

Start in the right company

Sign in using your usual account. Check the company and colored environment label in the header. Work only in the company and environment intended for the task.

Open your work

Use Ask Nexa, the menu or an assigned-work card.

Find a record

Use the list search and filters; check its identity and status before editing.

Return

Use the form's Return action to keep the owning list context.

Use links and record navigation

A linked record opens a compact summary. Use Show more for additional details and Open full record for the form. Previous and Next page within available records; unavailable directions are greyed out.

Navigation rules

Hold either paging arrow to see available choices.

Record links

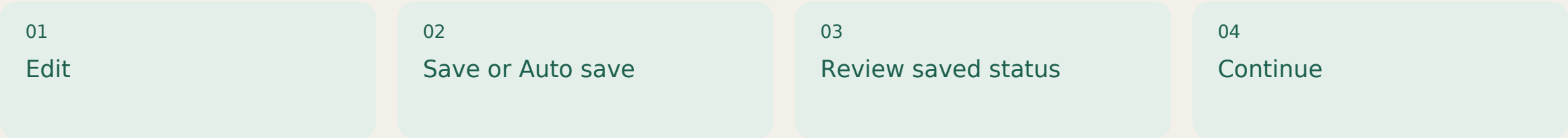
Unlinked, linked and currently selected links have distinct standard states.

Help navigation

Open ? and choose This form, Workflow, Audit, Docs, Support or Record chat.

Save your edits deliberately

Where a form offers Auto save, enable it if you want changes saved as you work. A saved form shows Saved when nothing remains to save. A saved draft is not an ERP submission.



Leaving with changes

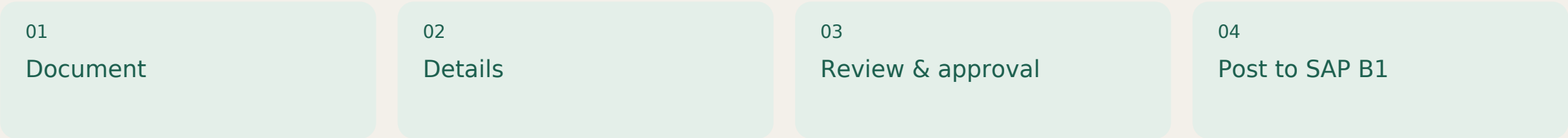
Choose Save, Disregard changes or Back to record when the form asks.

Before submission

Resolve required values and any approval requirements first.

Process an A/P invoice

Inspect the original, correct extracted details and resolve the supplier and purchasing business case. Compare amounts, dates, currency, lines, tax and posting fields with the document.



Review & approval

Submit for approval. Authorized approvers approve or decline with the required decision note.

Post

After approval, use the separate final posting action and wait for the actual result.

Handle errors and follow up

Open the record's Sync details to read its latest attempt. A red sync indicator means that record has an unresolved sync failure. A company connection issue does not make unrelated records failed.

Documents

Use Status → Sync errors to find records with their own unresolved sync failure.

Before retrying

Check whether the ERP received the transaction. Do not create a duplicate by guessing.

Support

Use the contextual Help guidance and provide the record/error context through your normal support process.

Get help and install the app

Use ? → Docs on the actual form for its walkthrough, controls and troubleshooting. The public guide is an overview; configured company workflows and permissions govern your work.

Install app

Open your account name → Settings and go to the final Install app section.

Android test APK

Download the named APK, open Downloads, choose Package installer → Just once, then Install → Open. Allow that download source only if Android asks.

Other devices

Use the web-install option or the device-specific instructions shown there. Store links appear only when a release is available.