

Comments and tasks on a sales job

September 11, 2026

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A sales job is the workspace for one sales opportunity throughout its working life. Its **Comments** area keeps the written conversation with the job, while **Tasks** keeps follow-up work linked to that job.

If you need to...	Go to
Record or reply to written job discussion	Keep the job discussion
Review tasks linked to the saved job	Maintain an open follow-up task
Understand which tabs and fields are available	Understand the comments and tasks surface
Create a new sales job	Create a sales job
Work with the full task form	Create a task
Continue with activities and files	Sales job activities and files

Before you start

Prerequisites

- Have a saved sales job. The **Comments** and **Tasks** tabs require the job to have an ID.
- Have the Comments or Tasks feature available to your account.
- For task actions, work in the matching branch and use the role or ownership required by the action.
- For an existing task, be its owner when the action is limited to the owner.
- Have the discussion or follow-up information you want to record ready before you open the

editor.

The available task columns come from the list layout used for your account. Work from the headers that appear in your list rather than expecting every list to have the same columns.

Note: The **Comments** and **Tasks** tabs belong to a saved job. Open the record before looking for discussion or job-linked tasks.

Open a saved sales job

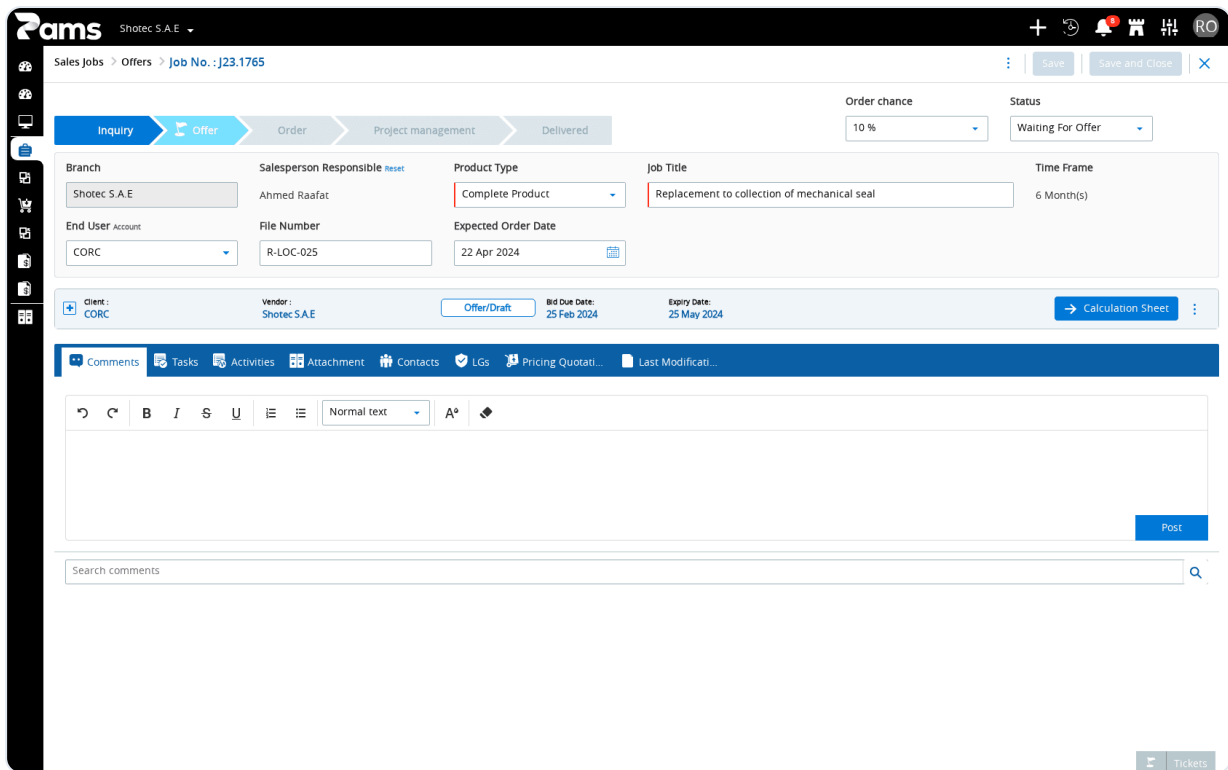
A saved sales job is the record that carries the **Comments** discussion and **Tasks** follow-up work. The **Comments** and **Tasks** tabs belong to the sales-job record, not to the new-record form.

Prerequisites

- Know which saved sales job you need to open.
- If you are creating a new job instead, use [Create a sales job](#).

Steps

1. Open the saved sales job at `/sales/edit/:id`.
2. Confirm that the sales-job workspace displays the **Comments** and **Tasks** tabs.



Result: The saved sales-job workspace is open and ready for you to select **Comments** or **Tasks**.

Understand the comments and tasks surface

This surface places discussion and job-linked follow-up work beside the sales-job record. The available tabs are **Comments**, **Tasks**, **Activities**, **Attachment**, **Contacts**, **LGs**, **Pricing Quotations**, and **Last Modifications**.

The **Comments** surface provides a rich-text editor and **Post**. Its editor toolbar includes the following controls:

Editing need	Control
Reverse or repeat an edit	Undo, Redo
Format text	Bold, Italic, Strikethrough, Underline, Font Color
Format lists	Ordered List, Bullet List
Remove formatting	Clear Formatting

The **Tasks** surface displays a task list filtered to the saved sales job.

Area	What you can work with
Comments	Rich-text discussion, Post , replies, and your own comment controls
Tasks	Job-linked task rows and the list views All , My Tasks , and View completed tasks
Main job fields	Order chance , Status , Branch , Product Type , Job Title , End User Account , File Number , and Expected Order Date
Task form fields	Priority , task title, Description , Start Date , Due Date , and Task Progress . Follow is not available here.
Task columns seen in the list	Title , Owner , Start date , Due date , Status , and Importance

In this workspace, **Product Type**, **Job Title**, and **File Number** carried required markers.

Order chance, **Status**, **Branch**, **End User Account**, and **Expected Order Date** did not carry required markers.

The screenshot displays the PAMS Fresh Generation interface for a job offer. The top navigation bar shows 'Sales Jobs > Offers > Job No.: J23.1765'. The main form is divided into several sections:

- Process Flow:** Inquiry (selected), Offer, Order, Project management, Delivered.
- Order chance:** 10 %
- Status:** Waiting For Offer
- Branch:** Shotec S.A.E
- Salesperson Responsible:** Ahmed Raafat
- Product Type:** Complete Product
- Job Title:** Replacement to collection of mechanical seal
- Time Frame:** 6 Month(s)
- End User Account:** CORC
- File Number:** R-LOC-025
- Expected Order Date:** 22 Apr 2024
- Client:** CORC
- Vendor:** Shotec S.A.E
- Offer/Draft:** 25 Feb 2024
- Expiry Date:** 25 May 2024
- Buttons:** Calculation Sheet, Save, Save and Close, X

Below the form is a tabbed interface with 'Comments' and 'Tasks' (selected). The 'Tasks' tab shows a table with columns: Title, Owner, Start date, Due date, Status, Importance. The table is currently empty, displaying 'No data' and a count of 407. The bottom right corner has a 'Tickets' button.

Select **Comments** for discussion and **Tasks** for job-linked follow-up work.

Keep the job discussion

The job discussion is the written conversation associated with the current sales job.
Use it to
leave context that colleagues returning to the job can read later.

Prerequisites

- Open a saved sales job.
- The **Comments** tab is available.
- Have the comment text ready.

Steps

1. Select **Comments**.
2. Enter the discussion in the rich-text editor.
3. Select **Post**.
4. Confirm that the new comment appears in the displayed conversation.

Result: The comment is associated with the current sales job and appears in its conversation.

Reply to a comment

Prerequisites

- Open the **Comments** tab.
- Have a top-level comment from another person to answer.

Steps

1. Select **Reply** on the comment.
2. Enter the response.
3. Select **Reply**.

Result: The response is added beneath the comment.

Edit your own comment

Prerequisites

- Open the **Comments** tab.
- Have one of your own comments available.

Steps

1. Select **Edit** on your comment.

2. Enter the revised text in the comment editor.
3. Select **Save**.

Result: Your edited comment is saved in the job discussion.

Delete your own comment

Prerequisites

- Open the **Comments** tab.
- Have one of your own comments available.

Steps

1. Select **Delete** on your comment.
2. Read the confirmation.
3. Select **Delete**.

Result: The selected comment deletion is submitted.

The editor does not post when its plain text is empty or contains only spaces. Keep at least one meaningful character in the comment before selecting **Post**.

Maintain an open follow-up task

The **Tasks** tab is the sales job's related-task list. It keeps task rows associated with the current job instead of showing the general task list.

Prerequisites

- Open a saved sales job.
- The **Tasks** tab is available.
- For task changes, be the task owner when the action requires ownership.

Steps

1. Select **Tasks**.
2. Review the task rows shown for the current sales job.
3. Select a task row to open that task.
4. Select **View completed tasks** when completed work needs to be included.

The screenshot displays the PAMS system interface for a sales job. The top navigation bar shows 'ams' and 'Shotec S.A.E'. The main header indicates 'Sales Jobs > Offers > Job No.: J23.1765'. The interface includes a sidebar with various icons and a main content area with a form and a task list.

Form Fields:

- Order chance:** 10 %
- Status:** Waiting For Offer
- Branch:** Shotec S.A.E
- Salesperson Responsible:** Ahmed Raafat
- Product Type:** Complete Product
- Job Title:** Replacement to collection of mechanical seal
- Time Frame:** 6 Month(s)
- End User Account:** CORC
- File Number:** R-LOC-025
- Expected Order Date:** 22 Apr 2024
- Client:** CORC
- Vendor:** Shotec SAE
- Offer/Draft:** [Button]
- Bid Due Date:** 25 Feb 2024
- Expiry Date:** 25 May 2024
- Calculation Sheet:** [Button]

Task List:

Title	Owner	Start date	Due date	Status	Importance
Q	Q	Q	Q	Q	Q

No data

Count: 407

Navigation: < 1 2 3 4 5 ... 14 >

Tickets

The embedded list starts on **All**. The task list can show **Title, Owner, Start date, Due date, Status, and Importance**. A task row opened from the embedded list opens the task in a new browser tab.

The full task form contains the following fields:

Field	Rule
Priority	Required
Task title	Required
Description	Optional
Start Date	Required
Due Date	Required and cannot be earlier than Start Date
Task Progress	Optional
Follow	Not available here.

Use [Create a task](#) for the full task-creation procedure.

Result: The task list shows work associated with the saved sales job, and the selected task is open for the next task-specific action.

Handle availability branches

The tabs and task actions change with feature access, role, branch, ownership, and task status.

Use the visible tab and action state to choose the applicable route.

Situation	What to use or expect
Comments is available	Select Comments to open the job discussion.
Tasks is available to a non-principal user	Select Tasks to open the job-linked task list.
You are a principal user	The Tasks tab is displayed as disabled.
A task action requires ownership	Work from the task owner's account before selecting the action.
The task is completed	Completed-task controls are disabled for the completed state.
You need a task action from another branch	The task activity menu is available only when the branch matches.
You need a new task from the job	The job-level plus control requires the Tasks tab, the matching branch, a non-input-driven record, and permission to create a task.
You look for Follow	Follow is not available here.
You need to search comments	Search comments is not available here.

The task list columns depend on your saved list layout. The task list showed **Title**, **Owner**, **Start date**, **Due date**, **Status**, and **Importance**.

When a comment or task action goes wrong

Use the exact message on screen to identify the correction or the page that owns the action.

Class	Message	What to do
Validation	Required Receiving Date	Complete the receiving-date field on the sales-job items surface.
Validation	This field is required	Complete the required field on the sales-job items surface.
Validation	Invalid input. The value must be greater than 0 and cannot exceed 999,999.00	Enter a value within the displayed range.

Class	Message	What to do
Validation	Invalid input. Please enter a non-negative value	Enter zero or a positive value.
Success	Custom fields saved successfully	Continue after the custom fields save.
Success	Job updated successfully	Continue with the updated job.
Success	Job deleted successfully	Continue in the sales-job lifecycle page.
Success	Job regretted successfully	Continue in the sales-job lifecycle page.
Success	Job cancelled successfully	Continue in the sales-job lifecycle page.
Success	Job missed successfully	Continue in the sales-job lifecycle page.
Success	Job reactivated successfully	Continue in the sales-job lifecycle page.
Success	Converted to offer successfully	Continue with Offers .
Success	Converted to inquiry successfully	Continue with Inquiries .
Error	An error occurred while processing your request	Review the action and its conditions before trying again.
Error	Error saving custom fields	Review the custom fields before trying again.
Error	Cannot be un-delivered – a due invoice already exists	Continue with From orders to delivered .
Error	All offers must be in draft status to revert to inquiry	Continue with Offers and return the offers to draft status.
Error	An account with this name already exists	Continue with Accounts .
Error	A project with this name already exists	Continue with Projects .
Error	Please save opened inquiry first	Save the opened inquiry before returning to the previous stage.
Error	All inquiries must be in draft stage to revert to potential	Continue with Potentials and return the inquiries to draft stage.
Error	Please enter action for each milestone	Complete the required action for each milestone.

Class	Message	What to do
Error	Please save opened cost sheet first	Continue with Job profitability record .
Success	Your request was completed successfully	Continue with the related activity.
Error	Error: Vendor not saved yet	Save the vendor before continuing.
Error	Error: Client not saved yet	Save the client before continuing.
Validation	This Field Is Required	Complete the required field before saving.
Error	Forbidden characters detected. Please remove them and try again.	Remove the forbidden characters and try again.
Error	You already have a contact with this name	Continue with Contact record .
Error	Booked quantity for this job is greater than the required BOM quantity	Correct the booked quantity on the items surface.
Error	You cannot edit or delete the product after the purchase package is created	Continue with Sales job items .
Error	Cannot be deleted. Product is in purchasing	Continue with Purchase jobs procurement chain .
Error	You cannot edit the product after the PO is created	Continue with Purchase job orders .
Error	This product is already included in BOM	Review the BOM before adding the product again.
Error	The first variant cannot be deleted	Continue with Sales job variants .
Error	An error occurred while connecting to your CRM system.	Continue with Configuration integration CRMs .
Validation	Please select one product	Select one product before continuing.
Validation	Required Receiving After	Complete the receiving-after field.
Validation	Package must have at least one item	Add at least one item to the package.
Validation	You cannot save without adding at least one product	Add a product before saving.
Error	Action not allowed	Check the action's role, branch, and record-state conditions.

Class	Message	What to do
Validation	Please enter at least one email	Enter at least one email address.
Validation	Inquiry must have at least one item	Add at least one inquiry item.
Validation	Offer must have at least one item	Add at least one offer item.
Validation	Order must have at least one item	Add at least one order item.
Error	Items labeled as 'Ready for Shipment' or 'Delivered' cannot be deleted	Continue with From orders to delivered .
Validation	Please select one or more items to create a RFQ.	Select the items for the RFQ.
Validation	Required Offer Type	Complete the offer type.
Validation	Required Bid Due Date	Complete the bid due date.
Error	Error loading accounts	Continue with Accounts .
Error	Serial you have entered already exist and belong to same manufacturer	Review the serial and manufacturer.
Error	There is error in serial you have entered	Correct the serial and try again.
Validation	Minimum: At least one serial	Enter at least one serial.
Error	LG has one or more extensions or deductions and cannot be reverted to the requested stage	Continue with L/G lifecycle .
Validation	Please choose a date after the current expiry date	Choose a date after the current expiry date.
Error	One topic and at least one note is required	Add one topic and at least one note before completing the activity.

The list above includes messages from shared sales-job surfaces and other stages.

For ownership,

use these pages: [Sales job information and assessment](#),

[Sales job lifecycle](#), [Sales job items](#),

[Sales job contacts, guarantees and history](#),

[Sales job activities and files](#), and

[Sales job variants](#).

Continue after saving

The saved job remains the home for its discussion and related task list. Continue according to the work you need to do next:

Next need	Continue with
Review the sales-job record around the Comments and Tasks tabs	Sales job record
Work through the job lifecycle	Sales jobs lifecycle
Create or maintain the full task record	Create a task
Work with activities and files	Sales job activities and files
Find another saved sales job	Find sales job work

Result: The saved sales job retains its written discussion and job-linked follow-up work, and you know which registered page owns the next action.