

Cost items

September 11, 2026

Cost items

Cost items

A cost item is a name maintained for the additional-cost list in sales configuration. Use this page when you need to review or maintain the names available in that list.

If you need to...	Go to
Check the field and list layout	Understand the Cost items screen
Open the configuration page	Find Cost items
Add or maintain a name	Add and maintain a cost item
Reorder or remove a name	Handle ordering and removal
Respond to a message	When maintenance does not work

Before you start

The page's list and maintenance actions depend on the configuration and access available to your account.

Prerequisites

Check	What to have in place
Subscription	The configuration feature is included so the list can load.
Access	The access available to your account determines whether New , edit, delete, import, and export actions are available.
Page setup	The page uses the Cost items configuration for its field and list.
List layout	Work from the column headings shown on your page. The page can supply its columns from your configuration.

Find Cost items

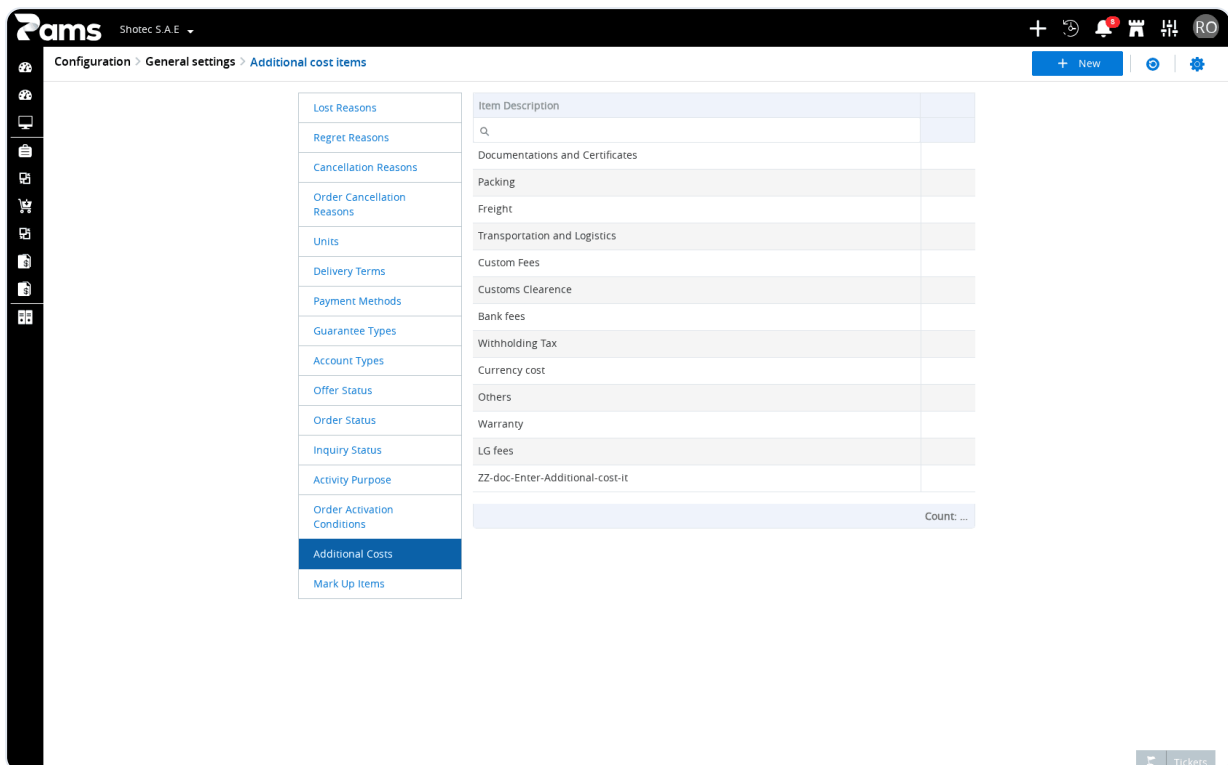
Cost items is the sales-configuration page where you reach the additional-cost list.

Prerequisites

- Have access to the configuration area.

Steps

1. Open the Cost items page.
2. In the configuration side menu, select **Additional Costs**.
3. Check that the page heading is Additional cost items.
4. Check that the breadcrumbs include **General settings** and **Configuration**.



Result: The Additional cost items page is open.

Understand the Cost items screen

The Cost items screen presents the names in a grid and uses the same field when you open the new-item form.

Prerequisites

- Open the Cost items page.

Steps

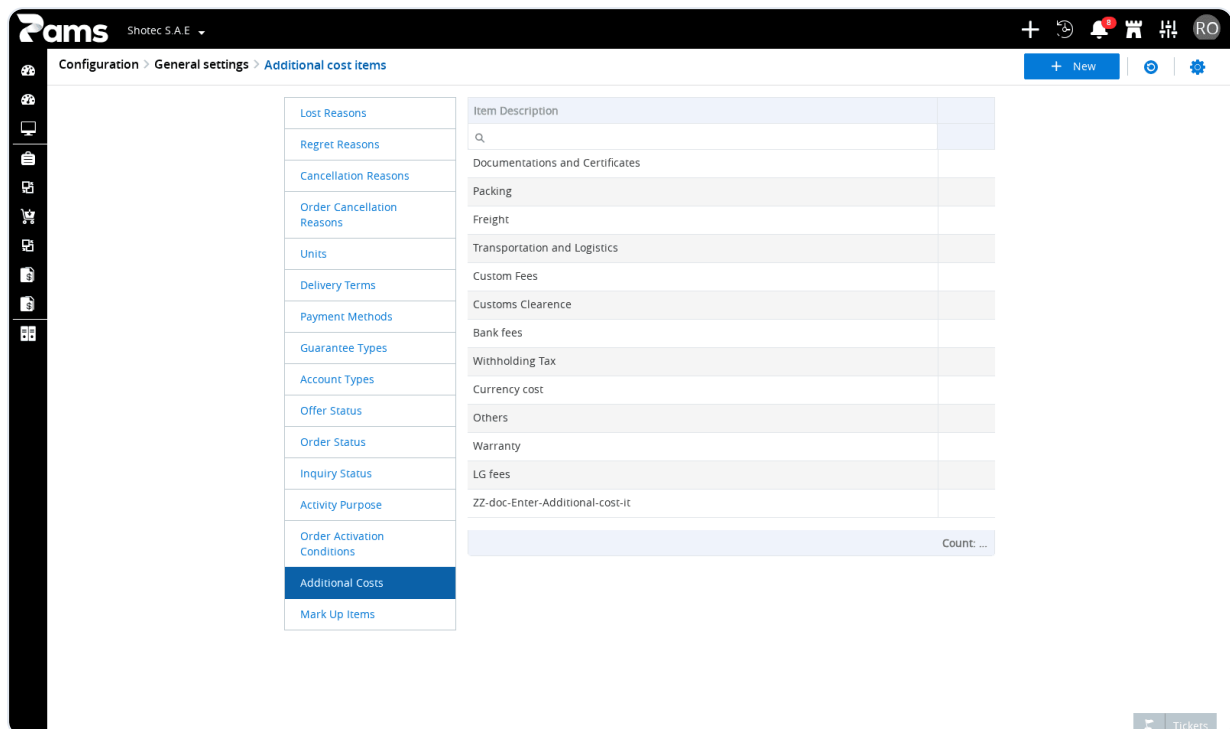
1. In the grid, read the **Item Description** column heading.
2. In the form, enter the name in the **Item Description** text box.
3. Check the required marker beside **Item Description** before submitting the form.

The page-specific field is:

Field	Type	Required	Where it appears
Item Description	Text box	Yes	Grid and new/edit form

The page does not present `DisplayOrder` , `Id` , or `CompanyID` as fields in the form. Rows can also be reordered directly in the list.

The list currently shows **Item Description** as its column. The page also shows **New**, and the icon-only controls titled **Refresh** and **Settings**.



Result: You can identify the list column, the form field, its required marker, and the controls used to maintain the list.

Add and maintain a cost item

Adding or maintaining a cost item changes the names available in the additional-cost list.

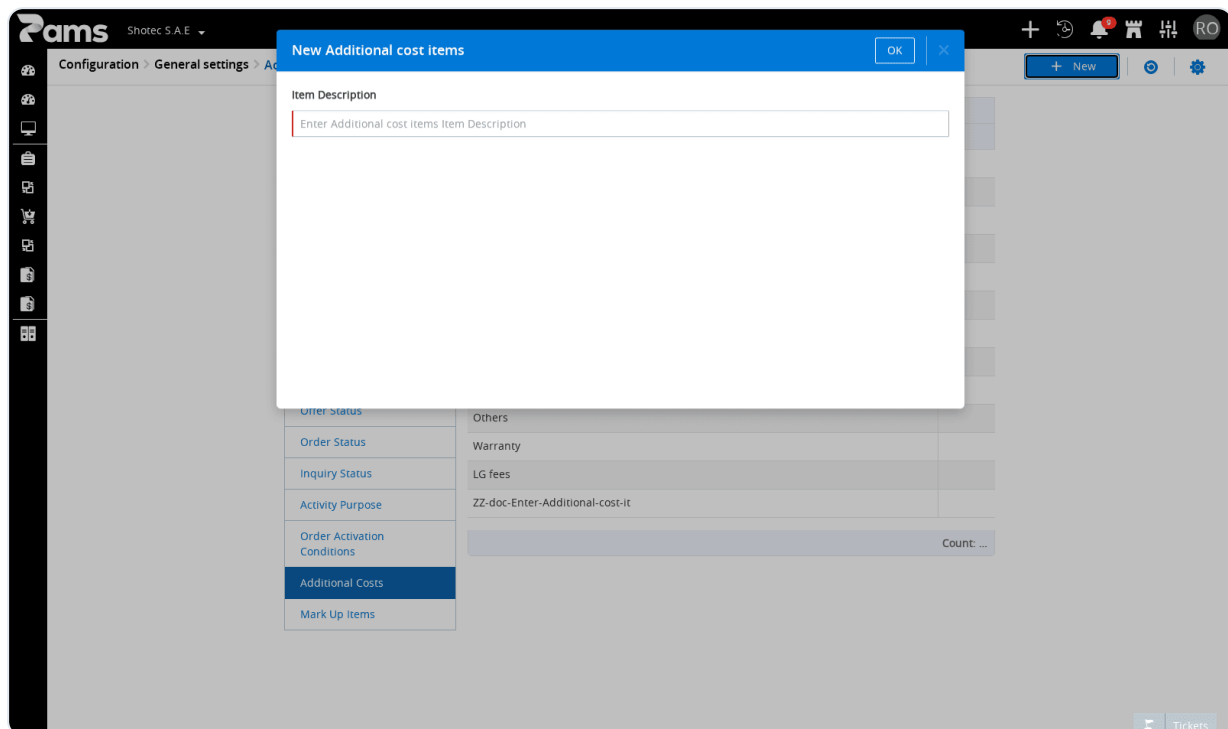
Prerequisites

- Open the Additional cost items page.
- Have the name you want to maintain ready.

Steps

1. Choose the action for the name you want to maintain:

If you need to...	Action
Add a name	Select New to open the new-item dialog.
Change an existing name	Select the row to open the edit form.

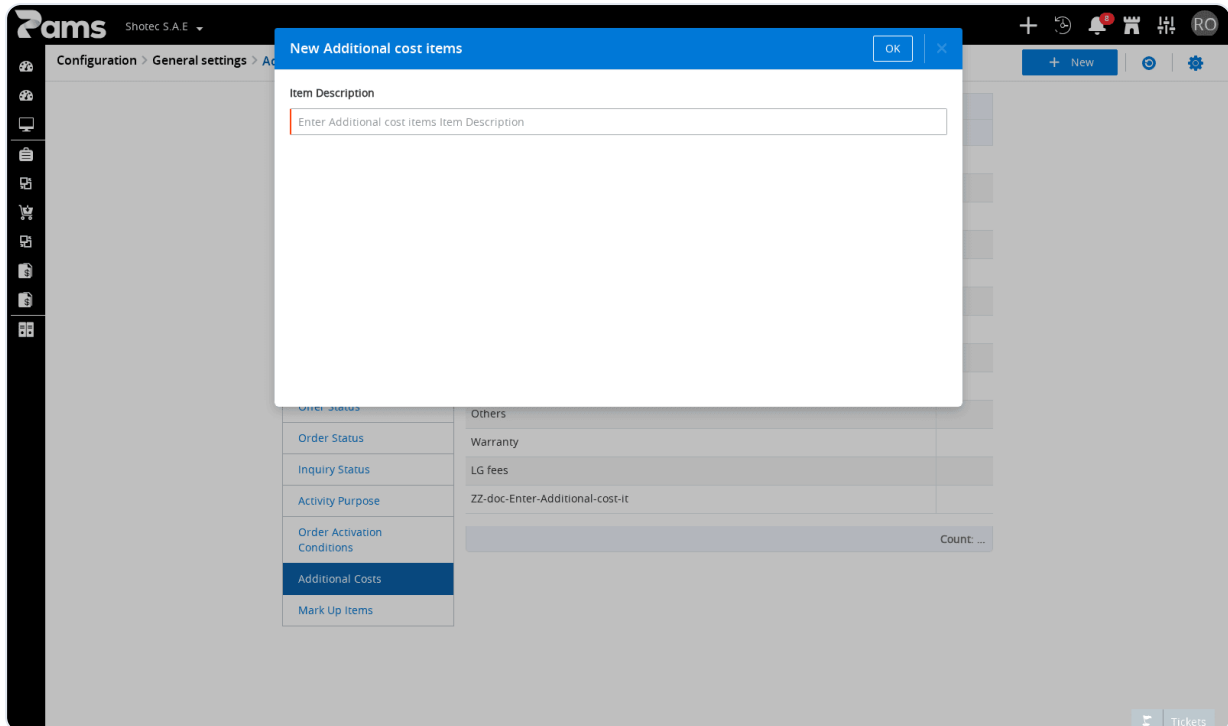


2. Enter the name in **Item Description**.

3. Choose how to finish:

If you need to...	Action
Submit the name	Select OK .
Close without saving	Select Cancel .

The new-item dialog is titled New Additional cost items. It contains **Item Description** with a required marker and the **OK** control. Selecting **Cancel** closes the dialog.



The page also supports import and export when those actions are available to your account.

Result: The dialog is closed after **Cancel**. After **OK**, the item is submitted for saving.

Handle ordering and removal

Rows can be reordered, and you can remove a row when **Delete** is available.

Prerequisites

- Open the **Additional cost items** page.
- Have delete access when you need to remove a row.

Steps

1. Drag a row to its new position to reorder the list.
2. Select **Delete** to open the confirmation menu.
3. Read `Are you sure you want to delete this item? .`
4. Select **Cancel** to keep the row.
5. Select **Delete** to remove the row.

Result: The row remains when you select **Cancel**; selecting **Delete** submits the removal.

When maintenance does not work

The page reports the following messages when validation or a maintenance operation stops.

What you see	What it means	What to do
Item Description is required	The form needs a value in Item Description .	Enter the value in Item Description and select OK again.
Just ' _ ' '-' And ' .' Characters Accepted	The entered name contains a character the field does not accept.	Enter the corrected value in Item Description and select OK again.
Must have at least one item	The removal would leave no item.	Keep at least one item in the list.
Related to Saved data, Can't be deleted	Saved data is related to the item.	Keep the related item instead of deleting it.
Failed to Delete	The delete operation failed.	Return to the list and review the item before trying again.
Forbidden characters detected. Please remove them and try again.	The filter input contains forbidden characters.	Remove the forbidden characters and try again.
Data saved Successfully	A new item was saved.	Continue from the list.
Data updated Successfully	An existing item was updated.	Continue from the list.
Data Deleted Successfully	An item was deleted.	Continue from the list.
Data Importing completed	The import completed.	Continue from the list.
Export to Excel	The export dialog is offering the Excel option.	Select the export action available in that dialog.

After maintaining cost items

This page ends at configuration maintenance. It does not move a record through a sales lifecycle stage.

Result: You remain in the configuration area after maintaining or cancelling a cost-item change.