

# Activity purpose

September 10, 2026

## Activity purpose

Activity purpose is the reference list that supplies the names shown in the Activity purposes list. Use this page when you need to review or maintain those names.

| If you need to...                  | Go to                                                                                   |
|------------------------------------|-----------------------------------------------------------------------------------------|
| Reach the list                     | <a href="#">Before you start</a> , then <a href="#">Find and open Activity purposes</a> |
| Understand the list and its fields | <a href="#">Understand the list and form</a>                                            |
| Add or change a purpose            | <a href="#">Add or edit an Activity purpose</a>                                         |
| Remove a purpose                   | <a href="#">Remove an Activity purpose</a>                                              |
| Resolve a message                  | <a href="#">When an action goes wrong</a>                                               |
| Maintain related reference lists   | Reference-list data                                                                     |

The screenshot displays the 'Activity purposes' configuration page in the PAMS Fresh Generation application. The interface includes a dark sidebar with various icons, a top navigation bar with the PAMS logo and user information, and a main content area. The main content area features a list of activity purposes with a search bar and a 'Count: 8' indicator. The list includes items like 'Project Meeting', 'Marketing', 'Technical Opening', 'Follow Up', 'Commercial Opening', 'Service Activities', and 'Procurement'. The 'Activity Purpose' option is highlighted in the sidebar.

## Before you start

The Activity purposes page is a protected configuration route. What you can see and do

depends on your permissions and on how your company has set up this list.

### Prerequisites

| Check        | What must be true                                                                   |
|--------------|-------------------------------------------------------------------------------------|
| Route        | Select <b>Configuration</b> , then <b>Activity Purpose</b> .                        |
| Access       | You have access to the protected configuration route.                               |
| Subscription | The configuration subscription is included.                                         |
| List setup   | The columns and fields shown for this list may vary with your organisation's setup. |

## Find and open Activity purposes

Use this procedure to reach the list and open a new or existing purpose.

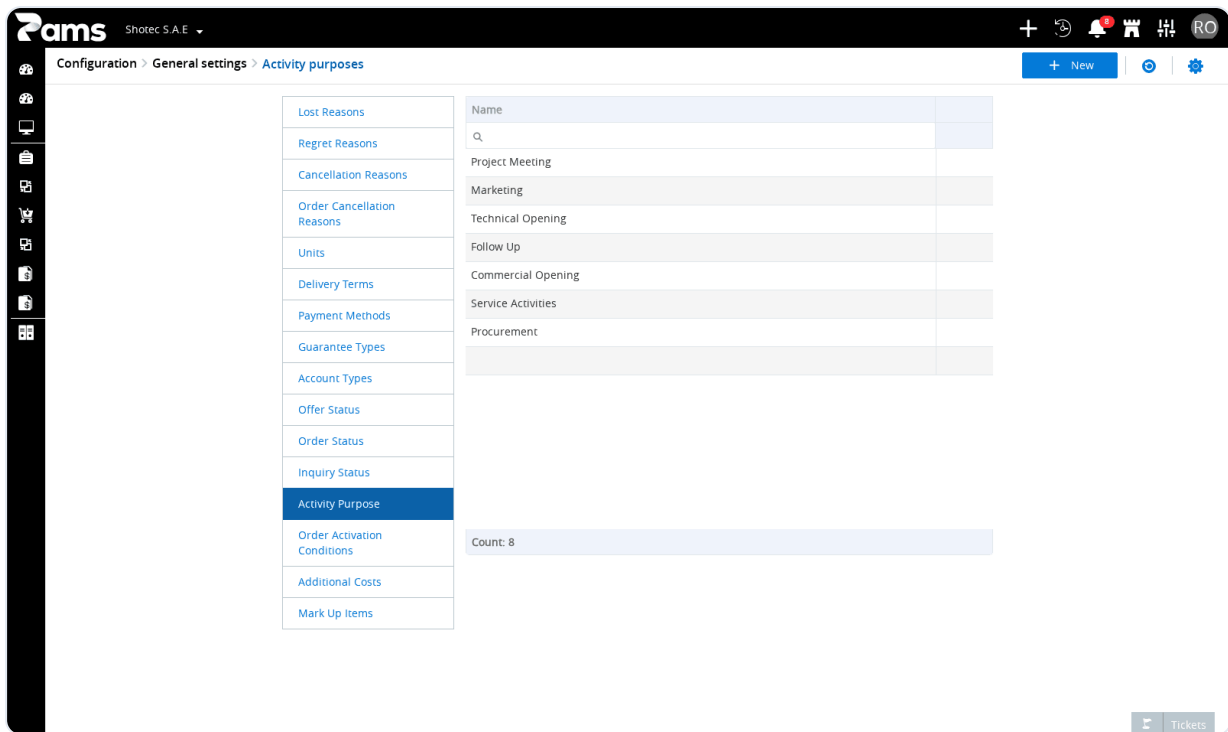
### Prerequisites

- You have access to the configuration route.
- The configuration subscription is included.

### Steps

1. Select **Configuration**, then **Activity Purpose**.
2. Confirm that the page heading reads **Activity purposes**.
3. Confirm that the list contains the **Name** column.
4. Choose what you want to open:

| If you need to...        | Select              |
|--------------------------|---------------------|
| Open a new purpose       | <b>New</b>          |
| Open an existing purpose | The row edit action |



**Result:** The Activity purposes list is open, or the new/edit dialog is open for the purpose you selected.

## Understand the list and form

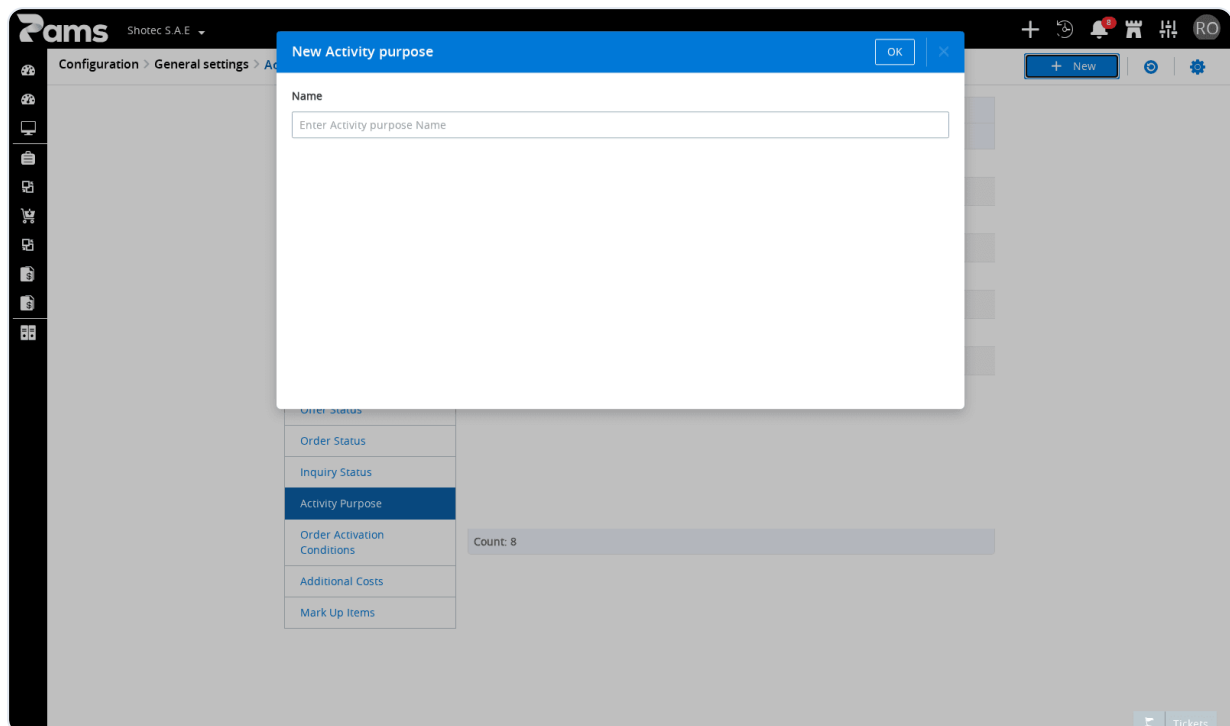
The list shows the configured fields for each Activity purpose. The form uses the same configuration to decide which fields are available and which requirements apply.

| Area             | What you use it for               | Rule                                                                              |
|------------------|-----------------------------------|-----------------------------------------------------------------------------------|
| List columns     | Read each purpose in the list     | The visible header is <b>Name</b> ; the list showed 8 entries.                    |
| Text field       | Enter text values                 | Required only where your company configures it.                                   |
| Select field     | Choose from available values      | Required only where your company configures it.                                   |
| Date field       | Enter a date                      | Required only where your company configures it.                                   |
| Percentage field | Enter a percentage                | Required only where your company configures it; the value is from 0 through 100 . |
| Amount field     | Enter an amount with its currency | Required only where your company configures it; the value cannot be below         |

| Area                         | What you use it for                                                 | Rule                                                              |
|------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------|
|                              |                                                                     | 0 .                                                               |
| Survey answer details        | Enter the answer text and answer rate when that list type is in use | Both fields are required; the answer rate is from 0 through 100 . |
| Reference-list question      | Enter the question text when that list type is in use               | The question text is required.                                    |
| Reference-list question unit | Enter the unit name when that list type is in use                   | The unit name is required.                                        |

In the new-purpose dialog, the available field is **Name** and the dialog provides **OK** and **Cancel** actions. The list uses **Name** as its visible column. Other fields depend on the configured list type.

The list also exposes controls titled **Refresh** and **Settings** .



## Add or edit an Activity purpose

Use this procedure to add a new purpose or change an existing one.

### Prerequisites

- The Activity purposes list is open.
- For a new purpose, **New** is available.
- For an existing purpose, the row edit action is available.

## Steps

1. Choose one route:

| If you need to... | Do this                                     |
|-------------------|---------------------------------------------|
| Add a purpose     | Select <b>New</b> .                         |
| Change a purpose  | Select the row edit action for the purpose. |

2. In **Name**, enter the purpose name.
3. Complete any additional fields that your configured list presents.
4. Choose the result you need:

| If you need to...    | Select        |
|----------------------|---------------|
| Save the purpose     | <b>OK</b>     |
| Close without saving | <b>Cancel</b> |

If the form is valid, an edit displays **Data updated Successfully** ; a new entry displays **Data saved Successfully** .

**Result:** The dialog closes after a successful save and the list reloads with the updated or added purpose. Selecting **Cancel** closes the dialog without saving.

## Remove an Activity purpose

Use this procedure to remove a purpose after confirming that it is no longer needed.

### Prerequisites

- The Activity purposes list is open.
- Delete access is available for the row.
- More than one item remains in the list.

## Steps

1. Open the row's delete action menu.
2. Read **Are you sure you want to delete this item?** .
3. Choose the result you need:

| If you need to... | Select        |
|-------------------|---------------|
| Keep the purpose  | <b>Cancel</b> |

| If you need to...  | Select |
|--------------------|--------|
| Remove the purpose | Delete |

**Result:** **Cancel** closes the confirmation without removing the purpose. A successful deletion displays `Data Deleted Successfully` and refreshes the list.

## When an action goes wrong

Use the message text to choose the next action.

| What you see                                                        | What it means                              | What to do                                                               |
|---------------------------------------------------------------------|--------------------------------------------|--------------------------------------------------------------------------|
| Forbidden characters detected.<br>Please remove them and try again. | The filter contains forbidden characters.  | Remove the forbidden characters and apply the filter again.              |
| Default item                                                        | The selected item is a default item.       | Do not delete that item.                                                 |
| Are you sure you want to delete this item?                          | The delete confirmation is open.           | Select <b>Cancel</b> to keep the item. Select <b>Delete</b> to continue. |
| Data Deleted Successfully                                           | The deletion completed.                    | Return to the list and review the remaining rows.                        |
| Related to Saved data, Can't be deleted                             | Saved data is related to the item.         | Keep the item and review the related saved data.                         |
| Failed to Delete                                                    | The deletion failed.                       | Leave the item in place and try again after checking the row and access. |
| Must have at least one item                                         | The list cannot be reduced below one item. | Keep at least one item in the list.                                      |
| Data updated Successfully                                           | The edit completed.                        | Review the updated row in the list.                                      |
| Data saved Successfully                                             | The new item completed.                    | Review the new row in the list.                                          |
| Data Importing completed                                            | The import completed.                      | Review the imported rows in the list.                                    |

## What to do next

The Activity purposes page is one list in a shared configuration surface. Its visible navigation includes related reference lists such as Lost Reasons, Regret Reasons, Cancellation Reasons, Order Cancellation Reasons, Units, Delivery Terms, Payment Methods, Guarantee Types, Account Types, Offer Status, Order Status, Inquiry Status, and Order Activation Conditions. Open the related list when you need to maintain one of those reference values.