

Market segments

September 10, 2026

Market segments

Market segments at a glance

Market segments are reference values maintained in the company configuration area.

If you need to...	Go to
Reach the list and check that it loaded	Find and open Market segments
Understand the field and list controls	Understand the Market segments screen
Add or change an entry	Create or edit a market segment
Remove an entry or open export	Delete or export the list
Resolve a message or unavailable surface	When the list or save action does not work
Maintain company branches	Branches
Maintain product types	Product Types
Maintain frequent currencies	Frequent Currencies
Maintain flags	Flags

Before you start

You maintain Market segments from the company configuration area when the subscription includes the configuration feature and your account has the permissions needed for the action.

Prerequisites

Before you start	What you need to know
Route	Open the Market segments configuration page.
Included subscription	The configuration grid is available when the feature is included.

Before you start	What you need to know
New permission	New appears when the subscription surface is available and the new action is not hidden.
Edit permission	The row edit action and row-click editing depend on edit access.
Delete permission	The delete action depends on delete access.
Import and export permissions	Import and export availability depends on your account permissions.

If the feature is not included, the configuration area shows the subscription-upgrade surface instead of the grid.

With these conditions in place, continue to [Find and open Market segments](#).

Find and open Market segments

The list opens with **Market Segments** as its title and **Name** as its visible column.

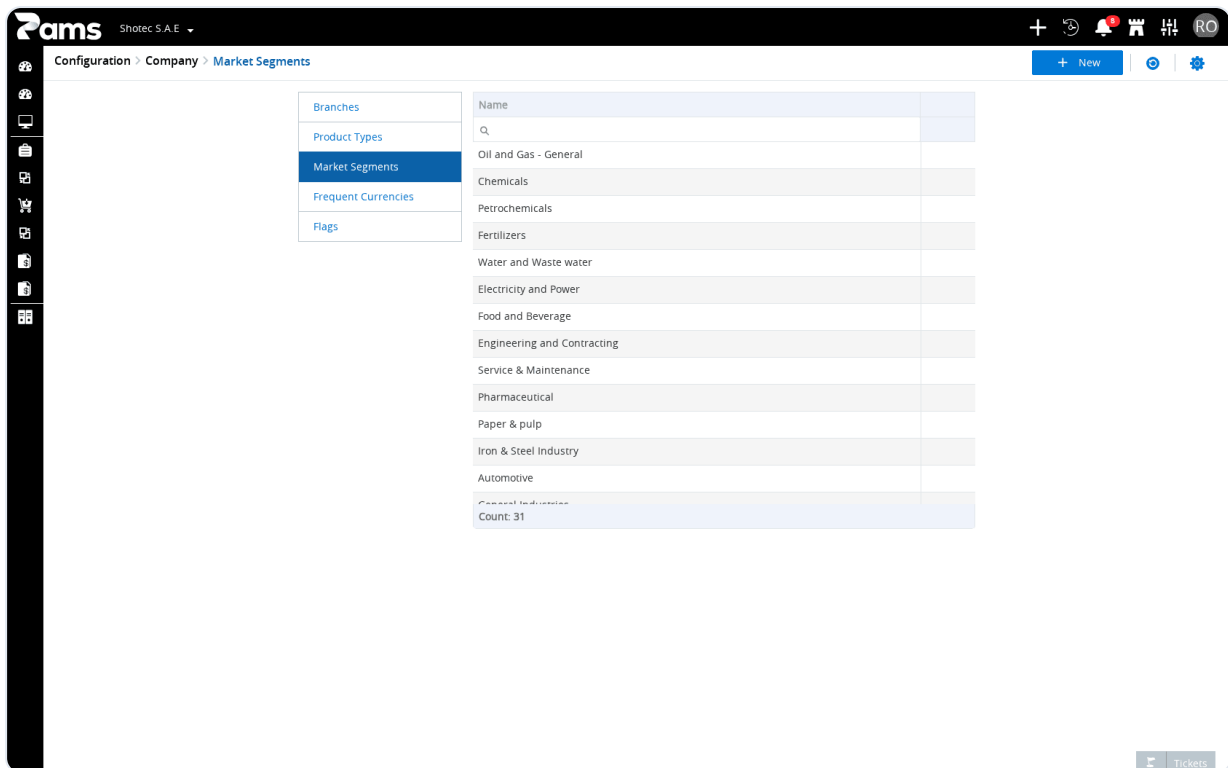
Prerequisites

- You are signed in.
- You have the route and subscription access described in [Before you start](#).

Steps

1. Open the Market segments configuration page.
2. Check that the page title reads **Market Segments**.
3. Check that the list contains the **Name** column.
4. Check that the list has loaded its rows before selecting a maintenance action.

The list contains 31 rows and settles without a visible spinner.



Result: The Market segments list is open, with **Name** visible as its list column and the list ready for review or maintenance.

Continue to [Understand the Market segments screen](#) before choosing a maintenance action.

Understand the Market segments screen

The Market segments screen is a list with one visible business field, **Name**, and a shared action area. The form uses **Name** when you create or edit an entry; the list uses **Name** to identify each row.

Surface	What it contains or does
Name	The text field shown in the new/edit form. It is required for this configuration.
Name column	The visible list column. It can be filtered, but it is not sortable or directly editable in the grid.
Hidden fields	Display order, the market-segment identifier, and the company-branch identifier are stored fields rather than visible list columns.
List header	Column headers are hidden for this configuration.

Surface	What it contains or does
Paging and row filter	Paging is disabled and the configured row filter is not shown.
Action area	The screen shows New , Refresh , and Settings .

Other configuration lists use fields for survey answers, reference category questions, question units, currencies, banks, colours, surveys, costs, products, and dates. Those fields belong to their own configuration pages; use the related links in the overview rather than looking for them in a Market segments entry.

When you are ready to maintain a value, continue to [Create or edit a market segment](#).

Create or edit a market segment

Use **New** to add a value or open an existing row for editing, then save the **Name** so the list contains the corrected value.

Prerequisites

- The Market segments list is open.
- You have the permission for the action you are taking.
- You have the name to enter in front of you.

Steps

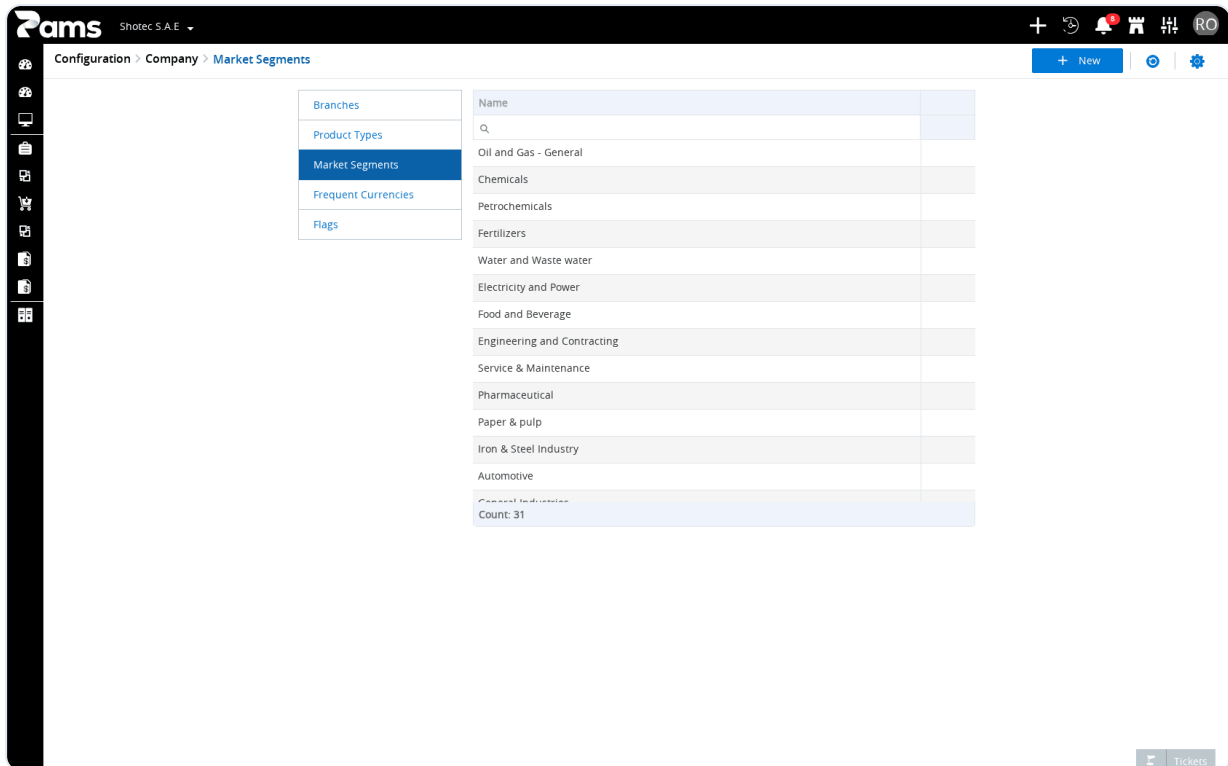
1. Choose one route:

If you need to...	Action
Add a value	Select New .
Change a saved value	Select the row's edit action, or select the row outside the action column when edit access is available.

2. In **Name**, enter the market-segment name.
3. Select **Save**.
4. If the form reports "Name is required", enter a value in **Name**.

5. Select **Save** again.

After a successful new entry, the application reports **Data saved Successfully** . After a successful edit, it reports **Data updated Successfully** , refreshes the list, and closes the popup.



Result: The saved or updated market segment appears in the Market segments list, and the popup is closed.

For removal or export, continue to [Delete or export the list](#).

Delete or export the list

Deleting removes an eligible list entry; exporting opens the list export flow. Treat deletion as a removal of a reference value, and confirm the row is the one you intend to remove before choosing the delete action.

Prerequisites

- The Market segments list is open.
- You have delete permission to remove a row.

- You have export permission to use the export action.

Steps

1. Choose one route:

If you need to...	Action
Remove a row	Open the row's delete action.
Prepare an export	Select Export in the action area.

2. When the confirmation displays `Are you sure you want to delete this item?`, select **Delete**.

3. Select **Cancel** to leave the row unchanged instead.

4. If you opened **Export**, choose the required export option in the export dialog.

After a successful deletion, the application reports `Data Deleted Successfully` and updates the list.

If the row is related to saved data, it reports `Related to Saved data, Can't be deleted`. For another

delete failure, it reports `Failed to Delete`. If the list contains only one item, it reports `Must have at least one item` instead of deleting it.

Result: The row is removed and the **Market Segments** list is updated, the row remains unchanged

after **Cancel**, or the export flow is open for the **Market Segments** list after selecting **Export**.

When the list or save action does not work

Use the message or the visible surface to choose the next check. The list and form have different

failure points, so start with the place where the message appears.

What you see	What it means	What to do
<code>Forbidden characters detected. Please remove them and try again.</code>	The applied list filter contains forbidden characters.	Remove the forbidden characters from the filter and apply it again.
The subscription-upgrade surface appears instead of the grid.	The configuration feature is not included.	Ask your administrator to review the subscription before attempting list maintenance.

What you see	What it means	What to do
The sign-in form remains after submitting credentials.	The Market segments page did not open.	Sign in again, then open the Market segments configuration page.
"Name is required"	Name has no value when the form is validated.	Enter the market-segment name in Name , then select Save .
Related to Saved data, Can't be deleted	The row is related to saved data.	Keep the row and use the related business record rather than deleting this reference value.
Failed to Delete	The delete request failed for another reason.	Leave the row unchanged and retry after checking access.
Must have at least one item	The list contains only one item.	Keep the remaining item; the last item cannot be deleted.

If the page title **Market Segments** or **New** is absent, the Market segments page has not loaded.

Open the Market segments configuration page again and check the page title before selecting a maintenance action.

What to do next

After a successful save or edit, the application refreshes the list and closes the popup.

After a

successful deletion, it updates the list and rennumbers the remaining display order.

Continue from the

list when you need to maintain another reference value.

If you need to...	Go to
Maintain branches	Branches
Maintain product types	Product Types
Maintain frequent currencies	Frequent Currencies
Maintain flags	Flags

Result: You are back at the Market segments list, with the saved, updated, or remaining rows ready for the next configuration task.

