

Inquiry status

September 10, 2026

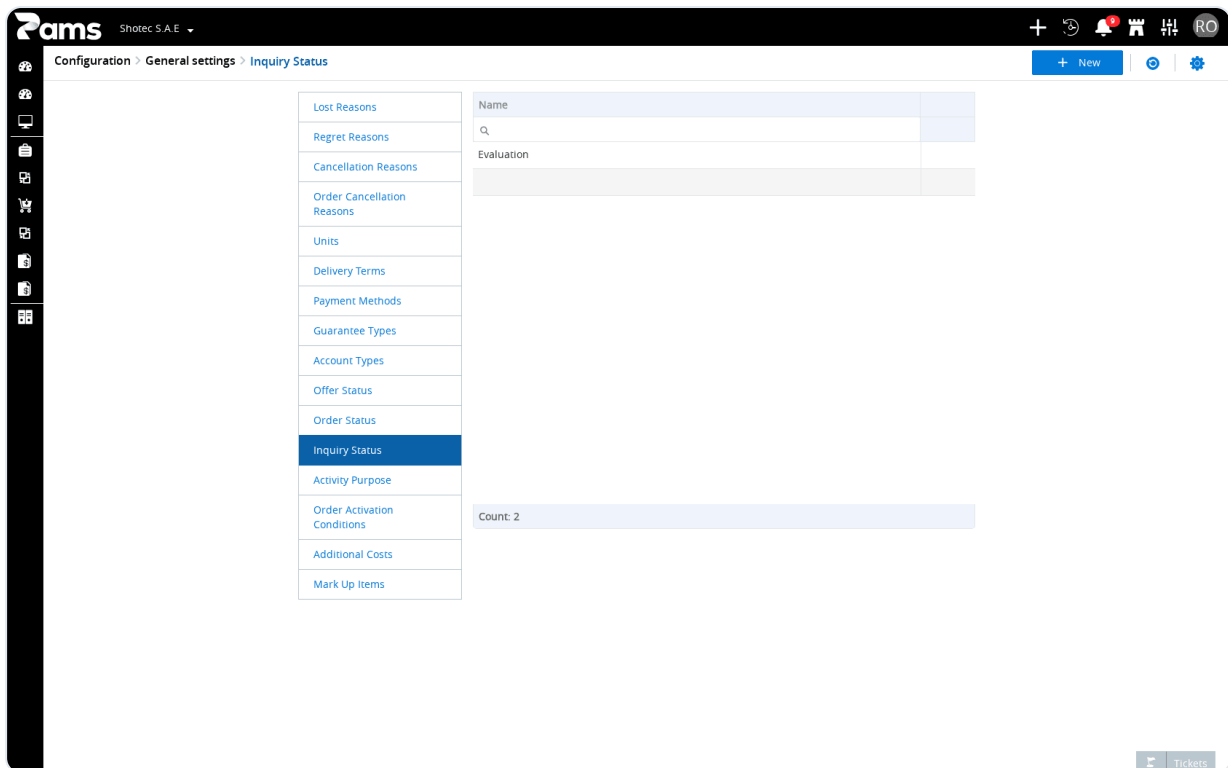
Inquiry status

Overview

An Inquiry Status is a named reference value used with sales inquiries. You maintain these

values in the sales configuration area alongside the lists used by the sales-inquiry workflow.

If you need to...	Go to
Reach the list	Find the Inquiry Status list
Check the fields and list layout	Understand the list and form
Add or change a status	Add, edit, delete, and export Inquiry Status entries
Resolve a validation or deletion message	When an Inquiry Status operation goes wrong
Continue with inquiry work	Inquiries
Review the sales flow	Sales jobs lifecycle
Maintain related inquiry configuration	Inquiry types



Before you start

Prerequisites

- You are signed in with access to the configuration area.
- The subscription feature for this configuration is available to your company.
- You know whether you are reviewing the list or maintaining a status name.
- You know that the visible columns can follow the list setup in use.

The list and its actions depend on the available subscription feature and your configuration

permissions. If the subscription feature is unavailable, the page shows the subscription upgrade

surface instead of the list. When the feature is available, the list shows the columns and actions

provided for your configuration.

Find the Inquiry Status list

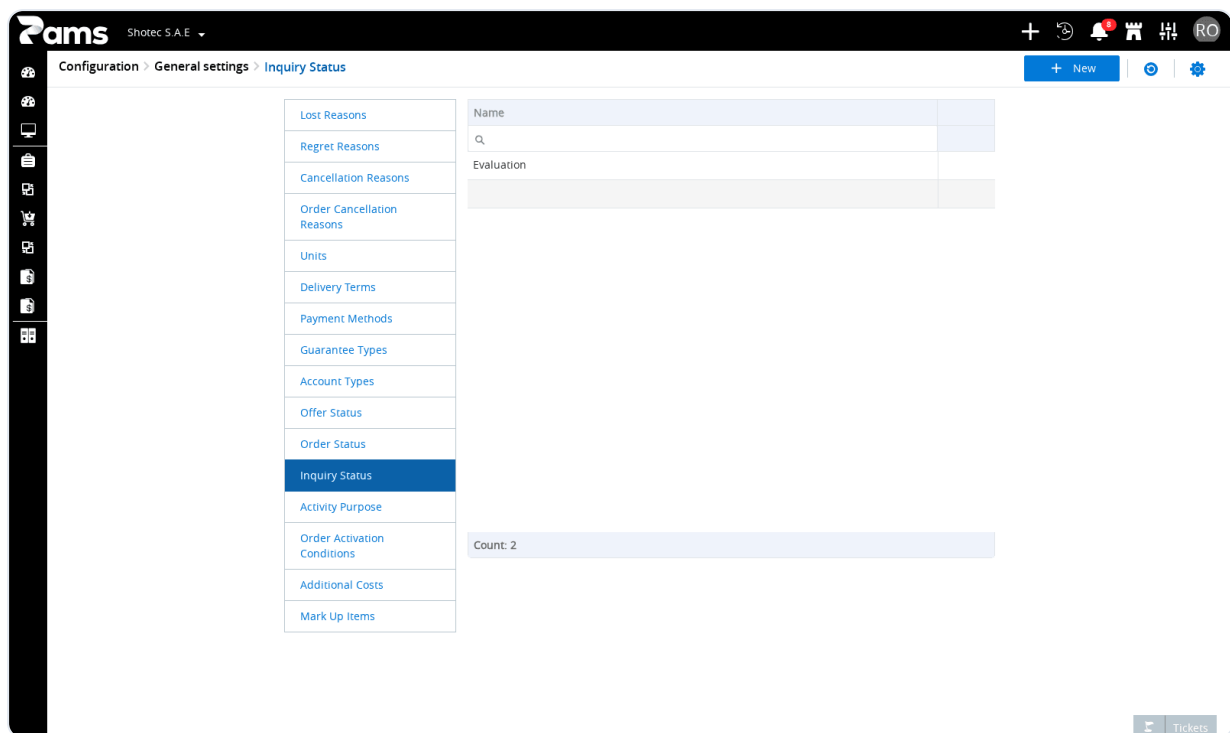
The list is in the Sales configuration area.

Prerequisites

- You are signed in.
- The configuration area is available to you.

Steps

1. Open the Sales configuration area.
2. Select **Inquiry Status**.
3. Confirm that the page heading is **Inquiry Status**.
4. Confirm that the list contains the **Name** column.



Result: The Inquiry Status list is open. The list displays the **Name** column, the **New** control, and the toolbar control titled **Refresh**.

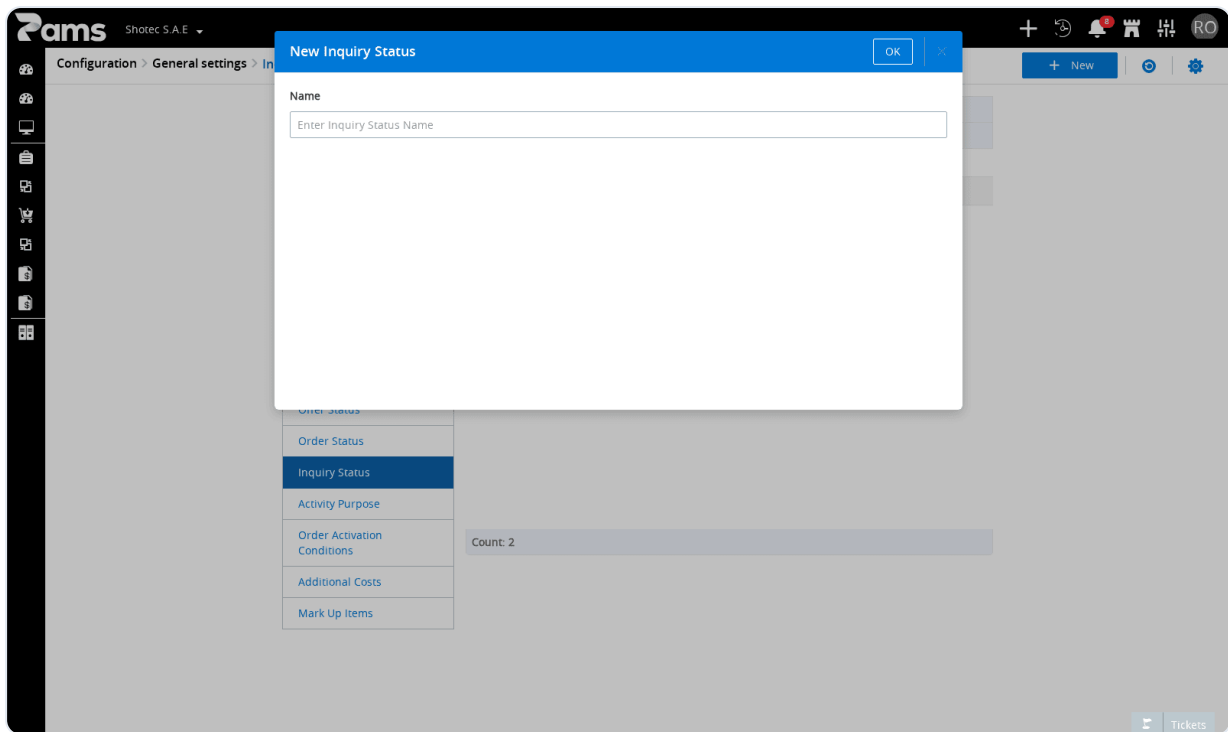
Understand the list and form

The list uses **Name** for the visible status name; the other configured fields support the record without appearing as form fields.

Area	What you see	What it means
List	Name	The visible status-name column.
New or edit form	Name	The text field used for the status name.

Area	What you see	What it means
Supporting list information	Row order	Not editable in this form.
Supporting list information	Status identity	Not editable in this form.
Supporting list information	Company association	Not editable in this form.
Form rule	Required only where your company configures it	Name can be required when your company configures it that way.
List layout	No column headers	The list shows its rows without a column-header row.
Form content	Name only	The form shows Name as its visible entry field.
Other form types	No repeatable sub-item, select box, date box, percentage, or amount field	The Inquiry Status form shows none of these additional field types.
List setup	Your list may show a different set of columns.	Review the columns displayed on your page.

Selecting **New** opens the New Inquiry Status dialog. The dialog contains one **Name** text box and **OK**. The required marker was absent in the dialog, and Add more was not present.



Add, edit, delete, and export Inquiry Status entries

You can add, change, remove, or export an Inquiry Status entry from this page.

If you need to...	Use this operation
Add a status name	Open a new form with New .
Change a saved status name	Open the row's Edit action.
Remove a saved status	Open the row's delete menu, then use Delete .
Prepare a list export	Open the export dialog with Export .

Add a status

Prerequisites

- The Inquiry Status list is open.
- The **New** control is available.

Steps

1. Select **New**.
2. In the New Inquiry Status dialog, enter the status name in **Name**.
3. Select **OK**.

For a valid new entry, the save operation adds the returned entry to the list and shows

Data saved Successfully .

Result: The new status entry appears in the Inquiry Status list.

Edit a status

Prerequisites

- The Inquiry Status list contains the status row you want to change.
- You have permission to edit the row.

Steps

1. Select the row's **Edit** action.
2. Replace the value in **Name**.
3. Select **OK**.

For a valid edit, the updated entry replaces the existing row and shows

Data updated Successfully .

Result: The changed status name appears in the list.

Delete a status

Prerequisites

- The Inquiry Status list contains the status row you want to remove.
- You have permission to delete the row.
- More than one list item remains after the deletion.

Steps

1. Open the row's delete menu.
2. Read the confirmation text, Are you sure you want to delete this item? .
3. Select **Delete**.

For a successful deletion, the row is removed and the page shows Data Deleted Successfully .

Result: The selected status no longer appears in the list.

Export the list

Prerequisites

- The Inquiry Status list is open.
- The export action is available.

Steps

1. Select **Export**.

Result: The export dialog opens for the Inquiry Status list.

Handle access and runtime branches

What appears on the page depends on your subscription, permissions, and list setup.

Condition	What appears
The subscription feature is unavailable	The subscription upgrade surface replaces the list.
The page setup hides new entries	New is hidden.
Your editing permission is unavailable	The row's Edit action is hidden.
Your deletion permission is unavailable	The row's delete menu is hidden.
Your saved list setup supplies different columns	The list follows that setup and shows the columns it provides.
You open a related reference list	That list can show fields suited to its own entries rather than the fields shown here.

The page presents the same list-and-form arrangement used by related reference lists, with the Inquiry Status fields shown here.

When an Inquiry Status operation goes wrong

Use the message on screen to identify the operation that stopped and the correction to make.

What you see	What it means	What to do
Field is required	The configured required rule has no value.	Enter a value in Name .
Name is required	The form's Name validation rule has no value.	Enter a value in Name before selecting OK .

What you see	What it means	What to do
Just ' _ ' '-' And ' . '	The value contains a character outside the accepted pattern.	Replace the disallowed character in Name .
Forbidden characters detected. Please remove them and try again.	The list filter contains a forbidden character.	Remove the forbidden character from the filter, then apply the filter again.
Related to Saved data, Can't be deleted	Related saved data prevents deletion.	Keep the status entry and review the related saved data.
Failed to Delete	The deletion request failed.	Keep the status entry and retry after checking the row and access.
Must have at least one item	The list cannot be reduced below one item.	Keep at least one status entry.

After a successful add, the page shows `Data saved Successfully` . After a successful edit, it shows `Data updated Successfully` . After a successful deletion, it shows `Data Deleted Successfully` .

Continue with related sales configuration

Inquiry Status belongs to the sales-inquiry configuration set. Continue from the work you need to do next.

If you need to...	Open
Work with sales inquiries	Inquiries
Review the complete sales flow	Sales jobs lifecycle
Maintain inquiry types	Inquiry types
Maintain offer statuses	Offer status
Maintain order statuses	Order status
Maintain lost reasons	Lost reasons
Maintain regret reasons	Regret reasons
Maintain cancellation reasons	Cancellation reasons
Maintain order-cancellation reasons	Order cancellation reasons

Result: You have a route from Inquiry Status to the sales-inquiry workflow and its related reference lists.