supporting files are needed.**
   Where supporting material is required, use **Attach** and review the **files[]** area. Attach only documents that are relevant to the inquiry status or reason record.

5. **Review and share the configured list when needed.**
   Apply **Search** and **Apply filter** to display the required category and records, then select **Export** to produce an export of the displayed information.

   Use exports for controlled review, reporting preparation, or reconciliation of the available inquiry status and reason records.

   > **Warning:** Export only the category and filtered results required for the intended review. Check the selected tab before exporting because each tab represents a different reason or settings category.

Examples

A sales team needs to ensure that users can select a consistent reason when an inquiry is not progressed.

1. Open **Configurations > General Settings > Inquiry Status**.

2. Select the **regret reasons** tab because the required record concerns a regret outcome rather than an order cancellation.
3. Enter the proposed reason wording in **Search** and select **Apply filter**.
4. If the search returns a suitable existing record, use that established record and do not create a duplicate.
5. If no matching record is displayed, select **New**.
6. Complete the fields shown for the new regret reason record using the organisation-approved reason wording.
7. Select **Ok** to retain the record.
8. Return to **Search**, enter the new wording, and select **Apply filter** to confirm that the record is now included in the regret reason list.
9. If the sales manager requires a review of the available reasons, select **Export** after applying the appropriate filter.

The result is a maintained regret reason record in the correct category, available for consistent use in the inquiry process.

Tips

> **Tip:** Keep cancellation reasons, order cancellation reasons, and regret reasons distinct. Similar wording may be appropriate in more than one category, but the category should match the business outcome being recorded.

> **Note:** Use the **general settings** tab for general inquiry status configuration records. Use the reason tabs when the record specifically describes a cancellation or regret outcome.

> **Warning:** Select **Cancel** rather than **Ok** if the new record is incomplete or entered in the wrong category.

Troubleshooting

Symptom	Likely cause	Fix
The expected record is not displayed.	The incorrect tab is selected, or the current search/filter criteria exclude the record.	Select the appropriate category tab, clear or revise **Search**, and select **Apply filter** again.

Symptom	Likely cause	Fix
A similar reason already exists.	A record was created without first checking the relevant category.	Search the selected tab before creating another record. Retain the existing record where it meets the requirement.
The export does not contain the expected records.	The wrong tab or an overly restrictive filter was active when **Export** was selected.	Select the required tab, review **Search** and filter criteria, select **Apply filter**, and then select **Export** again.
A new record should not be retained.	The entry is incomplete or was started in error.	Select **Cancel** before confirming the record with **Ok**.

Related pages

- Activity Purpose
- Lost Reasons
- Configurations — Learning Path
- Margin Items
- Order Activation Conditions
- Order Cancellation Reasons
- Regret Reasons
- Configurations — Overview
- 2 Factor Authentication
- Account Managers
- Branches
- Flags
- Frequent Currencies
- Products
- Custom Fields