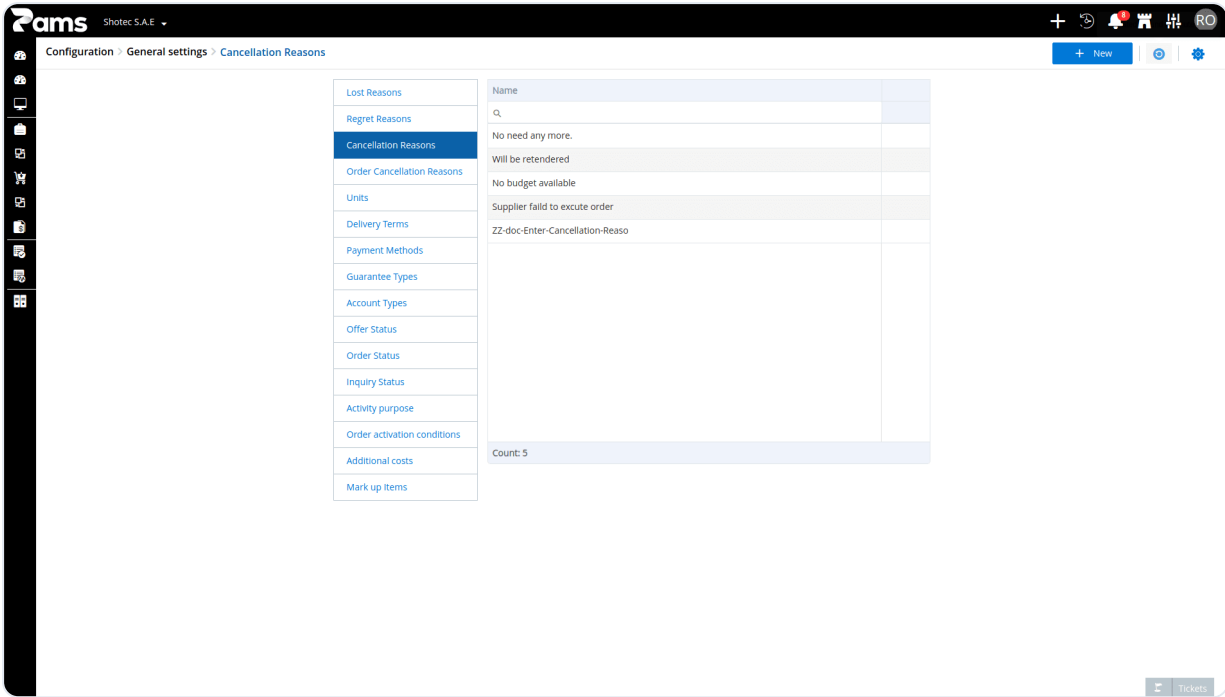


Configure Cancellation Reasons

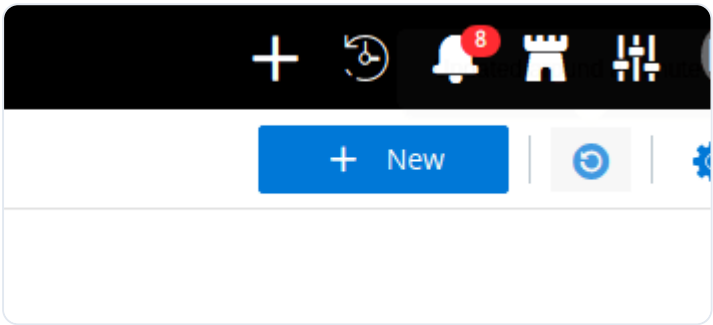
August 18, 2026

Configure Cancellation Reasons

Administrator Guide › Configuration › General Settings



Cancellation Reasons — Configurations › General Settings › Cancellation Reasons



Overview

Cancellation Reasons provides the configuration area for maintaining the reasons used when business records are cancelled. Administrators use this area to begin maintaining cancellation reason entries and to access the related Lost Reasons and Regret Reasons configurations.

In the operational lifecycle, a job progresses through Offer, Order, and Delivered. An Offer must progress through Draft, Awaiting approval, Approved, Valid, and Ordered before the job can progress to Order. An Order must progress through Draft, Awaiting approval, Approved, Awaiting activation, Valid, Ready for shipment, and Delivered before it reaches Delivered.

Before you start

- Sign in to the application before accessing Cancellation Reasons.
- Ensure that you are configuring the appropriate reason category:
 - Use Cancellation Reasons for cancellation-related entries.
 - Use **Lost Reasons** for lost-offer reason entries.
 - Use **Regret Reasons** for regretted-offer reason entries.

Steps

1. Navigate to **Configurations > General Settings > Cancellation Reasons**.
2. Review the existing cancellation reason entries in the Cancellation Reasons list.
The list contains reason descriptions used to distinguish why a business record was cancelled.
3. To begin configuring an additional cancellation reason, select **New**.
4. To configure a reason for a different outcome category, select the appropriate configuration area:
 - Select **Lost Reasons** to work with reasons associated with lost outcomes.
 - Select **Regret Reasons** to work with reasons associated with regretted outcomes.
5. Return to **Cancellation Reasons** when the cancellation-related reason configuration is required.

Tips & cautions

Note: A job can be cancelled before it reaches Offer, at the Offer stage, or at the Order stage. When cancelling an Offer by using Cancel items or Cancel single offer, there must be no active sales after the Offer stage.

Warning: Delivered records cannot be un-delivered when a due invoice already exists. Orders with binding invoices cannot be reverted. Items marked Ready for Shipment or Delivered cannot be deleted.

Tip: An Offer that has been cancelled can be considered active again by using **Offer Considered As Not Cancelled** where that control is available. A rejected Order can be returned by using **Consider Offer as Not Rejected** or **Back to Offer**, where applicable.

Troubleshooting

Symptom	Likely cause	Fix
Cancellation Reasons is not available.	The user is not signed in.	Sign in and navigate to Configurations > General Settings > Cancellation Reasons .
The required reason category is not displayed in Cancellation Reasons.	The reason belongs to a lost or regretted outcome rather than a cancellation outcome.	Select Lost Reasons or Regret Reasons and configure the appropriate category.
An operational record cannot be reversed after cancellation or delivery.	The record has progressed to a restricted state, such as Delivered, or has related invoices.	Review the record status and related invoices before attempting a reversal.

Result

The Cancellation Reasons configuration area is available for maintaining cancellation-related reason entries and accessing related reason categories.

Related pages

- [Configure Activity Purpose](#)
- [Configure Cost Items](#)

- **Configuration — Learning Path**

- [Configure Account Types](#)
- [Configure Delivery Terms](#)
- [Configure Guarantee Types](#)
- [Configure Inquiry Status](#)
- [Configure Lost Reasons](#)
- [Configure Margin Items](#)
- [Configure 2 Factor Authentication](#)
- [Configure Account Managers](#)
- [Configure Attachment Categories](#)
- [Configure Branches](#)
- [Configure Flags](#)
- [Configure Frequent Currencies](#)