

Margin items

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Margin items

Margin items at a glance

A margin item is a named percentage definition that you maintain for sales margin calculations. The Margin items page is the reference configuration for these definitions, and it shares its configuration screen with other lists while you work only with this tab.

If you need to...	Go to
Check the fields and list layout	Understand the list and form
Add, edit, or delete a definition	Add, edit, and delete a margin item
Resolve an access or validation message	Handle access and validation branches
Maintain additional cost definitions	Cost items

Before you start

The configuration feature must be available for the grid to appear. Your access also determines whether **New**, row editing, and row deletion are available. The list columns come from the configuration used by your system, so work from the headers displayed in your list.

Use the checks below before you choose an action.

Check	What you need to see
Configuration access	The Margin items grid appears rather than the upgrade surface.
Add access	New appears above the list.
Edit access	Select a row to edit it.
Delete access	The row delete menu is available.

Find Margin items

Open the Margin items page to maintain these definitions.

Open the list or a new item

Prerequisites

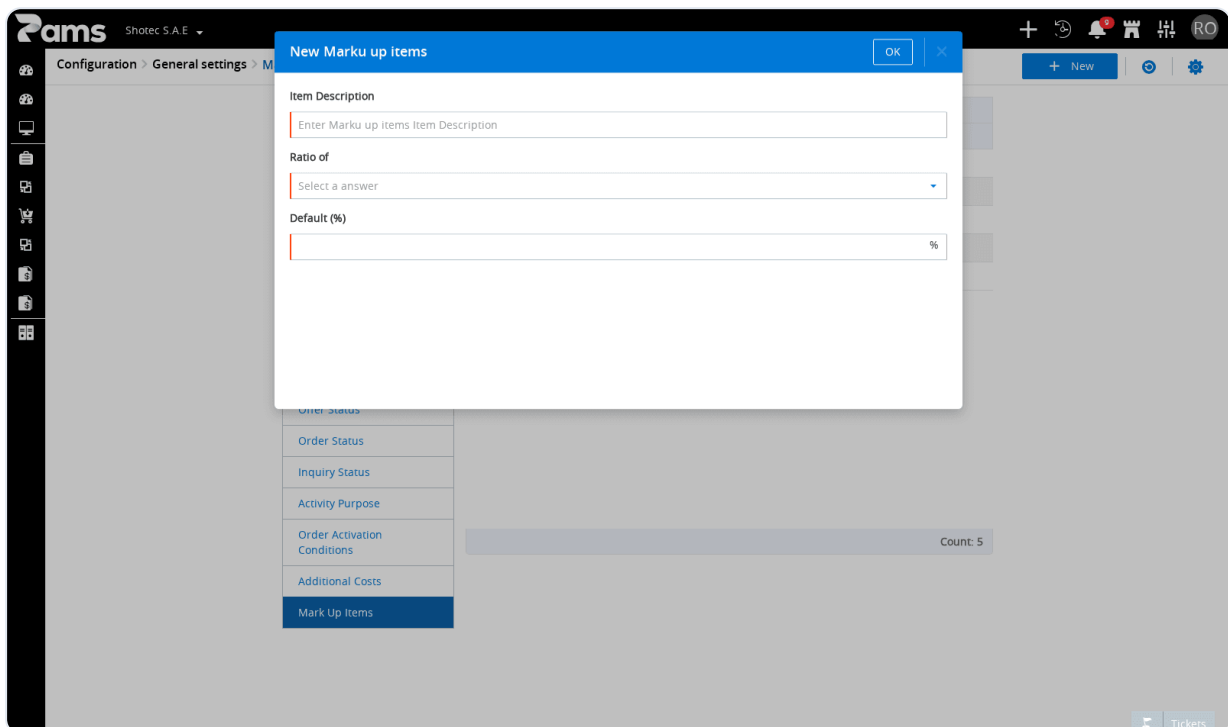
- You have opened the Margin items configuration page.
- The Margin items list is visible.

Steps

1. Choose the route that matches your task.

If you need to...	Action
Review or change an existing definition	Select its row.
Add a definition	Select New above the list.

The successful new-item view opens the New Marku up items dialog with **Item Description**, **Ratio of**, **Default (%)**, and **OK**.



Result: The list or the new-item dialog is open for the task you chose.

Understand the list and form

The list identifies each definition with its description, ratio basis, and default percentage.

The form uses the same three reader-facing labels.

List fields

Field	Form control	Required	List use
Item Description	Text box	Required	Visible and filterable.
Ratio of	Select box	Required	The displayed name is visible; its numeric value is hidden.
Default (%)	Percentage number box	Required	Visible and filterable.

The configuration also carries hidden ordering, record-identity, and company values.

They do

not appear as fields for you to enter.

The list has no column headers, paging, or header filtering. Its built-in grid editing, adding, and deleting modes are off; use the page actions instead. Rows can be reordered by dragging when editing is allowed.

Add, edit, and delete a margin item

Use these procedures to maintain one definition at a time. Enter a description, choose the

ratio basis, and enter a percentage that follows the field rules before selecting **OK**.

Prerequisites

- The Margin items list is open.
- You know the description, ratio basis, and percentage to enter.

Add or edit a definition

Steps

1. Select **New** to add a definition, or select its row to edit it.
2. Enter the definition name in **Item Description**.

3. Select the basis in **Ratio of**.
4. Enter a percentage from 0 through 100 in **Default (%)**.
5. Select **OK** to commit the new or edited definition.

Result: The definition is committed and the list is ready for review.

Close without saving

Steps

1. Select **Cancel**.

Result: The form closes without saving.

Delete a definition

Steps

1. Open the row delete menu.
2. Select **Delete**.

Result: The definition is removed from the list when deletion succeeds.

Handle access and validation branches

The page changes what you can select according to configuration access and the state of the list. The messages below are the messages associated with the fields and record actions.

What you see	What to do
Item Description is required	Enter a value in Item Description .
Ratio of is required	Choose a value in Ratio of .
Default (%) is required	Enter a value in Default (%) .
Range restricted from 0 - 100 %	Enter a percentage from 0 through 100 in Default (%) .
Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters and select OK again.
Must have at least one item	Keep at least one definition in the list.
Related to Saved data, Can't be deleted	Keep the definition because saved data refers to it.

What you see	What to do
Failed to Delete	Return to the list and retry the delete action.
Data saved Successfully	Continue from the list after adding a definition.
Data updated Successfully	Continue from the list after editing a definition.
Data Deleted Successfully	Continue from the list after deleting a definition.

The grid appears when the configuration feature is included; otherwise the upgrade surface

appears. **New** is shown when the add action is available. Selecting a row for editing requires edit access, and the delete menu requires delete access.

After maintaining the list

After you select **Cancel**, the form closes and the list is the next place to review the definitions. After **OK** or **Delete**, continue working from the list and confirm the definition shown there before using it in later sales work.

The same configuration screen also contains import and export messages, but those flows belong to their owning configuration pages rather than this Margin items reference.

Shared flow	Message
Import	Import inserted successfully ; Data Importing completed
Export	Export to Excel

Result: The Margin items list is ready for the next definition you need to maintain.