

# Lost reasons

September 10, 2026

## Lost reasons

### Lost reasons at a glance

A lost reason is a named choice available when a sales job reaches the Lost stage. Administrators maintain this list when the choices used to describe lost sales jobs need to be added, changed, or removed.

| If you need to...                        | Go to                                                   |
|------------------------------------------|---------------------------------------------------------|
| See the choices currently available      | <a href="#">Find the Lost reasons list</a>              |
| Check the list and its fields            | <a href="#">Understand the list and entry form</a>      |
| Add, update, remove, or export a choice  | <a href="#">Add, update, remove, or export a reason</a> |
| Resolve a validation or deletion problem | <a href="#">When maintenance does not work</a>          |
| Maintain regret choices                  | <a href="#">Regret reasons</a>                          |
| Maintain cancellation choices            | <a href="#">Cancellation reasons</a>                    |
| Maintain order-cancellation choices      | <a href="#">Order cancellation reasons</a>              |

### Before you start

The Lost reasons page uses the shared configuration list, so subscription access, permissions, and company setup determine which maintenance controls you can use.

#### Prerequisites

- Have access to the Sales configuration area.
- Know that the list is filtered for the Lost sales-job stage and reason type.

The list is available when the subscription branch does not replace it with an upgrade surface.

**New** appears when new-item creation is available; the edit and delete controls appear only

when your permissions allow them. The page receives the Lost-stage and reason-type filters as

part of its route configuration.

[!NOTE]

Work from the headers visible in your list because company setup can change which columns appear.

## Find the Lost reasons list

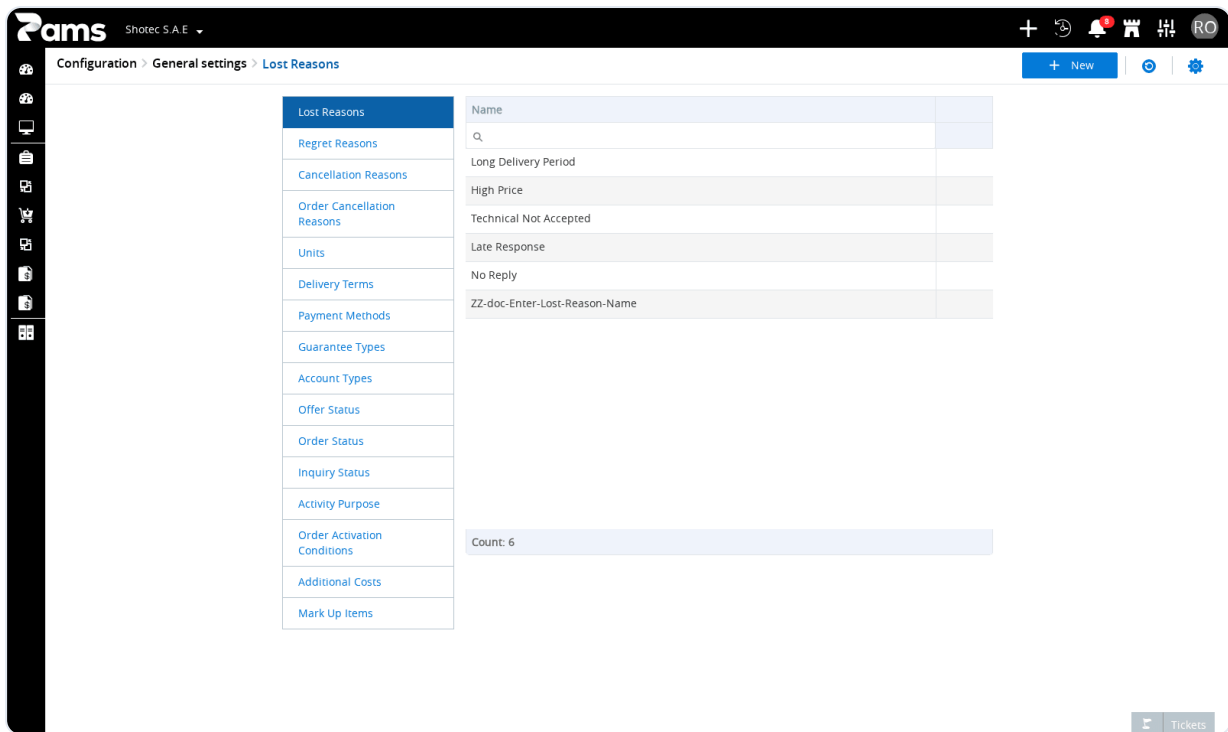
Review or maintain the choices used for lost sales jobs.

Prerequisites

- Have access to the Sales configuration area.

Steps

1. Open the Sales configuration area.
2. Select **Lost Reasons**.
3. Confirm that the page heading is **Lost Reasons**.
4. Confirm that the list header is **Name**.
5. Confirm that the visible sibling tabs include **Regret Reasons**, **Cancellation Reasons**, and **Order Cancellation Reasons**.



**Result:** The Lost reasons list is open, with the choices displayed under **Name**.

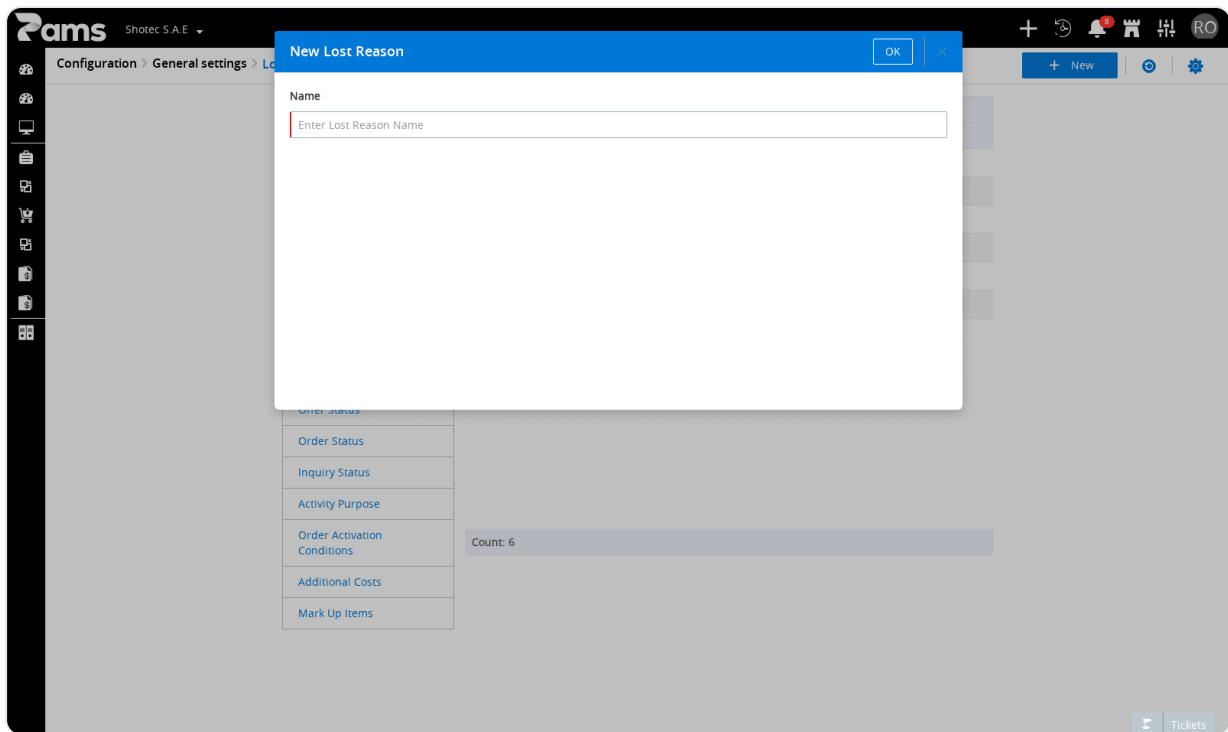
## Understand the list and entry form

The list currently shows one column, **Name**, and the entry form shows **Name** with a required

marker. Other fields are handled automatically and are not fields you enter:

| Field | What you use it for                                       |
|-------|-----------------------------------------------------------|
| Name  | Enter the wording that users choose for a lost sales job. |

The shared toolbar also exposes icon-only **Refresh** and **Settings** buttons. Selecting **New** opens the New Lost Reason dialog. The dialog contains the required **Name** field and an **OK** button.



## Add, update, remove, or export a reason

### Prerequisites

- The Lost reasons list is open.
- You know the wording that users must choose when recording a lost sales job.

### Steps

1. Choose the action that matches your task.

| If you need to...           | Select                                           |
|-----------------------------|--------------------------------------------------|
| Add a new choice            | Select <b>New</b> .                              |
| Change an existing choice   | Select the row's edit action.                    |
| Remove an existing choice   | Select the row's delete control.                 |
| Prepare the list for export | Select <b>Export</b> to open the export options. |

2. If you selected **New**, enter the choice in **Name**.
3. If you selected **New** or the row's edit action, select **OK**.
4. If you selected the row's delete control, read **Are you sure you want to delete this item?**.
5. If the confirmation is displayed, select **Delete**.

After adding a choice, the page reports `Data saved Successfully` . After updating a choice, it reports `Data updated Successfully` . After removing a choice, it reports `Data Deleted Successfully` .

**Result:** The list remains open with the maintained choice, or the export options are open.

## Handle access and list variations

The sibling reason lists are separate choices for related sales-job outcomes, while this page remains focused on Lost reasons.

| If you need to...                    | Use this list                              |
|--------------------------------------|--------------------------------------------|
| Record why a sales job was regretted | <a href="#">Regret reasons</a>             |
| Record why a sales job was cancelled | <a href="#">Cancellation reasons</a>       |
| Record why an order was cancelled    | <a href="#">Order cancellation reasons</a> |

The page can show different maintenance controls according to subscription and permissions.

The list headers also depend on company setup; work from the headers visible on your screen.

## When maintenance does not work

Use the message on screen to choose the next action.

| Message                                                          | What to do                                                                                  |
|------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| Forbidden characters detected. Please remove them and try again. | Remove the forbidden characters from the filter, then retry the action.                     |
| Related to Saved data, Can't be deleted                          | Keep the entry and review the saved data that uses it.                                      |
| Failed to Delete                                                 | Retry the delete action or ask an administrator with the required permission to perform it. |
| Must have at least one item                                      | Keep at least one choice in the list.                                                       |

## Continue after maintaining lost reasons

Lost reasons support the Lost stage of the sales-job lifecycle. After maintaining the choices, use the sales-job lifecycle page to follow how a sales job moves through its stages. Use the sibling lists when the outcome is regret or cancellation rather than loss.

The maintenance action changes the choices available for the Lost outcome; the sales-job lifecycle remains the place to follow a job's stage.