Letters Of Guaranties

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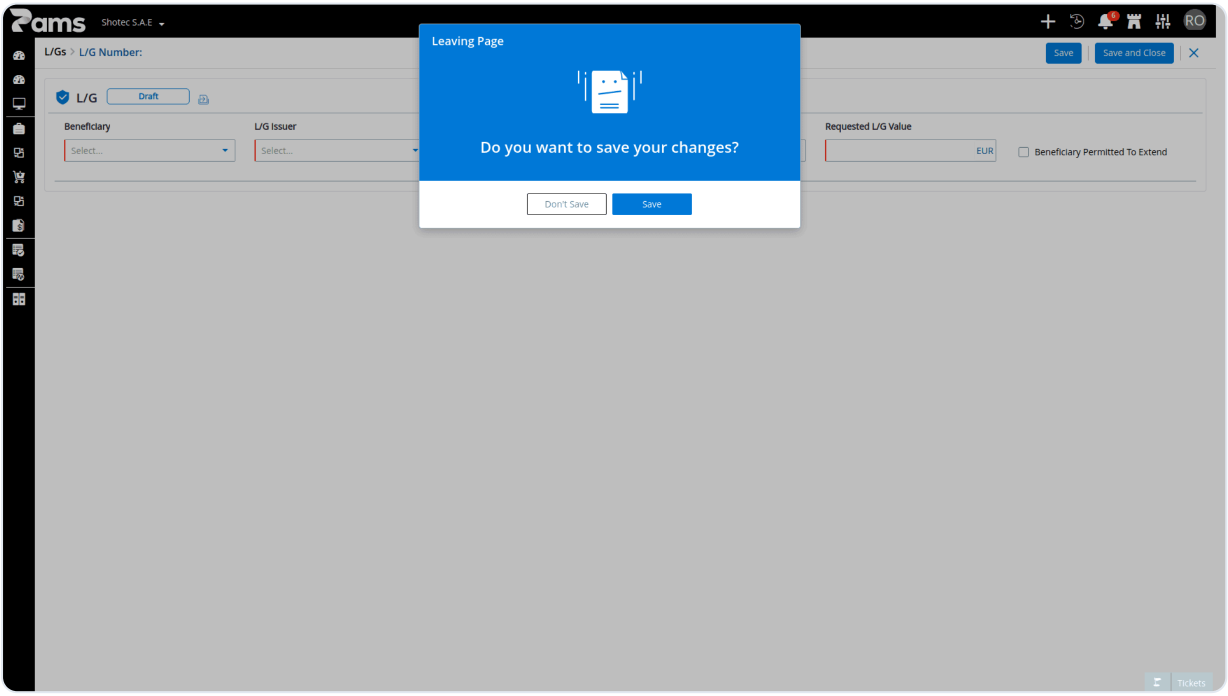


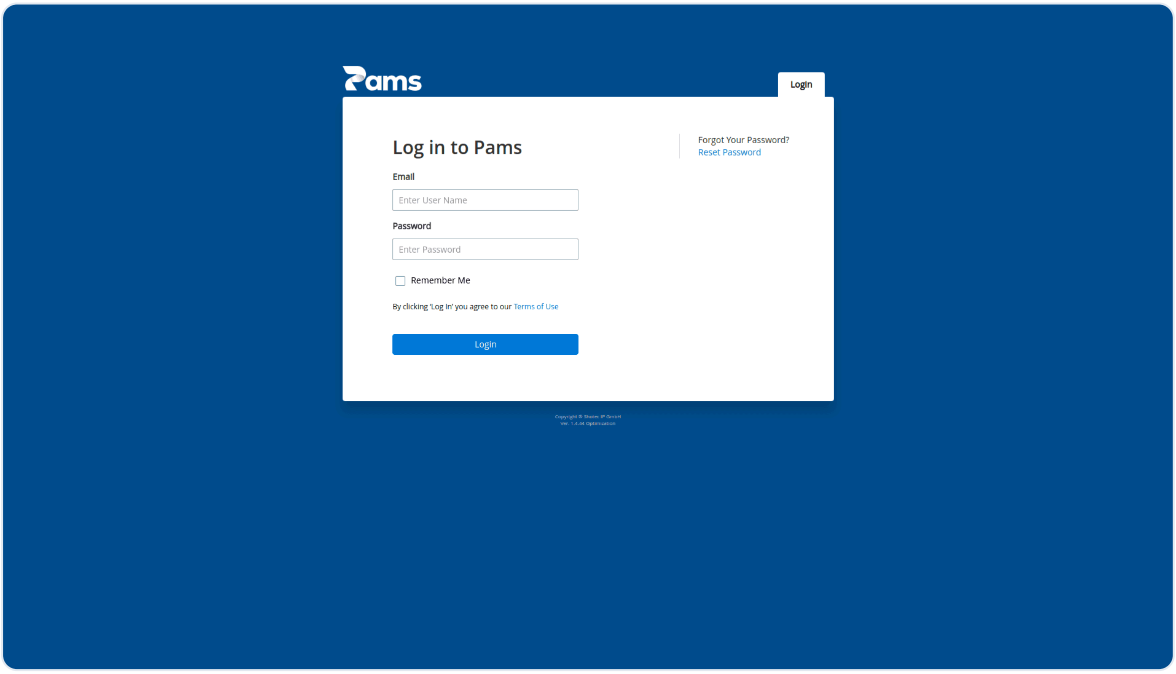
Letters Of Guaranties

Overview

Use Letters Of Guaranties (L/Gs) in the Sales application to work with files associated with Letter of Guarantee records. Sales representatives, account managers, project managers, and finance users can select a file and save it from the L/G file screen when supporting documentation must be retained with the L/G activity. The available screen supports file selection and saving; it does not display issuance, approval, expiry, or other L/G status information.

Workflow

1. Open the Sales application and select **L/Gs** from the available navigation options.



Letters Of Guaranties

Use this area when you need to add or save a file for a Letter of Guarantee. The screen contains a file list, shown as **files[]**, and a file-selection control.

2. Decide whether you are ready to select a file.
   - To choose a file, select **Select...** and choose the required file in the selection window.
   - Review the selected item in **files[]** before saving.
   - If you are not ready to keep the selection, select **Don't Save** to leave without saving the current work.

   > **Note:** The screen provides a file-selection workflow only. Do not treat saving a file as confirmation that the Letter of Guarantee itself has been issued, approved, or completed.

3. Decide how to save the selected file.
   - Select **Save** to save the current selection and remain on the screen.
   - Select **Save and Close** to save the current selection and close the screen.
   - If a confirmation message is displayed after saving, select **Ok** to acknowledge it.
4. Decide whether to continue working with related items.

The screen also provides **Tickets** and **Attach** actions. Use these actions only when they are required by your current business process. The provided screen does not describe their resulting workflow or record changes.

> **Warning:** Select **Don't Save** only when you intend to discard unsaved work. Any file selection that has not been saved should be treated as incomplete.

Examples

A sales representative needs to retain a bank-provided Letter of Guarantee document for a customer sales activity.

1. The representative opens **L/Gs** in Sales and reaches the file screen.
2. The representative selects **Select...** and chooses the bank document from the available files.
3. The representative checks that the intended document is shown in **files[]**.
4. Because no additional file work is required, the representative selects **Save and Close**.
5. If the system displays a confirmation message, the representative selects **Ok**. The file selection has now been saved and the screen is closed.

Tips

> **Tip:** Use **Save** when you want to keep the selected file and remain on the screen to review the current selection.

> **Tip:** Use **Save and Close** when the selected file is final and you have finished working on the current screen.

> **Warning:** If you selected the wrong file, do not save the current selection. Use **Don't Save** and repeat the file-selection process with **Select...**.

Troubleshooting

Symptom	Likely cause	Fix
No file is shown in **files[]**.	A file has not yet been selected.	Select **Select...** and choose the required file.
You do not want to retain the current selection.	The selected file is not the intended document, or the work is not ready to save.	Select **Don't Save** rather than **Save** or **Save and Close**.
A message remains visible after saving.	The system is requesting acknowledgement.	Select **Ok** to close the message.
You need to keep working after saving.	**Save and Close** would close the current screen.	Select **Save** instead, then continue working on the screen.

Related pages

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