

Common issues and solutions

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Common issues and solutions

Use this page to triage problems on the home screen, principal report, custom, business-analysis, and sign-in surfaces it can show.

If you need to...	Go to
Identify the surface you reached	Reach and identify the affected surface
Compare what is visible with the expected screen	Read the settled surface
Restore or save changes	Restore home work
Handle a sign-in or principal-report branch	Handle access and report branches
Match an error or unexpected control	When a message or control does not match
Continue to the owned help topic	Continue from the result

Before you start

The home screen is the starting surface for signed-in work and for the signed-out sign-in branch.

It can take you to the library, principal report, custom, and business-analysis surfaces.

Prerequisites

- You know whether you are signed in.
- You have reached the home screen.
- You have the exact labels and message currently visible.
- For a principal-report problem, you know which report setup is selected.

The home screen does not require a field before you compare it. Report columns depend on the report setup selected for your screen.

Check	Why it matters
Access state	It determines whether the home content or login content is shown.
Home screen	It identifies the surface to compare.
Exact wording	The message and label determine which troubleshooting row applies.
Report setup	The principal-report columns depend on the selected setup.

Reach and identify the affected surface

From the home screen, open the surface where the problem appears. The home screen switches between signed-in content and the login surface according to your access state.

Prerequisites

- You know whether you are signed in.
- You can read the labels currently displayed.

Steps

1. Open the home screen.
2. Compare each visible label with the entries in the table below.

If you need to...	Start with...
Work with Dashboard	Dashboard
Work with the principal report	Principals Report
Check a time range	Interval
Check sorting	Sort by Booking , Sort by Target , or Sort by Achievement
Resolve an access problem	Email , Password , or Enter code

3. Record the route and the exact label or message that led you to the affected surface.

Result: You have matched the problem to a home, principal-report, custom, business-analysis, or login branch.

Read the settled surface

The settled surface is the screen after loading finishes. Compare its labels, controls, required markers, buttons, columns, and visible loading state before changing anything.

Prerequisites

- You have reached the affected home surface.
- The screen has finished loading.

Steps

1. Look for the three sorting controls **Sort by Booking**, **Sort by Target**, and **Sort by Achievement**.
2. Check whether any of those controls carries a required marker.
3. Check whether buttons or report columns are visible.
4. Check whether a password field or spinner is visible.
5. Record the five visible controls without text labels.
6. Compare the visible result with the branch table.

What you see	Follow
The three sorting controls	Investigate the sorting surface.
No buttons or report columns	Continue with the home or report page that owns the problem.
A password field	Follow the sign-in branch.
A spinner	Wait for the screen to settle before comparing it.

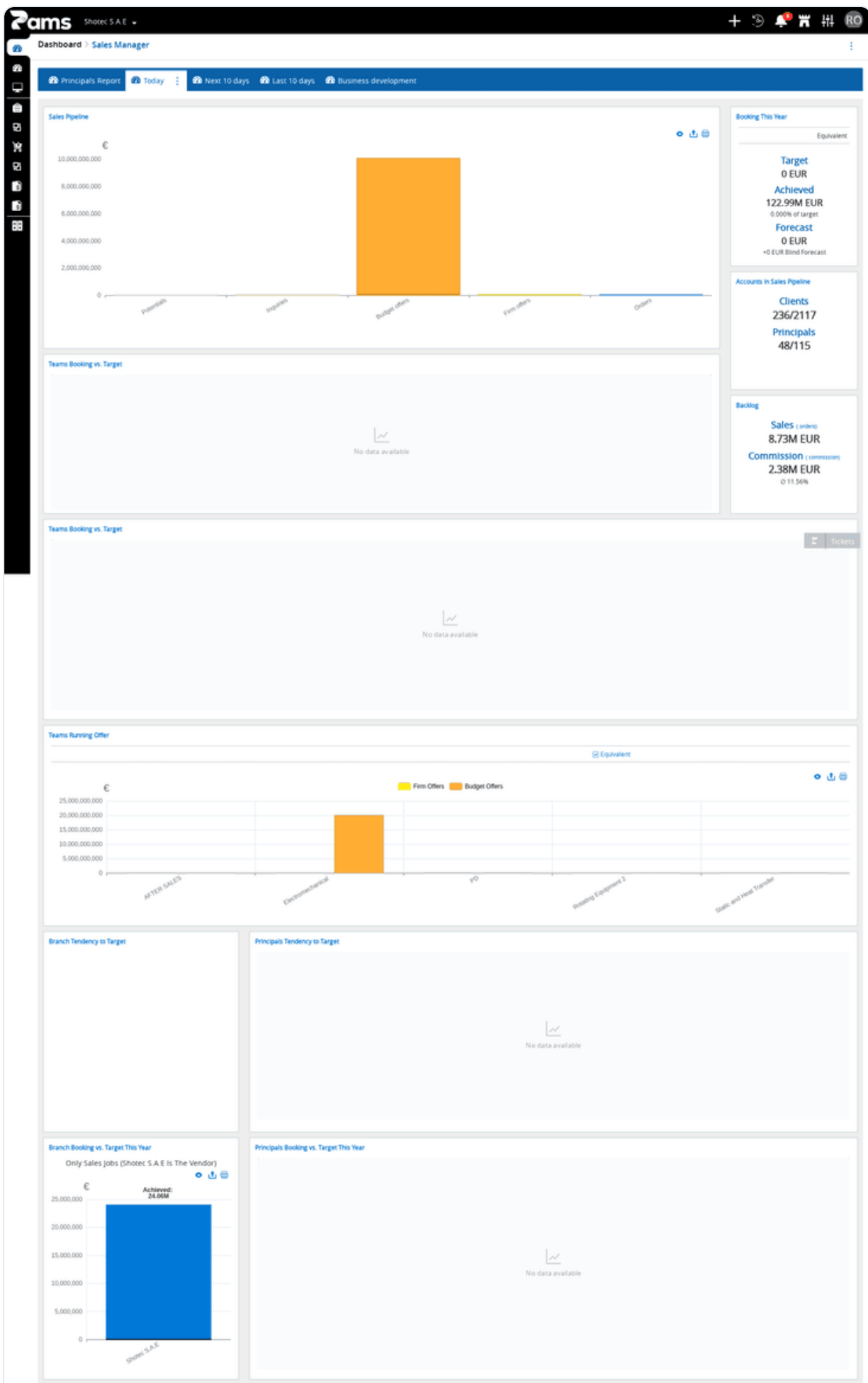
The settled screen has shown three sorting controls with no required markers, zero buttons, zero report columns, and five visible controls without text labels. It has shown no visible password field and no spinner.

The custom surface also provides the optional **Over**, **Highlight**, and **Interval** fields. The **Over** choices are **Clients** , **Sales Responsibles** , **Projects** , and **Market Segments** .

The **Interval** choices are **Last 12 Months** and **All Years** .

Result: You have recorded the controls and screen elements that are visible before applying a

fix.



Steps

1. Select **Add New Widget** to open the widget-selection action.
2. Enter the tab name in the required **New Tab** field when the new-tab popup opens.

Result: The required **New Tab** value is entered in the new-tab popup.

Save changes

Prerequisites

- You are signed in and on the home screen.
- The home screen is in edit mode.

Steps

1. Select **Save** to save the tabs.

After a successful save, the tabs are saved and edit mode closes. Undo replaces the current tabs with the original copy and exits edit mode.

Result: The tabs are saved and edit mode closes.

Remove an extra tab

Use this procedure when an edit-tab popup offers the conditional deletion action.

Prerequisites

- You are signed in and on the home screen.
- The home screen is in edit mode.
- The edit-tab popup is open.

Steps

1. Select **Delete** in the edit-tab popup when the deletion action is available.

Result: The tab deletion action is applied.

Restore standard tabs

Prerequisites

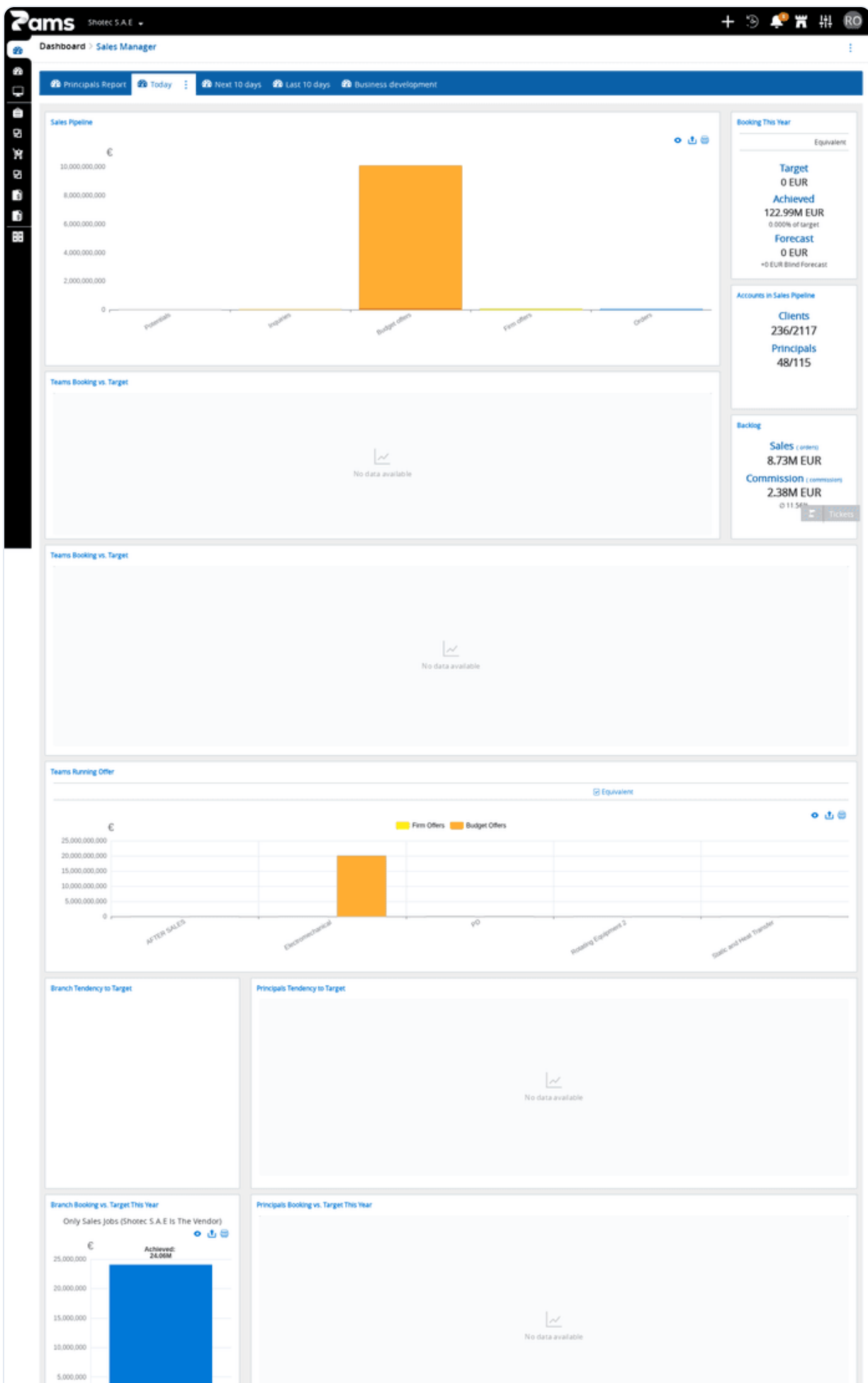
- You are signed in and on the home screen.
- The home screen is in edit mode.

Steps

1. Select **Restore Standard Tabs** to open the restore menu.
2. Choose one restore-menu action.

If you need to...	Select
Close the restore menu	Cancel
Restore the standard tabs	Restore

Result: The restore menu closes or the standard tabs are restored according to your selection.



- You know whether the login flow asks for credentials or a verification code.
- For the principal report, you have reached the report surface.

Steps

1. Use the access-state table to choose the login fields.

If the sign-in flow...	Use
Does not require verification	Email and Password
Requires verification	Enter <code>code</code>

2. In the principal report, enter the required **Report** value when the report surface asks for it.
3. Follow the report setup fields when the introduction-and-outlines popup is open.

4. If the principal-report validation message appears, choose one or more principals before trying the report action again.

The principal-report surface also carries **Introduction :**, **Sales Analysis :**, **Lost Opportunities and Competition :**, **Client Complaints and Difficulties :**, **Suggestions for Business Improvement :**, **Booking Forecast :**, and **Conclusion :** fields in its introduction-and-outlines popup.

Result: You are working in the login or principal-report branch that matches the fields shown.

When a message or control does not match

Use the exact wording on screen to separate a validation message, a general request failure, a login failure, a control that does not appear, and a surface whose values depend on the saved setup.

What you see	Meaning	What to do
This Field Is Required	A required field is empty.	Return to the required field on the active surface and enter its value.
An error occurred while processing your request	The request returned a general error.	Check the active surface and retry the action when its prerequisites are satisfied.
Please choose one or more principals	The principal report needs one or more principals selected.	Select one or more principals before retrying the report action.
Incorrect username or password	The sign-in credentials were rejected.	Re-enter Email and Password .

The available **Highlight** choices depend on the selected **Over** choice.

Out of scope messages and choices

The following entries belong to other surfaces or depend on runtime records rather than a fixed choice list.

Entry	Owned by
Vendors as an Over option	Custom surface; it is not an active Over option.
This Year, Definite Year, last 12 months , and From / To	Principal report time-frame choices, not the custom Interval field.
Your request was completed successfully	Pipeline, status, sales, backlog, and management-report widgets.
An error occurred while processing your request	Pipeline, status, sales, backlog, and management-report widgets.

Result: You have matched the exact message or control discrepancy to the action or surface that owns it.

Continue from the result

After the immediate triage, continue in the page that owns the next task rather than repeating the same comparison on the home screen.

If you need to...	Continue with...
Understand home content	Home overview
Choose or understand widgets	Widget catalog
Personalize the workspace	Personalizing your workspace
Work with the principal report	Principal report
Match a broader error message	General error messages
Review recurring questions	FAQ
Get further assistance	Getting help

Result: You have moved from the immediate home-surface problem to the page that owns the next piece of work.