

Help & Troubleshooting — Add new

July 28, 2026

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Contact

Symptom	Likely cause	Fix
The Contact details are not retained.	The record was not saved.	Enter or revise the details, then choose Save or Save and Close .
You do not want to keep the changes you entered.	The record is still being edited.	Choose Cancel rather than saving the record.
A supporting file is missing from the Contact.	The file was not added to files[] .	Choose Attach and add the relevant file.
The contact's job information is outdated.	The Position or Department no longer reflects the person's current role.	Open the Contact, update the relevant fields, and choose Save .

[Open the full page](#)

Accounts

Symptom	Likely cause	Fix
The Account details are no longer present after leaving the form.	The record was closed with Cancel instead of Save or Save and Close .	Reopen Accounts , enter the required information again, and select Save or Save and Close .
A selected value is not applied to the Account.	The selection was not confirmed.	Use Select... or Select , choose the required items, verify them in Selected items , and select Ok .
The Account remains open after saving.	Save was used instead of Save and Close .	Select Save and Close after confirming that all Account information is complete.

Symptom	Likely cause	Fix
An Account contains an incorrect address or contact value.	An incorrect value was entered in one of the available fields.	Revise the applicable field, such as **City ** , **Street ** , **Name ** , or Department , then select Save .

[Open the full page](#)

Call

Symptom	Likely cause	Fix
A selected value is not shown on the Call form.	The selection was not confirmed.	Select Select... , choose the required value again, and confirm with OK .
A supporting document is missing from the record.	The file was not attached or is not listed in files[] .	Select Attach , add the file again, and verify that it appears in files[] before selecting Save or Save and Close .
The Call form closes before you finish reviewing the record.	Save and Close was selected.	Open the Call record again if further changes are needed. For future entries, select Save when you need to remain on the form.
Entered information is no longer available.	The form may have been closed without using a save action.	Re-enter the information and select Save or Save and Close before leaving the Call form.

[Open the full page](#)

Task

Symptom	Likely cause	Fix
You cannot proceed with login.	The user name or password may be incomplete or incorrect.	Review Enter User Name and **Enter Password ** , then select Login again.
You need to choose a value but cannot enter it directly.	The required value may need to be selected through the available selection control.	Use Select... , then use Select if the screen requires confirmation of the selected item.
You saved the entry but remain on the Task screen.	Save preserves the entry without closing the screen.	Select Save and Close when you want to save the current entry and exit the Task screen.
You are unsure whether a task is	The available screen does not show task status or	Do not infer completion from the available actions. Use only the documented save,

Symptom	Likely cause	Fix
complete.	completion fields.	close, ticket, attachment, and selection actions.

[Open the full page](#)

Payment

Symptom	Likely cause	Fix
The required supporting document is not shown in the payment record.	The file was not added through the attachment process or was not confirmed.	Select Attach , add the file in files[] , select Ok , and then select Save or Save and Close .
You are still on the Payment screen after saving.	Save keeps the record open.	Select Save and Close when you have completed the record.
You cannot identify the correct value in Select....	The screen does not describe the available selection values.	Use Select and choose the value required by your internal payment process.

[Open the full page](#)

Product

Symptom	Likely cause	Fix
The required product is not yet confirmed.	A value has not been selected in Select....	Use Select... , choose the appropriate product, and select Select to confirm it.
The product selection is lost after leaving the screen.	The record may have been cancelled or closed without saving.	Reopen Product , select the product again if necessary, and use Save or Save and Close .
A supporting document is not associated with the product.	No file has been added to files[] .	Select Attach , add the required file, and save the record.
The Products view does not show any records.	The displayed record count is zero.	Review the Products view and use the Product screen to select and save the required product record.

[Open the full page](#)

Project

Symptom	Likely cause	Fix
The project does not appear after you leave the screen.	The record may not have been saved.	Reopen the Project screen, complete the required details, and select Save or Save and Close .
The wrong items appear in Selected items .	An incorrect selection was confirmed.	Use Select... to review the selection again, choose the correct entries, and confirm with Ok .
An attachment is missing from the project.	The file selection or attachment changes may not have been saved.	Select Attach , add the file using files[] , and select Save changes .
RFQ information is not visible in the expected place.	The RFQ-related content is viewed from the project's RFQ stage.	Open the rfq tab and review the RFQ-stage content for the project.

[Open the full page](#)

Direct Order

Symptom	Likely cause	Fix
You cannot proceed with the required choice.	A required selection has not yet been made.	Use Select... and complete the available selection before saving.
Supporting documentation is not associated with the Direct Order.	The file was not added through the attachment control or was not confirmed.	Select Attach , add the file using files[] , then select Ok where available.
You left the Direct Order screen but need to continue reviewing it.	Save and Close was used instead of Save .	Return to the Direct Order workspace and use Save when you need to remain on the screen.
The Direct Order does not appear to have moved to another business stage.	The available screen does not provide a status, approval, receipt, or confirmation control.	Save the record using Save or Save and Close . Use only the available actions shown on the Direct Order screen; do not assume an unlisted lifecycle transition.

[Open the full page](#)

RFQ

Symptom	Likely cause	Fix
You cannot identify the RFQ record you need to update.	The current record has not been selected.	Use Select... and then Select to choose the appropriate available record.
A supporting document is not visible on the RFQ.	The file has not been attached or confirmed.	Select Attach , complete the available attachment action, confirm with Ok if prompted, and check files[] .
Changes are not retained after leaving the RFQ.	The record was not saved.	Select Save before continuing work, or select Save and Close when the update is complete.
You cannot find an action to move the RFQ between tabs.	No transition action is available on the provided RFQ screen.	Review the information in the relevant contact , direct order , or project tab; do not assume that tab selection changes the RFQ stage.

[Open the full page](#)

Process

Symptom	Likely cause	Fix
You cannot proceed from the Inquiry prompt.	The required login details have not been entered or accepted.	Complete Enter User Name and Enter Password , then select Login .
You selected the wrong item.	An incorrect record was chosen through the selection controls.	Use Select... or Select again to choose the intended item before saving.
You need to continue working after saving.	Save and Close was selected instead of Save .	Reopen Add new > Sales Jobs > Process , access the required inquiry, and use Save while further work remains.
You cannot find task-related quantity information.	You are not viewing the task stage.	Open the Task tab and review the task-stage records shown there.

[Open the full page](#)