Configurations — Learning Path

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Learning Paths › Configurations

This path is for configuration administrators who maintain the reference data used in sales processes. You will learn to locate and manage account types, offer statuses, and order cancellation reasons using the General Settings configuration screens and their available search, filter, create, update, confirm, and cancel controls.

Learning objectives

- By the end of this path you can locate the correct General Settings reference list for an account-type, offer-status, or order-cancellation scenario.
- By the end of this path you can search and filter account types before deciding whether to add an entry.
- By the end of this path you can create an account type using the available confirmation and cancellation controls.
- By the end of this path you can find, add, and update offer-status reference entries.
- By the end of this path you can maintain order cancellation reasons while avoiding unnecessary duplicate entries.

Prerequisites

- Access to **Configurations** and the relevant **General Settings** screens.
- Permission to use the **New** and, where applicable, **icn-update** controls on reference-list screens.
- Familiarity with your organization's approved account types, offer statuses, and order cancellation reasons before changing configuration data.

Module 1: Establish clean account-type reference data

Goal: Learn to check existing account types first and add a new one only when the required entry is not already available.

Lesson 1.1: Find the account type needed for a sales scenario

When a sales team needs an account classification, first confirm whether it already exists rather than creating a duplicate. Open **Account Types**, enter your search criteria with **Search**, and use **Apply filter** to narrow the list to matching account types. Review the returned entries to determine whether the requested type is already configured.

Practice task: In **Account Types**, use **Search** and **Apply filter** to look for an account type used by your organization.

Lesson 1.2: Add a missing account type safely

If the account type cannot be found after searching and filtering, create it from **Account Types**. Select **New** to start the entry, then use **Ok** to confirm the new account type or **Cancel** if you determine that it should not be added. This sequence ensures the team checks for an existing value before creating a new reference entry.

Practice task: Start a new account-type entry in **Account Types**, then use **Cancel** to leave without creating a test entry.

Module 2: Maintain offer statuses through the sales lifecycle

Goal: Keep offer-status reference data current so users can classify offers consistently.

Lesson 2.1: Locate an offer status before making changes

When an offer status needs review, begin by finding the current entry in **Offer Status**. Use **Search** to locate likely matches and **Apply filter** to focus the results. This verification step helps you distinguish an existing status that needs maintenance from a genuinely missing status.

Practice task: Use **Search** and **Apply filter** in **Offer Status** to find an existing offer status.

Lesson 2.2: Add or revise an offer status

When the needed offer status is absent, use **New** in **Offer Status** to create it. When an existing status needs revision, use **icn-update** for that entry. Use **Ok** to confirm the intended change, or **Cancel** to abandon it before confirmation.

Practice task: In **Offer Status**, identify an existing status and initiate its maintenance using **icn-update**; use **Cancel** rather than committing a change.

Module 3: Govern order-cancellation reason data

Goal: Maintain a reliable list of cancellation reasons for order-related exception handling.

Lesson 3.1: Check for an existing cancellation reason

When users request a cancellation reason, first search the current list in Order Cancellation Reasons. Use **Search** and **Apply filter** to identify whether the requested reason is already available. This prevents separate entries from being created for the same business reason.

Practice task: In Order Cancellation Reasons, search and filter for a cancellation reason relevant to your business.

Lesson 3.2: Add a cancellation reason only when needed

If no matching entry is found, use **New** in Order Cancellation Reasons to maintain the missing cancellation-reason reference entry. If you should not proceed, use **Cancel** instead of continuing. Always perform the search-and-filter check before selecting **New**.

Practice task: Open Order Cancellation Reasons, select **New**, and then select **Cancel** to practice exiting without adding an unapproved entry.

Final assessment

1. A sales user asks for an account type that may already exist. What should you do before creating anything, and which screen should you use?
2. You searched for an account type and found no matching result. Which control begins the process of adding the missing reference entry, and which control confirms it?
3. An existing offer status has inaccurate information. Which screen and control should you use to maintain the existing entry rather than create another one?
4. While creating or updating an offer status, you decide the change should not be saved. Which control should you use?

5. A request arrives to add an order cancellation reason. Describe the sequence of controls you should use to avoid creating a duplicate before starting a new entry.

Answers

1. Use **Search** and **Apply filter** in **Account Types**. **Why:** You must verify that the requested account type is not already configured.
2. Select **New**, then **Ok** in **Account Types**. **Why:** New starts the entry and Ok confirms it.
3. Use **Offer Status** and select **icn-update**. **Why:** icn-update is the available control for maintaining an existing offer-status entry.
4. Select **Cancel** in **Offer Status**. **Why:** Cancel abandons the change rather than confirming it.
5. In Order Cancellation Reasons, use **Search**, then **Apply filter**, review the results, and select **New** only if no suitable entry exists. **Why:** Searching first prevents duplicate cancellation reasons.