# Getting Help

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*Welcome*

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Use this page to find the appropriate source of assistance when working with sales jobs, projects, buyouts, Warehouse operations, Finance records, or other business processes.

## Find an Answer

Use the following options in order:

1. **Search this manual**
   Search for the task, record type, or business term you need help with, such as Sales job, RFQ, Direct order, Buyout, Stock, L/G, or Job profitability.
2. **Review the Help & Troubleshooting pages**
   Consult the Help & Troubleshooting content for guidance on common issues, error messages, and system behaviour.
3. **Open the guide for your work area**
   Refer to the documentation for the area in which you are working. For example, use the relevant guide when managing Sales jobs, Projects, Purchasing activities, Warehouse Stock, or Finance transactions.
4. **Contact your administrator or support contact**
   If the available documentation does not resolve the issue, contact your organisation's administrator or designated support contact.

## Information to Gather Before Reporting a Problem

Provide the following information to help your administrator or support contact investigate efficiently:

| Information | What to provide |
| --- | --- |
| Page | The page or work area where the problem occurred. |
| Record | The affected record, such as the Sales job, project, RFQ, Buyout, product, customer account, or payment. Include its identifying number or reference where available. |
| Expected result | What you expected the system to do. |
| Actual result | What happened instead. |
| Error text | The complete text of any displayed error or warning message. |
| Steps taken | The actions performed before the problem occurred. |
| Relevant details | Any related information, such as the selected customer, product, Warehouse, date, amount, or job status. |

When reporting an issue, avoid sharing passwords or other confidential credentials.