PAMS (V2 PIPELINE RUN)

Managing Tasks And Activities

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Choosing the Right Activity Type

Pams uses activities to keep the next action visible against the sales job, Account, Contact, Project, invoice, payment, or other related work item. Choosing the right type makes it easier for you and your team to understand what needs to happen and why.

Use the activity type that best reflects the action you expect the responsible person to take:

Activity type	Use it when you need to…	Example outcome to record
Task	Complete internal work or update information in Pams.	Pricing information prepared, documents reviewed, or a Sales Job updated.
Call	Plan or record a telephone conversation with a Client, Principal, Sub-supplier, or colleague.	Call completed, contact reached, next discussion agreed.
Meeting	Arrange or document a scheduled discussion with participants.	Commercial points reviewed, responsibilities agreed, decisions recorded.
Visit	Plan or record an in-person visit to a Client, Principal, Sub-supplier, or project location.	Visit findings, site observations, or follow-up requirements.
Email	Plan or record email communication that needs follow-up.	Email sent, response received, documents requested, or reminder required.

Use **Task** when the action is work to be completed rather than communication. For example, use a Task to check an Offer before its validity period ends. Use **Call** when you need to speak with the Client about the Offer. If that conversation needs a formal discussion with several people, create a **Meeting** instead.

A **Visit** is useful when the activity depends on being at the Client's premises, a project location, or another physical location. Use **Email** when the required action is written communication, such as sending technical notes or asking for confirmation.

[SCREENSHOT: The activity type choices showing Task, Call, Meeting, Visit, and Email.]

Use the activity Title and Description to make the purpose immediately clear. A title such as “Confirm revised delivery date with Client” is more useful than a vague title such as “Follow up.”

Creating Tasks and Follow-Up Activities

Create an activity from the item that needs attention so the follow-up stays connected to the relevant work. For example, create a Call from the Sales Job when you need to discuss an Offer with the Client, or create a Task from a Project when documents need review.

1. Open the related item in Pams, such as a **Sales Job**, **Account**, **Contact**, **Project**, **Invoice**, **Payment**, **MRQ**, or purchasing item.
2. Find the **Activities** area on that item and start a new activity. Creating it from the related item ensures that the follow-up can be reviewed later with the correct business context.
3. Select the appropriate activity type: **Task**, **Call**, **Meeting**, **Visit**, or **Email**. Choose the type based on the action required, not simply on the person who will perform it.
4. Enter a clear **Title** that states the action. Add the key instructions in **Description**. Include the specific point that needs attention, such as an Offer Number, expected delivery date, required document, or decision needed from the Client or Principal.
5. Set the **Due Date**. Use the actual deadline or the date by which the next contact should take place. For work linked to an Offer, RFQ, or bid due date, set a Due Date early enough to allow time for the next action.
6. Select the **Assignee** or **Assign To** user who is responsible for the activity. Assign the activity to the person who can complete the action, rather than leaving responsibility unclear.
7. Save the activity using **Save** or **Save and Close**.

[SCREENSHOT: A new activity form with activity type, Title, Description, Due Date, and Assignee highlighted.]

Before saving, read the Title and Description as if you were the Assignee. They should explain what to do without requiring the person to search through unrelated messages or notes.

Reviewing Assigned and Upcoming Activities

Review your assigned activities regularly so that Calls, Meetings, Visits, Emails, and Tasks are completed before their Due Dates. Activities are most useful when they are treated as the working list for follow-up, rather than as a history that is updated only after an issue becomes urgent.

Begin with the activities assigned to you. Pay particular attention to items marked **Missed**, **Due/overdue**, or **Is Due**. Handle these before activities with later Due Dates unless a later item has a fixed deadline, such as a bid due date, contractual delivery date, or scheduled Meeting.

For each activity, open the related item before acting. A Call connected to a Sales Job may require you to check the Client, Offer Status, Delivery Date, Commercial Notes, or previous activities first. A Task linked to a Project may require you to review the Project Name, current progress, or related Bill of Material. Opening the related item helps you avoid repeating a question that a colleague has already answered or acting on outdated information.

Read the **Title**, **Description**, **Due Date**, and **Assignee** carefully:

- The **Title** identifies the required action.
- The **Description** explains what needs to be discussed, prepared, checked, or sent.
- The **Due Date** tells you when action is expected.
- The **Assignee** shows who owns the follow-up.

When coordinating with colleagues, review activities assigned to other users as well. This is especially important when a Sales Job involves sales, purchasing, project management, delivery, or invoicing work. Use the activity history on the related item to see whether a Call, Meeting, or Email has already produced an outcome.

[SCREENSHOT: An activities list showing assigned users, activity types, Due Dates, and overdue items.]

If the next action belongs to another person, make sure the Assignee is correct rather than assuming that a comment or email will transfer ownership.

Completing Activities and Recording Outcomes

Complete an activity only after the planned work, communication, Meeting, Visit, or Email has actually taken place. Marking activities complete too early removes an important reminder and can make a Sales Job or Project appear more advanced than it is.

1. Open the activity from the related item’s **Activities** area or from your assigned activity list.
2. Review the **Title** and **Description** one last time. Confirm that the expected action was completed and that you have the information needed to record the result.
3. Add a concise outcome in **Note**. Record facts that the next person needs to know, such as:
    - What the Client, Principal, or Sub-supplier confirmed.
    - Whether a document, Offers, technical note, or revised date was received.
    - Decisions made during a Meeting or Visit.
    - A reason why the activity could not be completed.
    - The agreed next action and expected date.
4. Mark the activity as **Done (completed)** after entering the outcome. If the activity remains open, it may still appear as an outstanding responsibility.
5. Open the related Sales Job, Account, Contact, Project, or other item to confirm that the completed activity is visible in its activity history.

Keep the Note focused on the result rather than repeating the original instructions. For example, “Client requested revised commercial offer before Friday; sales responsible will prepare revision” gives the next reviewer a clear status. A note such as “Called Client” does not explain what happened or what must happen next.

[SCREENSHOT: A completed Call activity with a Note showing the call outcome and the Done (completed) status.]

A completed activity remains part of the history on the related item. This gives colleagues a shared view of communication and decisions when responsibility changes or when a Sales Job is reviewed later.

Scheduling the Next Follow-Up

Many activities lead to another action. When a Call produces a request for information, a Meeting produces agreed actions, or an Email receives a question, create the next follow-up while the outcome is still clear. This prevents important commitments from being left only in a Note.

1. Complete the current activity and write the outcome in **Note**. Identify who must act next, what they must do, and when it needs to happen.
2. From the same related item, start a new activity in the **Activities** area. Keeping the new activity on the same Sales Job, Account, Contact, Project, or purchasing item preserves the full sequence of follow-ups.
3. Select the next activity type that matches the agreed action. For example:
   - Create an **Email** after a Call when you must send requested documents.
   - Create a **Meeting** after a Call when several people need to agree on commercial or technical points.
   - Create a **Task** after a Visit when internal work is needed.
   - Create a **Call** after an Email when a response requires discussion.
4. Set a realistic **Due Date**. Use a specific date that reflects the commitment made, the Offer validity period, the RFQ deadline, or another relevant date.
5. Choose the correct **Assignee**. Assign the activity to the person who owns the next action, even when that person did not complete the current activity.
6. Use the **Title** and **Description** to connect the new activity to the earlier outcome. Include the decision, request, or deadline that caused the follow-up.
7. Save the new activity with **Save** or **Save and Close**.

[SCREENSHOT: A completed Call followed by a newly created Email activity on the same Sales Job.]

Avoid creating a broad follow-up such as “Follow up later.” State the action and expected result, such as “Email revised Offer after Principal confirms delivery time.”

Resolving Missed, Duplicate, and Incorrect Activities

Activities can become outdated when a Client changes a date, a Sales Job moves forward unexpectedly, or responsibility changes between team members. Resolve these issues in the related item’s **Activities** area so that the activity history continues to reflect what actually happened.

For an activity marked **Missed** or **Due/overdue**, first open the related Sales Job, Account, Contact, Project, or purchasing item. Review the most recent activities, Notes, and current status before changing anything. The activity may already have been addressed by another person, or the original action may no longer be needed.

Use the situation to decide what to do:

- **The action was completed:** Add the actual outcome in **Note** and mark the activity **Done (completed)**.
- **The action is still needed:** Update the **Due Date** to the realistic next date, revise the **Description** if the required action has changed, and keep the activity assigned to the correct person.
- **The action is no longer needed:** Record a short Note explaining why it is not required before treating it as completed.
- **The activity belongs to someone else:** Change the **Assignee** or **Assign To** user before the new Due Date. Include enough detail in the Description so the new Assignee can take over.
- **The activity type is wrong:** Create the correct Task, Call, Meeting, Visit, or Email activity on the same related item. Record why the original activity was replaced, then complete the incorrect activity so it does not remain as an open reminder.

Before creating any new activity, check the existing activity list for the same Title, Due Date, and purpose. This avoids duplicate Calls to a Client, repeated requests to a Principal, or two team members preparing the same information.

[SCREENSHOT: An activity list showing a Missed activity, an updated Due Date, and activity history on a related Sales Job.]

Use short, factual Notes when an activity cannot be completed. The next Assignee needs the reason, the latest position, and the next expected action.

Overview

Tasks and activities in Pams give your team one place to manage the work that sits between major sales and operational milestones. They are especially useful when a Sales Job requires repeated contact with a Client, Principal, or Sub-supplier; when a Project needs internal coordination; or when an Offer, RFQ, delivery, Invoice, or Payment needs attention by a particular date.

Each activity is connected to its related item. This means a colleague reviewing a Sales Job can see the Calls, Meetings, Visits, Emails, and Tasks that supported the Sales Job. A colleague reviewing an Account or Contact can understand recent communication without relying on personal inboxes or private notes. The activity history also provides context when responsibility moves from sales to purchasing, project management, delivery, or finance.

Use the activity type, Title, Description, Due Date, Assignee, and Note together:

- The activity type shows whether the action is a Task, Call, Meeting, Visit, or Email.
- The Title and Description explain what must happen.
- The Due Date establishes the expected timing.
- The Assignee makes ownership visible.
- The Note records the result after the action is completed.

Your **My Desk** workspace helps you stay aware of activity that needs attention alongside sales and operational work. For guidance on using that workspace to review your personal workload, see Using My Desk Workspace.

Activities work best when they describe one clear next action. If a Call produces several separate commitments, create separate follow-up activities with their own Assignees and Due Dates. This makes it clear which actions are complete and which still need attention.

Prerequisites

Before creating or updating activities, make sure you can open the related item in Pams. Activities are created and reviewed in the context of work such as **Sales Jobs**, **Accounts**, **Contacts**, **Projects**, **Invoices**, **Payments**, **MRQs**, and purchasing items. Open the relevant item first so that the activity is connected to the correct Client, Principal, Sub-supplier, project, or commercial process.

Have the following information ready before creating a follow-up:

- The correct activity type: **Task**, **Call**, **Meeting**, **Visit**, or **Email**.
- A clear action to place in the **Title**.
- Details for the **Description**, including the requested information, decision, document, or commercial point.
- A realistic **Due Date**, based on the agreed commitment, Offer validity period, RFQ deadline, delivery date, or other required date.
- The correct **Assignee** or **Assign To** user.
- The related item where the activity belongs.

When you are recording an outcome, review the existing activity history first. This helps you write a Note that adds new information rather than repeating details already recorded by another user. For a Client discussion, check the related Sales Job and Contact. For Principal communication, check the Principal relationship and the relevant Offer or Orders. For Sub-supplier follow-up, check the related RFQ, Purchase Order, MRQ, or Project.

Use the same naming approach across the team. Start Titles with the action and subject, such as “Call Client about revised delivery date,” “Meeting to review technical offer,” or “Task: prepare documents for RFQ.” Consistent Titles make assigned and overdue activities easier to scan.

After you are comfortable managing individual follow-ups, continue with Using Dashboards and Reports to review wider sales, operational, and performance information in Pams.