

Principal Desk

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Principal Desk

Overview

Principal Desk is the central workspace entry point for day-to-day business operations. Use it to access available work areas, including sales, project management, purchasing, warehouse, finance, tasks, activities, data, and tickets. Sales representatives, sales managers, purchasing officers, warehouse managers, project managers, and finance officers can use this desk to move to the relevant operational area.

Steps

1. From the application navigation, select **My Desk**.
2. Select the operational area required for your current work:
 - **Dashboard** for dashboard access.
 - **Reports** for report access.
 - **Sales** for sales work.
 - **PM** for project management work.
 - **Purchasing** for purchasing work.
 - **Warehouse** for warehouse work.
 - **Finance** for finance work.
 - **Tasks** for task work.
 - **Activities** for activity work.
 - **Data** for data-related work.
 - **Tickets** for ticket work.
3. Select **My Desk** when you need to return to the Principal Desk.

Tips & cautions

Tip: Select the operational area that corresponds to the business process you are currently completing, such as **Sales**, **Purchasing**, or **Finance**.

Note: Use **My Desk** as the central navigation point when moving between operational areas.

Result

You have opened the Principal Desk and can select an available operational area.

Related pages

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