

Help & Troubleshooting — Add New User

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Tasks

- The task does not save → Required information is missing → Complete the required information and select **Save** again.
- A warning appears when leaving the page → The Task page contains unsaved changes → Select **Save** to retain the changes, or respond to the warning before leaving.
- The Task page is unavailable → You are not signed in → Sign in, then navigate to **Add new > My Desk > Task**.

Tasks

Payments

- You cannot open the **Payment** page → You are not signed in → Sign in, then navigate to **Add new > Payments > Payment**.
- A warning appears when you leave the page → The payment entry contains unsaved changes → Select **Save** or **Save and Close** before leaving, or respond to the warning as appropriate.

Payments

Projects

Symptom	Likely cause	Fix
The Project does not save.	Required information is missing.	Complete the required entries and select Save again.

Symptom	Likely cause	Fix
A warning appears when leaving the Project form.	The form contains unsaved changes.	Select Save to retain the changes, or respond to the warning as appropriate.
The Project form is unavailable.	You are not signed in.	Sign in, then navigate to Add new > Project > Project .

Projects

Direct Order

Symptom	Likely cause	Fix
The direct order does not save.	Required information is missing.	Complete the required information and select Save again.
A warning appears when leaving the page.	The direct order contains unsaved changes.	Select Save or Save and Close before leaving the page.
An item cannot be deleted.	The item is labelled Ready for Shipment or Delivered .	Retain the item in the direct order.

Direct Order

RFQ

Symptom	Likely cause	Fix
The RFQ does not save.	Required information is missing.	Complete the required information and select Save again.
A warning appears when you leave the page.	The RFQ contains unsaved changes.	Select Save to retain the changes, or continue leaving the page if the changes are not required.
The procurement process requests an RFQ.	No RFQ has been added to the Purchase Job.	Add the required RFQ information and save the record.

RFQ

Process

- You cannot continue an Offer from Awaiting Approval → The Offer is awaiting manager approval → Have the manager complete the required approval before continuing Offer processing.

- You cannot return an Offer to the inquiry → The Offer is not in Draft status → Return the Offer only when it is in Draft status.
- You cannot delete an item → The item is Ready for Shipment or Delivered → Retain the item and continue the applicable fulfillment process.
- You cannot revert an Order or remove Delivered status → A due invoice or binding invoices exist → Continue financial processing for the existing invoice relationship; the Order cannot be reverted.

Process

Direct Order

Symptom	Likely cause	Fix
The Order cannot be reverted.	The Order has binding invoices.	Continue processing the Order; an Order with binding invoices cannot be reverted.
An item cannot be deleted.	The item is marked Ready for shipment or Delivered.	Do not attempt to delete the item at these statuses.
The Order cannot be un-delivered.	A due invoice already exists.	Process the related invoice requirement before attempting further Order changes.
The Order remains Awaiting approval.	Approval has not yet been completed.	Wait for the required approval to be completed before progressing the Order.

Direct Order

Configure Accounts

Symptom	Likely cause	Fix
The account configuration does not save.	One or more required fields are incomplete.	Complete the required information and select Save .
A value is not accepted in the form.	The field requires a specific input format.	Correct the value to the required format, then select Save .
A warning appears when leaving the page.	The account configuration contains unsaved changes.	Select Save or Save and Close to retain the changes, or continue leaving the page if the changes are not required.

Configure Accounts

Configure Contacts

- The contact does not save → Required information is missing → Complete the required information and select **Save** again.
- A warning appears when leaving the form → Unsaved changes are present → Select **Save** to retain the changes, or leave the form only after reviewing the warning.
- You cannot open the contact form → You are not signed in → Sign in, then navigate to **Add new > Accounts > Contact**.

Configure Contacts

Configure Products

Symptom	Likely cause	Fix
The Product record does not save.	One or more required fields are missing.	Complete all required information, then select Save .
A warning appears when leaving the Product page.	The Product record contains unsaved changes.	Save the Product record using Save or Save and Close before leaving the page.
The new Product is not visible after creation.	The Product record was not saved successfully.	Return to the Product page, complete the required information, and select Save .

Configure Products