

Delivery terms

September 10, 2026

Delivery terms

Delivery terms are named and coded entries maintained in the sales configuration list. Use this page when you need to review the list or maintain an entry.

If you need to...	Go to
Open the list and check its columns	Find the Delivery terms list
Check the fields before entering a value	Understand the list and form
Add or change an entry	Add or edit an entry
Remove an entry or handle access branches	Handle delete and access branches
Resolve a validation or maintenance message	When maintenance goes wrong
Continue to another sales reference list	After maintaining Delivery terms
Maintain units	Item units
Maintain additional costs	Cost items
Maintain payment methods	Payment methods
Maintain guarantee types	Guarantee types
Maintain offer, order, or inquiry statuses	Offer status , Order status , or Inquiry status
Maintain lost, regret, or cancellation reasons	Lost reasons , Regret reasons , Cancellation reasons , or Order cancellation reasons
Maintain order activation conditions	Order activation conditions

Before you start

You must be signed in with access to the sales configuration page. Have the name and code for the entry ready before you begin; both fields are required in the form.

Prerequisites

- You have access to the sales configuration page.
- You have the value to enter in **Name**.
- You have the value to enter in **Code**.

The availability of editing, deleting, importing, and exporting depends on your access. The page can also restrict **New** through the page's access settings.

Find the Delivery terms list

Open the Delivery terms list to review existing entries before adding or changing one.

Prerequisites

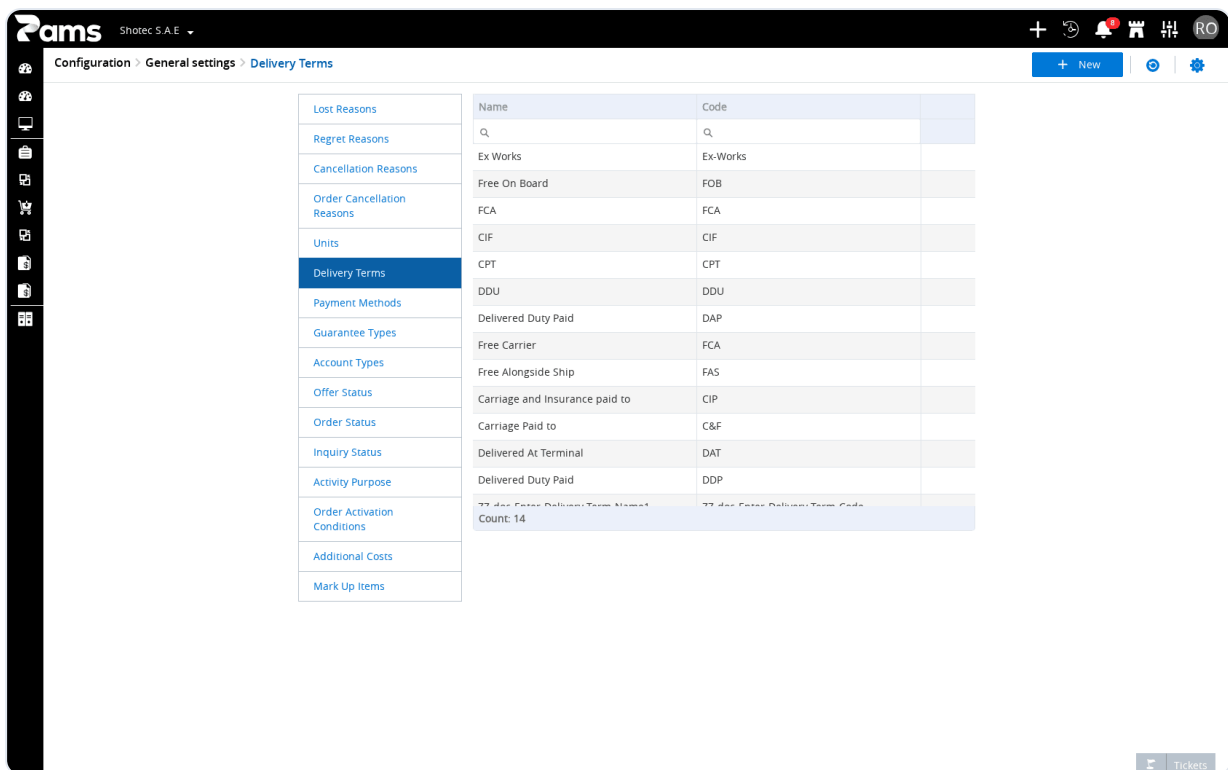
- You are signed in and have access to sales configuration.

Steps

1. Open the **Delivery Terms** configuration page.
2. Check that the page shows the **Delivery Terms** title and the **Name** and **Code** columns.
3. Choose the next action:

If you need to...	Select
Add an entry	New
Review the list again	Refresh
Open list settings	Settings
Edit an existing entry	The row in the list

Result: The Delivery terms list is open, and you have either selected the next list action or identified the row to edit.



Understand the list and form

The list and form use the same two values. Both form fields are text fields and both carry a required marker.

Area	What you use it for
List	Review the Name and Code columns.
Name	Enter the name shown for the entry.
Code	Enter the code shown for the entry.
New-entry dialog	Enter the two values and select OK .

The new-entry dialog is titled **New Delivery Term**. The page also shows sibling navigation labels, including **Units**, **Payment Methods**, **Guarantee Types**, **Offer Status**, **Order Status**, **Inquiry Status**, **Lost Reasons**, **Regret Reasons**, **Cancellation Reasons**, **Order Cancellation Reasons**, **Additional Costs**, **Mark Up Items**, and **Order Activation Conditions**. Select a sibling page when you need to maintain that other reference list.

The form does not present `DisplayOrder` , `DeliveryTermID` , or `CompanyID` as editable fields.

Add or edit an entry

To add or edit an entry, follow these steps.

Prerequisites

- You have access to create or edit the entry.
- You have values for **Name** and **Code**.

Steps

1. Choose the entry action:

If you need to...	Action
Create a new entry	Select New .
Change an existing entry	Select the row in the list.

The shared new or edit dialog opens. Editing a row requires edit access.

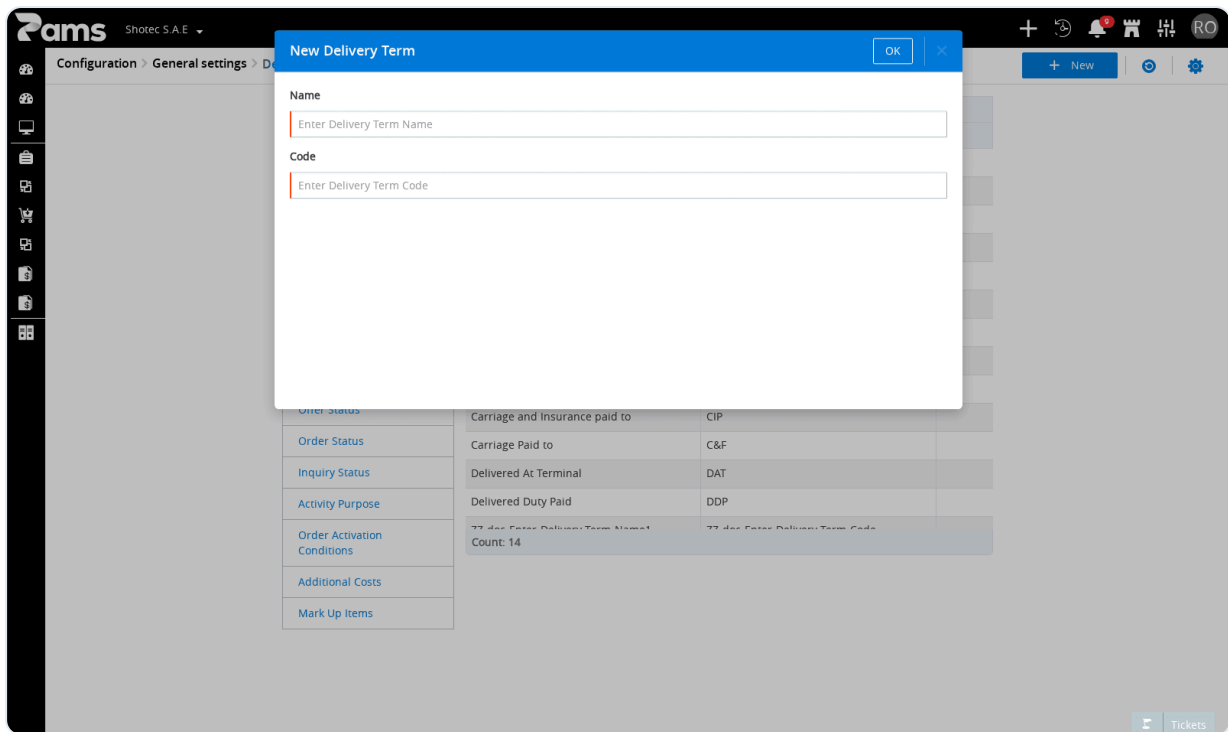
2. Enter the entry name in **Name**.
3. Enter the entry code in **Code**.
4. Select **OK**.

The form validates the fields before saving. If the new entry is saved, the application displays

`Data saved Successfully` . If an existing entry is saved, it displays

`Data updated Successfully` .

Result: The saved entry is loaded back into the list.



Handle delete and access branches

Deletion applies to an existing row. The delete option is available only where your access

allows deletion; importing, exporting, editing, and creating can also depend on access.

Prerequisites

- You have identified the row to remove.
- You have delete access.

Steps

1. Select the row's delete control.
2. Choose one action in the confirmation menu:

If you need to...	Select
Keep the entry	Cancel
Remove the entry	Delete
If the list contains more than one entry	Select Delete .
If saved data uses the entry	Select Cancel . Resolve the related data before trying Delete again.

Result: The entry remains in the list after **Cancel**, or the list is refreshed after a successful deletion.

When maintenance goes wrong

Use the message text to identify whether the form needs a value, a permitted character, or a different maintenance action.

Message	What to do
<field caption> is required	Enter a value in the named field.
Just ' _ ' '-' And '.' Characters Accepted	Replace characters that are not accepted in the field.
Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters and submit the form again.
Related to Saved data, Can't be deleted	Keep the entry and resolve the saved data that uses it.
Failed to Delete	Check the entry and your delete access before trying the delete action again.
Must have at least one item	Keep at least one entry in the list.
Data saved Successfully	The new entry was saved; check the list for it.
Data updated Successfully	The edited entry was saved; check the list for the change.
Data Deleted Successfully	The entry was deleted; check the list for its removal.
Data Importing completed	Check the list after the import operation.

Before removing an entry, the confirmation asks **Are you sure you want to delete this item?**

Select **Cancel** to keep the entry or **Delete** to continue.

After maintaining Delivery terms

After a successful maintenance action, check the list rather than leaving the page: the save operation reloads the list, and the delete operation updates the list after the response.

Prerequisites

- You have completed or cancelled the maintenance action.

Steps

1. Check the **Name** and **Code** columns for the entry you maintained.
2. Select the sibling reference-list label for the next configuration task.

Result: You remain on the Delivery terms list until you choose another registered sales configuration page.