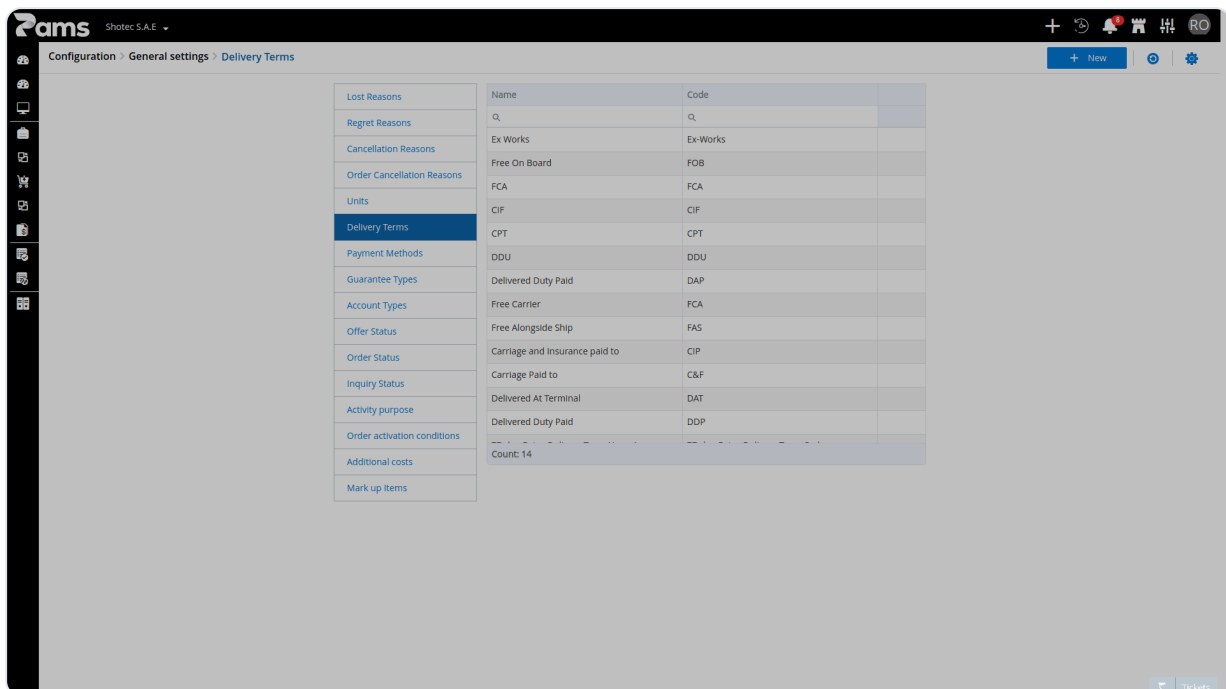


Configure Delivery Terms

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Configure Delivery Terms

Administrator Guide > Configuration > General Settings*Delivery Terms — Configurations > General Settings > Delivery Terms*

Overview

Use the **Delivery Terms** configuration page to maintain the list of delivery terms identified by **Name** and **Code**. Administrators use this page when delivery terms must be added or reviewed in General Settings. Examples shown in the list include terms such as Ex Works and Free On Board.

Before you start

- Sign in to the application before opening the configuration page.
- Ensure that you have access to **Configurations** and **General Settings**.

Steps

1. Open **Configurations > General Settings > Delivery Terms**.
2. Review the existing delivery-term records in the list. Use the **Name** column to identify the delivery term and the **Code** column to identify its associated code.
3. Select **New** to begin creating a delivery-term record.
4. Enter the required delivery-term information in the record form, following the field validation displayed by the application. Where a code-format validation is shown, use only the permitted characters.
5. Complete the new record according to the available form actions and return to the **Delivery Terms** list to verify that the delivery term is available for selection.

Tips & cautions

Note: The application requires a signed-in user to access this configuration.

Warning: Complete all required fields before attempting to finalize a delivery-term record.

Tip: Use consistent names and codes so that delivery terms can be identified clearly in the list.

Troubleshooting

- Cannot open **Delivery Terms** → The user is not signed in or does not have access to the configuration area → Sign in and open **Configurations > General Settings > Delivery Terms**.
- A delivery-term record cannot be completed → One or more required fields have not been completed → Enter values for all fields marked as required.
- A code value is rejected → The code does not meet the permitted character format → Enter the code using only the characters accepted by the validation message.

Result

The **Delivery Terms** configuration list is available for reviewing and creating delivery-term records.

Related pages

- [Configure Cost Items](#)
- [Configure Guarantee Types](#)
- **Configuration — Learning Path**
- [Configure Account Types](#)
- [Configure Activity Purpose](#)
- [Configure Cancellation Reasons](#)
- [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](#)