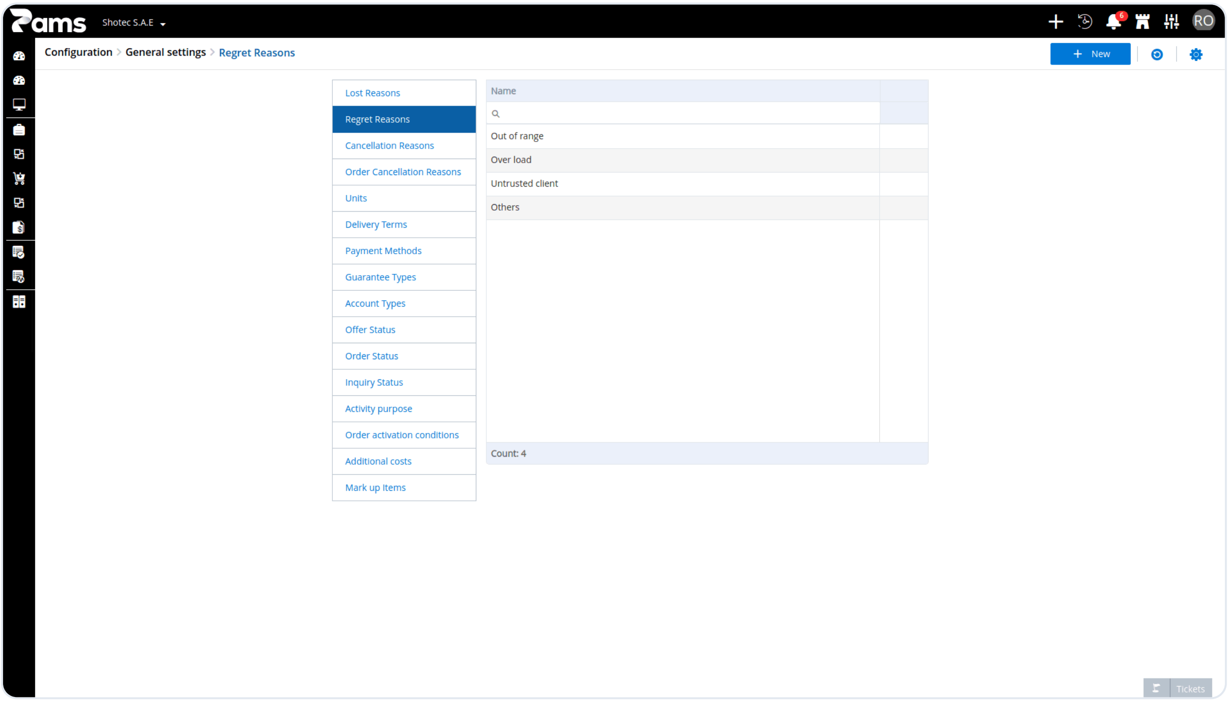
PAMS V2

Regret Reasons

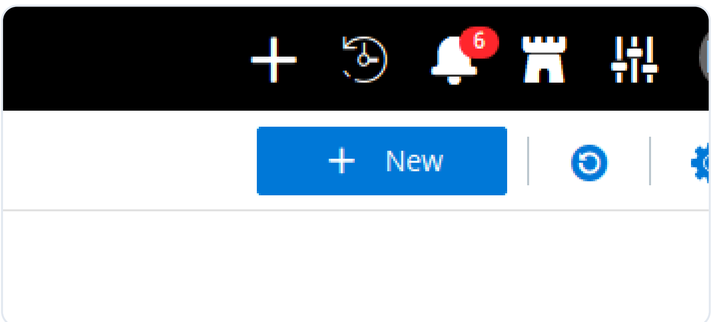
July 29, 2026

Regret Reasons

Applications › Configurations › General Settings



Regret Reasons — Configurations › General Settings › Regret Reasons



Overview

Regret Reasons is a configuration list used to maintain the reasons recorded when a sales job or related commercial activity is regretted. Sales representatives and project managers use the list to locate existing reasons, while authorized users maintain the available entries to support consistent reporting and review. Use this screen when you need to review, add, filter, attach files to, or export regret-reason records.

Settings

Open **Regret Reasons** from **Configurations** > **General Settings** > **Regret Reasons**. The screen presents the available regret-reason records and provides list-management actions.

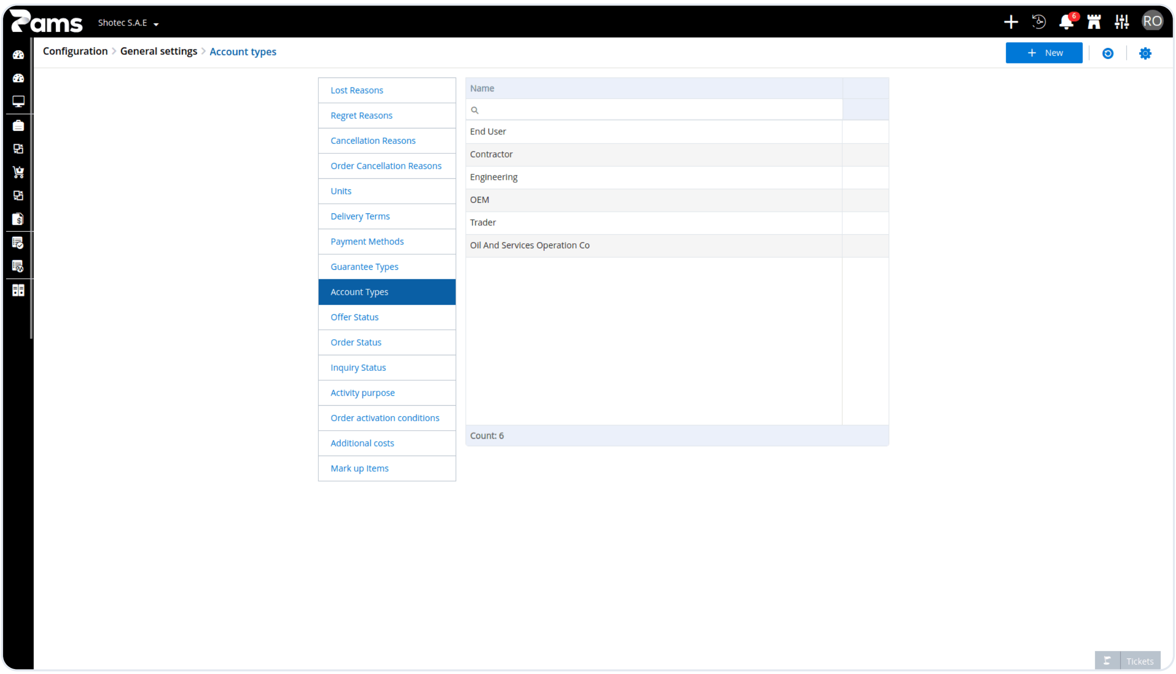
Use **Search** to find a known reason. Use **Apply filter** to apply the selected search or filtering criteria, and use **Cancel** to leave the filtering action without applying it.

You can also use **Attach** to associate files with the selected record. Attached items are shown through the **files[]** field.

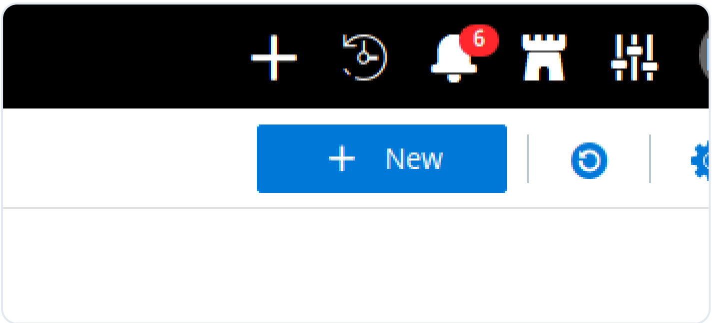
> **Note:** The screen provides a single visible tab, Account Types. No additional lifecycle states or automated transitions are available from the provided screen.

Workflow

1. Open **Regret Reasons** from **Configurations** > **General Settings** > **Regret Reasons** to review the current list of available reasons.



Regret Reasons — Configurations › General Settings › Regret Reasons



2. Decide whether the required regret reason already exists.
    - If it exists, use **Search** to enter a search value and select **Apply filter** to narrow the displayed records.
    - If you do not want to apply the current search or filter criteria, select **Cancel**.
    - If the required reason is not present, select **New** to begin creating a new regret-reason record.
3. Review the available reasons and decide whether the record needs supporting documentation.
    - To associate documentation with the record, select **Attach** and add the required file.
    - Review attached items in **files[]**.
    - Select **Ok** when the displayed action requires confirmation.
4. Decide whether you need to share or analyze the displayed list outside the application.
    - Select **Export** to export the available regret-reason data.
    - Use **Tickets** only when your working process requires the ticket action available from this screen.
5. Keep the list current. When a reason must be added or reviewed, return to this screen and use **New** or **Search** as appropriate. The provided screen does not show a separate approval, rejection, or status-transition action for regret reasons.

Account Types

The **Account Types** tab contains the regret-reason records available in this view. Use this tab to review the configured reasons, locate an entry with **Search**, and apply filtering with **Apply filter**. The visible records are reason entries rather than sales jobs, RFQs, or buyouts.

No control is provided that moves a regret-reason record into or out of this tab. Use the tab as the available working view for reviewing and maintaining the displayed records.

Examples

A sales representative needs to determine whether an appropriate regret reason is already available before recording a regretted sales job.

1. Open **Regret Reasons** from **Configurations** > **General Settings** > **Regret Reasons**.
2. Enter `Out of range` in **Search** and select **Apply filter**.
3. If the reason is displayed, review the record and use it consistently when the relevant sales job is regretted.
4. If the reason is not displayed, select **New** to create the required regret-reason record.
5. If the organization needs evidence or supporting correspondence for the reason, select **Attach** and add the relevant file. Confirm the action with **Ok** when prompted.
6. If the finance, sales, or PM team needs a copy of the configured list for review, select **Export** after applying the required filter.

Tips

> **Tip:** Search before selecting **New** to reduce duplicate or overlapping regret reasons.

> **Note:** Apply filters only after entering the intended search criteria. Select **Cancel** if you need to discard the current filtering action.

> **Warning:** Attach only files that are relevant to the regret-reason record, because attachments are associated through **files[]**.

Troubleshooting

Symptom	Likely cause	Fix
The required regret reason is not visible.	The list is filtered or the search term is too specific.	Clear or revise **Search**, then select **Apply filter** again.
The displayed list does not change after entering a search value.	The filter has not been applied.	Select **Apply filter** after entering the search criteria.
You do not want to continue with the current filter selection.	The current criteria are not required.	Select **Cancel**, then begin a new search if necessary.
Supporting files are not associated with the reason.	No file has been added to the record.	Select **Attach** and verify the attachment in **files[]**.

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