PAMS (V2 PIPELINE RUN)

Using My Desk Workspace

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Opening My Desk and Reading Your Operational Status

1. In Pams, open **My Desk** to bring your daily assigned work into one workspace. My Desk combines the information that needs your attention across pipeline work, **Invoices**, **Activities**, **Tasks**, and **Calendar** items.
2. Start with the operational status area. This area gives you a current view of operational information connected to your work. Use it as an early warning area: look for work that appears overdue, incomplete, awaiting action, or otherwise requires review.
3. Keep the operational status area separate in your mind from the work queues below it. The status area helps you understand the overall condition of your work. The assigned pipeline, invoice, activity, task, and calendar areas identify the individual items you can open and work on.
4. Before opening individual items, use the operational status information to decide where attention is most urgent. For example, an item with a due date approaching may need attention before a record that is still progressing normally.
5. Move from the operational status area into the relevant My Desk list. If the issue relates to a sales Sales Job, review the assigned pipeline area. If it concerns a financial document, review **Invoices**. If it relates to a follow-up, review **Activities** or **Tasks**. If timing is the concern, check the **Calendar** items.

[SCREENSHOT: My Desk showing the operational status area and the separate assigned pipeline, invoices, activities, tasks, and calendar sections]

My Desk is designed to help you begin with a focused view of your own work rather than searching through all Pams records. Return to this workspace throughout the day after making changes, especially when you need to confirm whether urgent work is still assigned to you.

Monitoring Your Assigned Pipeline

1. In **My Desk**, locate the area showing your assigned pipeline. This list brings together pipeline work currently assigned to you, so you can review your active sales responsibilities without opening the full list of **Sales Jobs**.

2. Scan the displayed **Status** and **Stage** information for each assigned item. Use these indicators to identify records that need follow-up, such as an item waiting for an offer, an item approaching a required date, or an item that has not moved forward as expected.

3. Consider the business context of each item before choosing what to open. A sales item with a client deadline, a bid due date, or an active offer may need priority over a record that is still being prepared. Use the information displayed in My Desk to decide which work should be handled first.

4. Select an assigned pipeline item to open its record. Review the details shown there, including its current **Stage**, related client information, dates, and any available notes or activities. Continue the appropriate workflow from the record, such as reviewing an Inquiry, updating an Offer, or progressing a Orders.

5. Save the change using **Save** or **Save and Close** where those actions are available. Return to **My Desk** and review the assigned pipeline area again. The list should reflect the record's current state after your update.

[SCREENSHOT: Assigned pipeline area in My Desk with visible Status and Stage information]

Use My Desk as a personal monitoring view, not as a replacement for the full sales workflow. When you need detailed guidance for sales records, see Creating Sales Inquiries, Preparing Customer Offers, and Confirming Orders.

Reviewing Assigned Invoices

1. Open **My Desk** and find the assigned **Invoices** area. This section identifies invoice work currently assigned to you, allowing you to review financial follow-up alongside your sales and operational responsibilities.

2. Review the information displayed for each invoice before opening it. Pay particular attention to the invoice **Status**, payment position, and any due or overdue information shown in the list. These details help you separate invoices that require action from invoices moving through the expected process.

3. Give priority to invoices that need review, allocation, approval, payment follow-up, or another action connected to their current status. An invoice that is already

progressing normally can remain visible for monitoring, while an outstanding item may require immediate attention.

4. Select an invoice from My Desk to open the invoice record. Review the invoice information carefully, including the **Invoice Number**, **Invoice Amount**, **Status**, dates, and any note or related payment information available on the screen.
5. Complete the required work in the invoice record using the actions available to you. This may involve reviewing invoice details, updating the invoice's progress, or continuing the related payment workflow. Use **Save** or **Save and Close** after making changes.
6. Return to **My Desk** and check the assigned **Invoices** area again. Confirm whether the invoice is still listed as outstanding or whether its updated status now reflects the work completed.

[SCREENSHOT: My Desk invoice area showing assigned invoices and their status information]

My Desk helps you see invoice work in the context of your broader workload. For detailed invoice processing, use Managing AR Invoices, Managing AP Invoices, and Recording Incoming Payments.

Working Through Activities and Tasks

1. Review the **Activities** area in **My Desk** at the start of your workday. Activities may relate to calls, meetings, visits, or other follow-up connected to a client, account, project, sales job, invoice, MRQ, or payment.
2. Use the displayed timing and status information to choose which activity to handle first. Give attention to activities with a near due date, a reminder, or a status showing that follow-up is still needed. Where an activity is linked to a sales or operational record, consider the importance of that related work as well.
3. Select an activity when you need to review the full details. Check the activity's **Purpose**, **Assignee**, participants, date, reminder information, and related record. Take the required action in the activity or use the related record to continue the business workflow.
4. Review the **Tasks** area separately. Tasks are actionable work assigned to you and should not be overlooked simply because related activities are also visible. Check the task's **Task Purpose**, **Task Progress**, **Priority**, **Due Date**, and **Assignee** information where shown.

5. Open the task that requires action and update it when the work moves forward or is complete. Save the change, then return to **My Desk** to verify that the assigned task view reflects the current task progress.
6. Revisit both areas during the day. Activities help you manage scheduled follow-up; tasks help you track work that must be completed. Keeping both current makes My Desk a reliable view of your personal workload.

[SCREENSHOT: My Desk showing separate Activities and Tasks areas, with due dates and progress information]

For more detailed instructions on recording and managing follow-up work, continue with Managing Tasks and Activities.

Checking Calendar Items Alongside Daily Work

1. In **My Desk**, review the **Calendar** items alongside the assigned **Activities** and **Tasks** areas. Calendar items show scheduled commitments that affect the time available for calls, meetings, visits, and other work.
2. Check the date and timing information shown for each calendar item. Identify appointments that are upcoming or that conflict with the time you expected to use for tasks, invoice work, or pipeline follow-up.
3. Compare scheduled items with your assigned activities and tasks. If you have a meeting or visit planned, complete urgent preparation work before the scheduled time. If an activity has a reminder close to a calendar commitment, decide whether you need to handle it before or after that commitment.
4. Select a calendar item to open its related record. Review the available details, such as the activity **Purpose**, participants, related account or sales record, and reminder information. Use the record to confirm what preparation or follow-up is needed.
5. When a calendar item changes, return to **My Desk** and recheck the calendar area together with your work queues. This keeps scheduled commitments aligned with your current pipeline, invoice, activity, and task workload.
6. Use the calendar view as a planning aid rather than viewing it in isolation. A scheduled meeting may be connected to an offer, a client, a project, or a task. Opening the item from My Desk gives you a direct route to the information needed for that scheduled work.

[SCREENSHOT: My Desk calendar items displayed beside assigned tasks and activities]

Checking calendar items throughout the day helps you avoid treating assigned work as a simple list. Your availability, due dates, and scheduled client or project commitments all need to be considered together.

Resolving Missing or Unexpected My Desk Items

If an expected item does not appear in **My Desk**, first check the item itself. Open the relevant **Sales Jobs**, **Invoices**, **Activities**, or **Tasks** record and verify the **Assignee**. My Desk shows work assigned to the current user, so an item assigned to another user will not appear in your personal workspace.

If an item remains in My Desk after you believe the work is complete, open it and check its current **Status**, **Stage**, or **Task Progress**. A saved update is needed before My Desk can reflect the record's latest position. Review the action you completed and confirm that the record shows the intended current state.

Use the following checks when the workspace does not match what you expect:

- **Missing pipeline item:** Check the record's **Assignee**, **Stage**, and **Status**.
- **Missing invoice:** Check the invoice assignment and current **Status**.
- **Missing activity or task:** Check the **Assignee**, **Due Date**, reminder information, and current progress or status.
- **Unexpected calendar item:** Open the related activity and review its scheduled date, participants, and reminder details.
- **Operational status seems incorrect:** Open the related record and verify that its current status has been saved.

After checking the source record, refresh **My Desk** and review the affected area again. If the assignment and status are correct but My Desk still appears inaccurate, note the affected record details, including its displayed number or title, current **Status**, and **Assignee**. Share those details with your Pams administrator so they can review the issue using the same record information.

[SCREENSHOT: Example of checking an item's Assignee and Status before returning to My Desk]

Avoid changing an item's assignment or status solely to make it disappear from My Desk. Update these fields only when they accurately reflect who owns the work and where it stands in the workflow.

Overview

My Desk is your focused operational workspace in Pams. It gathers work assigned to you so that you can review sales activity, invoices, activities, tasks, calendar commitments, and operational status from one screen.

Use My Desk to answer practical daily questions:

- Which assigned pipeline items need follow-up?
- Which **Invoices** require review or action?
- Which **Activities** have reminders, deadlines, or pending follow-up?
- Which **Tasks** are still open or approaching their **Due Date**?
- Which **Calendar** items affect the time available for your work?
- Does the operational status area show work that needs attention before routine follow-up?

My Desk is especially useful when you manage several clients, principals, sales jobs, projects, or financial records at the same time. Rather than beginning with a broad list of all company records, you can begin with items connected to your own responsibilities.

The workspace supports a simple daily pattern:

1. Open **My Desk** and review operational status.
2. Check time-sensitive **Calendar** items.
3. Prioritize assigned pipeline and invoice work.
4. Complete or update related **Activities** and **Tasks**.
5. Return to My Desk to confirm that your assigned work reflects the latest changes.

[SCREENSHOT: Full My Desk workspace showing all daily-work areas together]

My Desk does not replace the detailed screens for **Sales Jobs**, **Invoices**, projects, or payments. Instead, it provides a practical starting point and return point while you work through those records. Use it regularly to maintain visibility across the connected sales, operational, and financial work assigned to you.

Prerequisites

Before relying on **My Desk** for your daily workload, make sure you can access the records and work areas relevant to your role in Pams. My Desk displays assigned work, so the quality of what you see depends on the assignments and status information maintained in related records.

You should be able to:

- Open **My Desk** in Pams.
- Open records from the assigned pipeline, **Invoices**, **Activities**, **Tasks**, and **Calendar** areas.
- Recognize the meaning of displayed **Status**, **Stage**, **Due Date**, **Assignee**, and **Task Progress** information.
- Use **Save** or **Save and Close** after updating a record.
- Identify the related business record when an activity, task, or calendar item is connected to a client, sales job, project, invoice, MRQ, or payment.

Make sure work is assigned correctly. When you expect to see an item in My Desk, the related record should show you as the **Assignee**. If you work as part of a sales team, ownership and assignment should be clear before you use My Desk as your daily priority list.

You should also understand the basic status terms used in your team's workflow. For example, **Draft**, **Awaiting Approval**, **Approved**, **Done (completed)**, **Paid**, and **Due/overdue** can indicate very different next actions depending on the record you are reviewing.

[SCREENSHOT: Record details showing Assignee, Status, Stage, and Due Date fields]

After you are comfortable using My Desk to identify daily priorities, continue with Managing Tasks and Activities to learn how to maintain the follow-up work that appears in your workspace.