

Activity status

September 10, 2026

Activity status

Activity status at a glance

An activity status is the current work position of a planned Visit, Meeting, or Call. The product lists the statuses in this order: Planned, Overdue, Done, Due, and Cancelled.

Current status	Available action
Overdue or Due	Done
Done	Consider As Not Done
Planned, Overdue, or Due	Cancel This Activity, when editable
Cancelled	Undo Cancellation, when editable

If you need to...	Go to
Find an activity and read its status	Find an activity
Understand the list and activity fields	Understand the activity status screen
Complete, reverse, or cancel an activity	Change an activity status
Create a new activity	Create an activity
Work with the activity workspace	My Desk activities
Continue with tasks and activities	Tasks and activities

Before you change a status

An activity must be saved before its status actions become available. Cancellation actions also require an activity that you can edit.

Prerequisites

- Open a saved activity from the activity list.
- Check the current status in the activity record or the list's **Status** column.
- Confirm that the activity is editable before using **Cancel This Activity** or **Undo Cancellation**.

The available action depends on the current status:

Current status	Action available	Additional condition
Overdue or Due	Done	Job changes do not block the action.
Done	Consider As Not Done	Job changes do not block the action.
Planned, Overdue, or Due	Cancel This Activity	The activity is editable.
Cancelled	Undo Cancellation	The activity is editable.

Result: You know which status action can appear for the activity you opened.

Find an activity

The activity list is the place to locate a saved activity and read its current **Status**.

Prerequisites

- Know which activity you need to review.

Steps

1. Open the activity list.
2. Select the filter that matches what you need to review.

If you need to...	Select
View all activity types	All
Review visits	Visits
Review email activities	Email
Review meetings	Meetings
Review calls	Call
Include archived activities	Show archived activities

3. Read the activity's value in the **Status** column.

4. Identify the activity by comparing its **Title**, **Visitors**, **Activity purpose**, **Company**, and **Startdate** values.

[illegible]

Activities							
All	Visits	Email	Meetings	Call	☐ Show archived activities		
Title	Visitors	Activity purpose	Company	Startdate	Status	Importance	
Q	Q	Q	Q	Q	Q	Q	
kknmmn,	Heba Said	Technical Opening Technic...		17 Aug 2026 - 12:31 PM	Overdue	Medium	
dfgdftgfdgd	Said Hamza, Ragy Zaky			13 Aug 2026 - 11:38 AM	Overdue	Medium	
sdaasd	Ragy Zaky		ACOD-MASAFEE	13 Aug 2026 - 10:04 AM	Overdue	Medium	
Follow up visit to ERC	Omar Dighedy	Follow Up Follow Up	ERC	3 Aug 2026 - 12:25 PM	Overdue	Medium	
test2	Fatma2 Mohamed			26 jul 2026 - 02:00 PM	Overdue	Medium	
TETET	Ragy Zaky			23 jul 2026 - 01:26 PM	Overdue	Medium	
dasdadassss	Said Hamza, Fatma2 Moha...			2 Apr 2026 - 06:18 AM	Overdue	Medium	
.....	Fatma Sokar	Follow Up Follow Up	abc	10 Dec 2025 - 07:57 AM	Overdue	High	
...	Fatma Sokar			9 Dec 2025 - 10:17 PM	Overdue	Medium	
jnhv	Fatma Sokar	Project Meeting Project Me...		9 Dec 2025 - 09:58 PM	Overdue	Low	
....JHFEJFDIEWYGFUWEGK...	Fatma Sokar			8 Dec 2025 - 08:56 AM	Overdue	Medium	
J25.1104 Test the Visit	Ramy Othman, Ragy Ali	Procurement Procurement		12 Nov 2025 - 07:51 AM	Overdue	Medium	
Vi Ac in My Desk	Ramy Othman			11 Nov 2025 - 07:32 AM	Overdue	Medium	

Result: The activity list is filtered to the work you need to review, and its current status is visible in the **Status** column.

Understand the activity status screen

The activity surfaces combine a list status with activity-specific fields. Visit and Call records

use separate **Priority** controls; both offer `High` , `Medium` , and `Low` .

Activity surface	Field	Options or value rule
Visit	Priority	<code>High</code> , <code>Medium</code> , <code>Low</code>
Visit	Visit type	<code>Project Meeting</code> , <code>Marketing</code> , <code>Technical Opening</code> , <code>Follow Up</code> , <code>Commercial Opening</code> , <code>Service Activities</code> , <code>Procurement</code>
Visit	Start Date	Required
Visit	End Date	Required; it cannot be earlier than Start Date
Call	Priority	<code>High</code> , <code>Medium</code> , <code>Low</code>
Call	Call Use	<code>Phone</code> , <code>Skype</code> , <code>Viber</code>
Call	Start Date	Required
Call	Description	Optional

The activity list shows **Title**, **Visitors**, **Activity purpose**, **Company**, `Startdate` , and **Status**. The activity list includes **Refresh**, **Table Layout**, **Settings**, and **Visit**.

The activity editors provide these fields:

Activity	Field	Entry rule
Visit	Priority	Required; choose <code>High</code> , <code>Medium</code> , or <code>Low</code> .
Visit	Start Date	Required.
Visit	End Date	Required; it cannot be earlier than Start Date .
Visit	Visit type	Optional; choose <code>Project Meeting</code> , <code>Marketing</code> , <code>Technical Opening</code> , <code>Follow Up</code> , <code>Commercial Opening</code> , <code>Service Activities</code> , or <code>Procurement</code> .
Call	Priority	Required; choose <code>High</code> , <code>Medium</code> , or <code>Low</code> .
Call	Call Use	Optional; choose <code>Phone</code> , <code>Skype</code> , or <code>Viber</code> .

Activity	Field	Entry rule
Call	Start Date	Required.
Call	Description	Optional.

When you create or edit a non-email activity, the editor provides **Save** and **Save and Close**.

The status controls are:

Control	Available when
Done	A saved Visit or Call is Overdue or Due , and job changes do not block the action.
Consider As Not Done	A saved Visit or Call is Done , and job changes do not block the action.
Cancel This Activity	A saved, editable Visit or Call is Planned , Overdue , or Due .
Undo Cancellation	A saved, editable Visit or Call is Cancelled .
Print Minutes Of Activity	A saved Visit is open and job changes do not block the action.

Change an activity status

Use the status action that matches the activity's current status and your editing permission.

Prerequisites

- Open a saved Visit or Call.
- Check the current status in the activity record.
- Confirm that the activity is editable when the action requires it.

Steps

1. Select the action that matches the current activity status.

Current status	Select
Overdue or Due	Done
Done	Consider As Not Done
Planned , Overdue , or Due , when editable	Cancel This Activity
Cancelled , when editable	Undo Cancellation

2. Check the activity's **Status** value after the action.

Result: The activity remains available for the next status action supported by its current status.

Choose the applicable status branch

The status action depends on both the activity type and its current status. Use the matching branch rather than selecting an action from another activity type.

For a saved Visit or Call, check the current status. For **Cancel This Activity** or **Undo Cancellation**, confirm that the activity is editable. Then use the matching row in [Change an activity status](#).

Result: You have the status branch that matches the activity type, current status, and edit permission.

When a status change goes wrong

Use the message on screen to choose the next action.

Message	What to do
This action is only allowed if you belong to that branch	Open an activity belonging to a branch you can work with.
One topic and at least one note is required	Add one topic and at least one note before using the action that requires them.
There is no topic to print	Add a topic before selecting Print Minutes Of Activity .
An error occurred while processing your request	Review the activity details and try the action again.
Your request was completed successfully	Continue by checking the activity list or record.
Forbidden characters detected. Please remove them and try again.	Remove forbidden characters and repeat the action.
Action not allowed	Check the activity status and your permission before trying again.

Messages owned by other pages are outside this activity-status procedure:

