

Units

September 10, 2026

Units

What Units are for

A Unit is a reusable measurement name that you maintain for selection on a sales item line.

Use this page when you need to review, add, change, or remove the names available in that list.

If you need to...	Go to
Check which unit names are available	Understand the Units list
Add, change, or remove a unit name	Add, edit, and remove a unit
Check why an action is unavailable	Handle access and list variations
Resolve a save, delete, refresh, or export message	When maintenance does not work
Use a maintained unit on a sales item line	Sales job items

Before you start

Prerequisites

Have this ready	Why it matters
Access to the Units settings	New , row editing, row deletion, importing, and exporting can each be controlled separately.
The name you want to maintain	The form stores the name in Name . A blank or whitespace-only name is rejected.

The list loads all available units when you open it. Keep the name you want to enter in front of you before you start the maintenance procedure.

Find the Units list

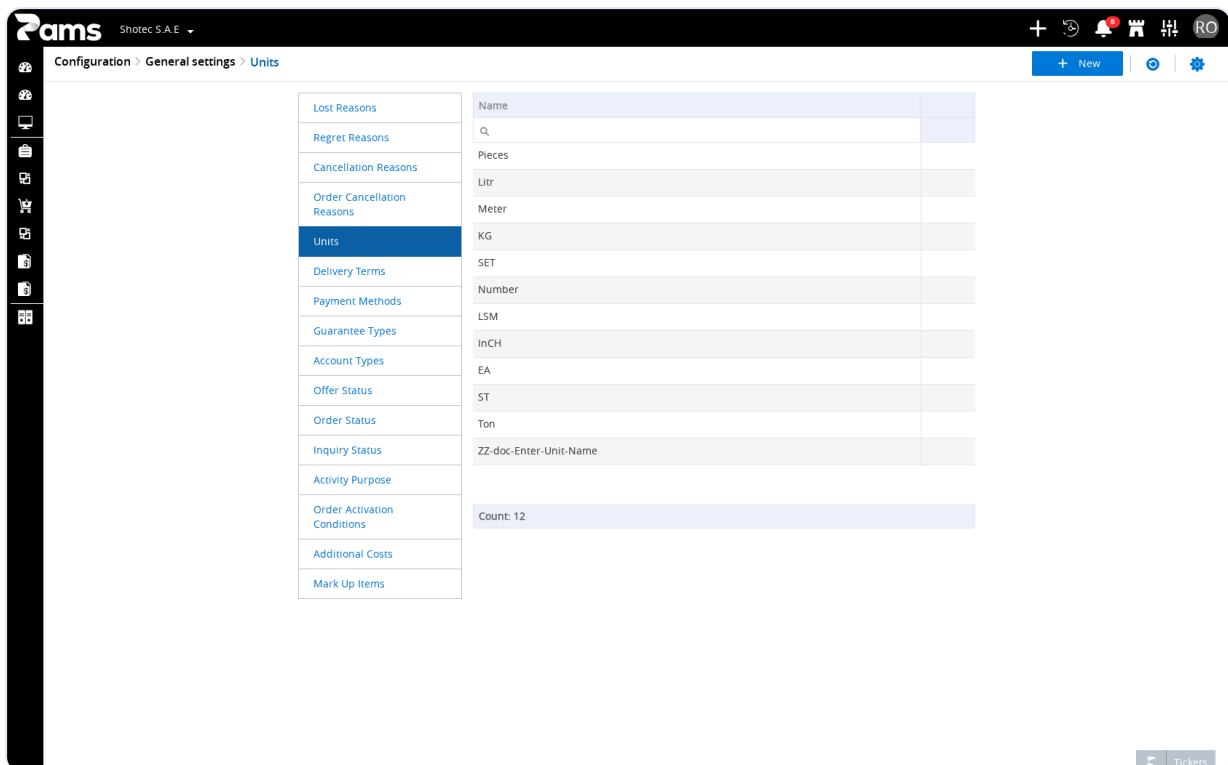
Units is listed under the configuration area for sales settings.

Prerequisites

- You have access to the configuration area.

Steps

1. Select **Configuration**.
2. Select **Sales**.
3. Select **Units**.
4. Confirm that the list contains the **Name** column.



Result: The Units list is open, with **New**, **Refresh**, and **Settings** available on the page.

Understand the Units list

The Units list is a single-column list of names. Each visible row also offers an edit action when your access allows it.

Area	What you use it for
Name	Read and filter the unit name shown in each row.
Edit action	Open a unit for editing when your access allows it.
Refresh	Refresh the list and update its refresh time.
Table Layout	Open the table-layout menu.
Settings	Open the available list settings.

The list has no visible column headings, paging, inline adding, inline editing, inline deleting, column chooser, or visible search panel. Use the visible name list and the available settings instead.

When you point to **Refresh**, the page can show `Updated around a minute ago` after one minute, or `Updated [minutes] minutes ago` after more than one minute.

When you are ready to change a name, continue to the maintenance procedure below.

Add, edit, and remove a unit

Use the procedure that matches the maintenance action you need. A new unit starts with an empty

Name field. An existing unit opens with its current name.

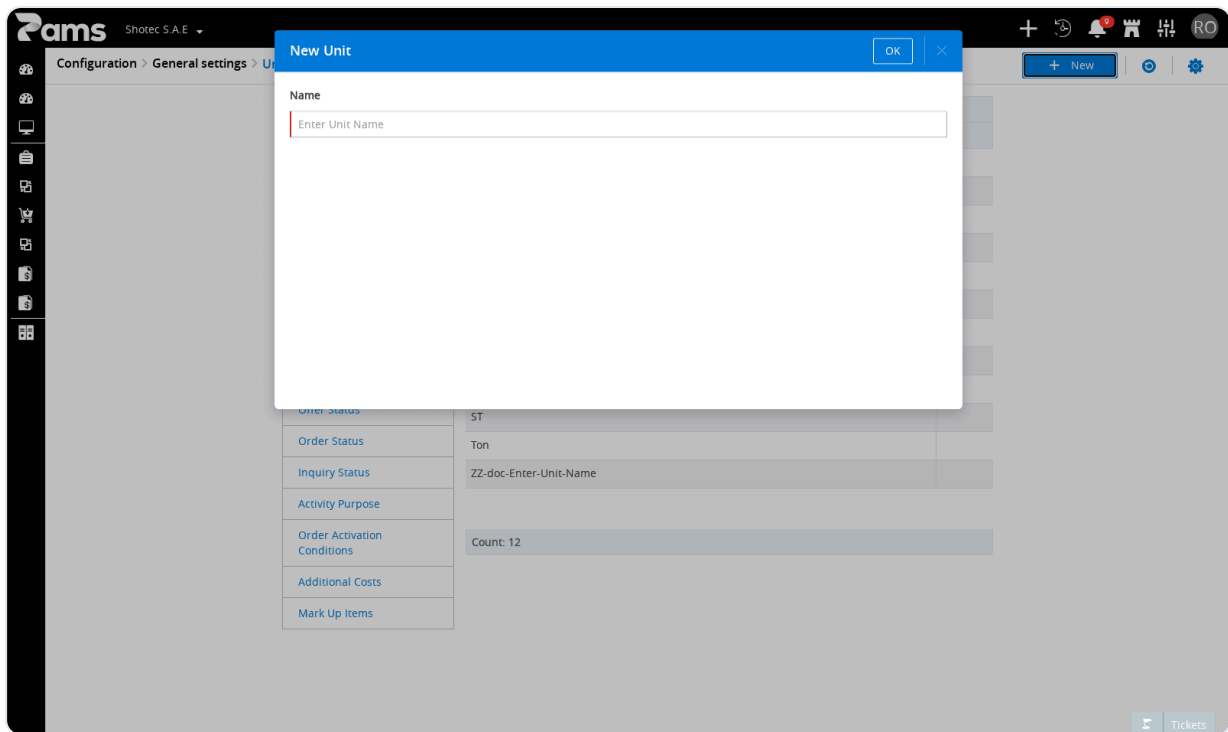
Add a unit

Prerequisites

- You are on the Units list.
- You have access to **New**.
- You have the name to enter in **Name**.

Steps

1. Select **New**.
2. Enter the name in **Name**.
3. Select **OK**.



Result: The Units list shows the new name and the message `Data saved Successfully` .

Edit a unit

Prerequisites

- You are on the Units list.
- You have access to the visible edit action.
- You have the replacement name for **Name**.

Steps

1. Select the visible edit action for the unit.
2. Replace the current value in **Name**.
3. Select **OK**.

Result: The Units list shows the edited name and the message `Data saved Successfully` .

Remove a unit

Prerequisites

- You are on the Units list.
- You have permission to delete units.

Steps

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

Result: The row is removed and the list shows `Data Deleted Successfully` .

Cancel an open unit form

Prerequisites

- The unit form is open.

Steps

1. Select **Cancel**.

Result: The unit form closes without saving the change.

Handle access and list variations

The page can show different actions according to your access. Use the action you need only when it is present.

If you can see...	Use it to...
New	Add a unit.
The visible edit action	Change a unit.
Export	Open the export choices.
Filter Row	Show or hide the grid filter row.

If **Filter Row** is available, select it to show the grid filter row. Use the row's filtering controls on the **Name** column.

Result: You use only the actions available to your access, and the list displays the filter row when you select **Filter Row**.

If a maintenance action produces a message, use the message table below to choose your next action.

When maintenance does not work

Use the message you see to choose the next action.

Message	What to do
please enter a proper unit name	Enter a non-blank value in Name , then select OK again.
Are you sure you want to delete this item?	Select Delete to remove the row, or Cancel to keep it.
Data saved Successfully	Continue with the refreshed list.
Data Deleted Successfully	Confirm that the row no longer appears in the list.
Updated around a minute ago	The refresh control has been unused for about one minute.
Updated [minutes] minutes ago	The refresh control has been unused for the displayed number of minutes.
Exporting List:	Choose the export format shown in the export modal.
Export to Excel	Continue with the Excel export action.
Export to PDF	Continue with the PDF export action.

Use the units in sales items

Sales item lines provide a **Unit** field for the measurement name associated with the item. After

you maintain the available names here, continue to [Sales job items](#) when you need to select one on a sales item line.

This reference list does not move a sales job to another stage. It keeps the available unit names

ready for the sales-item workflow.