Record activities from My Desk

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Record activities from My Desk

Use the standalone **Activities** tab to review sales follow-up across jobs or add a Visit, Meeting, or Call. For work tied to one sales job, continue in Sales job activities and files.

Record activities from My Desk

An activity records sales follow-up across jobs so you can review visits, meetings, and calls
from one workspace.

If you need to…	Go to
Review activities across jobs	Find and review activities
Narrow the all-job list	Filter the activity list
Add a Visit, Meeting, or Call	Add a Visit, Meeting, or Call
Choose the right activity form	Choose the activity type and handle its differences
Resolve a validation or action message	When activity work goes wrong
Work with activities for one sales job	Sales job activities and files
Understand activity statuses	Activity status

Before you start

The standalone activity workspace is available when your organisation includes the Activities
subscription and you are not a principal user.

Prerequisites

- Open **My Desk**.
- Confirm that **Activities** is available as a tab.

- Have the information for the activity ready before you open its form.
- For a Visit, prepare the title, **Priority**, **Start Date**, and **End Date**.
- For a Meeting, prepare the title, **Priority**, **Start Date**, and **End Date**.
- For a Call, prepare the title, **Priority**, and **Start Date**.

Use the activity-specific fields listed in Choose the activity type and handle its differences.

Find and review activities

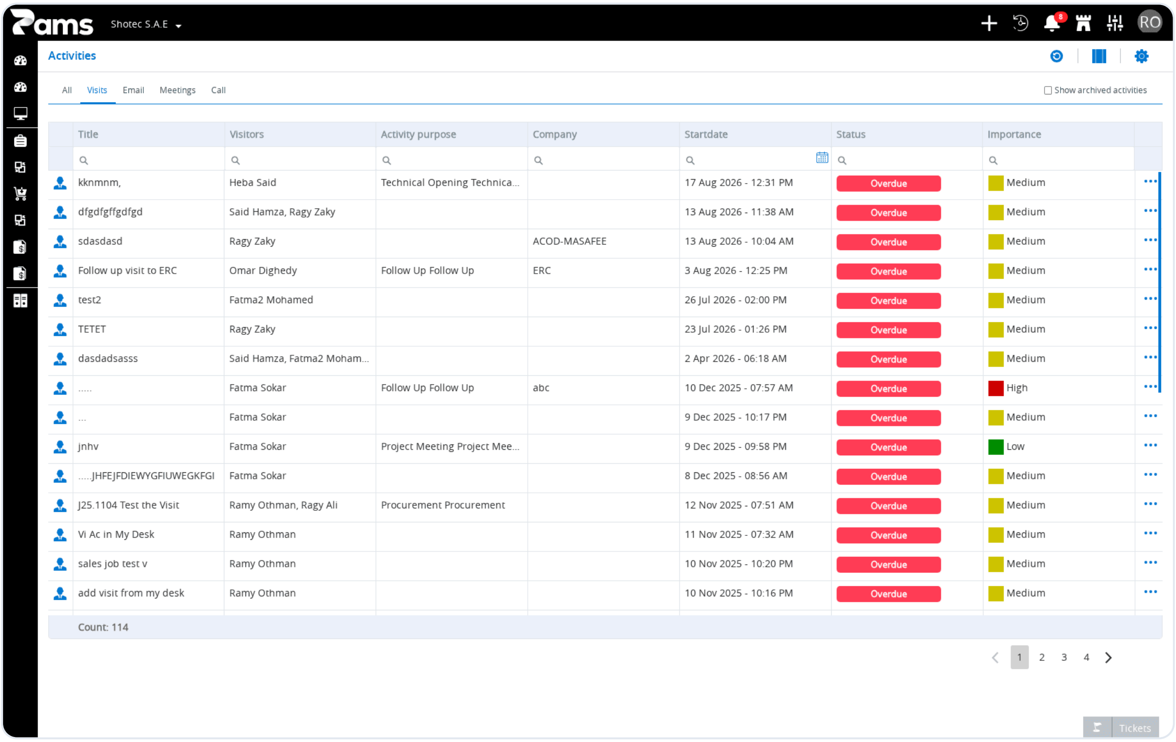
The activity list is the all-job view of recorded sales follow-up. Its visible headers identify the
information available for review, and each row can expose actions for opening or deleting an activity.

Prerequisites

- You are on **My Desk**.
- **Activities** is available.

Steps

1. Select **Activities**.
2. Read the activity rows under the visible headers.



3. Select **Open** for an activity you are allowed to view.
4. To remove an activity you own, select **Delete**.

Result: The activity list is open for review, or the selected activity opens in its activity view.

The list currently draws **Title**, **Visitors**, **Activity purpose**, **Company**, `Startdate`, **Status**, and **Importance**. Work from the headers visible in your list when the columns differ.
Use **Refresh**, **Table Layout**, and **Settings** in the activity list toolbar.

Filter the activity list

The activity filters let you review one activity type or include archived activities without leaving
the all-job list.

Prerequisites

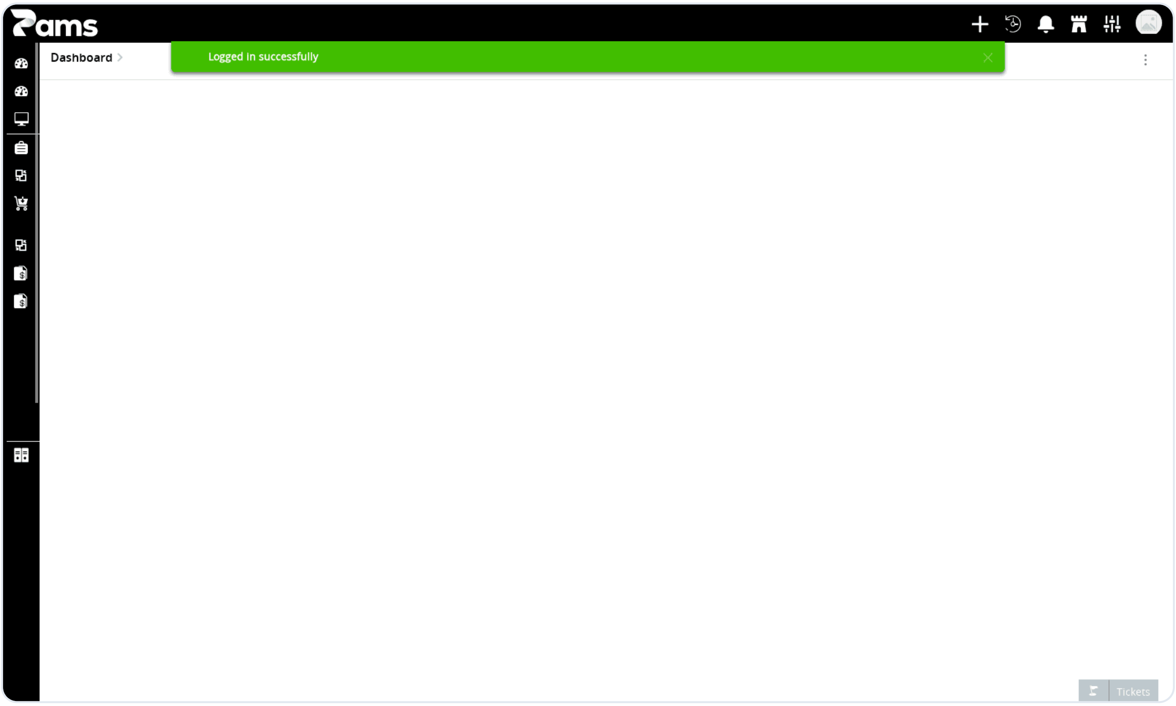
- The activity list is open.

Steps

1. In the activity-type filters, select the view that matches what you need to review.

If you need to…	Select
Review every activity type	**All**
Review visits	**Visits**
Review email activity	**Email**
Review meetings	**Meetings**
Review calls	**Call**

2. Select **Show archived activities** when archived activity records are part of your review.



Result: The activity list displays the filter view you selected.

Add a Visit, Meeting, or Call

Use an activity form when you need to record sales follow-up from the all-job My Desk workspace.

Prerequisites

- The activity list is open.
- You know which activity type describes the follow-up.
- You have the required information listed in Before you start.

Steps

1. Select the unlabeled plus icon beside the **Activities** tab.
2. Select one activity type.

If you are recording…	Select
A visit or site contact	**Visit**
A scheduled discussion	**Meeting**
A telephone follow-up	**Call**

3. In the form, select **Priority**.

4. Enter the title for the selected activity type.
5. Complete the type-specific fields listed in Choose the activity type and handle its differences.
6. Enter **Start Date**.
7. For a Visit or Meeting, enter **End Date** no earlier than **Start Date**.
8. If the form displays **Reminder**, set the reminder for the saved activity.
9. Choose how to finish saving the activity.

If you need to…	Select
Save and keep the form open	**Save**
Save and close the form	**Save and Close**

Result: The selected activity form has been completed and submitted with the values you entered.

Choose the activity type and handle its differences

Visit, Meeting, and Call are three activity types for different kinds of sales follow-up; choose the
one that matches the work you are recording.

Prerequisites

- The activity type has been selected.

Steps

1. Review the fields for the selected activity type.

Activity type	Complete these fields
Visit	**Priority**, **Visitors**, **Start Date**, **End Date**, and **Visit type**
Meeting	**Priority**, **Start Date**, and **End Date**
Call	**Priority**, **Call Use**, **Start Date**, and **Description**

2. For an existing activity, use **Reminder** when it is displayed for the saved activity.
3. Use the activity's edit-only tabs when the activity has already been saved.

Result: You know which fields apply to the selected activity type and which saved-activity controls are available.

The add menu offers **Visit**, **Meeting**, and **Call** for this workspace. Use one of these three
choices when you add an activity.

When activity work goes wrong

Use the message text on screen to identify the correction needed.

What you see	What it means	What to do
`Priority is required`	**Priority** is empty.	Select **Priority**.
`Title is required`	The activity title is empty.	Enter a title.
`Start Date is required`	**Start Date** is empty.	Enter **Start Date**.
`Date is required`	The Call date is empty.	Enter **Start Date** on the Call form.
`This action is only allowed if you belong to that branch`	The action is restricted to the activity's branch.	Use an activity belonging to your branch.
`One topic and at least one note is required`	Completing the activity requires a topic and a note.	Add one topic and at least one note before completing it.
`There is no topic to print`	The activity has no topic available for printing.	Add a topic before using the print action.
`An error occurred while processing your request`	The requested activity action did not complete.	Review the activity and retry the action.
`You are about to delete this activity, are you sure?`	PAMS is asking you to confirm the deletion.	Continue only when you intend to remove the activity.

Result: The message identifies the correction or the page that owns the related work.

Out of scope messages

These messages belong to the owning pages listed below.

Message	Owning page
`Your request was completed successfully`	Record activities from My Desk
`Forbidden characters detected. Please remove them and try again.`	General error messages

Message	Owning page
`Action not allowed`	Record activities from My Desk
`You already have a contact with this name`	Contact record
`Required Receiving Date`	Record payment
`This field is required`	Contact record
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Sales job record
`Invalid input. Please enter a non-negative value`	Sales job record
`An account with this name already exists`	Accounts
`Error: Vendor not saved yet`	Accounts
`Error: Client not saved yet`	Accounts
`This Field Is Required`	Accounts
`Custom fields saved successfully`	Sales job record
`Job updated successfully`	Sales job record
`Job deleted successfully`	Sales job record
`Job regretted successfully`	Sales job record
`Job cancelled successfully`	Sales job record
`Job missed successfully`	Sales job record
`Job reactivated successfully`	Sales job record
`Converted to offer successfully`	Sales job record
`Converted to inquiry successfully`	Sales job record
`Error saving custom fields`	Sales job record
`Cannot be un-delivered — a due invoice already exists`	Sales job record
`All offers must be in draft status to revert to inquiry`	Sales job record
`A project with this name already exists`	Sales job record
`Please save opened inquiry first`	Sales job record
`All inquiries must be in draft stage to revert to potential`	Sales job record
`Please enter action for each milstone`	Sales job record

Message	Owning page
`Please save opened cost sheet first`	Sales job record
`Booked quantity for this job is greater than the required BOM quantity`	Bill of materials
`You cannot edit or delete the product after the purchase package is created`	Bill of materials
`Cannot be deleted. Product is in purchasing`	Bill of materials
`You cannot edit the product after the PO is created`	Bill of materials
`This product is already included in BOM`	Products
`The first variant cannot be deleted`	Products
`An error occurred while connecting to your CRM system.`	Products
`Please select one product`	Products
`Required Receiving After`	Purchase job information
`Package must have at least one item`	MRQ record follow-up
`You cannot save without adding at least one product`	MRQ record follow-up
`Please enter at least one email`	Purchase job record
`Inquiry must have at least one item`	Purchase job record
`Offer must have at least one item`	Purchase job record
`Order must have at least one item`	Purchase job record
`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	Purchase job record
`Please select one or more items to create a RFQ.`	Purchase job record
`Required Offer Type`	Purchase job information
`Required Bid Due Date`	Purchase job information
`Error loading accounts`	Delivery notes
`Serial you have entered already exist and belong to same manufacturer`	Reference list data
`There is error in serial you have entered`	Reference list data

Message	Owning page
`Minimum: At least one serial`	Reference list data
`LG has one or more extensions or deductions and cannot be reverted to the requested stage`	L/G lifecycle
`Please choose a date after the current expiry date`	L/G lifecycle

Continue with job-filtered activity work

The standalone My Desk list covers activities across jobs. Use the sales-job activity page when you need
to review or manage activities in the context of one sales job.

Result: Continue with Sales job activities and files for job-filtered activity work.