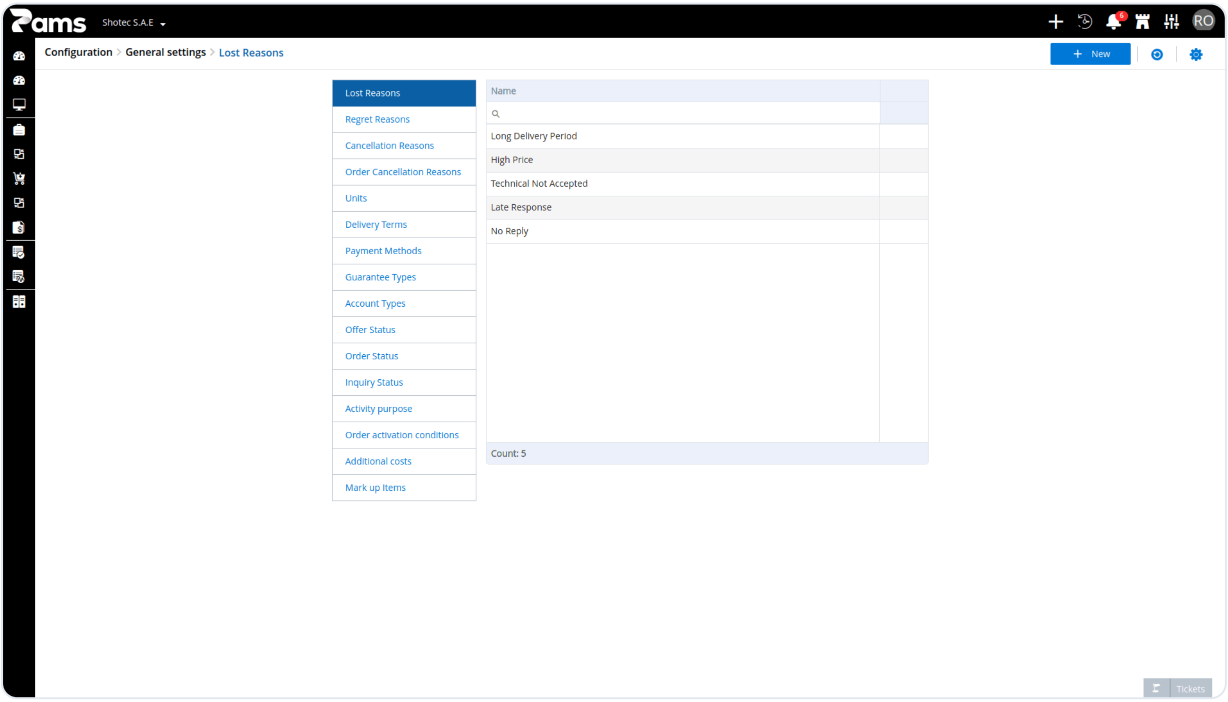
Lost Reasons

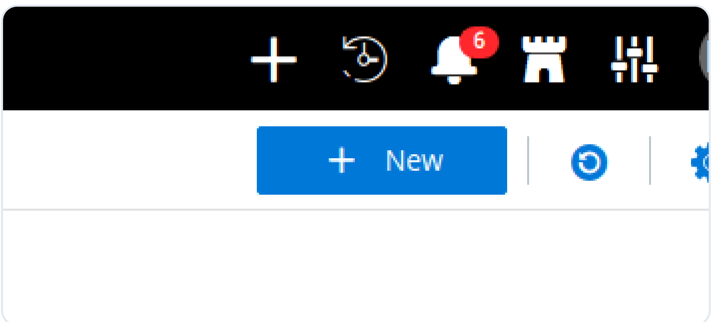
July 29, 2026

Lost Reasons

Applications › Configurations › General Settings



General settings — Configurations › General Settings › Lost Reasons



Overview

Lost Reasons are the reason records used to classify why a sales opportunity or commercial request was not successful. Sales representatives, account managers, project managers, and purchasing officers use these records to apply consistent wording when reviewing unsuccessful business outcomes. Maintain the list in General Settings so that reporting and follow-up discussions use clear, repeatable reasons.

Settings

Open **Configurations** > **General Settings** > **Lost Reasons** to review and maintain the available reason records. The page includes the **regret reasons** tab, where the reason list is displayed.

Use a short, distinct reason name for each business outcome that your team needs to identify. For example, reasons may distinguish a commercial issue, a delivery issue, or a technical acceptance issue. Avoid creating multiple records that describe the same outcome in different words.

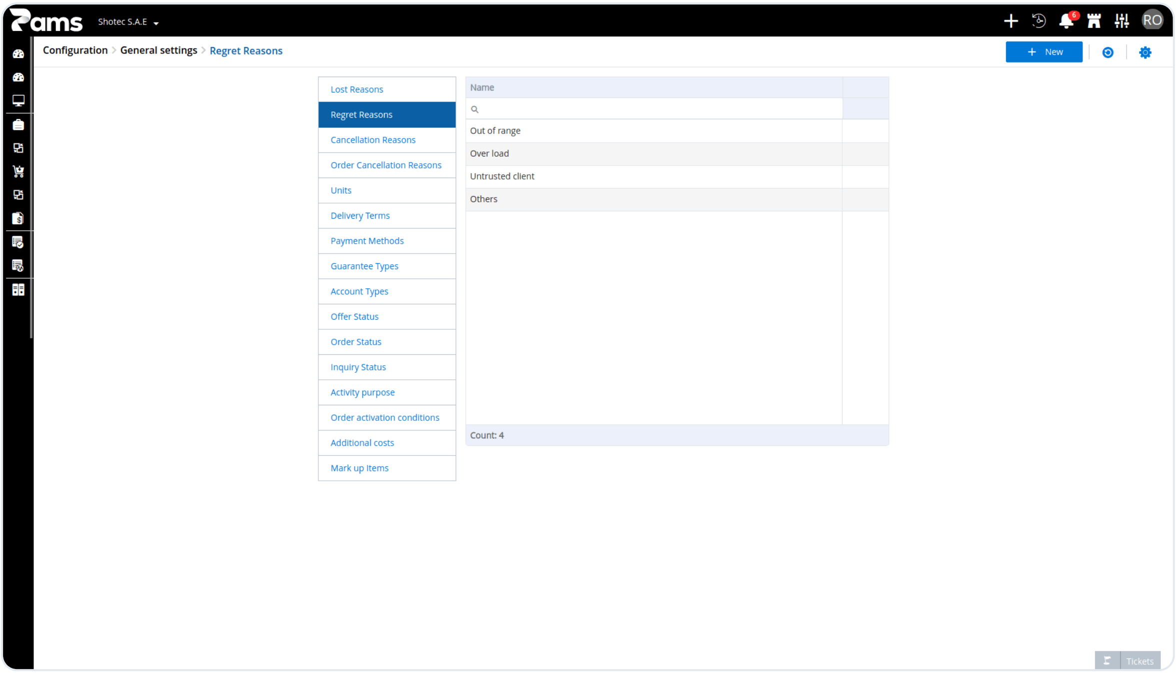
> **Note:** The available screen does not provide separate categories, status values, or mandatory fields for Lost Reasons. Maintain the reason records themselves as the configuration.

To find an existing reason before creating another one, use **Search** and then select **Apply filter**.

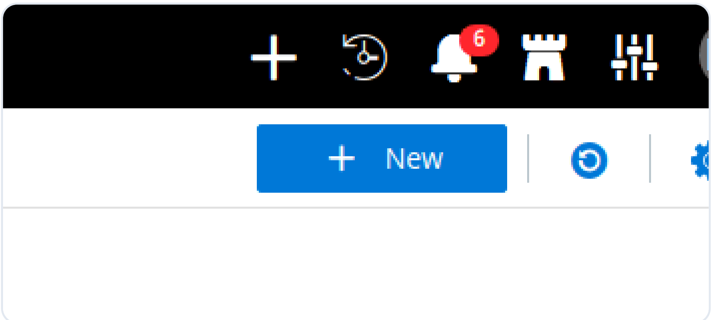
Workflow

1. Open **Configurations** > **General Settings** > **Lost Reasons**.

   Decide whether you need to review an existing reason, create a new reason, or export the current list for review.



General settings — Configurations › General Settings › Lost Reasons



2. To review or locate a reason, enter relevant text in **Search** and select **Apply filter**.

   Review the displayed reason records before making changes. This helps you determine whether an appropriate reason already exists.

   > **Tip:** Search first to reduce duplicate reason records. A single, agreed reason name makes later analysis more consistent.

3. If the required reason is not available, select **New**.

   Enter the information requested in the new record window. When you are satisfied with the entry, select **Ok** to confirm it. Select **Cancel** instead if you decide not to create the record.

4. If you need to add supporting material to the reason record, use **Attach** and select the relevant file from **files[]**.

Attach only material that is relevant to the reason record and appropriate for users who can access General Settings.

5. When you need to review the list outside the application, select **Export**.

   Apply a search filter first if you need an export containing only a specific group of reasons. The export reflects the records currently available from the page.

Regret Reasons

The **regret reasons** tab contains the configured reason records used to describe unsuccessful outcomes. Use this tab to review the available reasons, search for a particular entry, and create a new entry where the existing list does not cover the required business situation.

The screen shows reason records rather than a separate approval or completion stage. No control is provided in the available screen data to move records into or out of this tab.

Examples

A sales representative is reviewing a lost sales request where the customer chose another supplier because the proposed price was not competitive.

1. The representative opens **Configurations** > **General Settings** > **Lost Reasons**.
2. They enter `price` in **Search** and select **Apply filter** to check whether a suitable commercial reason already exists.
3. A matching reason is available, so they do not create a duplicate record.
4. If no suitable reason had been available, they would select **New**, enter a concise reason such as `Price not competitive`, and select **Ok**.
5. The team can later select **Export** when they need to review the maintained reason list as part of commercial performance analysis.

Tips

> **Tip:** Use concise reason names that identify one primary cause. This makes the list easier to search and review.

> **Warning:** Do not create near-duplicate records for the same outcome. For example, different wording for the same pricing issue can make the reason list

> harder to use consistently.

> **Note:** Use **Cancel** when a new reason should not be retained. Select **Ok** only after confirming that the reason is necessary and clearly named.

Troubleshooting

Symptom	Likely cause	Fix
The required reason does not appear in the list.	The list is filtered by the current search criteria.	Clear or revise **Search**, then select **Apply filter** again.
A similar reason already exists.	The reason list contains an existing record with comparable wording.	Use the existing record where it accurately represents the outcome; create a new record only when the business reason is materially different.
A new reason was not retained.	The new record was cancelled or not confirmed.	Create the record again using **New** and select **Ok** after entering the required information.
The exported list contains more or fewer records than expected.	The current search filter affects the displayed records being reviewed.	Check **Search**, select **Apply filter**, and then select **Export** again.

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- Order Cancellation Reasons
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