

Activities — Overview

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Applications > Activities

Overview

Activities provides a central area for recording and reviewing operational activity records. Sales representatives, sales managers, project managers, purchasing officers, warehouse managers, and finance users can use these records to keep work items visible within the business management platform.

The area supports working with activity lists and individual activity records. It also provides access to related tickets and attachments, helping users keep relevant work information together.

Activities can be displayed using saved layouts, adjusted through column selection, filtered, and exported for review or reporting.

What you can do here

- Use **Standard Layout** to apply the standard activity list layout.
- Use **Add Layout** to create an additional layout for viewing activities.
- Use **Columns Chooser** to select the columns shown in the activity list.
- Use **Apply filter** to filter the displayed activities.
- Use **Export** to export activity information.
- Use **Tickets** to access tickets associated with an activity record.
- Use **Attach** to add an attachment to an activity record.

Related pages

- [Getting Started with Activities](#)
- [Activities](#)

- [Activities — Learning Path](#)