Getting Started with Sales

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Use Sales to access Sales records and move to related operational areas such as purchasing, project management, reports, and your work desk.

What You Can Do

- Select **Sales** to open the Sales area.
- Select **Tickets** to access tickets associated with your work.
- Select **Attach** to add or manage attachments for the current record.
- Select **Delete** to remove the current record when deletion is appropriate.
- Select **Ok** to confirm the current action or prompt.
- Select **Cancel** to close the current action or prompt without confirming it.
- Select **Dashboard** to open the dashboard.
- Select **Reports** to open reporting.
- Select **My Desk** to open your personal work area.
- Select **PM** to move to the project management area.
- Select **Purchasing** to move to the purchasing area.
- Select **Go Back to Home Page** to return to the home page.

Your First Session: Open a Sales Record

Your first task is to open the Sales area and confirm that you can access a Sales record.

1. From the application navigation, select **Sales**.

2. Review the Sales record that opens.
3. If the record contains information, confirm that the displayed data is available to you.
4. To leave the area, select **Go Back to Home Page**.

> The available screens show Sales records but do not show a Sales list, a create action, editable field labels, or a dedicated save action. Therefore, creating or updating a Sales record cannot be documented from the available controls.

Confirm That It Worked

You should see a Sales record. A record with data may display existing Sales information for review.

Next Steps

- Select **Attach** when you need to associate supporting files with the current Sales record.
- Select **Tickets** to work with related tickets.
- Select **Reports** for reporting activities.
- Select **Dashboard** or **My Desk** to continue with your operational work.
- Select **Purchasing** or **PM** when the Sales activity requires purchasing or project management follow-up.

Related pages

- Sales — Overview
- Sales record
- Sales — Learning Path
- Pricing Quotation
- Sales jobs
- buyouts
- List
- Letters Of Guaranties
- company
- NewInstantJob

- **Pricing Tool**