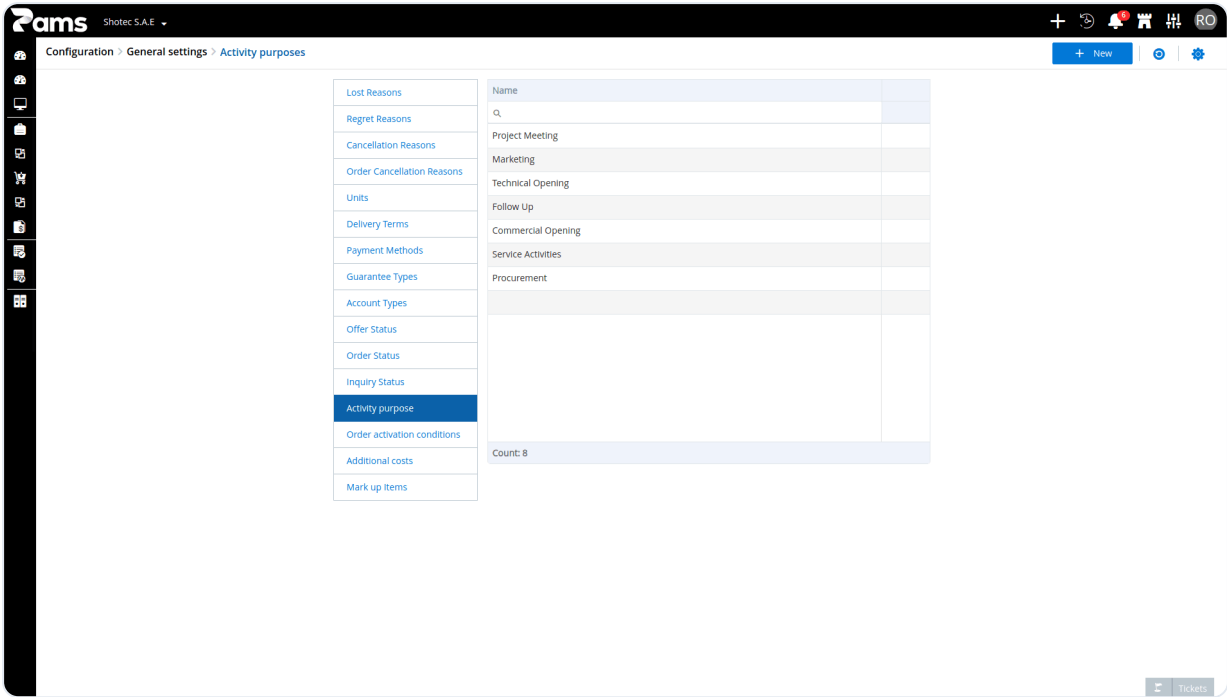


Activity Purpose

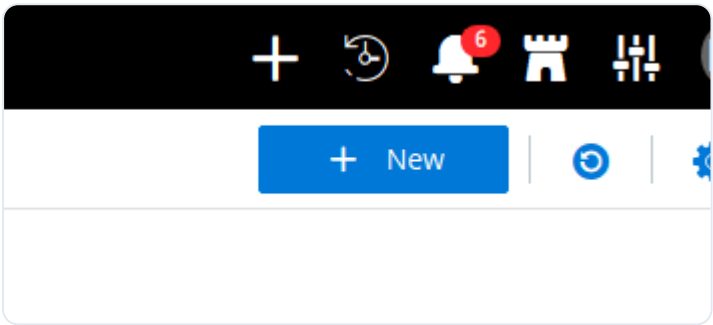
July 29, 2026

Activity Purpose

Applications › Configurations › General Settings



Activity Purpose — Configurations › General Settings › Activity Purpose



Overview

Activity Purpose is used to maintain the list of purposes that can be identified for business activities. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance users can review the available purposes when they need to distinguish the reason or context for an activity.

Use this screen when an existing purpose must be located, when a new purpose is required, or when the current list must be exported for review.

Settings

Open **Configurations > General Settings > Activity Purpose** to manage the available activity-purpose records.

The screen provides a searchable list of existing records, such as project-related, marketing-related, and technical purposes. No separate enablement option or purpose-specific setting is available on the provided screen.

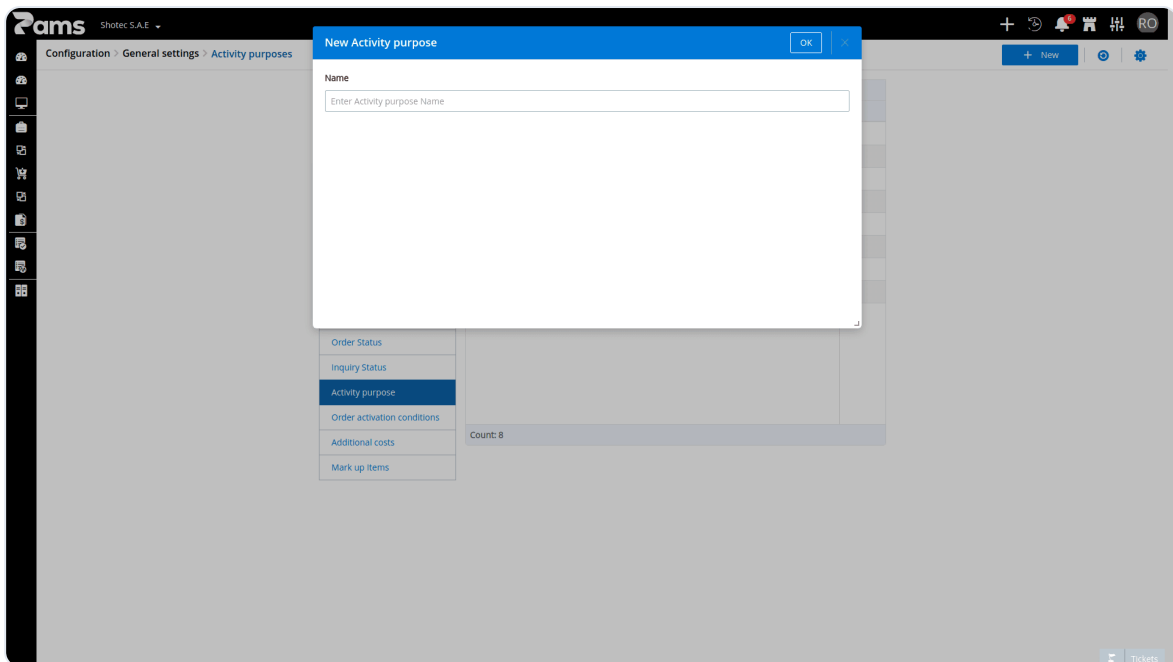
Note

Use clear, distinct purpose names. A consistent list helps users select and report on activities without creating similar records for the same business reason.

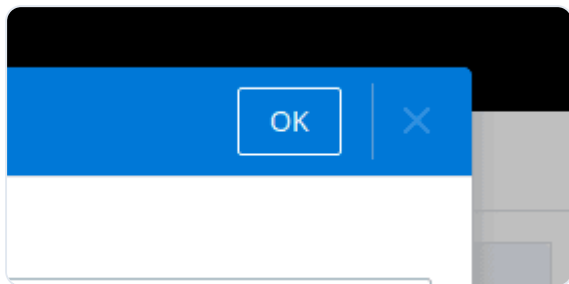
Workflow

Review or locate an existing purpose

1. Open **Configurations > General Settings > Activity Purpose**.



Activity Purpose — Configurations > General Settings > Activity Purpose



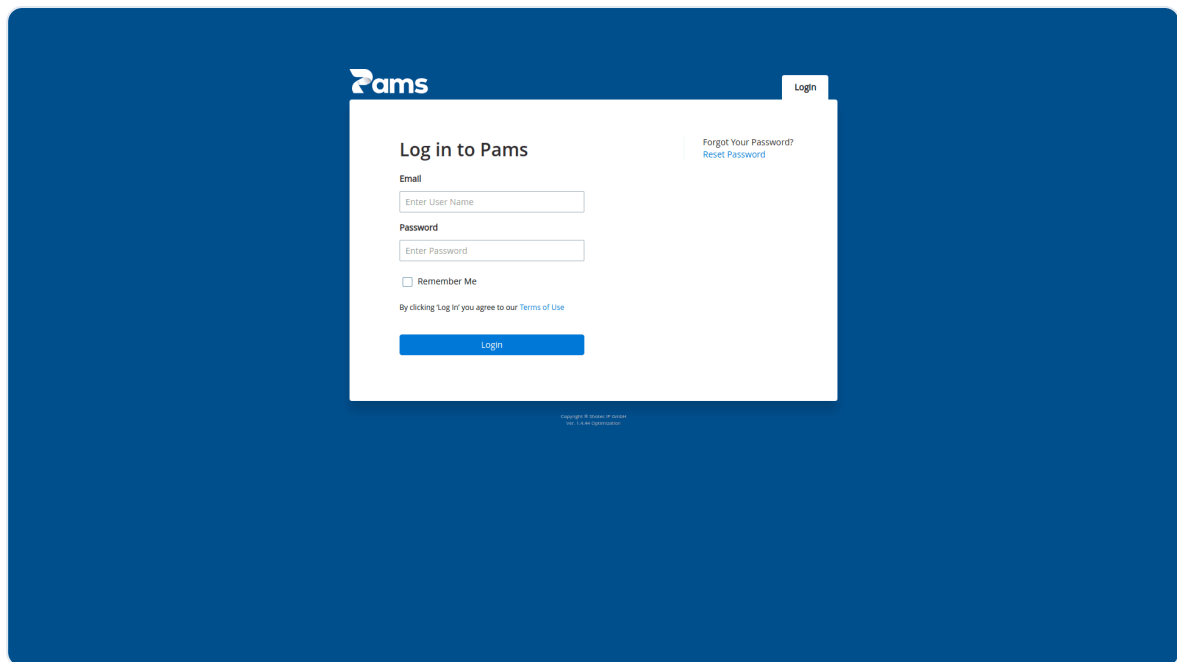
2. Decide whether you need to work with an existing purpose or create a new one:
 - To locate an existing record, enter relevant text in **Search**.
 - Select **Apply filter** to apply the search criteria.
 - Review the matching activity-purpose records in the list.
3. If the required purpose is displayed, use the available record actions as appropriate. Select **icn-update** when an update action is available for the record.

Tip

Search before creating a new record. This reduces the risk of maintaining duplicate purposes with slightly different names.

Create a new purpose

4. If no suitable purpose exists, select **New**.



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5. Complete the information requested in the new-purpose form. If supporting files are required, use **Attach** and review the **files[]** field.
6. Decide whether to keep or abandon the new record:
 - Select **Ok** to accept the entered information.
 - Select **Cancel** to leave the entry without completing the action.

Export the purpose list

7. When you need an offline copy of the visible activity-purpose list, first apply any required search criteria using **Search** and **Apply filter**.
8. Select **Export** to export the list currently available from the screen.

Warning

Apply the required filter before exporting. The available screen does not indicate that an export automatically includes records outside the current list or filter result.

Examples

A project manager needs a purpose for activities related to an initial technical review.

1. The project manager opens **Configurations > General Settings > Activity Purpose**.
2. In **Search**, the project manager enters **Technical** and selects **Apply filter**.
3. The list is reviewed to determine whether an appropriate technical-purpose record already exists.
4. If the required purpose is not available, the project manager selects **New**.
5. The project manager completes the information requested by the new-record form and selects **Ok**.
6. If the purpose list is needed for a PM review, the project manager filters the list as required and selects **Export**.

The result is an updated Activity Purpose list that can be used consistently when recording relevant activities.

Tips

Tip

Use short, business-recognizable names so that users can quickly find the appropriate purpose through **Search**.

Note

Use **Cancel** rather than **Ok** when the new-purpose information is incomplete or no longer required.

Tip

Use **Export** after filtering when a team needs a focused list, for example purposes relevant to project, sales, or purchasing work.

Troubleshooting

Symptom	Likely cause	Fix
The required activity purpose is not visible.	The list has not been searched or filtered using the relevant wording.	Enter a relevant term in Search and select Apply filter .
A new purpose should not be retained.	The new-record form was opened unnecessarily or the	Select Cancel rather than Ok .

Symptom	Likely cause	Fix
	information is incomplete.	
The export does not contain the expected visible records.	The required search criteria may not have been applied before export.	Set the required value in Search , select Apply filter , verify the list, and then select Export .
Supporting material is not associated with the activity-purpose entry.	A file may not have been attached during entry.	Use Attach and review the files[] field before selecting Ok .

Related pages

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- [Configurations — Overview](#)
- [Configurations — Learning Path](#)
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- [Margin Items](#)
- [Order Activation Conditions](#)
- [Order Cancellation Reasons](#)
- [Regret Reasons](#)
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