

Help & Troubleshooting — Configurations

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2 Factor Authentication

Symptom	Likely cause	Fix
The required user record is not visible.	The current user or field filter is too restrictive.	Review Filter by user and Filter by field , adjust the criteria, then select Refresh (icn icn-update) .
The displayed list does not reflect recent changes.	The screen has not been refreshed.	Select Refresh (icn icn-update) and review the displayed entries again.
A file was added but is not retained.	The attachment was not confirmed or the record was not saved.	Use Attach , confirm with Ok , verify the file in Files (files[]) , then select Save or Save and Close .
You cannot confirm which record you are working on.	Multiple entries may be selected or the view is not filtered.	Check Selected items and apply Filter by user before using Two-Factor Authentication (twoFactorAuth) , Log History (logHistory) , or Attach .

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Account Managers

Symptom	Likely cause	Fix
The required account manager does not appear in the list.	The list is not filtered to the correct value, or the search query is too specific.	Review or clear the value in Search , then use Select... or Select to refine the records again.
Important account manager details are not visible.	The current layout does not include the required columns.	Select Columns Chooser and include the needed columns, or select Standard Layout .

Symptom	Likely cause	Fix
A custom list arrangement is not retained.	The layout changes were not saved or updated.	Use Save for a new layout or Update Current for the selected layout.
The wrong layout is displayed.	A different layout is currently selected.	Select Standard Layout to return to the default list arrangement, then select or create the required layout.

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Frequent Currencies

Symptom	Likely cause	Fix
The required currency is not visible.	The list may not be filtered correctly, or the displayed information may need refreshing.	Enter a code or name in Search , select Apply filter , and then select Refresh (icn-update) if necessary.
The list shows too many records to review efficiently.	No search or filter has been applied.	Enter a relevant currency code or name in Search , then select Apply filter .
The filtered result is no longer needed.	A search or filter operation is still active.	Select Cancel and review the list again.
A required currency cannot be found after searching and refreshing.	The currency may not be present in the frequent-currency list.	Select New to start a new record. Complete only the fields and actions shown in the new-record view.

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Flags

Symptom	Likely cause	Fix
The required flag is not shown.	The search text is too specific, incomplete, or incorrect.	Revise the value in Search and select Apply filter again. Try a shorter or alternative keyword.
The list still does not show expected results after searching.	The displayed information may need to be updated.	Select Update (icn-update) , then repeat the search and select Apply filter .
A new flag was started but should not be	The record is not ready for confirmation or an existing	Select Cancel , then search the list again using Search and Apply filter .

Symptom	Likely cause	Fix
created.	flag was found.	
The exported list does not contain the expected records.	The export was created from a filtered display.	Review the current value in Search , select Apply filter , confirm the displayed list, and then select Export again.

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Branches

Symptom	Likely cause	Fix
Changes are not visible after leaving the branch form.	The form was closed without selecting a save action.	Reopen the branch record, enter the changes again, and select Save or Save and Close .
The wrong branch information was updated.	The branch record was not checked before editing.	Review Branch and Full Name before changing legal, tax, or address information. Save the corrected values with Save or Save and Close .
A branch selection cannot be completed.	A selection window may still be open.	Choose the required value and select Select to confirm it.
A branch was deleted by mistake.	Delete was selected for the wrong record.	Check whether the branch can be entered again using the branch entry form. The supplied screens do not show a restore action.

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Products

Symptom	Likely cause	Fix
The required product is not visible.	The list is not filtered to the correct description, or the desired product is not present in the displayed results.	Enter a more specific value in Search and review the results. If no suitable record exists, select New to begin a record.
The product list does not show the information needed for review.	The active layout does not include the required columns.	Select Columns Chooser , adjust the displayed columns, and select Update Current or save a new layout with Add Layout .
A layout change was made by mistake.	The current layout was updated unintentionally.	Select Standard Layout to use the standard page arrangement. For future

Symptom	Likely cause	Fix
		changes, use Add Layout before saving a separate view.
A layout was removed unexpectedly.	Delete Current was selected while that layout was active.	Recreate the required layout with Add Layout , enter a new Layout name , select the needed columns through Columns Chooser , and select Save .

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Custom Fields

Symptom	Likely cause	Fix
The required item is not visible for selection.	The current user or field filter may be too restrictive.	Review Filter by user and Filter by field , then use please select or Select... again.
The wrong items appear in Selected items .	An incorrect value was selected or the selection was made before filters were reviewed.	Recheck the filters, select the appropriate value with Select... , use Select , and verify Selected items before saving.
The selection was saved but the screen remains open.	Save was selected instead of Save and Close .	After confirming the selection, select Save and Close when you are finished with the screen.
A required supporting file cannot be confirmed.	The file list has not been reviewed after using Attach .	Use Attach as required and check files[] before selecting Save or Save and Close .

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Dashboard Settings

Symptom	Likely cause	Fix
The required layout is not visible.	A search value may be filtering the list.	Clear or revise Search , then locate the layout again.
Changes to an existing layout are not reflected.	The layout may not have been updated after editing.	Select the required layout and use Update Current .
A new layout is not available after entry.	The new layout may not have been saved.	Confirm Layout name is entered and select Save .

Symptom	Likely cause	Fix
The wrong layout is selected for removal.	The current layout was not reviewed before deletion.	Stop before using Delete Current , locate the correct layout with Search , and verify the selected record.

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Dynamic Validation

Symptom	Likely cause	Fix
You cannot complete the selection.	An option has not been confirmed.	Choose an available value in Please Select... , then select Select .
A file is not associated with the configuration.	The file was not added or the file dialog was not confirmed.	Select Attach , add the file to files[] , and select Ok when available.
Changes are not retained.	The screen was closed without using a save action.	Select Save to remain on the screen, or Save and Close to save and exit.
You cannot find a setting on the current tab.	The setting may be presented under a different Dynamic Validation tab.	Review integration with crms , reports settings , shareable content , templates , and work procedure settings .

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Banks

Symptom	Likely cause	Fix
The required bank does not appear in the results.	The search term is too specific, incorrect, or the wrong tab is selected.	Select bank accounts , revise the value in Search , and select Apply filter again.
The required L/G information is not visible.	You are viewing bank account records rather than L/G facility records.	Select lgs facilities and review the available facility records.
The export contains unrelated records.	Export was selected before the results were narrowed.	Enter the appropriate criteria in Search , select Apply filter , verify the displayed records, and then select Export .
You cannot confirm whether a new bank record was saved.	The provided Finance Settings screen does not show the entry fields or a save action.	Use New to start the entry process and complete it according to your organisation's approved procedure; do not treat Ok as a documented save action for bank records.

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Invoice Settings

Symptom	Likely cause	Fix
The expected information is not displayed.	A filter is limiting the current view.	Review Filter by user and Filter by field , then confirm the resulting Selected items .
A file is not available with the configuration.	The supporting document has not been attached to the current record.	Select Attach and confirm that the file appears in files[] .
You are unsure whether the correct company configuration was updated.	The active company tab was not confirmed before saving.	Open the relevant company tab, review its displayed settings, and use logHistory where available.
You need to continue working after an update, but the page has closed.	Save and Close was selected.	Reopen Configurations > Finance Settings > Invoice Settings , select the required company tab, and continue the review.

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Activity Purpose

Symptom	Likely cause	Fix
The required activity purpose is not visible.	The list has not been searched or filtered using the relevant wording.	Enter a relevant term in Search and select Apply filter .
A new purpose should not be retained.	The new-record form was opened unnecessarily or the information is incomplete.	Select Cancel rather than Ok .
The export does not contain the expected visible records.	The required search criteria may not have been applied before export.	Set the required value in Search , select Apply filter , verify the list, and then select Export .
Supporting material is not associated with the activity-purpose entry.	A file may not have been attached during entry.	Use Attach and review the files[] field before selecting Ok .

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Lost Reasons

Symptom	Likely cause	Fix
The required reason does not appear in the list.	The list is filtered by the current search criteria.	Clear or revise Search , then select Apply filter again.
A similar reason already exists.	The reason list contains an existing record with comparable wording.	Use the existing record where it accurately represents the outcome; create a new record only when the business reason is materially different.
A new reason was not retained.	The new record was cancelled or not confirmed.	Create the record again using New and select Ok after entering the required information.
The exported list contains more or fewer records than expected.	The current search filter affects the displayed records being reviewed.	Check Search , select Apply filter , and then select Export again.

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Inquiry Status

Symptom	Likely cause	Fix
The expected record is not displayed.	The incorrect tab is selected, or the current search/filter criteria exclude the record.	Select the appropriate category tab, clear or revise Search , and select Apply filter again.
A similar reason already exists.	A record was created without first checking the relevant category.	Search the selected tab before creating another record. Retain the existing record where it meets the requirement.
The export does not contain the expected records.	The wrong tab or an overly restrictive filter was active when Export was selected.	Select the required tab, review Search and filter criteria, select Apply filter , and then select Export again.
A new record should not be retained.	The entry is incomplete or was started in error.	Select Cancel before confirming the record with Ok .

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Order Cancellation Reasons

Symptom	Likely cause	Fix
You cannot find a cancellation reason.	The search term is too specific, or the filter has not been applied.	Enter a broader term in Search , then select Apply filter .
The results do not reflect the search you intended.	An incorrect or unwanted search action is still active.	Select Cancel , then enter the required search text again and select Apply filter .
You are unsure whether to create a new reason.	A similar shared classification may already exist.	Search for equivalent wording and confirm the approved classification before selecting New .
You cannot maintain the list.	Your user account may not have permission to maintain the shared configuration list.	Confirm that you have access to Configurations > General Settings > Order Cancellation Reasons and the required maintenance permission.

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Order Activation Conditions

Symptom	Likely cause	Fix
You cannot access Order Activation Conditions.	Login details may be required or may not have been accepted.	Re-enter Enter User Name and Enter Password , then select Login .
The required condition or cancellation reason does not appear.	The current search or filter may be too restrictive, or no matching record is displayed.	Clear or revise the search criteria, then select Apply filter again.
You started a new record unintentionally.	New was selected before confirming that a new entry was required.	Select Cancel to stop the current action.
The exported list does not contain the expected records.	The current view may have been filtered or searched before export.	Review the active search and filtering criteria, apply the intended criteria with Apply filter , and then select Export again.

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Regret Reasons

Symptom	Likely cause	Fix
You cannot access the Regret Reasons page.	The screen requires sign-in details.	Enter valid values in Enter User Name and Enter Password , then select Login .
The required reason does not appear in the list.	A search or filter may be restricting the displayed records.	Clear or revise Search , then select Apply filter .
You are unsure whether to create a new reason.	A similar standardized reason may already exist.	Search using related keywords and review the filtered results before selecting New .
You no longer want to continue with the current action.	A create, update, or other screen action is still in progress.	Select Cancel where it is available.

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Margin Items

Symptom	Likely cause	Fix
The required record is not visible.	A search term or filter is limiting the list, or the wrong tab is selected.	Check the selected tab, revise Search , and select Apply filter .
A new record was created in the wrong category.	New was selected before choosing the appropriate tab.	Return to the required tab and create or maintain the record there. The screen does not provide a listed move action between tabs.
An update should not be saved.	The record is still in the current action form.	Select Cancel before selecting Ok .
A review requires supporting evidence, but no document is available with the record.	A file was not attached during record maintenance.	Use Attach and review available files through files[] where applicable.

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Rating Types

Symptom	Likely cause	Fix
A required rating type is not visible.	The list may be filtered, or the search term may be too specific.	Review Search , adjust or clear the criteria, and select Apply filter again. Use Cancel if you need to exit the current filter action.
Multiple similar rating types are displayed.	Existing scales may use similar type names or response values.	Review the listed rating values before selecting New . Use the existing type when it provides the required scale.
You need to share the rating type list with another team.	The information is only displayed in the ISO settings list.	Select Export to produce an exported copy of the displayed information.
You need to continue from rating types to survey activity.	Rating Types and Customer Satisfaction Surveys are accessed through related workflow controls.	Select Customer satisfaction survey to open the related survey area.

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Customer Satisfaction Survey

Symptom	Likely Cause	Fix
The required survey record is not visible.	The list contains more records than the current view shows, or the search criteria are too broad.	Enter a more specific value in Search and select Apply filter .
The survey questions are not displayed.	The wrong survey record may be selected, or the questions tab has not been opened.	Return to iso settings , select the intended survey record, and then open questions .
A file is not visible after attempting to add it.	The attachment may not have been confirmed or may not have been added to the selected record.	Use Attach again, complete the available confirmation with Ok , and check files[] .
Exported information is broader than expected.	No search or filter was applied before exporting.	Use Search and Apply filter , verify the displayed records, then select Export again.

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Integration With Other CRMs Settings

Symptom	Likely cause	Fix
The required CRM integration setting is not visible.	The incorrect tab is selected.	Review each available tab and select the integration context required for the task.
A supporting document is missing from the setting.	No file has been added to files[] , or the attachment has not been confirmed.	Select Attach , add the required file, select Ok if prompted, and then select Save .
Changes to the ExternalApp value are not retained.	The page was closed or another tab was selected without saving.	Return to the relevant tab, review ExternalApp , and select Save or Save and Close .
The user is unsure whether the setting applies to the intended business context.	The tab name was not checked before reviewing the field values.	Confirm the tab name first, then review ExternalApp and files[] within that tab.

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Manage Demo Data

Symptom	Likely cause	Fix
The required demo data file is not available in files[] .	The file has not been added to the page.	Select Attach , add the required file, and verify that it appears in files[] .
An unnecessary file remains in the demo data list.	The file has been retained rather than removed.	Confirm that the file is no longer required, then select Delete .
You are not ready to import the current set of files.	The files[] list contains files that have not been reviewed.	Review the list, use Keep for files that should remain available, and use Delete for files that should not remain before selecting Import demo data .
A confirmation remains on screen after an action.	The page is awaiting acknowledgement.	Select Ok to confirm the displayed action.

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Product Categories

Symptom	Likely cause	Fix
You cannot find the category you expect in the list.	The list contains many records or the current display does not show the required record.	Use Filter (icn-filter) to narrow the list, then use Update (icn-update) if you need to refresh the displayed information.
A new category was started but should not be retained.	An existing category was found, or the category details are incomplete.	Click Cancel rather than Ok , then return to the category list and review the existing records.
The export contains records that are not relevant to the request.	The list was exported before the display was narrowed.	Apply Filter (icn-filter) first, confirm the displayed records, and then click Export again.
A supporting file was not accepted.	The attachment activity was cancelled or was not completed.	Use Attach , provide the file through Files (files[]) , and click Ok to accept the activity.

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PM Statuses

Symptom	Likely cause	Fix
The required PM status does not appear in the list.	A search or filter may be limiting the visible records.	Review the value in Search , select Cancel if appropriate, and run the search again with a broader term.
The export does not contain the expected records.	The current filter may not have been applied before exporting.	Enter the required value in Search , select Apply filter , verify the displayed list, and then select Export .
You cannot confirm what will happen after selecting an action.	The screen data does not define the results of Update (icn-update) , Tickets , Attach , or Settings (icn icn-settings) .	Open the action and review the resulting dialog or page before selecting Ok or making further changes.
You need to create a status but do not see the required fields on the PM Statuses list.	The fields are expected to appear after selecting New , but the creation form is not included in the captured screen data.	Select New and complete only the fields presented in the resulting form. Confirm the record only when the available form provides a confirmation action.

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Product Serial Combination

Symptom	Likely cause	Fix
A required supporting document is not shown after leaving the screen.	The change was not saved.	Reopen the Product Serial Combination screen, add the file through Attach , and select Save .
An incorrect file was added.	The attachment was selected before the record was reviewed.	If the change is still unsaved, select Don't Save and repeat the attachment process with the correct file.
A confirmation prompt remains open.	An action requires confirmation.	Review the prompt and select Ok when you intend to confirm the action.
You cannot find the required serial-combination information.	The visible configuration information does not match the expected record.	Review the displayed serial component digits, default values, and count before making changes.

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Serial Status

Symptom	Likely cause	Fix
The required serial status is not visible.	A search filter may be limiting the list.	Clear or revise Search , then select Apply filter .
The export contains records that are not needed.	The list was exported without the intended filter.	Enter the required value in Search , select Apply filter , verify the displayed results, and select Export again.
You cannot determine what information is required for a new record.	The supplied Serial Status screen does not expose the new-record fields or validation requirements.	Select New and follow the fields shown in the resulting form; use your organisation's approved reference-data policy for the status value.
You need to stop an in-progress action.	A filter, attachment, or other action is still open.	Select Cancel where it is available.

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Categories Question Unit

Symptom	Likely cause	Fix
The expected record is not visible.	The list has not been filtered using an	Enter a more specific value in Search and select Apply filter . If a filter action

Symptom	Likely cause	Fix
	appropriate search term.	is open but no longer required, select Cancel and try again.
You need to attach supporting documentation, but no file is displayed.	No file has been attached through the current action.	Select Attach , complete the attachment action, then review files and select Ok when confirmation is presented.
You need serial-related information rather than category-question-unit list data.	You are viewing the reference-list tab instead of the related serial view.	Select the serial status tab and review the available Serial Status information.

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Categories Questions

Symptom	Likely cause	Fix
The list does not show the expected entry.	The current search or filter criteria may be too narrow or may not have been applied.	Review the text in Search , revise it if necessary, and select Apply filter again.
The displayed results appear outdated.	The screen may require a refresh.	Select Refresh (icn-update) , then repeat the search and filter if required.
You cannot continue past the access fields.	The screen is requesting user credentials.	Complete Enter User Name and Enter Password , then select Login .
The exported list contains unexpected entries.	The list was exported before the intended filter was applied.	Return to Search , select Apply filter , confirm the displayed results, and then select Export .

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Reports Settings

Symptom	Likely cause	Fix
The required layout cannot be found.	The layout name is unclear or the search criteria are too broad.	Use Search with a more specific value and review available Layout name entries.
Changes to a current layout are not retained.	The revised layout was not updated.	Select the correct layout, make the required changes, and select Update Current .

Symptom	Likely cause	Fix
A new layout does not appear in search results.	The layout was created but not saved.	Enter the required Layout name and select Save .
The wrong reporting area is being reviewed.	The incorrect reports settings tab is selected.	Select the appropriate tab: dashboard settings, integration with crms, targets and budgets, or work procedure settings .

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Serial Combinations

Symptom	Likely cause	Fix
The required component is not visible.	A filter may be limiting the displayed records.	Review and adjust Filter by user and Filter by field , then search again.
The selected component is not included in the combination.	The component was not confirmed through the selection controls or was not retained.	Use Select A Component and Select... again, verify the entry in Selected items , then select Save .
Changes disappear after leaving the page.	The changes were discarded or not saved.	Reopen the serial combination, make the required selections, and select Save rather than Don't Save .
Supporting documentation is not associated with the record.	No file was added through the attachment control.	Select Attach , add the required file in files[] , and save the record if changes were made.

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Shareable Content

Symptom	Likely cause	Fix
The content list is too broad to review efficiently.	No filter has been applied, or the current filter is too broad.	Use Filter by user and/or Filter by field to narrow the displayed content.
Relevant content is missing from Selected items .	The current filtering criteria may exclude the required item, or the item has not been selected.	Review Filter by user and Filter by field , then update Selected items as needed.

Symptom	Likely cause	Fix
A supporting document is not included with the saved content.	The file was not attached before saving.	Select Attach , confirm that the document appears under Files (files[]) , and then select Save or Save and Close .
The screen does not show the information expected after changes.	The displayed information may need to be refreshed.	Select icn icn-update and review the updated screen.

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Templates

Symptom	Likely Cause	Fix
The required template cannot be found.	The file has not been attached, or it is listed under a different template name.	Review the template list and its uploaded file names. If the file is not available, select Attach and add the required file.
A file is attached but the action is not completed.	The attachment has not been confirmed.	Review the selected file in files[] , then select Ok when it is correct.
You cannot determine whether a listed template is the current version.	Multiple files or similar template names may exist.	Compare the uploaded file name and uploaded date before using the template.
You need to manage a related request or issue.	Template file management and ticket work are separate actions on the screen.	Select Tickets when your process requires ticket handling.

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Base Of Inspection

Symptom	Likely cause	Fix
The expected record is not displayed.	The wrong tab may be selected, or the search criteria may be too restrictive.	Select the appropriate tab, review Search , and select Apply filter again.
The displayed export does not contain the expected records.	The list may have been exported before the correct tab or filter was selected.	Return to the required tab, apply the appropriate filter, verify the displayed records, and select Export again.

Symptom	Likely cause	Fix
A supporting file is not visible.	The file may not have been attached in the current record context.	Select the relevant tab and record context, use Attach if required, then review files[] .
An action should not be completed.	A filter or dialog may still be open.	Select Cancel to leave the current action without completing it.

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Inspection Document

Symptom	Likely cause	Fix
The required inspection document is not visible.	The list is not sufficiently narrowed or the current tab does not display the required record.	Enter a more specific value in Search , select Apply filter , and review both Base of inspection and Warehouse settings .
A supporting file is not shown for the document.	The file has not been attached, or the current action was not accepted.	Select Attach , verify the file appears in files[] , then select Ok .
The export contains unexpected records.	The list was exported without the intended search or filter criteria.	Return to the document list, set the required Search criteria, select Apply filter , and then select Export again.
The current action should not be retained.	The document details or selected file require correction.	Select Cancel , revise the required information or attachment, and continue only when ready.

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Warehouses

Symptom	Likely cause	Fix
The required warehouse does not appear in the list.	The current list is filtered by a search value.	Clear or change Search , then review the warehouse list again.
The warehouse details needed for review are not visible.	The current layout does not display the required columns.	Select Columns Chooser , add the required columns, and select Update Current or Save .
A layout change is not retained.	The revised layout was not saved or the update was cancelled.	Select Update Current for an existing layout, or select Save after creating a layout.

Symptom	Likely cause	Fix
The wrong list layout is displayed.	A non-standard saved layout is active.	Select Standard Layout to return to the standard warehouse-list arrangement.

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Service Types

Symptom	Likely cause	Fix
No Service Types records are displayed.	The list currently has no visible records, or the active filter does not match any records.	Check the displayed count, revise the value in Search , select Apply filter , or select Cancel to stop using the current filter.
The expected record cannot be found.	The search term may not match the available record, or the record may not be present.	Try a different search term and select Apply filter . If the required record is still not available, select New to begin the record-entry process.
A user cannot determine how to complete a new Service Types record.	The Service Types list screen does not expose the new-record fields or save action.	Select New and follow the fields and confirmation controls shown on the subsequent screen. Do not infer required values from the list view.
The exported result is not the expected set of records.	The list may have been exported before the intended search or filter was applied.	Set the required value in Search , select Apply filter , verify the displayed list, and then select Export .

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Transfer Reasons

Symptom	Likely cause	Fix
No records are displayed after filtering.	The search value or applied filter does not match available records.	Revise the value in Search and select Apply filter again. If you do not want to continue with the filter action, select Cancel .
The required transfer reason cannot be found.	The reason may not be included in the currently displayed records.	Search for an alternative term, review the service types tab, or select New to begin creating a new entry.
The exported list does not contain the	The list was exported with the current search or filter	Review Search and the active filter criteria, then select Apply filter before selecting

Symptom	Likely cause	Fix
expected records.	criteria applied.	Export again.

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Warehouse Product Types

Symptom	Likely cause	Fix
You cannot access the Warehouse Product Types list.	The system is displaying the login prompt, or your user session is not active.	Enter the required values in Enter User Name and Enter Password , then select Login .
The required product type is not visible.	The list has not been filtered with a relevant search value, or the current search does not match the record.	Clear or revise Search , then select Apply filter again and review the resulting list.
You are unsure whether to create a new record.	An existing record may already be available under a similar name.	Search the list first and select Apply filter . Select New only after reviewing the results.
The exported output contains more records than expected.	The list was exported before the intended search or filter was applied.	Return to the list, enter the required value in Search , select Apply filter , then select Export again.

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