

Help & Troubleshooting — Financial

July 28, 2026

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Bank Guaranties

Symptom	Likely cause	Fix
The required L/G record is not visible.	The current search term is too specific, incorrect, or still applied.	Revise or clear Search box , then search again using available L/G information such as the L/G number, beneficiary, or issuer bank.
The list does not show the information needed for review.	The current layout does not include the required columns.	Select Columns Chooser , adjust the displayed columns, and use Save or Update Current as appropriate.
A layout change is not retained.	The layout was not saved, or the changes were cancelled.	Select Save after creating a layout with Add Layout , or select Update Current when changing the active layout.
The export contains more or fewer records than expected.	The list was exported with an incorrect search result or layout.	Confirm the active layout and the results in Search box , then select Export again.

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Receivables

Symptom	Likely cause	Fix
The required invoice does not appear in the list.	The wrong invoice scope is selected, or the search value is too restrictive.	Select All or Sales Invoices as appropriate, clear or revise Search , and select icn-update .
The required job, account, or due-date information is not visible.	The current layout does not include the required columns.	Select Columns Chooser and adjust the visible columns, or select Standard Layout .

Symptom	Likely cause	Fix
A layout change is not retained for later use.	The layout was not saved or updated.	Use Add Layout and Save for a new layout, or select Update Current for the active saved layout.
The exported results do not match the intended review.	The current view was not filtered or arranged before export.	Set the correct scope, enter the required Search value, confirm the displayed columns, then select Export again.

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