L/G finance view

September 10, 2026

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An L/G finance view is the place to review letters of guarantee in lists and open an existing record. It brings together the company L/G list, stage filters, record details, and actions that depend on the record's current stage.

If you need to…	Go to
Reach the finance list or narrow it by stage	Find and filter the L/G list
Identify columns and list tools	Read the L/G list
Review an existing record	Open and read an L/G record
Change a record or move it through its stages	Handle record actions and saving and L/G lifecycle
Create a new L/G	Create an L/G

Before you start

An L/G review begins with access to the finance view and a saved record when you need
record-level tabs or actions.

Prerequisites

- Your subscription includes the Letter of Guarantee module.
- Your access includes the company L/G view. The Principal LGs view has its own view
  permission.
- To review a record, the record is already present in the list. Record-level areas use an existing record.
- To use a stage action, the record has no unsaved changes. Save the record first when
  the action is unavailable.

- Fields marked configurable are required only where your company configures them as
  mandatory. The record form has 11 validation groups, including basic data, recommendations, extensions, deductions, and increases.

The list filters are shown when the Letter of Guarantee subscription is included. On the
Principal LGs view, **Draft**, **Awaiting Approval**, and **Approved** are not available.
The current stage and access branch determine which record actions appear.

Find and filter the L/G list

The finance list is the starting point for reviewing saved L/G entries. Use its list scope and stage filters to bring the records you need into the grid.

Prerequisites

- Your subscription includes the Letter of Guarantee module.
- You have permission for the list scope you need.

Steps

1. Open the finance list.
2. Choose the list scope that matches the records you need.

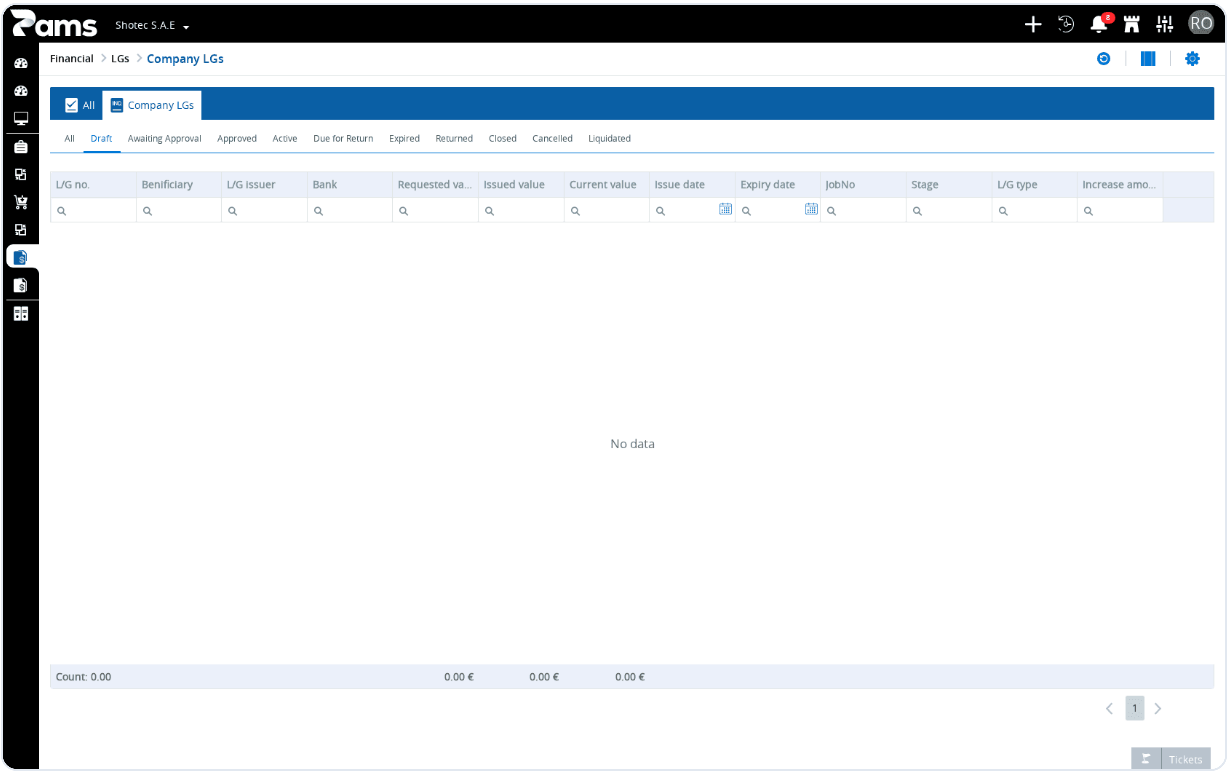
If you need to…	Select
Review company L/G entries	**Company LGs**
Review all available L/G entries	**All**
Review principal L/G entries	**Principal LGs**

3. Select the stage filter that matches the records you need.

If you need records in…	Select
All stages	**All**
Draft	**Draft**
Awaiting approval	**Awaiting Approval**
Approved	**Approved**
Active	**Active**
Due for return	**Due for Return**

If you need records in…	Select
Expired	**Expired**
Returned	**Returned**
Closed	**Closed**
Cancelled	**Cancelled**
Liquidated	**Liquidated**

4. Confirm that the grid refreshes with the selected stage.



Result: The finance list remains open with the selected scope and stage filter. The list can also open in the all-records view after you select **All**.

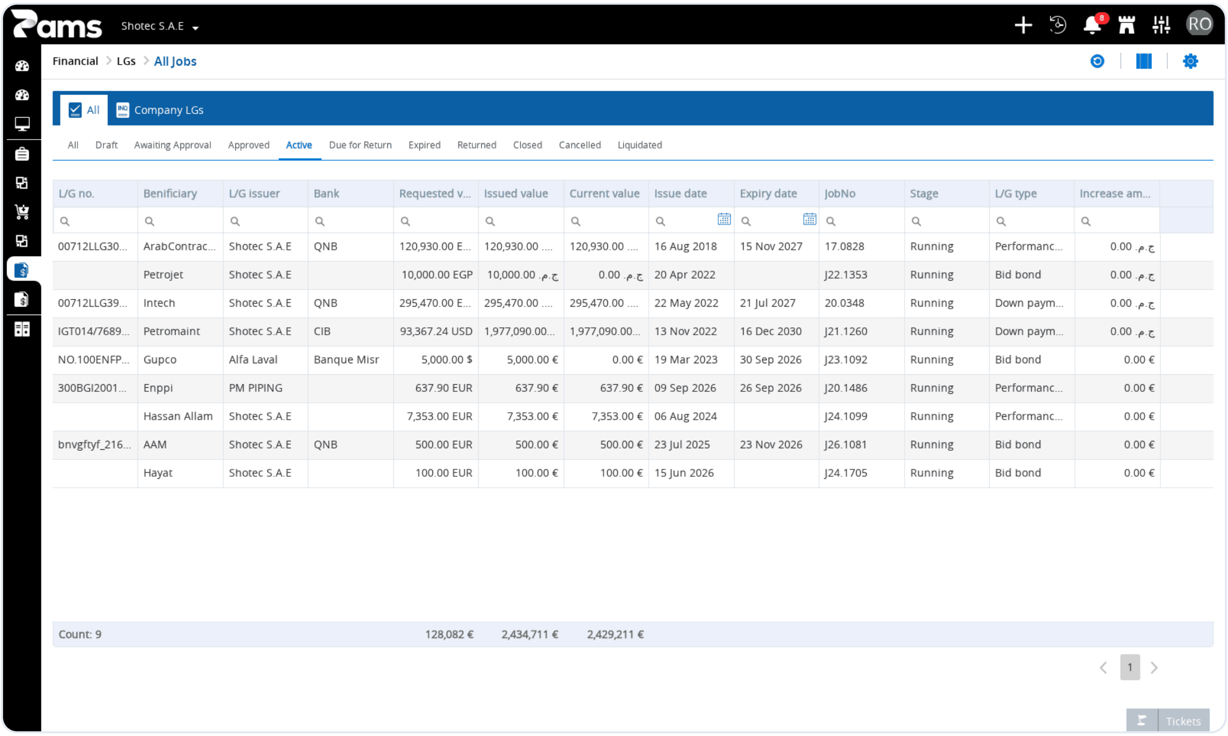
Read the L/G list

The L/G list is a grid of saved entries. Read the headers to identify the record number, parties, values, dates, job reference, current stage, type, and increase amount; do not infer a record's details from a different column.

Use these headers to locate information:

Header	Use it to locate
L/G no.	The guarantee number
Benificiary	The beneficiary
L/G issuer	The issuer
Bank	The bank
Requested value	The amount requested
Issued value	The amount issued
Current value	The current value
Issue date	The date of issue
Expiry date	The date the guarantee expires
JobNo	The related job reference
Stage	The record's current position
L/G type	The L/G type
Increase amount	The increase amount

The list also provides three tools: **Refresh**, **Table Layout**, and **Settings**. The headers shown in your list can depend on the list layout available to you, so use the headers visible in the grid when locating a value.



Result: You can identify an L/G row from its visible headers and choose a row to open the existing record.

Open and read an L/G record

An L/G record holds the information used to identify the guarantee, its value and dates,
its recommendations, and its current stage. Open a saved row when you need to review or
continue that record.

Prerequisites

- The L/G row is present in the finance list.
- You know which visible row you need.

Steps

1. Select a row in the finance list.
2. Read the record's identifying and value fields.

Record information	Fields
Parties and type	**Beneficiary**, **LG Issuer**, **On Behalf of**, **LG Type**, **Bank**
Numbers and values	**LG Number**, **Requested LG Value**, **Issue Value**, **Cash Cover**
Dates	**Activation Date**, **Expiry Date**

3. Read the current stage before choosing a record action. The available stage actions
depend on that stage and on your approval or edit access.

Result: The existing L/G record is open with its identifying fields, values, dates, current stage, and available record actions.

Handle record actions and saving

Record actions move an L/G between stages or change its editable state. The action strip
uses the current stage, approval branch, edit access, and whether the record has changes
to decide which actions are available.

Prerequisites

- The existing L/G record is open.
- The record has no unsaved changes before you choose a stage action.
- You have the approval access required for **Approve**, or the approval branch presents
  Request approval instead.

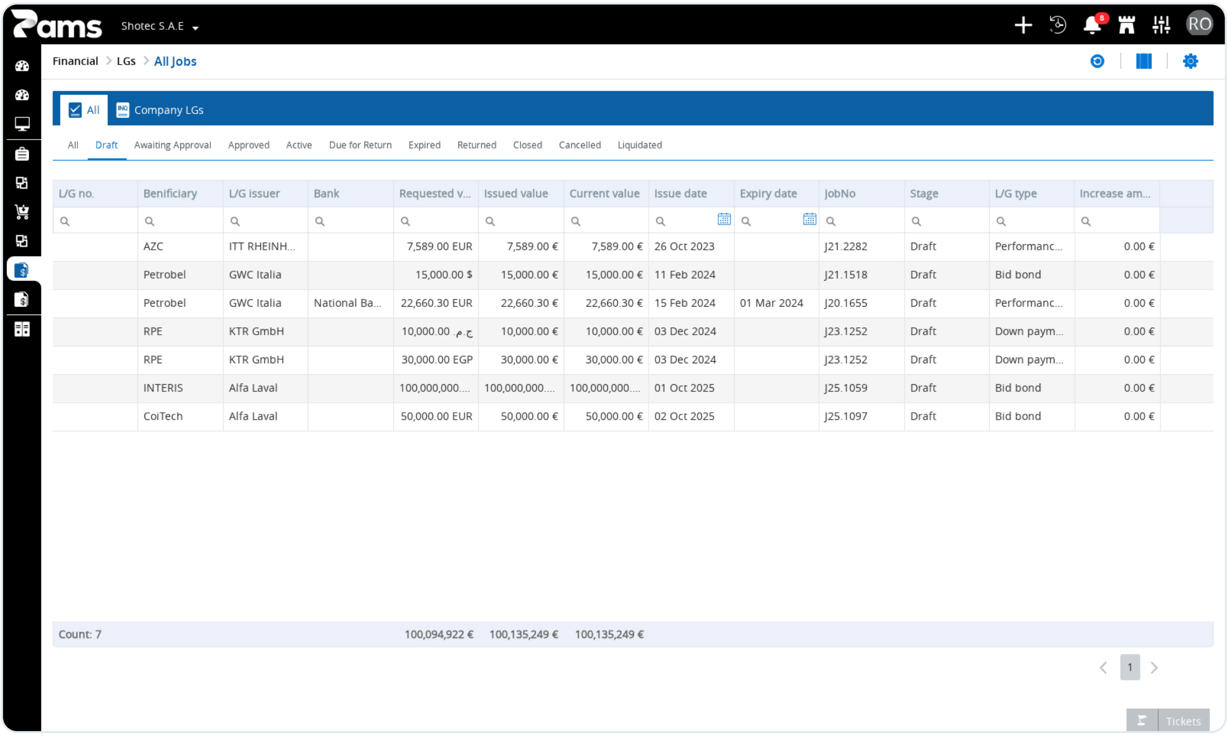
Steps

1. Choose the action that matches the current stage and your work.

If the record is…	Available action to look for
Returned and ready to close	**Closed**
Active and due to be returned	**Due for Return**
Due for Return or Expired and being returned	**Returned**
Draft or approved and being cancelled	**Cancel**
Active, Expired, or Due for Return and being liquidated	**Liquidated**
A Performance Bond that is Active or Expired and not already upgraded	**Extend As Warranty Bond**
Active or later and needing changes	**Enable Editing**
Awaiting approval without approval access	**Cancel approval request**
Awaiting approval with approval access	**Reject approval request** or **Approve**

2. Select the action that matches the condition.

Condition	Action
The approval process is active, you do not have approval access, and the record is in Draft	**Request approval**
The approval process is active, you have approval access, and the record is below Approved	**Approve**
You need to save changes and keep the record open	**Save**
You need to save changes and leave the record	**Save and Close**



Result: The selected stage action changes the record's lifecycle position when its conditions are met. A successful save displays `Your request was completed successfully`. An unsuccessful save or stage action displays `An error occurred while processing your request`.

Use supporting record areas

Supporting areas keep related discussion, files, and extension information with the L/G
record. Open them after the record itself is available.

Prerequisites

- An existing L/G record is open.
- The supporting area is available for that record.

Steps

1. Select the supporting area that matches your task.

If you need to…	Select
Activate the record's comments area	**Comments**
Activate the record's attachment area	**Attachment**
Activate the extensions area	**LG Extensions**

2. Review the extension period data after **LG Extensions** loads it when needed.

Result: The selected supporting record area is active.

Handle feedback and continue

Feedback identifies a value, permission, approval, date, or pending-change condition that
needs attention before you continue.

Message	What to do
`Forbidden characters detected. Please remove them and try again.`	Remove the forbidden characters from the value and submit it again.
`Your request was completed successfully`	Continue with the next record action or leave the saved record.
`An error occurred while processing your request`	Review the record and try the action again.
`You don’t have permission`	Use an action available to your access level.
`LG still needs confirmation`	Complete the required L/G confirmation before continuing.
`LG has one or more extensions or deductions and cannot be reverted to the requested stage`	Review the extensions or deductions before attempting the reversal.
`Please choose a date after the current expiry date`	Choose a date after the current expiry date.
`There is a pending increase you can edit`	Edit the pending increase before starting another increase.

The finance view is for reviewing and opening existing records. Follow L/G lifecycle for the complete stage map and lifecycle actions. Follow Create an L/G when the work is to create a new guarantee.

What to do next

After reviewing an existing L/G, continue with its lifecycle when the next task is a stage
change or another record action. When the work is to enter a new guarantee, start with
Create an L/G; creation fields and entry actions belong there.

Result: You have a route for the next L/G task: continue in L/G lifecycle for company-record stage work, or open Create an L/G for new-record work.