

Help & Troubleshooting — Data

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Projects

- The Projects page is not visible → You may not be in the Data area → Select **Data**, then select **Projects**.
- Planned Projects are not displayed → The **all** view may be selected → Select **planned**.

[Projects](#)

Configure Accounts

- **Symptom:** You cannot locate the Accounts workspace.
Likely cause: The **Data** navigation area has not been opened.
Fix: Select **Data**, and then select **Accounts**.
- **Symptom:** You need to begin adding an account record.
Likely cause: The new-record action has not been opened.
Fix: Select **New** in the Accounts workspace.

[Configure Accounts](#)

Configure Contacts

- The required contact is not displayed → The list may contain many contact records → Enter relevant identifying text in the **Search box** to narrow the list.
- You cannot begin a new contact record → The **New** action is unavailable or inaccessible → Verify that you have access to the **Contacts** workspace and the **New** action.

- You cannot update an existing contact → The **edit** action is unavailable or inaccessible → Verify that you have access to edit contact records in the **Contacts** workspace.

Configure Contacts