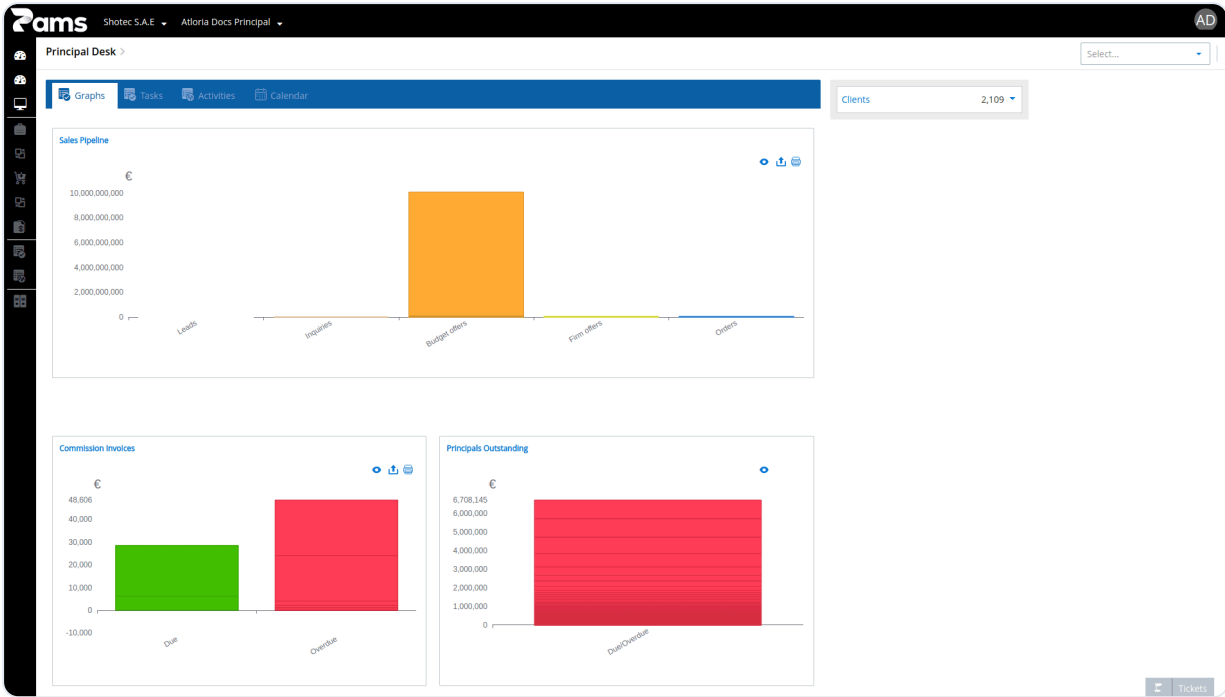


Principal Desk

July 31, 2026

Principal Desk

Applications › Principal Desk



Principal Desk



Overview

Principal Desk is the central entry screen for accessing the application's operational areas. Use it to sign in and then open the workspace that supports your current responsibility, such as Sales, PM, Purchasing, Warehouse, Finance, Tasks, or Activities. It is intended for day-to-day users who need a single starting point for sales jobs, project work, procurement, stock, finance, and related business activities.

Workflow

1. Enter your access details in **Enter User Name** and **Enter Password**.

Principal Desk

Select **Login** to open Principal Desk.

Note: Enter the user name and password exactly as provided for your account. The screen provides separate fields for each value.

2. Decide which working area you need after signing in.

Use the available navigation controls to open the appropriate area:

- Select **Dashboard** for the main dashboard view.
- Select **Reports** to access reporting.
- Select **My Desk** to return to your personal desk.
- Select **Sales** when working with sales activities and sales jobs.
- Select **PM** when working with project management activities.
- Select **Purchasing** when working with RFQs, suppliers, and buyouts.
- Select **Warehouse** when working with Stock and Warehouse activities.
- Select **Finance** when working with finance-related activities.
- Select **Tasks** or **Activities** when you need to work with the corresponding work items.
- Select **Data** when you need to access available data functions.

3. Choose an available item when a selection is required.

Use **Select...** to open the available selection control. Choose the required entry and select **Select** to confirm the choice.

If the screen displays a confirmation window after the selection, select **Ok** to close it and continue.

Tip: Use the area that matches the next business decision you must make. For example, open **Purchasing** before processing supplier-related work, and open **Warehouse** before working with Stock.

4. Review visual or support-related information when available.

Select **graphs** when you need to view the graph option displayed in Principal Desk. Select **Tickets** when you need to access the ticket option. If you need to add a file through the available interface, select **Attach**.

Continue working in the selected application area after completing the required selection or confirmation.

Examples

A purchasing officer needs to begin work on supplier pricing for a sales job.

1. The purchasing officer enters the account credentials in **Enter User Name** and **Enter Password**.
2. The purchasing officer selects **Login** to enter Principal Desk.
3. Because the next activity concerns supplier pricing and a potential buyout, the purchasing officer selects **Purchasing** rather than **Sales**, **Warehouse**, or **Finance**.
4. If a selection window is displayed, the purchasing officer uses **Select...**, chooses the required available entry, and selects **Select**.
5. If confirmation is requested, the purchasing officer selects **Ok**. The user can then continue in the Purchasing area with the relevant procurement work.

Tips

Tip: Use **My Desk** when you need to return to the central personal workspace after visiting another application area.

Note: **Dashboard** and **Reports** are separate navigation options. Select the option that matches whether you need the dashboard view or reporting access.

Warning: Do not select an operational area solely because it contains related information. Choose the area that corresponds to the work you are about to perform, such as **Warehouse** for Stock activities or **Finance** for finance activities.

Troubleshooting

Symptom	Likely cause	Fix
You cannot complete sign-in.	A value may be missing from Enter User Name or Enter Password .	Enter both values, then select Login again.
You are not in the area needed for your work.	A different Principal Desk navigation option was selected.	Return to My Desk and select the appropriate area, such as Sales , PM , Purchasing , Warehouse , or Finance .

Symptom	Likely cause	Fix
A selection window remains open.	The selection has not yet been confirmed.	Select the required entry, select Select , and then select Ok if a confirmation control is displayed.

Related pages

- [Principal Desk — Overview](#)
- [Principal Desk — Learning Path](#)