

Cancellation reasons

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Cancellation reasons

Overview

Cancellation reasons are reference values that explain why a sales record leaves the sales

lifecycle as cancelled. Maintain them when your team needs a new value, a clearer name, or a

value removed from the list used for cancelled sales work.

Cancellation can occur at three points in the sales lifecycle:

Record point	What the cancellation reason supports
Potential	Explains why an early sales opportunity was cancelled.
Offer	Explains why an offer was cancelled.
Order	Explains why an order was cancelled.

Opening the **Cancellation Reasons** page loads the list for the **Cancelled** status. The list

contains one visible **Name** column.

If you need to...	Go to...
Open and identify the list	Find the cancellation-reason list
Learn what appears on the page	Understand the list and form
Add, edit, or delete a reason	Maintain cancellation reasons
Search, filter, refresh, import, or export	Search, filter, and use list tools
Resolve an access or surface difference	Handle access and surface variations
Resolve a message after an action	When an action does not work

If you need to...	Go to...
Work with the sales lifecycle	Sales jobs lifecycle
Open a related sales reference list	Lost reasons , Regret reasons , or Order cancellation reasons

Before you start

Before you change a cancellation reason, have the name you want to use ready. The controls available to you depend on your access.

Before you start	Why it matters
Know the reason name	Saving requires a non-empty name.
Have permission to create	New appears when your create access allows it.
Have permission to edit	Selecting a row can open its edit form when your edit access allows it.
Have permission to delete	The row delete action appears when your delete access allows it.
Have permission to import or export	Import or Export appears in Settings when the matching access allows it.

Use only the actions that appear on your page.

Find the cancellation-reason list

The cancellation-reason list is the configuration sales list titled **Cancellation Reasons**.

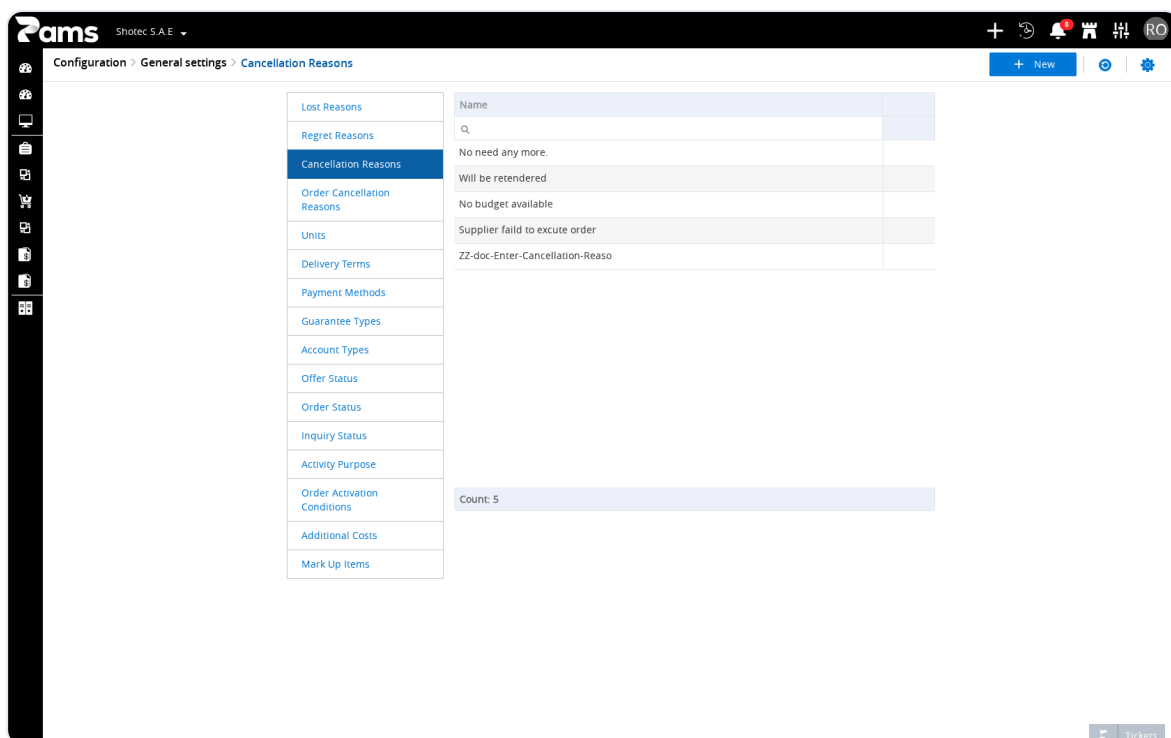
Use the title and the **Name** column to distinguish it from the related sales reason lists.

Prerequisites

- You have access to the configuration area.

Steps

1. Open the configuration area's sales list for cancellation reasons.
2. Confirm that the page title is **Cancellation Reasons**.
3. Confirm that the list uses the **Name** column.
4. Confirm that the list displays five rows.



Result: The **Cancellation Reasons** page is open with the **Name** list visible.

Understand the list and form

The list is a single-column reference list. **Name** identifies each row, while **Reason** is the field label used when you edit a row. The page also provides list tools above the rows.

Area	What you use there
List	Name identifies each cancellation reason.
Edit form	Reason is the field for changing the reason name.
List tools	Refresh , Table Layout , and Settings control the list view.
Settings	Filter Row shows or hides the grid filter row. It starts disabled.
Editing and deletion	Select a row to open its edit form when you have edit access. Use the delete control on that row when you have delete access.

The list does not show column headings or paging controls. The identifier is not shown, so work from the **Name** and **Reason** labels. Use the controls on each row to edit or delete a reason.

Maintain cancellation reasons

Use the procedure that matches the change you need.

Add a cancellation reason

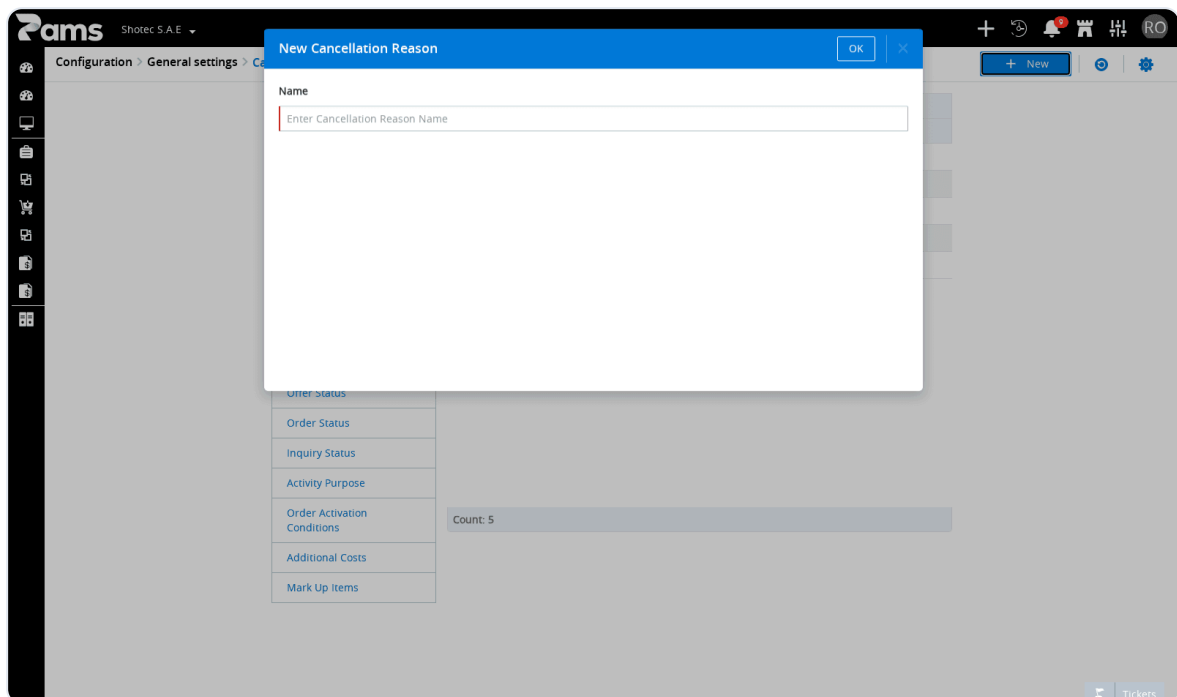
Add a reason when the list needs a new explanation for cancelled sales work.

Prerequisites

- The **Cancellation Reasons** list is open.
- **New** appears on the page.
- You have the reason name ready.

Steps

1. Select **New**.
2. In the new-reason dialog, enter a non-empty value in **Name**.



3. Select **OK**.
4. Confirm **Data saved Successfully**.

Result: The new reason is added to the list and the dialog closes.

Edit a cancellation reason

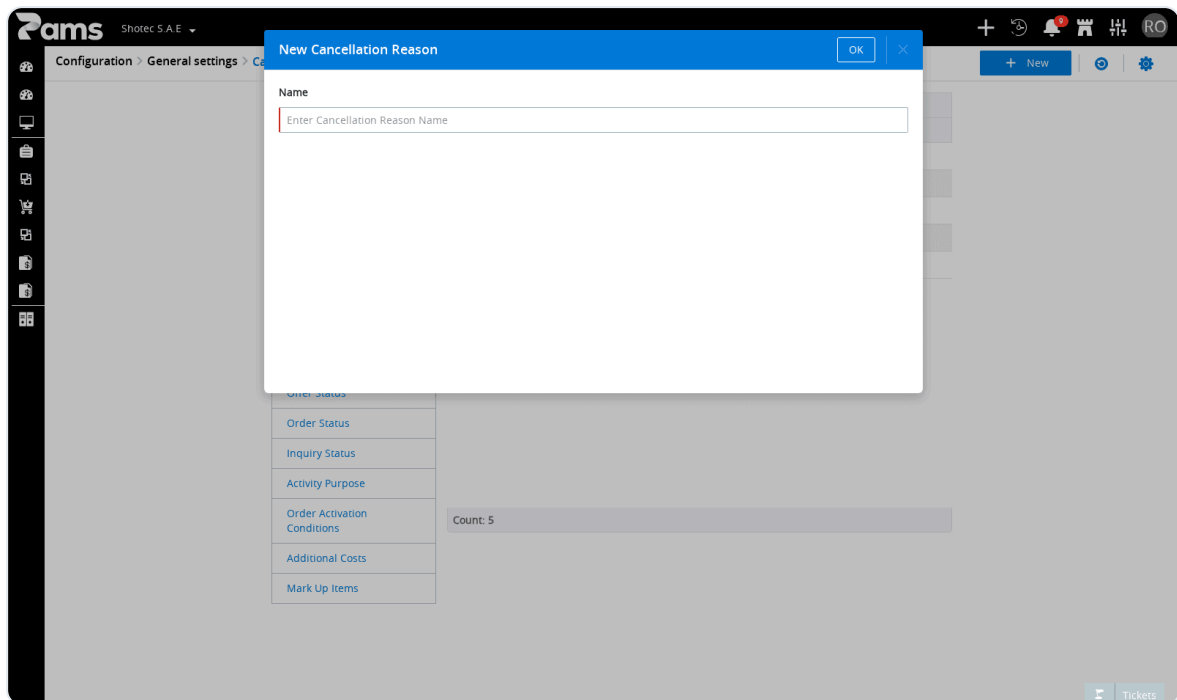
Edit a reason when its name no longer describes the cancellation clearly.

Prerequisites

- The **Cancellation Reasons** list is open.
- You can select the row you need to change.
- Edit access allows the edit action.

Steps

1. Select the reason row.
2. In the edit form, change **Reason** to the required name.



3. Select **Save**.
4. Confirm **Data saved Successfully**.

Result: The changed reason appears in the list and the edit dialog closes.

Delete a cancellation reason

Delete a reason when the reference value is no longer needed.

Prerequisites

- The **Cancellation Reasons** list is open.
- The row's delete action appears.

Steps

1. Open the row's delete action.
2. Read `Are you sure you want to delete this item?` .
3. Select **Delete**.
4. Confirm `Data Deleted Successfully` .

Result: The selected reason is removed and the list refreshes.

Search, filter, and use list tools

Use the list tools to locate a reason or prepare the list for review. **Keyword to Search** searches entered text; **Filter Row** provides a filter row; **Refresh** reloads the list.

Prerequisites

- The **Cancellation Reasons** list is open.

Steps

1. Choose one list task:

If you need to...	Select or enter...
Search by text	Enter text in Keyword to Search .
Show the grid filter row	Open Settings .
Reload the list	Select Refresh .
Open the list-layout choices	Select Table Layout .

2. If you chose to show the grid filter row, select **Filter Row**.
3. If you entered a filter value, select **Refresh**.
4. If **Export** appears, open **Settings**.
5. If **Export** is available, choose one format:

If you need...	Choose...
An Excel file	Export to Excel
A PDF file	Export to PDF

6. If you selected an export format, select **Export** in the `Exporting List:` window.

Result: The requested list task is complete, and the list remains ready for the next action.

Handle access and surface variations

Access determines which maintenance actions appear on the **Cancellation Reasons** page. The

same configuration area also lists **Lost Reasons**, **Regret Reasons**, and **Order Cancellation**

Reasons. Each list has its own reference values.

If you do not see...	Check...
New	Your create access for cancellation reasons.
The edit control	Your edit access and the row you selected.
The delete control	Your delete access.
Import in Settings	Your import access.
Export in Settings	Your export access.

When a reason row is selected, the edit form uses **Reason**. When you add a reason, the new

dialog uses **Name**. Use the list title and **Name** column to remain on the **Cancellation Reasons**

list when moving among the related sales lists.

If an action produces a message, use the guidance in [When an action does not work](#).

When an action does not work

Use the message on screen to choose the next action, then return to the list when the action is complete.

What you see	What it means	What to do
Can't save empty item	The reason has no name.	Enter a non-empty value in Name or Reason , then select OK or Save .
Are you sure you want to delete this item?	The page is waiting for deletion confirmation.	Select Delete to continue.
Data saved Successfully	The save completed.	Check the updated row in the list.
Data Deleted Successfully	The deletion completed.	Check that the row has left the refreshed list.

What you see	What it means	What to do
Parsed server error text	The save or delete request returned an error message.	Correct the entry or retry the action using the message shown.
Export to Excel	Excel is the selected export format.	Continue with Export in the Exporting List: window.
Export to PDF	PDF is the selected export format.	Continue with Export in the Exporting List: window.
Exporting List:	The export format window is open.	Select Export after choosing a format.

Continue with related sales lists

The sales reference lists provide named reasons for different outcomes. The cancellation list supports cancelled work at the potential, offer, and order points in the sales lifecycle.

If your next task concerns...	Open...
A cancelled potential, offer, or order	Sales jobs lifecycle
Lost sales work	Lost reasons
Regretted sales work	Regret reasons
Cancelled orders using order-specific reasons	Order cancellation reasons

After adding or editing a reason, check the updated row and Data saved Successfully .
 After deleting one, check the confirmation, Data Deleted Successfully , and the refreshed list.
 After searching or filtering, check the matching rows. After exporting, check the format you selected.