

Flags

September 10, 2026

Flags

Flags

A flag is a company reference entry with a name and a color. Use this page to maintain the entries available in the company Flags list.

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Reach the Flags list	Find Flags
Read the fields and list behavior	Understand the Flags list and form
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Its declared fields are **Name** and **Color**.

Before you start

Before maintaining a flag, sign in with access to the configuration area. Access uses an authentication guard, and the page's list and actions depend on the company subscription and your permissions.

Prerequisites

- You are signed in.
- Your company subscription includes this configuration feature.

- Your account has permission for the action you intend to use.
- You know the name and color to record.

The fields and list columns come from the configuration used for your company. Work from the headers and fields visible in your list. A required marker can depend on that configuration.

Find Flags

Open the configuration area when you need to review or maintain company flag entries.

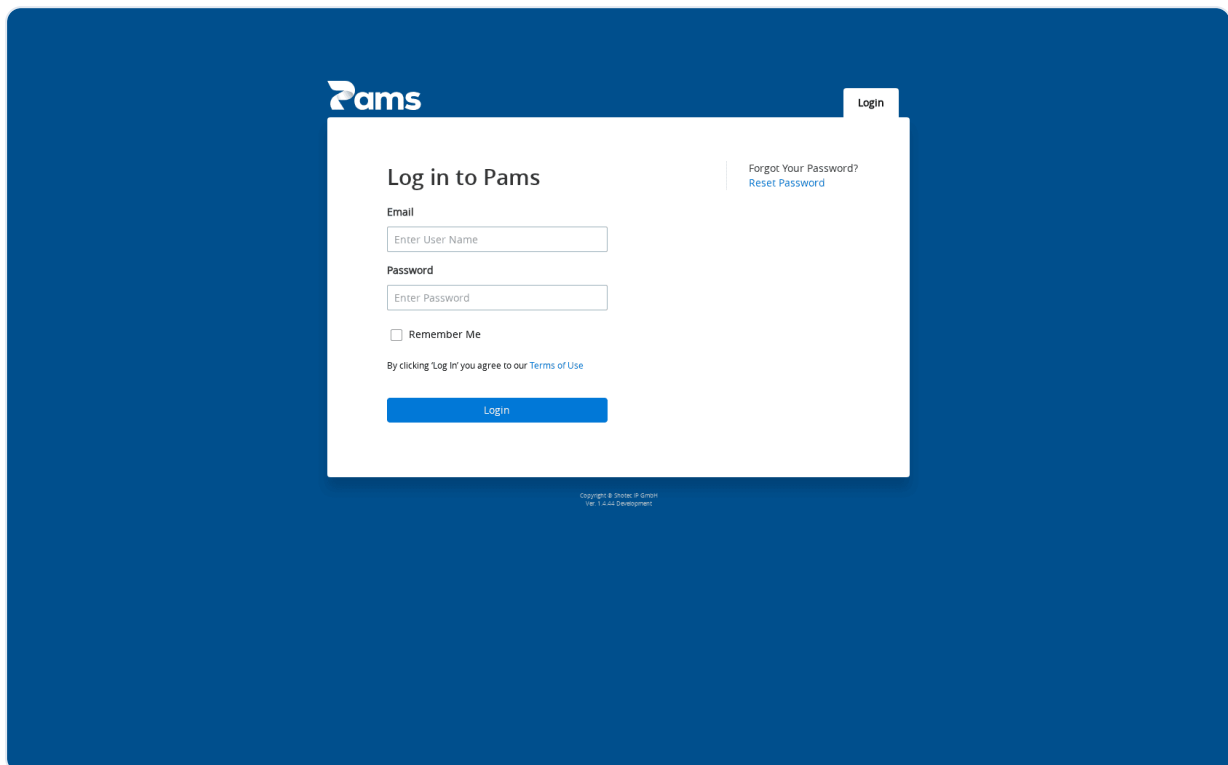
Prerequisites

- You are signed in.

Steps

1. Open the configuration area.
2. Select **Flags**.
3. Confirm that **New** is visible before opening a record action.

Result: The Flags reference list is open and ready for a list action.



Understand the Flags list and form

The form uses the same two fields when you create or edit an entry.

Fields

Field	Type	Required behavior	Where it is used
Name	Text box	Required	Identifies the flag in the list.
Color	Select box	Required	Assigns the flag's color.

Because no header row appears, use the values shown for each entry and select the edit or delete control beside it.

The **Color** list includes Red , Blue , Green , Yellow , Orange , Violet , and Black . The list of columns and the required marker can vary with your company configuration; use the fields and columns currently shown on your screen.

Add or edit a flag

Add a new company flag or change an existing flag's name or color.

Prerequisites

- The Flags list is open.
- **New** is visible for a new entry, or the edit control beside an existing entry is available.
- You have the flag name and color to enter.

Steps

1. Choose the task.

If you need to...	Select...
Create a new entry	New
Change an existing entry	The edit control beside an existing entry

2. Enter or change the flag name in **Name**.
3. Select **Color**.
4. Select a color from the list.

5. Select **Save** in the form.

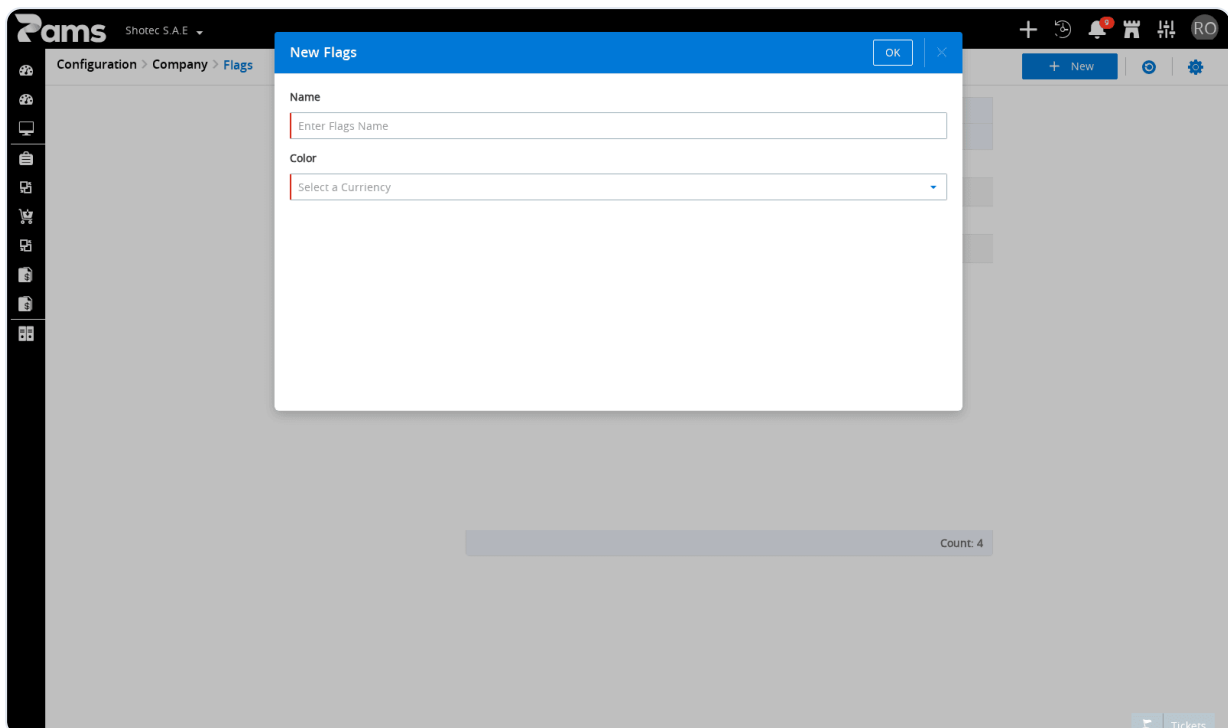
When a required value is empty, the form uses the message `Name is required` for **Name** or

`Color is required` for **Color**. The text field also uses the message

`Just '_' '-' And '.' Characters Accepted` when its pattern rule rejects the entry.

Result: A successful new entry produces `Data saved Successfully` . A successful change produces

`Data updated Successfully` .



Delete or export flag data

Delete an existing flag or open the export choices for the list.

Prerequisites

- The Flags list is open.
- You have permission for the list action.

Steps

1. Follow the path that matches your purpose.

After you select the delete control, the confirmation reads `Are you sure you want to delete this item?` .

Condition	Action
You want to remove an existing flag	Select the delete control beside the entry.
You want to keep the flag after the confirmation appears	Select Cancel .
You want to confirm removal after the confirmation appears	Select Delete .
You want to prepare a list export	Select Export .
The export dialog is open	Follow the export choices shown by the dialog.

Result: **Cancel** leaves the flag unchanged. A successful deletion produces `Data Deleted Successfully` . The export dialog is open when you choose **Export**.

When flag maintenance goes wrong

Use the message text to choose the corrective action.

Message	What to do
<code>Name is required</code>	Enter a value in Name .
<code>Color is required</code>	Select a value in Color .
<code>Just '_' '-' And '.' Characters Accepted</code>	Edit the text so it uses only the accepted characters.
<code>Forbidden characters detected. Please remove them and try again.</code>	Remove the forbidden characters and select Save again.
<code>Must have at least one item</code>	Keep at least one item in the list before deleting.
<code>Related to Saved data, Can't be deleted</code>	Keep the related flag because saved data depends on it.
<code>Failed to Delete</code>	Try the delete action again after checking that the row is still present.

Continue with company configuration

After reviewing the Flags list, continue with the configuration area that matches your next task:

- [Configuration home](#) for the configuration entry point.

- [Market segments](#) for the neighboring company reference list.
- [Branches](#) for company branch records.