

Order status

September 11, 2026

Order status

An order status is a named value that describes accepted work before delivery. The sales flow places

Orders before Delivered; this list keeps the names used to describe that progress consistent.

If you need to...	Go to
Maintain a status name	Before you start , then Add, edit, and remove a status value
Reach the list	Find the Order status list
Understand the fields	Understand the list and its fields
Export the list	Export the list
Resolve a maintenance message	When maintenance does not work
Work with accepted orders	Orders
Follow orders toward delivery	From orders to delivered
Compare earlier sales statuses	Offer status or Inquiry status

Before you start

The Order status list is a configuration reference list. Access requires sign-in, an included

configuration subscription, and the permission that controls the action you want to take.

Prerequisites

Check	What must be true
Access	You are signed in.
Subscription	The configuration subscription is included.

Check	What must be true
Add	New is available when the subscription is included, the button is not hidden, and new-item access allows it.
Edit	The row edit action is available when edit access is allowed.
Delete	Delete access is allowed and the list contains more than one item.

Find the Order status list

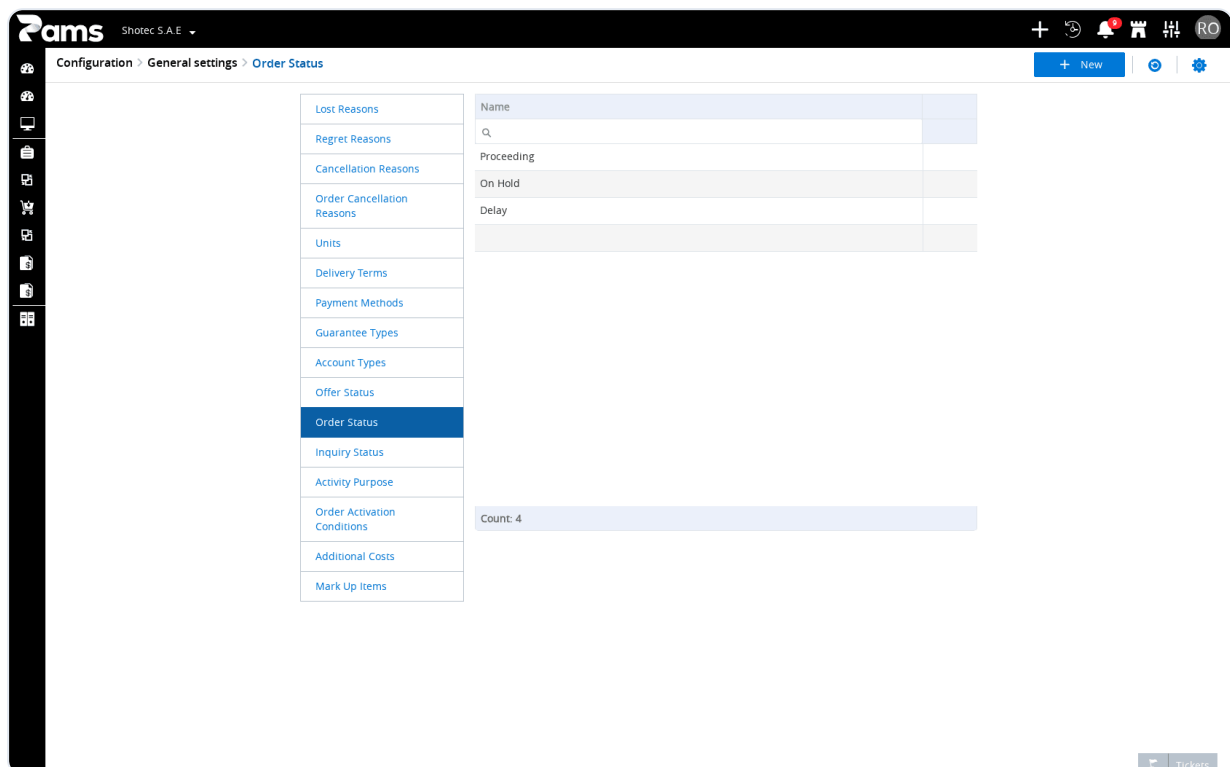
The **Order Status** list is available in the configuration area.

Prerequisites

- You are signed in and have configuration access.

Steps

1. Open the configuration area.
2. Select **Order Status**.
3. Check for the page title **Order Status**.
4. Check the available actions: **New**, **Refresh**, and **Settings**.



Result: The **Order Status** list is open.

Understand the list and its fields

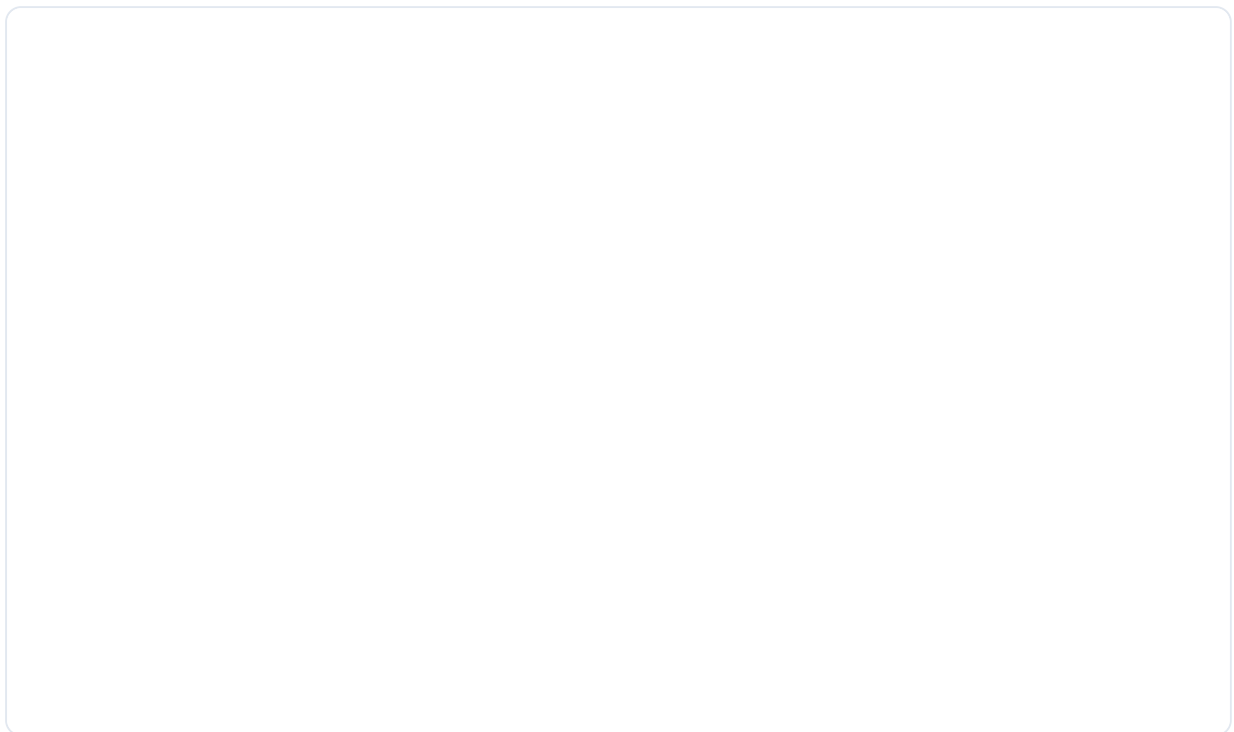
The list displays the status name in the **Name** column.

The configuration also carries hidden ordering, identifier, and company fields.

Field	Type	How it is used
Name	string	The visible status name and the form field for the status name.
DisplayOrder	numeric	Hidden from the list and used for ordering.
OrderStatusID	numeric	Hidden identifier field.
CompanyID	numeric	Hidden grid field.

The configuration marks **Name** as required. The list uses the item form for field editing. Paging is disabled, column headers are disabled by the settings, and column reordering is enabled.

Use the visible headers to identify the columns in the list.



Add, edit, and remove a status value

A status value is the name colleagues use to describe where accepted order work stands. Choose a distinct name that matches the terminology your company uses.

Add or edit a value

Prerequisites

- The Order status list is open.
- You have the permission required for the action.

Steps

1. Choose the action that matches your task:

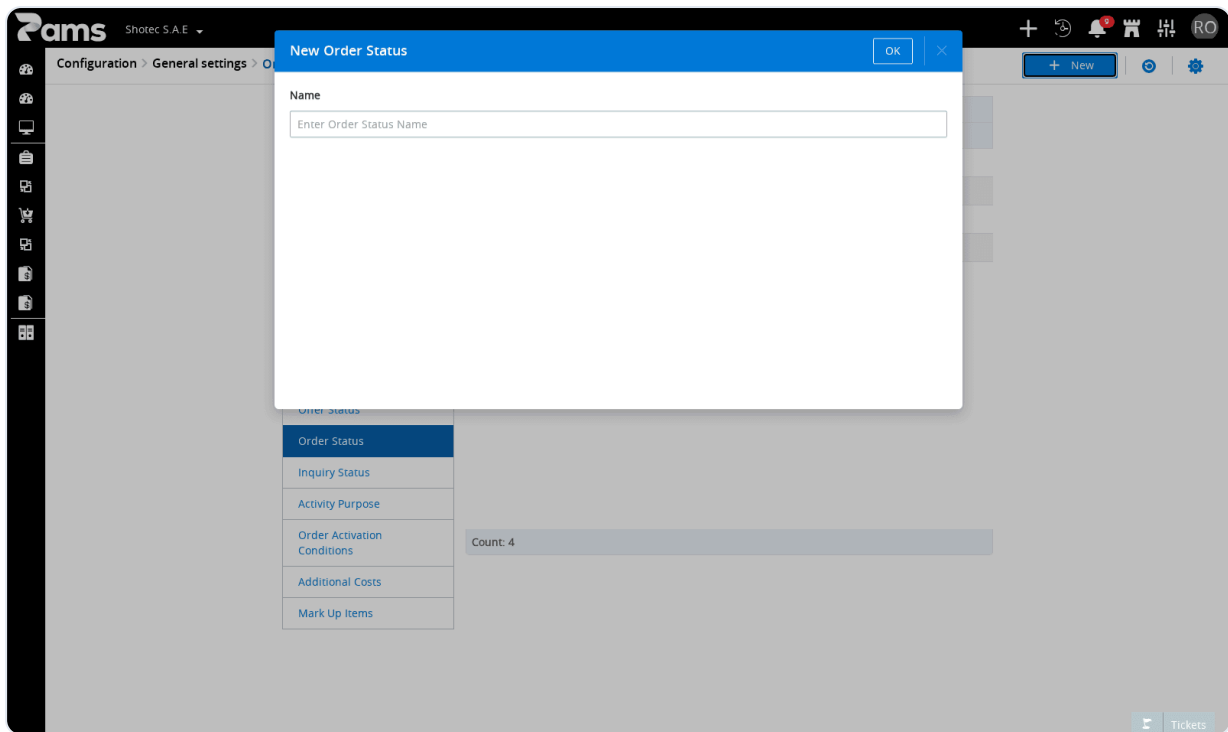
If you need to...	Do this
Add a value	Select New .
Edit a value	Select the row edit action.

2. Enter or change the status name:

If you need to...	Do this
Enter a new value	Enter the status name in Name .
Change a value	Replace the existing value in Name .

3. Choose the completion action that matches your task:

If you need to...	Do this
Leave without saving	Select Cancel .
Commit the shared popup form	Select Save .
Use the dialog's available confirmation	Select OK .



Result: The dialog remains available for its next action, or it closes when you select **Cancel**.

Remove a value

Prerequisites

- The list contains more than one item.
- Delete access is available.

Steps

1. Open the selected row's delete menu.
2. Read `Are you sure you want to delete this item?` .
3. Choose the action that matches your task:

If you need to...	Do this
Remove the value	Select Delete .
Keep the value	Select Cancel .

Result: The delete menu closes without deletion when you select **Cancel**. A successful deletion removes the selected value from the list.

Export the list

Export is a list operation. It is separate from adding, editing, or deleting a status value.

Prerequisites

- The Order status list is open.
- Export access is available.

Steps

1. Open the list export action from the page action area.
2. Choose an export option in the export dialog.
3. Select **Export** to confirm the export.

Result: The export request is confirmed from the export dialog.

When maintenance does not work

Use the message on screen to choose the next action.

Message	What to do
Field is required	Enter a value in Name before committing the form.
Are you sure you want to delete this item?	Select Delete only when the selected value is the one you intend to remove; otherwise select Cancel .
Data saved Successfully	Review the new value in the list.
Data updated Successfully	Review the changed value in the list.
Data Deleted Successfully	Review the remaining list.
Must have at least one item	Keep at least one value in the list.
Related to Saved data, Can't be deleted	Keep the value and review the saved data that refers to it.
Failed to Delete	Check the selected row and delete access before trying again.
Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters and try again.

Continue with related sales settings

Order status configuration names the values used by order work. Operational order work is in

[Orders](#), and the continuation toward delivery is in [From orders to delivered](#).

Continue with...	Open
Earlier sales-stage status values	Offer status or Inquiry status
The order workflow	Orders