Reference list

September 10, 2026

Reference list

Reference list overview

The Reference list is the place to find, create, and maintain reference records used in the
user-facing data work. Use the list to identify a record, then open its detail surface to enter
reference information or review its saved status and history.

If you need to…	Go to
Find an existing reference record or start a new one	Find and open a reference
Understand the fields and record areas	Understand the reference record
Create a record or keep changes	Create or update a reference
Review status or modification history	Review a saved reference
Resolve a validation or save message	When validation or saving goes wrong
Maintain the choices used by the record	Reference category or Reference serial status

Open the Reference list to view records. From the list, select **Product** to start a new record or
select an existing row to open its details.

Before you start

Before you work with a reference record, make sure you can reach the list and have the information
needed for the record. Access, subscription, permission, branch, saved-record state, and company
configuration determine which fields and actions appear.

The **Check-up** area records status checks. **Last Modifications** lists changes made to the saved
record.

Prerequisites

Check	What must be in place
List access	The Reference list surface is available to your account.
Form access	The record detail has loaded and is not a subscription or not-found surface.
New record	You have permission to create a new record.
Existing record	The record has loaded with its reference-detail collection.
Saved-record actions	The record has an ID before **Print**, **Check-up**, or **Last Modifications** can appear.
Editing a status	The record is in the active **Check-up** area, you have edit permission, you are in the same branch, and no passed record ID limits the action.
Company configuration	Fields marked configurable are required only where your company configures them as required.
List layout	The list columns depend on the selected list layout, so work from the headers visible in your list.

Find and open a reference

A reference record in this list is identified by the information in its visible row. Use the list
to choose an existing record or to reach the new-record surface.

Prerequisites

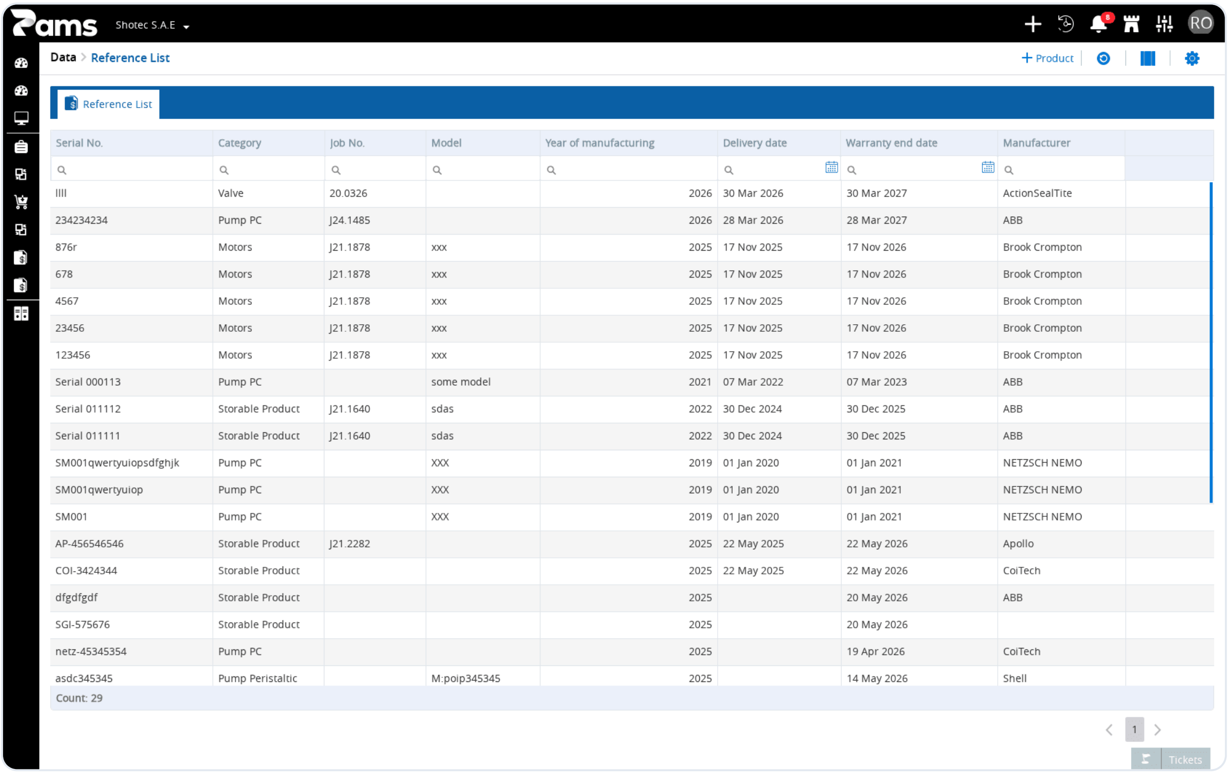
- You can open the Reference list.
- For an existing record, you know which visible row to open.

Steps

1. Open `/reference-list/view` to display the Reference list.
2. Identify the record from the headers visible in the list: **Category**, **Job No.**, Model, **Year of manufacturing**, **Delivery date**, **Warranty end date**, and **Manufacturer**.
3. Choose the action that matches your task.

If you need to…	Select
Open an existing record	The row for that record
Start a new reference record	**Product**
Export the list	**Export**

The list also provides icon-only actions titled **Refresh**, Table Layout, and **Settings**. Use the title shown on the icon to choose the list action you need.



Result: The selected existing record opens for detail work, or the new-record surface opens.

For a record surface, continue with Understand the reference record.

Understand the reference record

A reference record stores identifying, commercial, product, application, and status information for
one reference entry. The new-record surface displays 16 labelled fields. Its required markers are
shown on these fields:

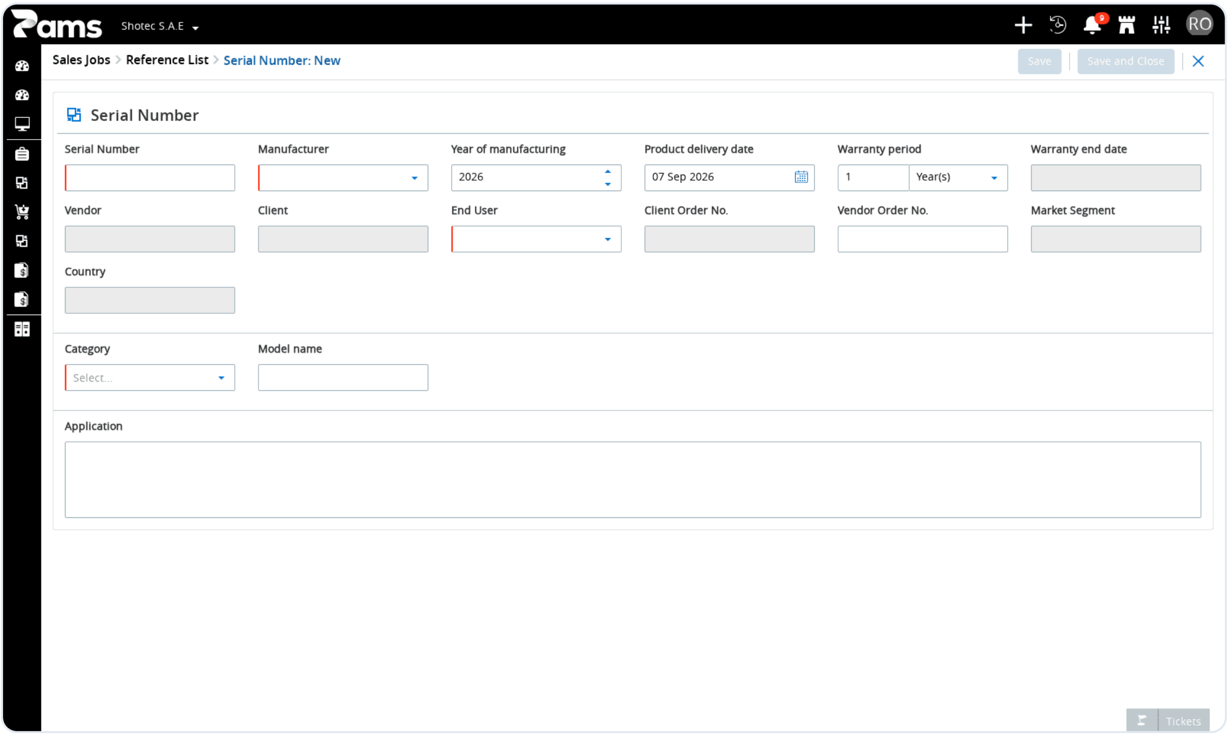
Required field	Required marker
Serial Number	Shown
Manufacturer	Shown
Vendor	Shown
Client	Shown
End User	Shown
Category	Shown

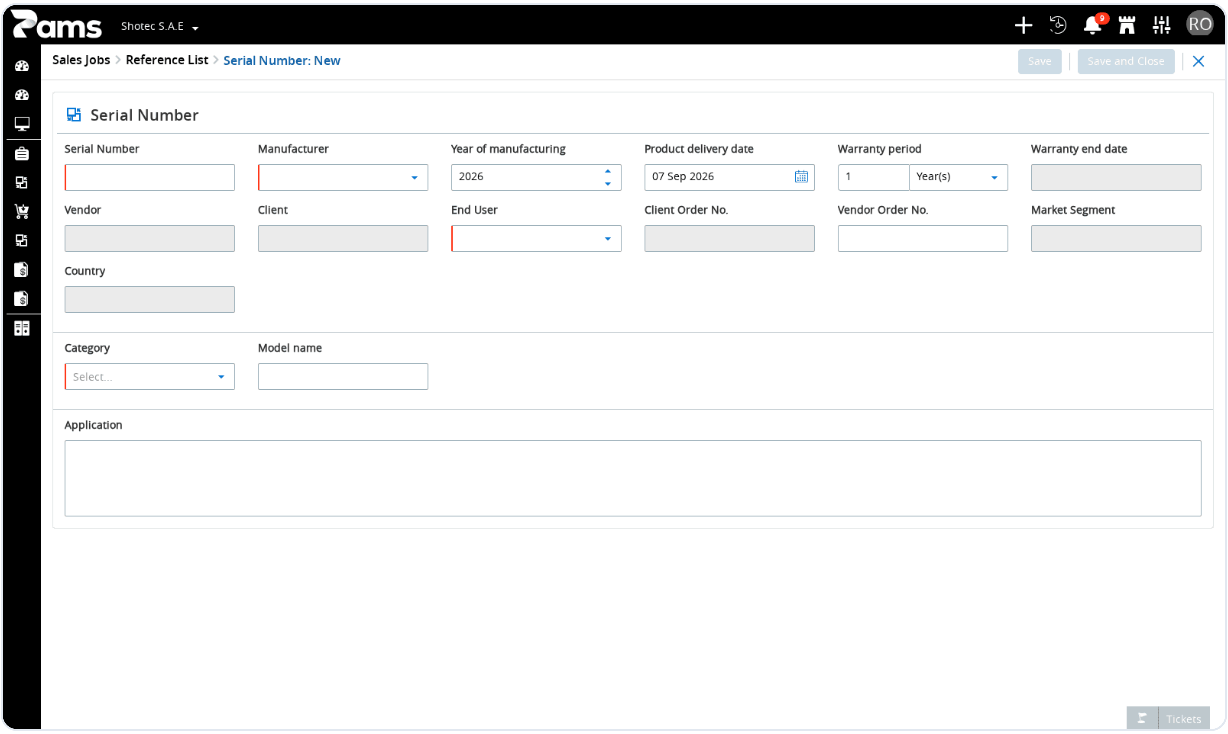
Area	Fields and rule
Identification	**Serial Number** is text and required. **Manufacturer** is a required selection.
Product details	**Year of manufacturing** is numeric. **Product delivery date** is a date. **Warranty period** is numeric and has a minimum of `0`. **Warranty end date** is a date.
Parties	**Vendor**, **Client**, and **End User** are required selections.
Orders and market	**Client Order No.**, **Vendor Order No.**, **Market Segment**, and **Country** are configurable text fields.
Classification	**Category** is a required selection. **Model name** is a configurable text field.
Application	**Application** is a configurable text area.
Question controls	Configurable warranty unit, question answer, and question unit; units must be available for the question.
Check-up	**Checked on** is required and cannot be later than today. **Status** and **Comment** are required.
Print options	The print area contains printing and watermark options.

The fields governed by company configuration are **Year of manufacturing**, **Product delivery date**, **Warranty period**, **Warranty end date**, **Client Order No.**, **Vendor Order No.**, **Market Segment**, **Country**, **Model name**, **Application**, and the question fields. Their required marker follows the configuration in use.

The saved-record surface can provide **Print**, **Check-up**, and **Last Modifications**. The **Check-up** area uses a grid with **Status**, **Checked on**, and **Comment**.

The **Application** field is a text area. The print area contains printing and watermark options.


ams
Shotec S.A.E
RO
Sales Jobs
Reference List
Serial Number: New
Save
Save and Close
Serial Number
Serial Number
Manufacturer
Year of manufacturing
2026
Product delivery date
07 Sep 2026
Warranty period
1
Year(s)
Warranty end date
Vendor
Client
End User
Client Order No.
Vendor Order No.
Market Segment
Country
Category
Select...
Model name
Application
Tickets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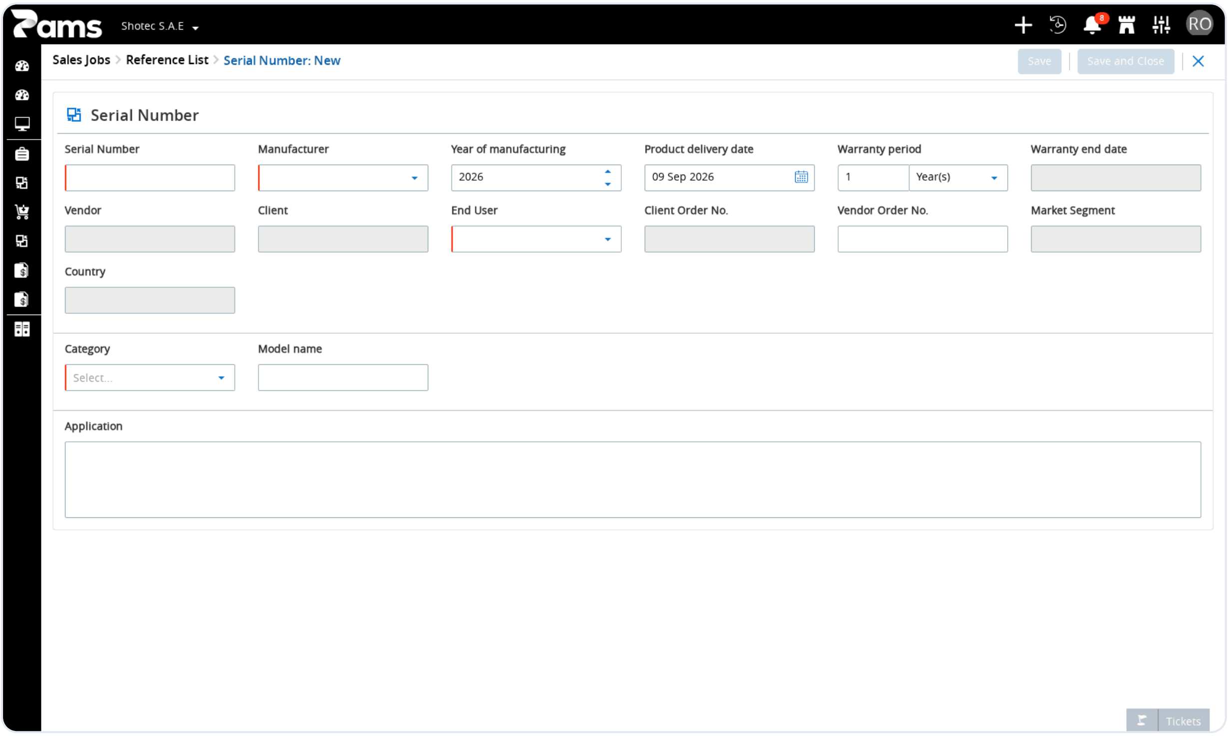
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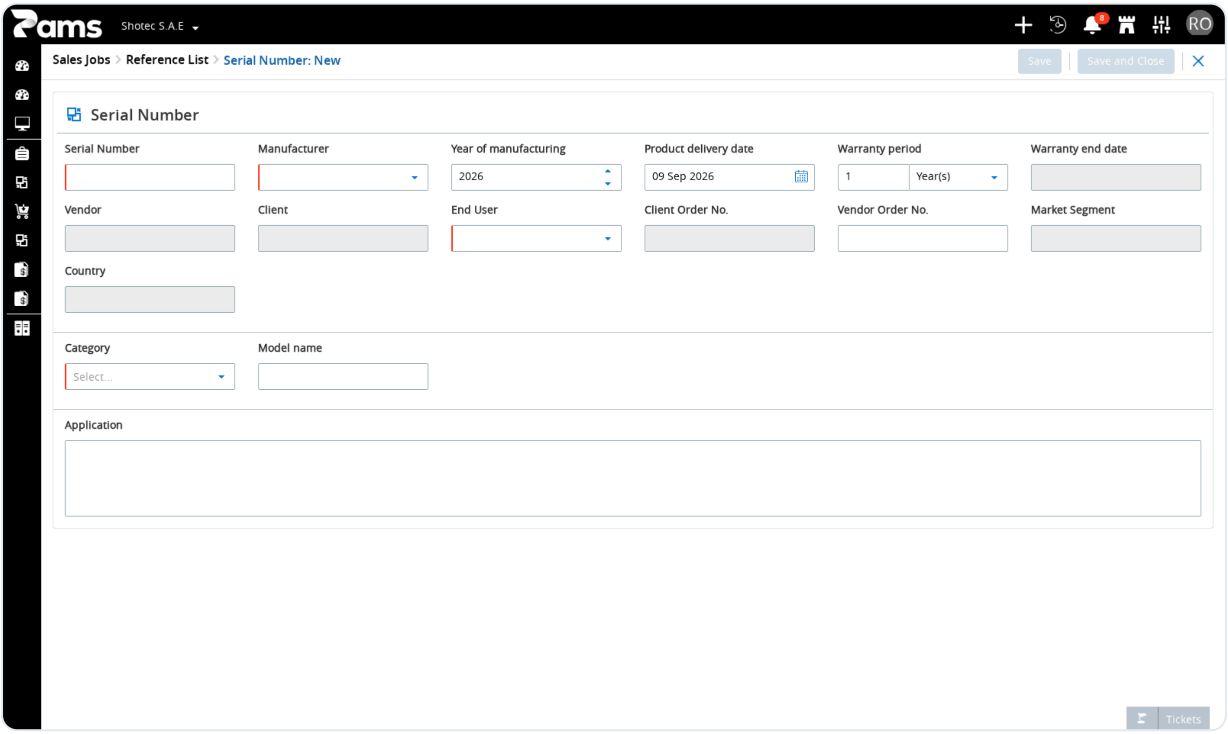
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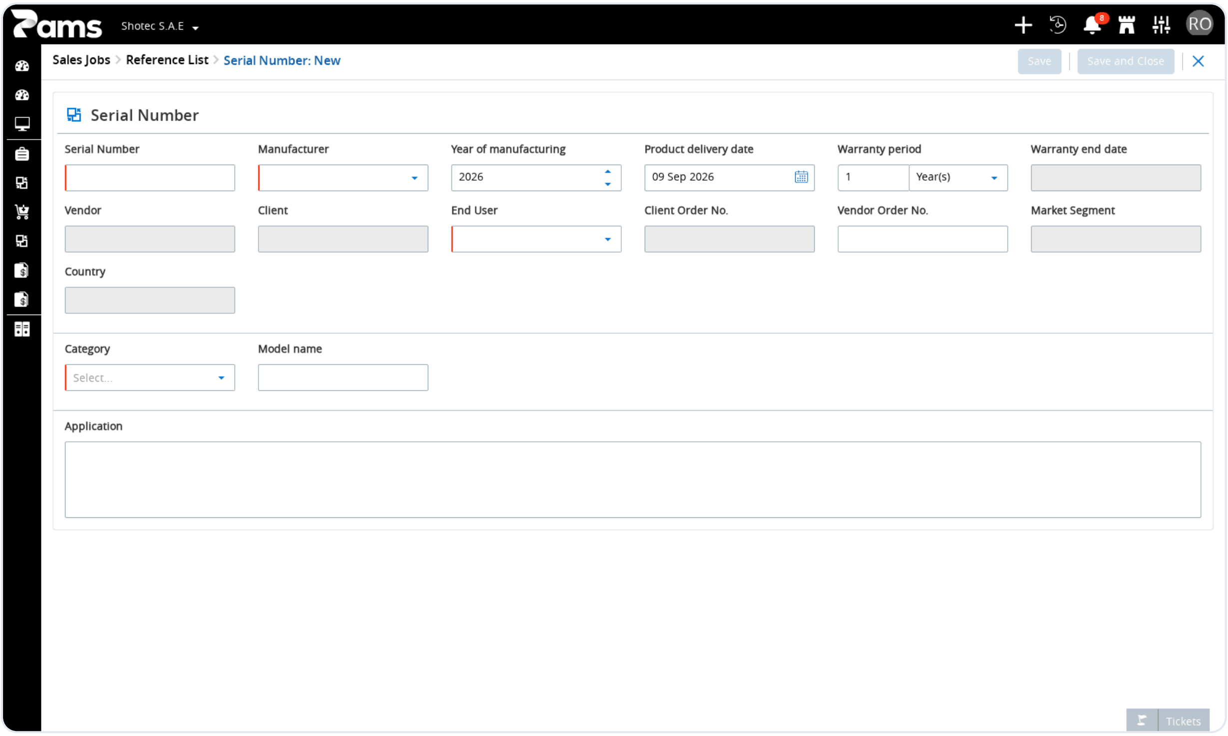
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Sales Jobs
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Serial Number: New
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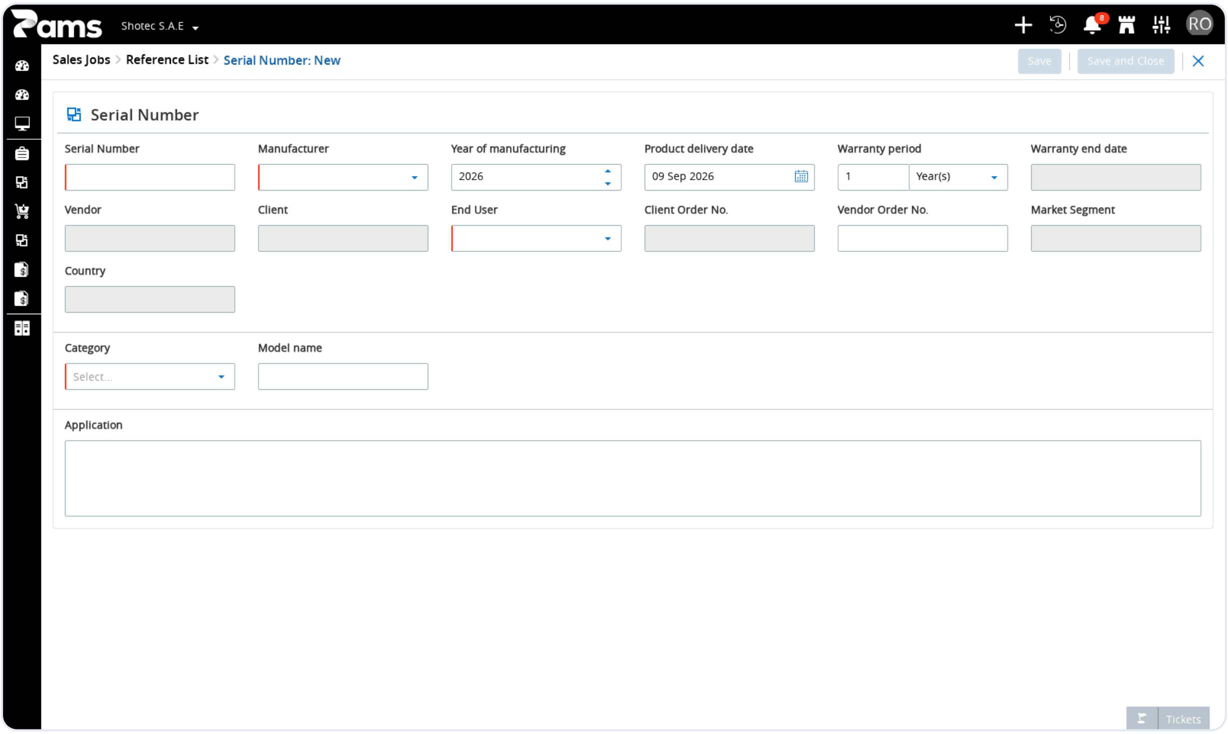
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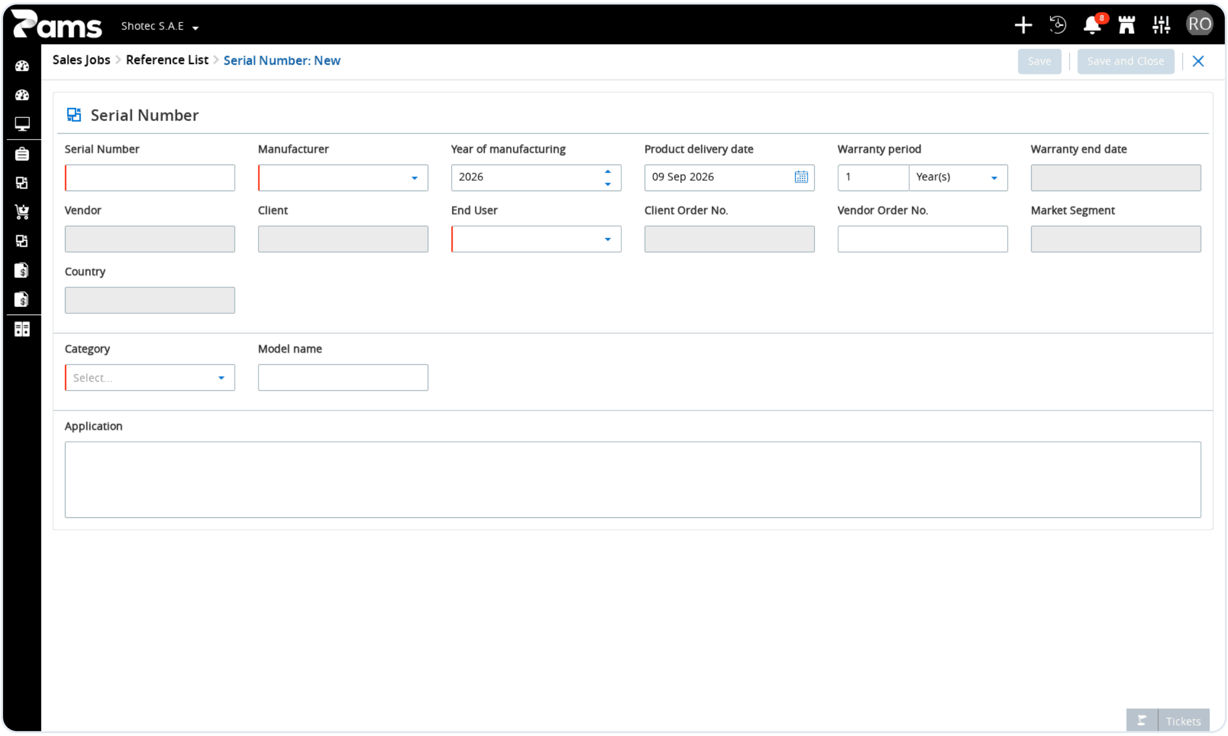


Use these fields to complete the record, then continue with [Create or update a reference](#create-or-update-a-reference).

Create or update a reference

Creating or updating a reference means entering the identifying and reference information, then
committing it with the save action. Complete the required fields shown on your screen; optional
configured fields are required only where your company configuration marks them required.

Prerequisites

- You have opened a new reference or an existing reference record.
- You have the reference information needed for the fields shown on the form.

Steps

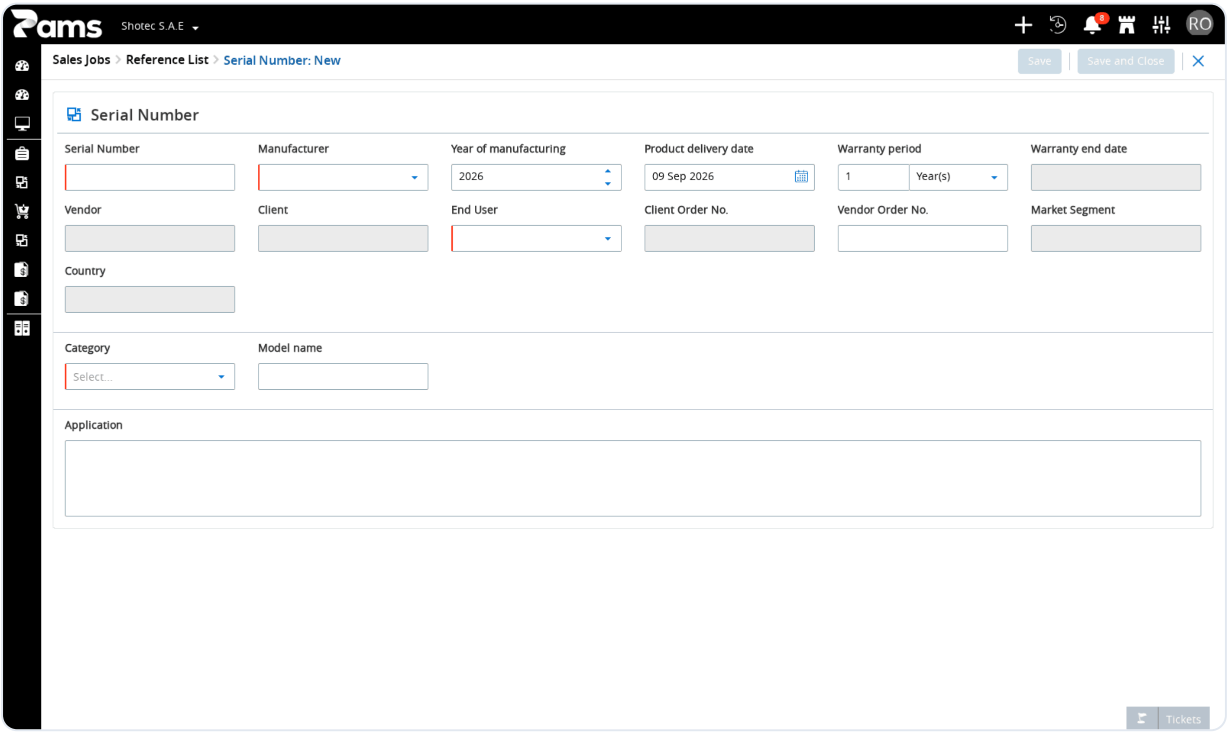
1. Enter the reference identifier in **Serial Number**.
2. Select the manufacturer in **Manufacturer**.
3. Complete the displayed product, party, order, market, classification, and application fields.

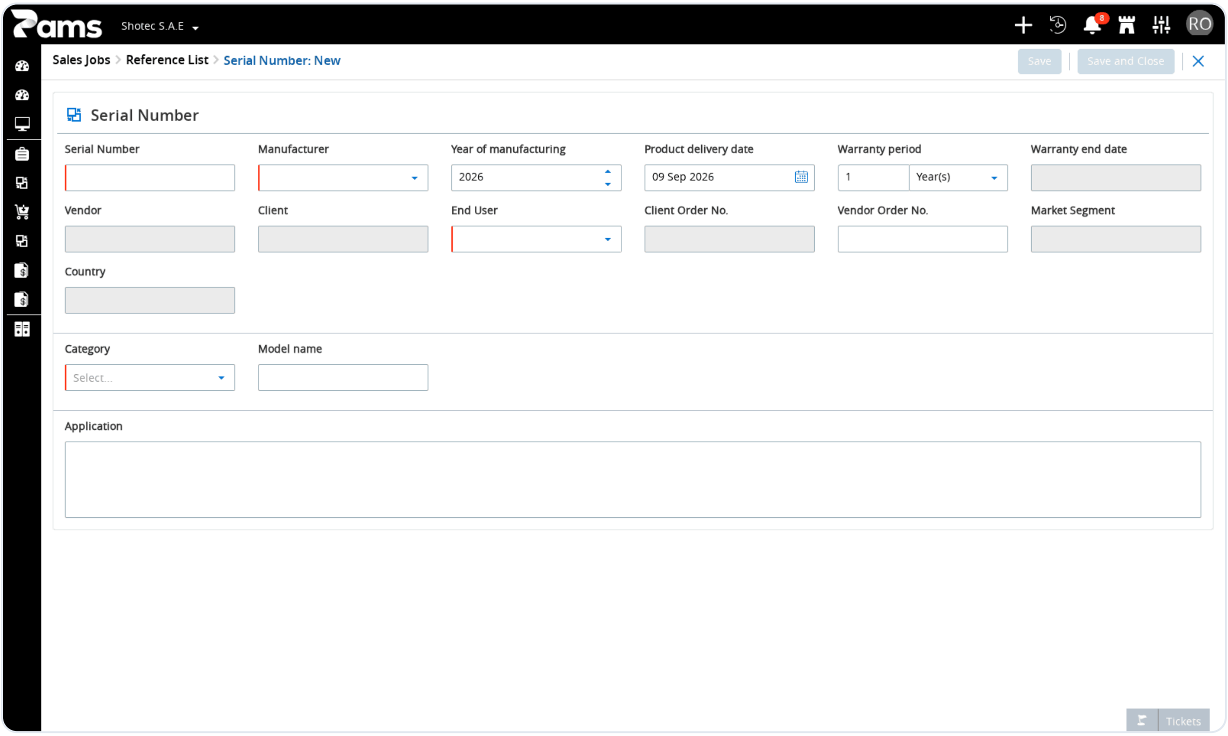
4. Choose the save outcome you need.

If you need to…	Select
Keep the record open	**Save**
Save the record and leave the form	**Save and Close**

5. If an unsaved-changes confirmation opens, select **Don't Save** to leave without the changes.

The form validates the main reference data, the status data when a status is being added or edited,
and the print-option data when print options are being completed. A successful save can display
`Your request was completed successfully`.





Result: The reference remains on the form after **Save**, or the saved record leaves the form
after **Save and Close**.
Continue with Review a saved reference when you need to inspect the
saved status or history.

Review a saved reference

Reviewing a saved reference means checking its printed representation, its recorded status checks,
or the changes made to it over time.

Prerequisites

- The reference record has loaded and has an ID.
- For status changes, **Check-up** is active and the edit and branch conditions are satisfied.
- **Last Modifications** also requires the latest-modifications feature.

Steps

1. Select **Print** when the record has no unsaved changes and printing is allowed.
2. Select **Check-up** to open the status area.
3. In **Check-up**, complete the status form when it is available.

4. Enter **Checked on**, **Status**, and **Comment** in the status form.
5. Select the action you need.

If you need to…	Select
Save the status	**Save**
Open the modification history	**Last Modifications**
Open a history entry	**Registration**

The status grid identifies each entry with **Status**, **Checked on**, and **Comment**. The history area also provides user and field filters; the action-type filter is not available on this surface.

The shared popups can also provide **Cancel**, **Don't Save**, **No**, **Yes**, and **Ok**, depending on the popup mode.

Result: The saved record shows the selected print, status, or modification-history surface, or the status is saved with **Save**.
If an action or field differs from the main path, continue with Handle optional fields and access branches.

Handle optional fields and access branches

The reference surfaces change with company configuration, subscription, permissions, branch, and record state. Use the condition that applies to the action instead of treating every field or tab as available on every record.

If you are trying to…	The required condition is…
See the list	The list is not behind the subscription-unavailable or not-found condition.
Start a record	The new-record permission allows **Product**.
Edit the detail fields	The detail collection has loaded and the form is available.
Use **Print**	The record has an ID, has no unsaved changes, and printing is allowed.

If you are trying to…	The required condition is…
Open **Check-up**	The record has an ID.
Add a status	**Check-up** is active, the record has an ID, you can edit it, the branch condition is satisfied, and no passed ID restricts the action.
Edit a status	**Check-up** is active and an existing serial status is present.
See the question-unit selection	Question units are available for the question.
Use **Last Modifications**	The record has an ID and the latest-modifications feature is available.

If the subscription does not include the list, the subscription-unavailable surface provides
Back. The declared action-type filter is not available on this surface.

Fields marked configurable follow company setup. On the new-record surface, the current required
markers are on **Serial Number**, **Manufacturer**, **Vendor**, **Client**, **End User**, and **Category**.

Result: The form, tabs, and actions on screen match the record state, your access, branch, and
company configuration.
If a save or validation message appears, continue with When validation or saving goes wrong.

When validation or saving goes wrong

Use the exact message on screen to choose the correction. The following messages belong to the
Reference list and its record surfaces.

What you see	What to do
`Your request was completed successfully`	Continue from the saved-record result.
`An error occurred while processing your request`	Review the fields and action conditions, then try the save action again.
`Serial you have entered already exist and belong to same manufacturer`	Use a serial number that is not already associated with the same manufacturer.

What you see	What to do
`There is error in serial you have entered`	Correct the serial number and submit the form again.
`Please enter the storage area and position for each product`	Check each product's storage area and position, then continue.
`Forbidden characters detected. Please remove them and try again.`	Remove the forbidden characters and repeat the action.

The **Warranty period** value has a minimum of `0`. **Checked on** cannot be later than today.
After correcting the entry, return to the relevant record step. When the record is saved, continue
with What to do next.

What to do next

After saving a reference, continue from the saved record when you need to review its status or
history. The choices used by the record are maintained in related configuration surfaces.

If you need to…	Go to
Maintain reference categories	Reference category
Maintain question units	Reference category question units
Maintain serial statuses	Reference serial status

Result: You have either returned to the saved reference for review or identified the related
configuration surface for the next maintenance task.