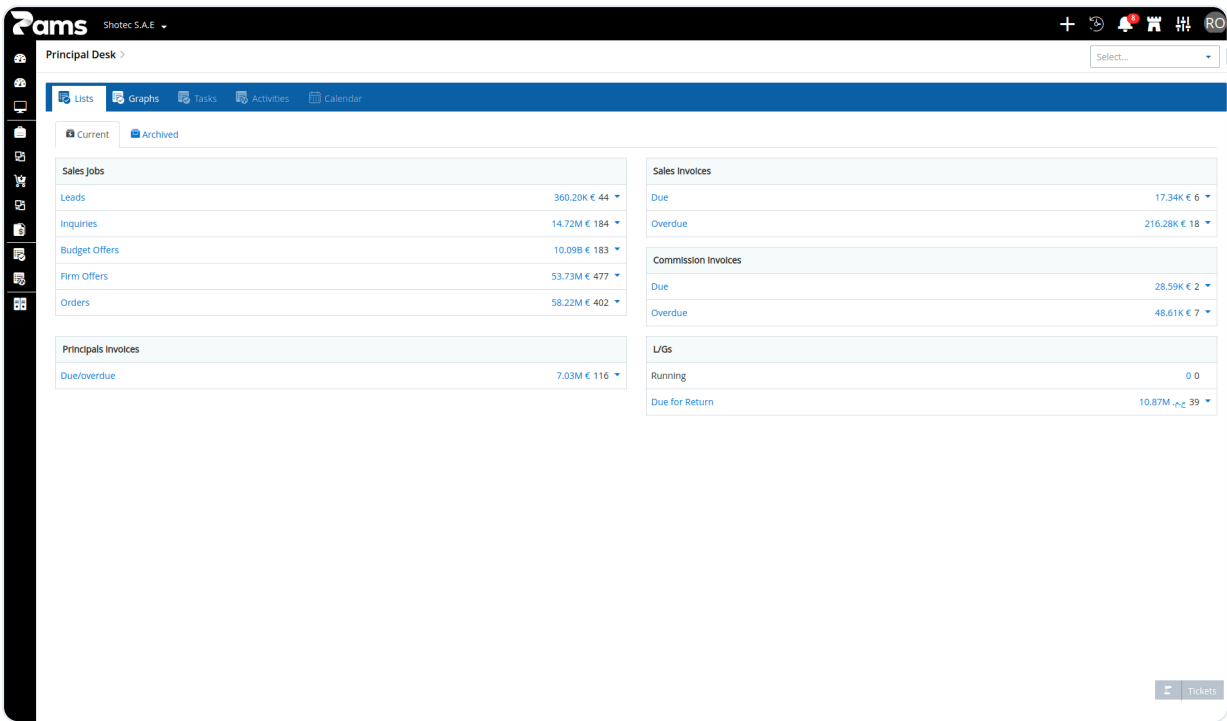


Principal Desk

August 8, 2026

Principal Desk

Applications > Principal Desk2



Principal Desk

Overview

Principal Desk provides a central workspace for accessing key business areas, including dashboards, reports, sales, projects, purchasing, warehouse operations, finance, tasks, activities, and data. Use it when you need to move between operational areas, review available lists or tickets, or attach a file to the current workspace.

Workflow

1. Open the required work area from the Principal Desk navigation.

Select **Dashboard**, **Reports**, **My Desk**, **Sales**, **PM**, **Purchasing**, **Warehouse**, **Finance**, **Tasks**, **Activities**, or **Data** according to the information or activity you need to work with.

Tip: Use **My Desk** when you want to return to your personal work area after reviewing another application area.

2. Decide whether you need to review available records or ticket-related items.

- Select **lists** to access available lists.
- Select **Tickets** to work with ticket-related items.

Return to the Principal Desk navigation when you need to move to a different operational area.

3. Decide whether a file must be attached.

Select **Attach** to begin adding a file. In the file selection area, either select **Select** to choose a file or drag the file to **Drop a file here**.

Note: Attach the file only after confirming that it is the correct document for the current work item.

4. Confirm or cancel the attachment action.

Select **Ok** to confirm the current selection and continue. If you are not ready to attach a file, do not confirm the selection; return to the relevant work area instead.

Examples

A sales representative needs to attach a customer specification document while reviewing daily work.

1. From Principal Desk, select **My Desk** to access the personal work area.
2. Select **Tickets** to review ticket-related work.
3. Select **Attach** when the specification document is ready to be added.
4. Select **Select** and choose the file `Customer-Specification-ACME-2026.pdf` , or drag the file to **Drop a file here**.
5. Select **Ok** to confirm the attachment.
6. Select **Sales** when you need to continue with the related sales activity.

Tips

Tip: Keep file names clear and specific, for example `RFQ-2026-014-Supplier-Quote.pdf` , so that attached documents are easier to recognize.

Warning: Review the selected file before selecting **Ok**. Confirming the selection completes the current attachment action.

Note: Use the main navigation to switch directly between functional areas rather than leaving the Principal Desk open when you need to work in Sales, PM, Purchasing, Warehouse, or Finance.

Troubleshooting

Symptom	Likely cause	Fix
A file cannot be added.	No file has been selected or dropped into the upload area.	Select Attach , then select Select or drag the file to Drop a file here .
The attachment has not been confirmed.	The selection has not been completed.	Select Ok after choosing the correct file.
You are viewing the wrong type of work item.	A different Principal Desk area is required.	Select lists , Tickets , or the relevant navigation area such as Sales , PM , or Finance .

Related pages

- [Principal Desk2 — Overview](#)
- [Principal Desk2 — Learning Path](#)