PAMS FRESH GENERATION

My Desk workspace

September 10, 2026

My Desk workspace

My Desk is a personal workspace for focusing grouped work, choosing a way to review it, and
opening linked records without leaving the workspace.

If you need to…	Go to…
Narrow the workspace to a client, vendor, project, responsible salesperson, contact, or team	Focus work and choose a list group
Review graphs or scheduled work	Choose a work mode
Work with standalone tasks or activities	Manage tasks from My Desk or Record activities from My Desk
Open a linked sales, invoice, account, project, contact, user, team, or L/G record	Open and hand off a linked record
Continue detailed work on a linked record	Sales job record, Invoice lifecycle, or the relevant hand-off in Open and hand off a linked record

Before you start

Open **My Desk** from the application navigation. Principal users open the principal workspace from
their principal workspace entry. The available workspace areas depend on the subscriptions
included for your organisation and on whether you use the standard or principal workspace.

Prerequisites

- Know whether you use the standard or principal workspace.
- Ask your administrator whether the My Desk, Tasks, Activities, and **Calendar** subscriptions are

included when one of those areas is unavailable.

The standard workspace provides a filter control and the list groups. A principal workspace provides a
client list at the top and displays the principal workspace title. **Tasks**, **Activities**, and the
scheduler
can be unavailable when their subscriptions are not included, and principal users see those work
tabs as disabled links.

Result: You know which workspace route and work areas are available to you.

Focus work and choose a list group

Use the workspace filter when the work you need to review belongs to a particular client, vendor,
project, responsible salesperson, contact, or team. Lists organises the grouped work into
Current and **Archived**.

Prerequisites

- Open the standard My Desk workspace.
- Know the business context you want to review.

Steps

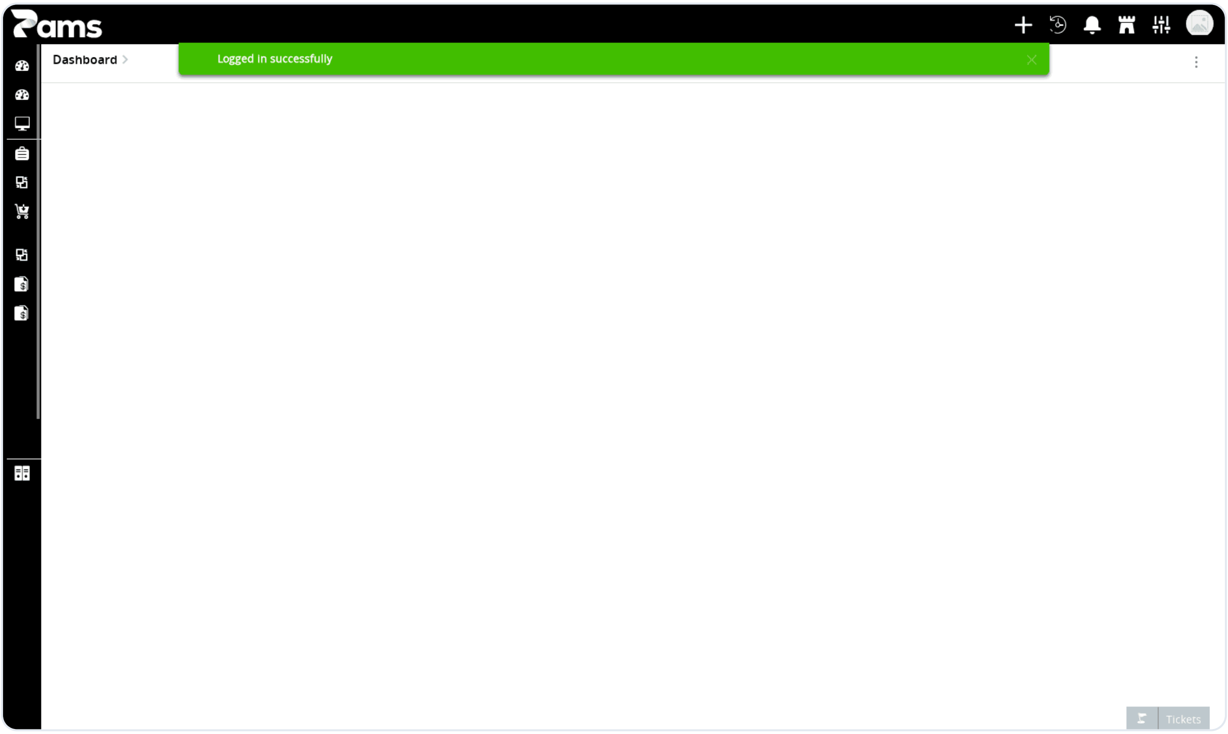
1. Select Filter.
2. Select the row that matches the context you need.

If you are focusing on…	Select…
A client	**Client**
A vendor	**Vendor**
A project	**Project**
A responsible salesperson	**Sales Responsible**
A contact	**Contact**
A team	Team

3. Select Filter by on a row that supports row filtering.
4. Select Lists.
5. Choose the group you need.

If you need to review…	Select…
Current work	**Current**
Archived work	**Archived**

6. Select **View** or Close view when you need to open or close a row view in the filter panel.
7. Select **Clear filter** when a row filter no longer applies.



The standard screen showed the available filter, list, graph, task, activity, scheduler, current, and
archived choices. Selecting **Filter** returned the browser to the
application home screen.

Result: The workspace is focused on the selected context, and its list groups are ready for
review.

While the list columns load, My Desk displays three placeholder groups with four placeholder rows in each group. When saved workspace state is enabled, My Desk restores the previously selected list group. The list request carries the selected client, principal, project, responsible person, contact, and team scope values.

Choose a work mode

Each work mode answers a different review question: the list mode groups work, the graph mode presents the chart view, the task mode presents standalone tasks, the activity mode presents visits, emails, meetings, and calls, and the scheduler presents scheduled work.

Prerequisites

- Open My Desk.
- Use a standard user account for an enabled task, activity, or **Calendar** tab.

Steps

1. Select the mode that matches your next task.

If you need to…	Select…
Review grouped work	the list mode
Review chart summaries	the graph mode
Work with standalone tasks	the task mode
Review or add visits, emails, meetings, or calls	the activity mode
Review scheduled work	**Calendar**

2. In **Calendar**, select Timeline when you need the timeline view.
3. In **Calendar**, select Tasks, Activities, Visit, Meeting, Call, BDD, or Delivery dates to choose the work shown.
4. Select Submit to apply the scheduler filters.

When the scheduler is in Day or Week view, Timeline changes its presentation. The control is disabled in Month view. Selecting **Today** returns the scheduler to today after you move away from the current date. Selecting an appointment opens its source record. Task appointments open the task record, bid-due and delivery appointments open the sales record, receivables open the procurement record, and other appointments open the activity record.

The visible Calendar filter choices are **Tasks**, **Activities**, **Visit**, **Meeting**, **Call**, **BDD**, and Delivery dates. Calendar opens task appointments at the task edit page, bid-due and delivery appointments at the sales edit page, receivables at the procurement edit page, and other appointment types at the activity edit page.

The screen provides the scheduler when its subscription is included. The groups and list columns depend on the workspace setup. Selecting the graph mode returned the browser to the home screen.

> **Note:** Work groups and list columns depend on the workspace setup available to your account.

Result: The selected work mode is open, with its available filters and work areas on screen.

Add a task or activity from My Desk

Use the task and activity work modes to create standalone work without opening a particular sales
job. The task mode starts with the personal task view and also provides an all-work view.

Add a task

Prerequisites

- Use a standard user account.
- Have the Tasks subscription included.

Steps

1. Select the task mode.
2. Select **My Tasks** for the personal task view, or select **All** for the wider task view.
3. Select **View completed tasks** when you need completed work included.
4. Select the plus action on the task tab.
5. Complete the task form.
6. Select **Save**.

The task form requires **Priority**, a task title, **Start Date**, and **Due Date**. A new task starts with today's **Start Date**, a **Due Date** one day later, and **Task Progress** at `0%`. The **Due Date** cannot precede the **Start Date**. A successful save displays `Data saved Successfully`; My Desk reloads the task list and closes the popup.

Result: The saved task is available in the task list after the save event completes.

Act on a task row

The task-row action menu provides **Open**, **Complete**, **Un complete**, and **Delete**. Only the
task owner can change completion or delete the task. **Complete** opens a confirmation with
`Are you sure that you want to mark this task as completed?`; **Un complete** opens a

confirmation
with `Are you sure that you want to un-complete this task?`.

Steps

1. Open the action menu for the task row.
2. Select **Open**, **Complete**, **Un complete**, or **Delete**.
3. Confirm the completion or deletion action when the confirmation appears.

After completion changes, My Desk refreshes the task grid. A successful deletion displays
`Task deleted successfully`; a deletion failure displays `Error while deleting task`.

Result: The selected task action is applied, or the task remains unchanged.

Add an activity

Prerequisites

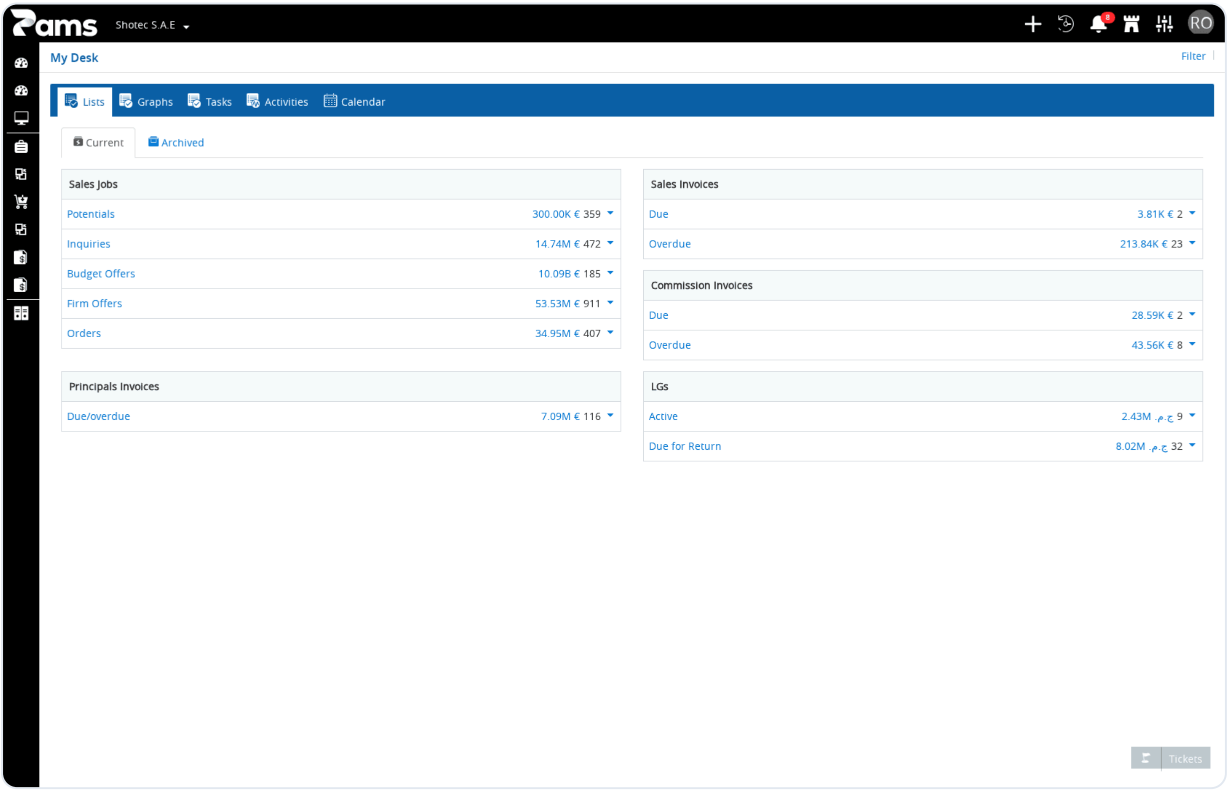
- Use a standard user account.
- Have the Activities subscription included.

Steps

1. Select the activity mode.
2. Select the plus action on the activity tab.
3. Select **Visit**, **Meeting**, or **Call**.
4. Complete the activity form.
5. Select **Save**.

The activity form validates its own entries before saving. After a successful save, My Desk reloads
the activity list and closes the popup. **Email** is an activity-list type, but it is not an available
My Desk add-menu choice.

In the activity list, the available type choices are **All**, **Visits**, **Email**, **Meetings**, and **Call**. **Show Archived Activities** includes archived activities when selected. Activity status
Activity status choices also include Not Reported, **Done**, and **Cancelled**.



Result: The saved activity is available in the activity list after the save event completes.

Open and hand off a linked record

An opened-record tab lets you inspect a linked record inside My Desk. The available record views
include sales jobs, accounts, projects, users, contacts, teams, invoices, principal invoices,
and L/Gs.

Prerequisites

- Open a row that has a linked-record view.
- For the normal record page, use a standard user account and a linked record with an available
link.

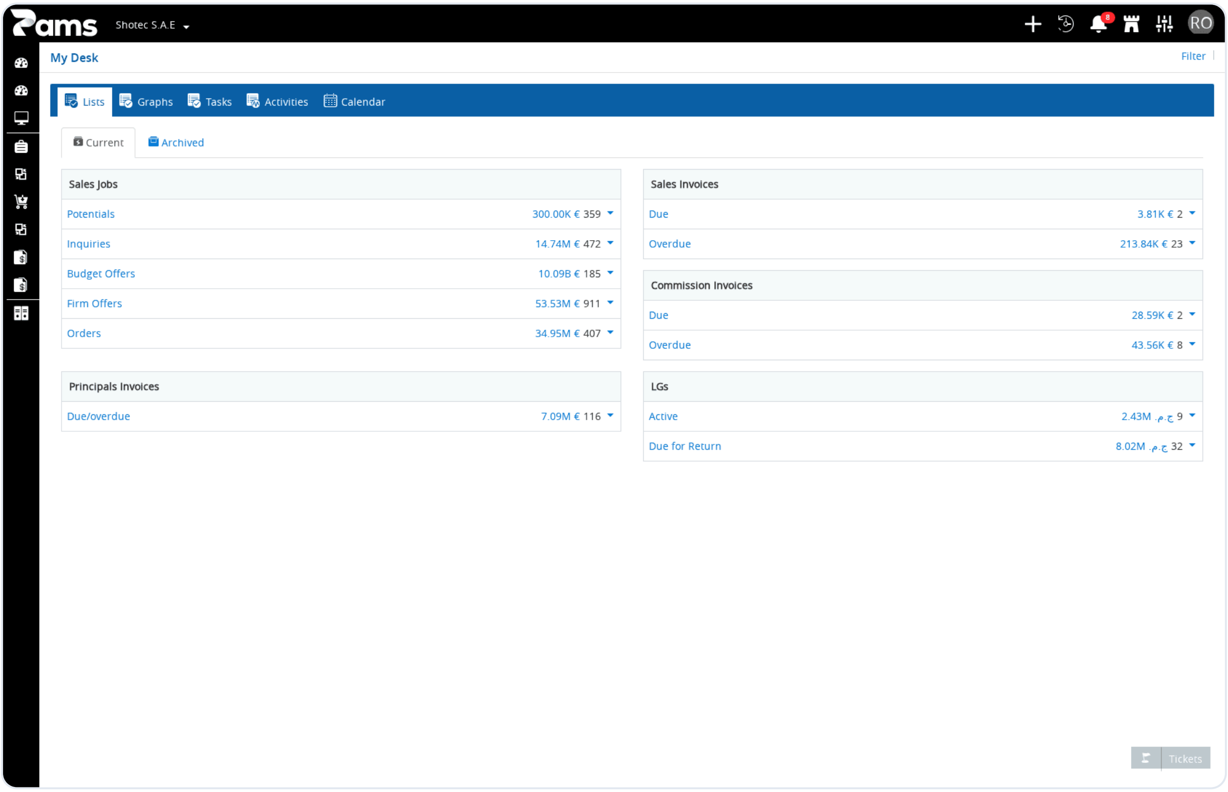
Steps

1. Select the linked row.
2. Select the dynamically titled tab to return to the opened record.

3. Select the control in the opened-record tab's options area that opens the record's normal page.
4. Select the X icon in the same options area when you finish reviewing the record.

The standard view-mode notice says `To make changes, click the pen icon on the tab bar.` The principal view-mode notice says `View Mode Only`.

Result: The linked record opens in My Desk, and closing its tab returns the workspace to **Lists**.



Continue detailed work in Sales job record, Invoice lifecycle, Principal invoices, L/G lifecycle, Accounts, Projects, Contacts, Users, or Teams, according to the record you opened.

Handle principal-user and subscription variations

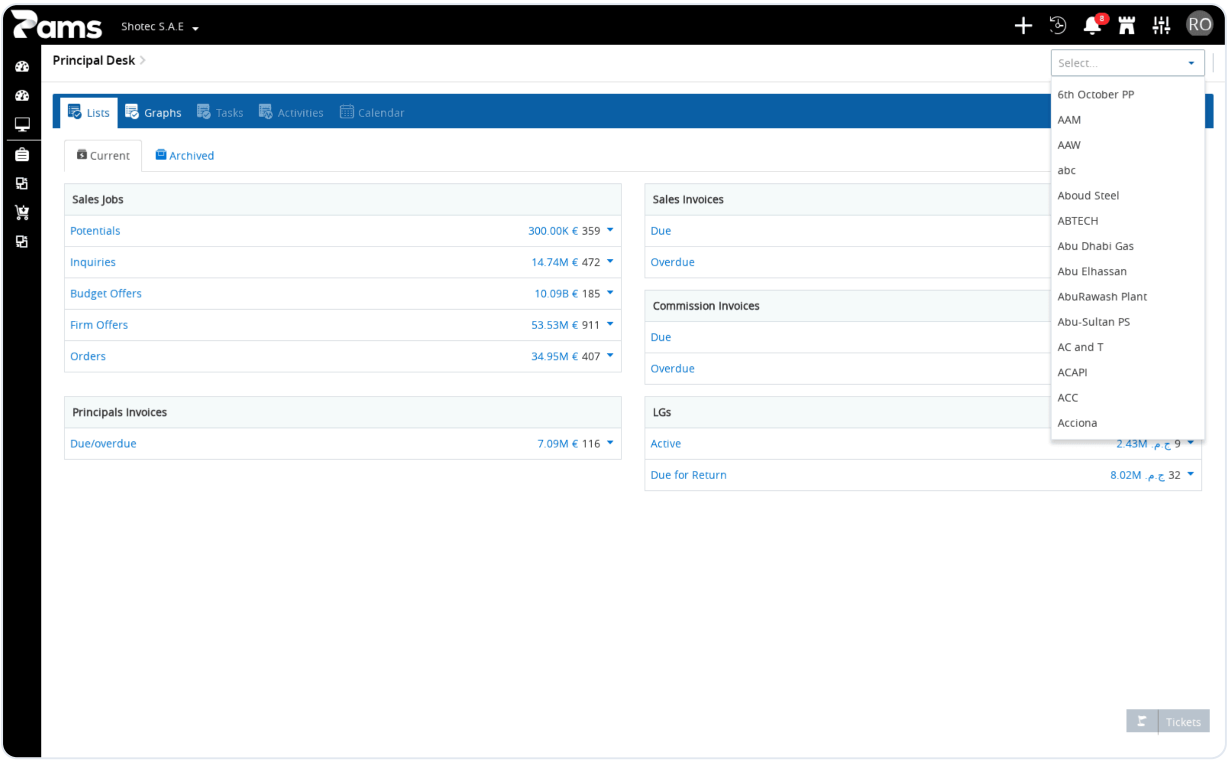
The principal workspace is the principal-user version of My Desk. It uses a client list at the top of the workspace and keeps the grouped work and work-mode tabs in the same overall surface.

Prerequisites

- Use the principal-user route when your account is a principal user.
- Have client records available in the client list.

Steps

1. Open the principal workspace from the principal workspace entry.
2. Select the client list at the top of the workspace.
3. Select the client whose workspace you need to review.
4. Select an available work mode.



The principal screen showed the principal workspace title, work-mode choices, **Current**, and
Archived. The client list opened a list of client records.
Principal users see
Tasks, **Activities**, and the scheduler as disabled links. When the My Desk subscription is
unavailable, the subscription-upgrade surface replaces the workspace.

Result: The workspace is scoped to the selected principal client, or you know that an unavailable subscription or disabled work mode requires an administrator's help.

When workspace behaviour does not match

Use this table when a control or workspace area does not behave as expected.

Steps

1. Choose the recovery path that matches what you see.

If the application…	Continue with…
Returns to its home screen after **Filter**	Step 2
Returns to the home screen after the graph mode	Step 4

2. Return to My Desk after the home-screen outcome.
3. Select the list mode.
4. Return to My Desk after the home-screen outcome.
5. Select an available task, activity, or **Calendar** mode.

What you see	What it means	What to do
Tasks, **Activities**, or the scheduler is disabled	Principal users cannot select those work tabs	Use the available workspace tabs or ask your administrator about access.
The workspace is replaced by a subscription-upgrade surface	The My Desk subscription is unavailable	Ask your administrator whether the subscription is included.
A task or activity save reports `An error occurred while processing your request`	The save was refused by the form or service	Check the form and try the save again.
My Desk reports `Can not open.. belong to other branch`	The linked activity belongs to another branch	Open work belonging to your permitted branch.
An activity save returns `error.Message`	The service supplies the activity error text	Follow the instruction in the returned message.
An activity reports `This action is only allowed if you belong to that branch`	The activity action is restricted to the permitted branch	Use an activity in your permitted branch.

What you see	What it means	What to do
An activity reports `One topic and at least one note is required`	The activity does not have the required topic and note	Add a topic and at least one note before completing the activity.
An activity reports `There is no topic to print`	There is no topic available for printing	Add a topic before printing the activity.
An activity reports `Action not allowed`	The requested activity action is not allowed	Check the activity and try an allowed action.
An activity reports `Forbidden characters detected. Please remove them and try again.`	The entered text contains forbidden characters	Remove those characters and try again.
A successful activity request reports `Your request was completed successfully`	The activity request completed successfully	Continue reviewing the activity or return to the workspace.
A saved task or activity reports `Data saved Successfully`	The save completed successfully	Continue with the task or activity.

Result: You know how to recover when a workspace area is unavailable, disabled, or returns to
another application screen.

Messages from linked panels

The opened-record area can carry messages owned by the page for the linked record. Use the
owning page when one of these messages appears.

Message	Owning page
`Required Receiving Date`	Material requisition
`This field is required`	Contact edit
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Sales job and invoice item panels
`Invalid input. Please enter a non-negative value`	Sales job and invoice item panels
`An account with this name already exists`	Accounts
`Error: Vendor not saved yet`	Accounts
`Error: Client not saved yet`	Accounts

Message	Owning page
`This Field Is Required`	Accounts
`You already have a contact with this name`	Contacts
`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`	Pricing quotation
`Please save opened cost sheet first`	Pricing quotation
`Booked quantity for this job is greater than the required BOM quantity`	Sales job BOM
`You cannot edit or delete the product after the purchase package is created`	Sales job BOM
`Cannot be deleted. Product is in purchasing`	Sales job BOM
`You cannot edit the product after the PO is created`	Sales job BOM
`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

Message	Owning page
`Please select one product`	Products
`Required Receiving After`	Material requisition
`Package must have at least one item`	Material requisition
`You cannot save without adding at least one product`	Material requisition
`Please enter at least one email`	Purchasing
`Inquiry must have at least one item`	Purchasing
`Offer must have at least one item`	Purchasing
`Order must have at least one item`	Purchasing
`Items labeled as ‘Ready for Shipment’ or ‘Delivered’ cannot be deleted`	Purchasing
`Please select one or more items to create a RFQ.`	Purchasing
`Required Offer Type`	Procurement
`Required Bid Due Date`	Procurement
`Error loading accounts`	Delivery notes
`Serial you have entered already exist and belong to same manufacturer`	Item references
`There is error in serial you have entered`	Item references
`Minimum: At least one serial`	Item references
`LG has one or more extensions or deductions and cannot be reverted to the requested stage`	L/G record
`Please choose a date after the current expiry date`	L/G record

The header add actions `Task`, `Email`, `Visit`, `Meeting`, and `Call` in the old header menu are not available. The task **Following** option, task priority/status/creator/owner filters, and the task `filterString` control are also not available in those guarded paths.