

List views and form views

Getting started

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List views and form views

How to work with lists of records and with a single record, and how to save and submit.

Beginner · About 12 minutes · Version 1.0 · Updated 17 November 2026

Overview

You work with records in two ways: a **list view** shows many records of one type, and a **form view** shows one record in full.

The list view

A list of purchase invoices with status labels, filters across the top and an Add Purchase Invoice button.

- The row of boxes above the table are **standard filters**. Type in them to narrow the list.
- **Status labels** (for example Paid and Overdue) show where each record stands.
- Use the **Add** button, such as **Add Purchase Invoice**, to create a new record.
- Click a row to open that record.
- The numbers at the bottom (20, 100, 500, 2500) set how many rows show per page.

The form view

A sales invoice form showing the customer, dates, company and an items table.

- The top shows the record's name and **status label**, such as Unpaid.
- Fields marked with a red star are **mandatory**.
- **Tabs** (Details, Payments, Address and Contact, Terms, More Info, Connections) organise the form. **Connections** lists related documents.
- The sidebar on the left holds **Assigned To**, **Attachments**, **Tags** and **Share**.
- The **Create** menu makes the next document in the chain. The **View** menu shows related ledgers. The **printer** icon prints.

Steps: create a record

1. Open the list and click **Add** (or use the search bar: `new` and the type).
2. Fill in the mandatory fields. Select existing records from drop-downs where offered.
3. Click **Save** (or **Ctrl + S**). The record is saved as a **Draft**.
4. Check it. For transactions such as invoices, click **Submit** to post it.

Practical example

The salesperson clicks **Add Sales Invoice**, picks the customer Baraka Supplies (the address and payment terms fill themselves in), adds three item rows, saves, and submits.

Important notes

- A saved draft has no effect on your books until you submit it.
- Unsaved changes show a **Not Saved** label. Save before leaving the page.

Common mistakes

- Closing the browser tab with the document still **Not Saved**.
- Editing a submitted document. It is locked; see Understanding document status.

Next steps

Read Filtering, sorting and exporting.

Related documentation

- Filtering, sorting and exporting records
- Understanding document status
- Documents, DocTypes and records