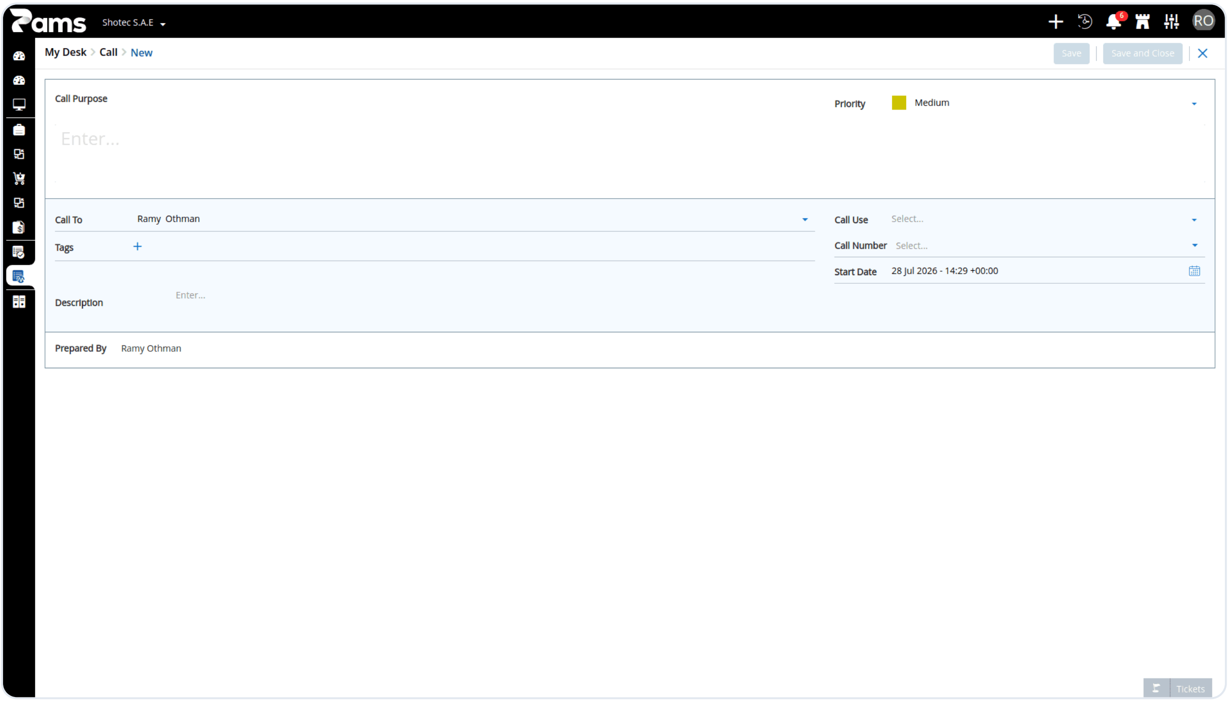
PAMS V2

Call

July 29, 2026

Call

Applications › Add new › My Desk



Call — Add new › My Desk › Call

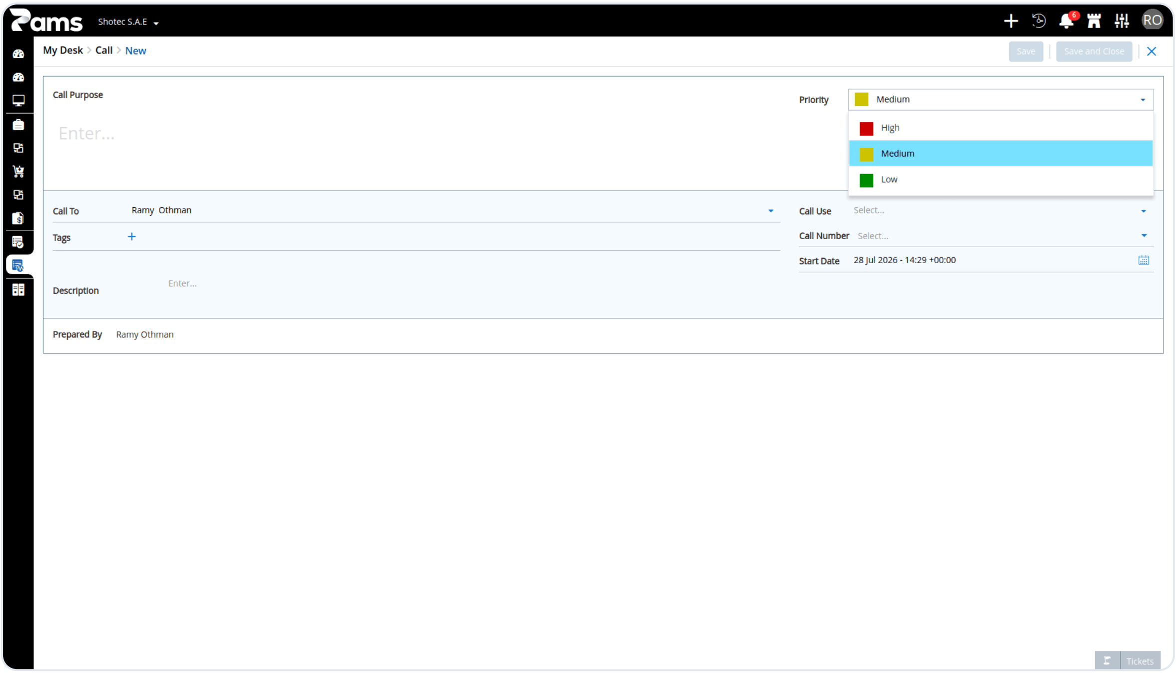
Overview

Use the Call form to record a call from **Applications > Add new > My Desk > Call**. This feature is suitable for sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance officers who need to capture call-related information and supporting files in My Desk.

Use a Call record when you need a saved business record rather than an informal note. You can enter information, select available values, attach files, and either keep the form open or save and close it when the record is complete.

Workflow

1. Open **My Desk**, then select **Call** from **Add new**.



Call — Add new › My Desk › Call

Start a new Call record when you need to document a business conversation or related activity.

2. Enter the required call information in **Enter...**.

   Use the available **Enter...** field to add the information required for your record. The form does not provide a status field, so complete the available entries before deciding whether the record is ready to save.

   > **Note:** Use clear, business-focused information so that other users can understand the purpose of the Call record when reviewing it later.

3. Decide whether you need to choose an available value for the record.

   - To choose a value, use **Select...**.
   - In the selection window, select the appropriate item and confirm it with **OK**.
   - If the form does not require a selection for your call, continue with the remaining information.

   Use **Select** when the form presents an available list or selection action. Do not assume that a value has been applied until you have confirmed the selection with **OK**.

4. Decide whether supporting documentation is needed.
    - If you need to add a file, select **Attach**.
    - Add the relevant file so that it appears in **files[]**.
    - If no supporting document is required, leave **files[]** empty.

   Attach files only when they are relevant to the Call record, such as a call summary, a supplier document, customer correspondence, or other business evidence.

   > **Tip:** Attach the final version of a document where possible. This helps users reviewing the Call record identify the applicable file without opening multiple versions.

5. Decide whether to review tickets before completing the Call record.

   Select **Tickets** when you need to access the ticket-related action available from the Call form. Return to the Call form after completing any required ticket-related work, then review the entered information and attachments.

6. Save the Call record according to your next action.
    - Select **Save** to save the current Call record and remain on the form. Use this option when you need to review the saved information, add further details, or continue working with the record.
    - Select **Save and Close** to save the Call record and close the form. Use this option when the call information is complete and you do not need to make further changes immediately.

   The Call form does not show lifecycle statuses or approval actions. Saving is therefore the available completion decision for the record.

   > **Warning:** Do not close the form before selecting **Save** or **Save and Close** if you need to retain the entered information.

Examples

A sales representative completes a Call record after discussing an upcoming customer requirement.

1. The representative opens **My Desk** and selects **Call** from **Add new**.

2. In **Enter...**, the representative records: “Call with Northstar Office Supplies regarding the requested delivery date for the current order.”
3. The representative selects **Select...**, chooses the applicable available value, and confirms the choice with **OK**.
4. The customer has sent a document relevant to the conversation. The representative selects **Attach** and adds the document. The attached document is then visible in **files[]**.
5. Because the representative wants to remain on the record and confirm that the attachment is visible, they select **Save** rather than **Save and Close**.
6. After reviewing the saved information, the representative can continue updating the Call record if needed. When no further work is required, they can use **Save and Close** to save the current information and leave the form.

Tips

> **Tip:** Use **Save** when you expect to add information after the initial entry. Use **Save and Close** only after confirming that the available fields and any required files have been completed.

> **Note:** The labels **Enter...** and **Select...** are generic. Enter only information that is relevant to the call, and confirm selected values with **OK** before saving.

> **Warning:** If a file is required as evidence of the call, check that it is listed in **files[]** after using **Attach** and before closing the form.

Troubleshooting

Symptom	Likely cause	Fix
A selected value is not shown on the Call form.	The selection was not confirmed.	Select **Select...**, choose the required value again, and confirm with **OK**.
A supporting document is missing from the record.	The file was not attached or is not listed in **files[]**.	Select **Attach**, add the file again, and verify that it appears in **files[]** before selecting **Save** or **Save and Close**.

Symptom	Likely cause	Fix
The Call form closes before you finish reviewing the record.	**Save and Close** was selected.	Open the Call record again if further changes are needed. For future entries, select **Save** when you need to remain on the form.
Entered information is no longer available.	The form may have been closed without using a save action.	Re-enter the information and select **Save** or **Save and Close** before leaving the Call form.

Related pages

- Task
- Add new — Overview
- Add new — Learning Path
- Accounts
- Contact
- Payment
- Product
- Project
- Direct Order
- RFQ
- Process