PAMS FRESH GENERATION

Activities and attachments on a sales job

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Activities are the visits, meetings, and calls that belong to a sales job. Attachments are files associated with that same job so related work stays together. Both are available after the sales job is saved.

If you need to…	Go to
Find the saved sales job	Find sales job work
Record a visit, meeting, or call from the sales job	Record a visit, meeting, or call
Attach a supporting file	Attach and manage supporting files
Create an activity outside the sales-job workspace	Create an activity
Review activity statuses	Activity status
Work with the wider file library	Libraries and files

Before you start

Prerequisites

- Have a saved sales job.
- Have access to the Activities module and the attachment area. The **Activities** tab is
  unavailable to principal users, and **Attachment** is disabled for principal users.
- Have the activity title, priority, dates, and any visit or call details ready.
- Have the file and its file name ready when you need to associate supporting material.

The activity editor requires **Priority**, **Title**, **Start Date**, and **End Date** for visits and meetings. Calls also require **Priority**, **Title**, and **Start Date**. **End Date** cannot come before **Start Date**. **Visit type**, **Call Use**, and **Description** are optional where they appear.

> **Note:** The **Attachment** tab appears after you save the activity.

Attach File is available when the related record exists and is editable. The **Activities** tab
requires its subscription; the add control also requires the current **Activities** tab, the same
branch, no input-driven record, and new-activity permission.

Find the sales job and open related work

A sales job is the saved workspace for one job and its related work.

Prerequisites

- Know which saved sales job you need to open.

Steps

1. Open the saved sales job from Find sales job work.
2. Select **Activities** to work with visits, meetings, and calls.
3. Select **Attachment** to work with files associated with the sales job.
4. In the activity list, select the filter that matches the work you need to review.

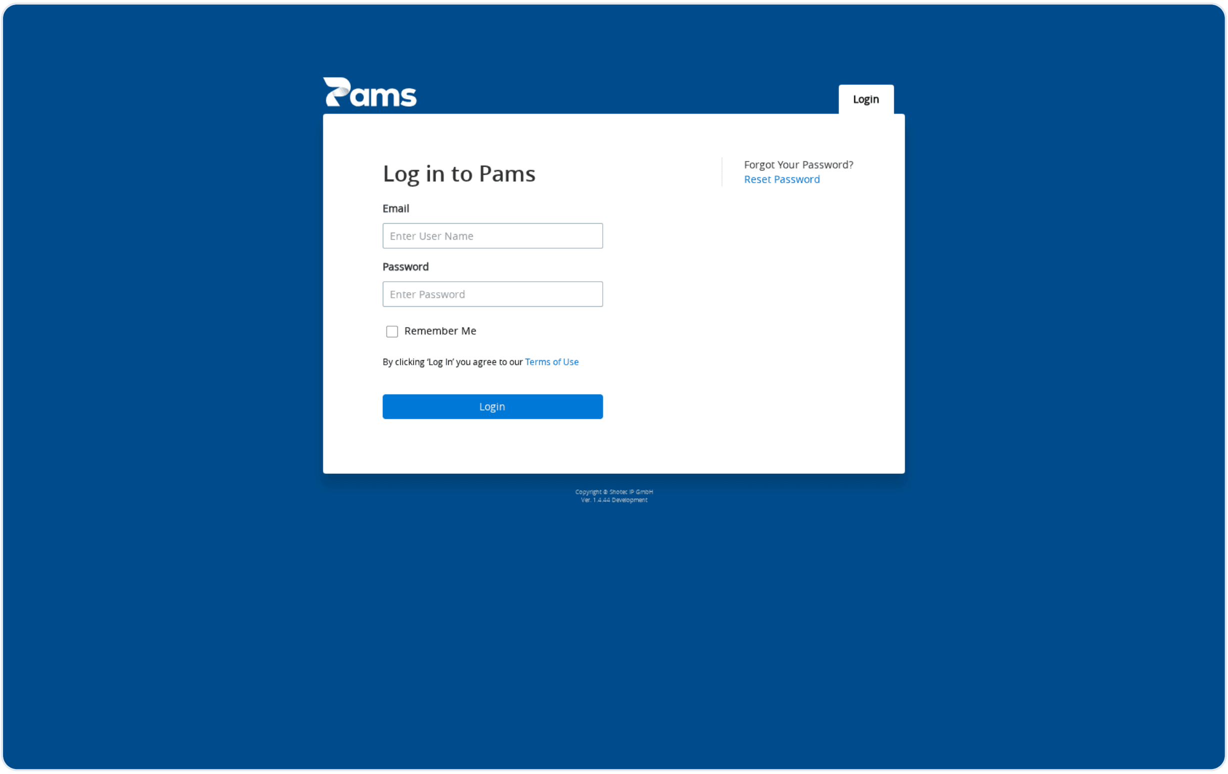
If you need to review…	Select
Every activity	**All**
Visits	**Visits**
Email activity	**Email**
Meetings	**Meetings**
Calls	**Call**
Archived activity	**Show archived activities**

Result: The sales-job workspace shows the related-work area you selected.

Selecting an activity row opens that activity in a new tab. A non-mail activity also has **Delete**
when the owner check passes.

Understand the activities and files surfaces

The Activities area lists work related to the sales job; the Attachment area lists files related to the same record.



The activity list uses these columns:

Column	Use
Title	Identify the activity.
Visitors	Review the visitors associated with the activity.
Activity purpose	Review the activity's purpose.
Company	Identify the associated company.
Startdate	Review when the activity starts.
Status	Review the activity status.
Importance	Review the activity's importance.

The attached-file list uses `File name`, **Category**, **Tags**, `Size (B)`, and `Modified`. The file library uses **Name**, **Type**, `Tags`, `Modified`, and a size column without a label. An empty activity list displays `No data` and `Count: 0.00`. When no files are

available,
the attachment list displays `No Files`; while it loads, it displays `loading...`.

Record a visit, meeting, or call

A visit, meeting, or call records a piece of follow-up work against the current sales job.

Prerequisites

- Open a saved sales job.
- Open **Activities**.
- Have the details for the activity ready.

Steps

1. In the **Activities** tab, select the add control.
2. Choose one activity type from the activity choices.

If you need to record…	Choose
A visit with the customer or another participant	**Visit**
A scheduled meeting	**Meeting**
A phone call	**Call**

3. Enter the required and optional information for the activity.

Activity	Required fields	Optional fields
Visit	**Priority**, **Title**, **Start Date**, **End Date**	**Visit type**
Meeting	**Priority**, **Title**, **Start Date**, **End Date**	—
Call	**Priority**, **Title**, **Start Date**	**Call Use**, **Description**

4. Set **End Date** on a visit or meeting to the same time as, or later than, **Start Date**.
5. Select **Save** to keep the activity open.
6. Select **Save and Close** to save the activity and close its editor.

The add control is available only when **Activities** is selected, the job is in the same branch,
the page has no input-driven record, and you have new-activity permission. After a save event, the
activity list reloads and the creation popup closes.

Result: The activity is saved in the sales-job activity list. The saved activity can expose
the **Attachment** and **Last Modifications** tabs.

Attach and manage supporting files

Supporting files preserve the documents that belong with the sales job.

Prerequisites

- Open a saved sales job or a saved activity with an editable related record.
- Have the file ready to upload, or know which existing file to associate.

Steps

1. Select **Attachment**.
2. Select **Attach File**.
3. For a new upload, enter the file information.

If you are completing…	Enter or select
A file upload	**File Name** and **Links**
A new library	**Library name**
An attached-file category	**Category**

4. Choose the action for the selected file.

Action	When to use it
Link	Associate an existing file from the file library.
Open	Open a selected file from the file library.
Download	Download a selected file.
Add/Remove tags	Change the tags on a selected file.

5. Select a file name in the attachment list to download it.
6. Select the file's **Category** value to set or change its category.

Result: The file is associated with the sales job and appears in the attached-file list.

Handle activity status and activity choices

An activity status tells you where the visit, meeting, or call is in its planned work.

Activity status	Meaning for the activity
Planned	The activity is scheduled.
Due	The activity is due during its scheduled period.
Overdue	The activity's scheduled period has passed.
Done	The activity is complete.
Cancelled	The activity is cancelled.

Prerequisites

- Open an existing activity from the sales-job activity list.
- Use an editable activity when the action requires editing permission.

Steps

1. Select the status action that matches the activity's current status.

When the activity is…	Select
Due or Overdue	**Done**
Done	**Consider As Not Done**
Planned, Overdue, or Due and editable	**Cancel This Activity**
Cancelled and editable	**Undo Cancellation**
An existing activity whose minutes you need	**Print Minutes Of Activity**

2. Select **Show archived activities** when you need to include archived activity records.
3. Select **Delete** for a non-mail activity when you are the owner and the activity belongs to
your branch.

Result: The activity list reflects the status or list choice you selected.

When an activity or file action fails

The message on screen identifies whether to correct the activity details, access, or file input.

Steps

1. Choose the correction that matches the message on screen.

Message	Correction
`Action not allowed`	Review the available status action.
`Your request was completed successfully`	Continue after the requested activity or file action finishes.
`This action is only allowed if you belong to that branch`	Use an activity in your branch.
`One topic and at least one note is required`	Enter a topic and note in the activity.
`There is no topic to print`	Add a topic before selecting **Print Minutes Of Activity**.
`Just '_'‘-''.' And '&' Characters Accepted`	Remove the characters that the field does not accept.
`Forbidden characters detected. Please remove them and try again.`	Remove the forbidden characters.
A required field is empty	Enter the empty field, such as **Priority**, **Title**, or a required date field.
End Date is earlier than **Start Date**	Correct the date range.

Result: The corrected activity or file action is ready to complete.

Out of scope

Message	Correction
`Attached files cannot be loaded`	Select **Try Again**.

After you record the activity or attach the file

The sales job keeps its related activities and files together. Return to **Activities** to review
the activity list, or return to **Attachment** to review and download an associated file. A saved
activity can also expose **Last Modifications** for its record history.

For other work, continue with Find sales job work, Create an activity, Activity status, or Libraries and files.