

Help & Troubleshooting — projects management

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Projects Management

Symptom	Likely cause	Fix
You cannot open or update a Shipping Order.	Your user does not have access to PM > Projects Management > Shipping Order or does not have permission to update the applicable record.	Confirm your access and update permission with the person responsible for user permissions.
The Shipping Order you need is not displayed.	The required order has not yet been located in the list.	Select Search and search again using the information available for the order.
Changes to a Shipping Order are not retained.	The record was revised but neither save action was selected.	Select Save to retain the changes, or select Save and Close to retain them and close the order.
The Orders list does not show the information needed for review.	The current layout does not include the required columns.	Use Columns Chooser to revise the current layout, then select Update Current . Alternatively, select Add Layout to create a separate role-specific layout.

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Production Orders

Symptom	Likely cause	Fix
The required Production Order is not visible in the	The list is filtered or the search criteria are too	Select All , clear or revise Search , and search by a sheet number, job number, item

Symptom	Likely cause	Fix
list.	specific.	description, or responsible PM.
The list does not show the information needed for daily review.	The active layout does not include the required columns.	Select Standard Layout , or use Add Layout and Columns Chooser to create a layout that includes the required information.
A supporting document is not attached to the order.	The file selection was not confirmed.	Select Attach , use Select to choose the file, then select Ok before saving the Production Order.
Changes are not retained after leaving the entry screen.	The Production Order was not saved.	Select Save to retain changes, or select Save and Close to retain changes and close the screen.

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Shipping Order

Symptom	Likely cause	Fix
A Shipping Order cannot be found in the list.	The search text does not match the displayed sheet, client order, or job reference, or the list needs refreshing.	Clear or revise Search , then select the Refresh icon (icn-update) and search again using a more specific reference.
The required list column is not visible.	The current layout does not include the required column.	Select Columns Chooser , add the required column, and select Update Current . Alternatively, create a separate layout with Add Layout .
Changes to the current layout are not retained.	The layout was changed but not saved.	Select Update Current for an existing layout, or use Save after creating a layout with Add Layout .
A supporting document is not shown on the Shipping Order form.	The file may not have been attached or saved.	Select Attach , confirm that the file appears in Files (files[]) , then select Save or Save and Close .

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List

Symptom	Likely cause	Fix
The required package or sales job is not visible.	A search value may be restricting the displayed records.	Review and amend the value in Search , then select Refresh (icn-update) .
Important information is not shown in the list.	The selected layout does not include the required columns.	Select Columns Chooser , add the required columns, and select Update Current or create a layout with Add Layout .
A revised layout is not available later.	The layout changes were not saved.	Use Save when creating a layout, or use Update Current when changing an existing layout.
The list presentation is unsuitable for the current task.	A role-specific layout is active.	Select Standard Layout , or select a more suitable saved layout through Layout options (icn icn-layout) .

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Buyout To Order

Symptom	Likely cause	Fix
The required selection is not shown on the record.	A value was chosen but not confirmed in the selection dialog.	Use Select after choosing the value. If a confirmation is shown, select Ok .
The Buyout To Order record is difficult to identify later.	Display name is blank or too general.	Enter a specific Display name that includes useful job or Buyout context, then select Save .
A supporting document is not visible on the record.	The file was not added or was not confirmed.	Select Attach , add the file, confirm it appears in files[] , and then select Save or Save and Close .
Changes disappear after leaving the form.	The record was closed without using a save action.	Reopen the record, make the changes again, and select Save or Save and Close .

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Orders

Symptom	Likely cause	Fix
The Orders list does not show the information	The current layout does not include the required	Select Columns Chooser , add the required columns, and select Update

Symptom	Likely cause	Fix
needed for the review.	columns.	Current.
A new layout is not available after it was created.	The layout was not retained.	Create the layout again and select Save after entering Layout name and selecting columns.
The wrong layout is being removed.	Delete Current applies to the current layout.	Select Cancel before confirming deletion, then verify the current layout before using Delete Current again.
An exported list does not contain the expected information.	The displayed layout did not contain the required columns before export.	Adjust the layout with Columns Chooser , save it with Update Current , and then use Export .

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NewInstantJob

Symptom	Likely cause	Fix
The required item is not yet associated with the draft.	No selection has been confirmed.	Use Select... , choose the appropriate item with Select , and confirm with Ok where available.
A document is missing from the job draft.	The file was not attached before the record was saved or closed.	Reopen the draft, use Attach , add the file to files[] , and select Save .
Changes are lost after leaving the record.	Don't Save was selected, or the record was closed without saving.	Re-enter the draft, make the required selections again, and use Save or Save and Close .
The draft should not remain in the list.	The record is no longer required.	Select Delete only after confirming that the draft should be removed.

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Delivered Orders

Symptom	Likely cause	Fix
The required delivered order is not visible.	The list is not filtered using the relevant identifying value, or the current visible rows do not include the order.	Enter the job number, client, or job title in Search and review the matching list rows.

Symptom	Likely cause	Fix
Important information is not displayed in the list.	The current layout does not include the required columns.	Select Columns Chooser , add the required columns, and use Update Current or Save to retain the change.
A layout change is no longer available.	The changes were cancelled or were not saved or updated.	Reapply the column changes and select Save for a new layout or Update Current for the selected layout.
The export includes information that is not needed.	The list was exported before applying the appropriate search criteria or layout.	Return to the list, use Search , confirm the required columns, and select Export again.

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