

Activities



Shotec S.A.E







Activities

All

Visits

Email

Meetings

Call

☐ Show archived activities

Title	Visitors	Activity purpose	Company	Startdate	Status	Importance	
Q	Q	Q	Q	Q	Q	Q	
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	...
dasdadsssss	Said Hamza, Fatma2 Mohamed			2 Apr 2026 - 06:18 AM	Overdue	Medium	...
.....	Fatma Sokar	Follow Up Follow Up		10 Dec 2025 - 07:57 AM	Overdue	High	...
...	Fatma Sokar			9 Dec 2025 - 10:17 PM	Overdue	Medium	...
Jnhv	Fatma Sokar	Project Meeting Project Meeting		9 Dec 2025 - 09:58 PM	Overdue	Low	...
.....JHFEJFDIEWGYFIUWEGKFGI	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	...
sales job test v	Ramy Othman			10 Nov 2025 - 10:20 PM	Overdue	Medium	...
add visit from my desk	Ramy Othman			10 Nov 2025 - 10:16 PM	Overdue	Medium	...
Visit testing	Ramy Othman			10 Nov 2025 - 09:24 AM	Overdue	Medium	...
Monthly visit to Shotec office	Ragy Ali, Mohamed-shorosh		Shotec S.A.E	6 Oct 2025 - 09:00 AM	Overdue	Medium	...
Visit Testing	Ramy Othman			1 Oct 2025 - 10:51 AM	Overdue	Medium	...
Some Visit	Ramy Othman			1 Oct 2025 - 07:43 AM	Overdue	Medium	...
visit testing	Ramy Othman	Project Meeting Project Meeting		1 Oct 2025 - 07:17 AM	Overdue	Low	...
visit testing	Mohamed Shorosh			1 Oct 2025 - 06:00 AM	Overdue	Medium	...

Count: 0/0

<

1

2

3

4

>

Tickets

Overview

Open the feature from **Activities** in the main navigation. Use the list when you need to monitor follow-up work, identify overdue activities, or prepare an activity view for reporting or export.

Workflow

1. Open **Activities** and review the current activity list.

Use the displayed columns to identify the activity you need:

- **Title** identifies the activity.
- **Visitors** identifies the visitor or related person.
- **Activity purpose** describes the purpose of the activity.
- **Company** identifies the related organization.
- **Startdate** shows the planned start date and time.
- **Status** shows the activity status.
- **Importance** shows the activity priority.

To move through a longer list, use **Previous Page** when it is available.

2. Decide whether you need to find a specific activity or review a group of activities.
 - To locate a known activity, enter relevant text in **Search** or the **Search box**.
 - To narrow the displayed records, use **Apply filter**.
 - To work with a particular record, use **Select** after locating it in the list.

Tip: Search using a distinctive value, such as part of the activity title, company name, or visitor name, to reduce the number of records displayed.

3. Decide whether the current columns and arrangement are suitable for your work.
 - To use the default view, select **Standard Layout**.
 - To change the information displayed in the list, select **Columns Chooser** and choose the columns required for your review.
 - To save a new reusable layout, select **Add Layout**, enter a value in **Layout name**, and select **Save**.
 - To revise the currently selected layout, make the required changes and select **Update Current**.
 - To discard a new or unneeded change before saving, select **Cancel**.
 - To remove the current saved layout, select **Delete Current**.

Note: Use a clear **Layout name** that describes the purpose of the view, such as “Overdue Follow-ups” or “Account Visit Review.”

4. Decide what to do with the selected activity records.

- Select one or more activity records with **Select**.
- Select **Export** when you need an output of the displayed activity information.
- Select **Attach** when you need to add a file to the selected activity.
- Use **Tickets** when you need to work with tickets from the Activities list.
- Use **Delete** only when you intend to remove the selected item.

Warning: Apply your search and filter criteria before using **Export** so that the exported output contains the activity records you intend to review.

Examples

A sales representative needs to review overdue follow-up visits for a customer account before a customer meeting.

1. Open **Activities** from the main navigation.
2. Enter the customer name in **Search** or the **Search box**. If further refinement is needed, select **Apply filter** to reduce the list to the relevant activities.
3. Review the matching rows. Check **Title**, **Activity purpose**, **Company**, **Startdate**, **Status**, and **Importance** to identify follow-up activities that require attention.
4. Select the relevant activity with **Select**. If supporting documentation is required, select **Attach** and add the file to the selected activity.
5. To retain this review view for future account visits, select **Add Layout**. Enter `Customer Follow-up Review` in **Layout name**, then select **Save**.
6. When the representative needs to share the current review outside the list, select **Export**.

Tips

Tip: Review **Status** together with **Startdate** to prioritize activities that are overdue or due soon.

Note: Use **Standard Layout** when a saved layout no longer displays the information needed for routine activity review.

Warning: Select the correct activity record before choosing **Attach**, **Tickets**, or **Delete**.

Troubleshooting

Symptom	Likely cause	Fix
The required activity is not visible in the list.	The current search or filter criteria are too restrictive.	Clear or revise Search , then use Apply filter again.
The list does not show the columns needed for review.	The selected layout does not include the required information.	Select Columns Chooser to adjust columns, or select Standard Layout .
Changes to a layout are not available later.	The layout changes were not saved.	Select Save for a new layout or Update Current for the current layout.
An activity action cannot be applied to the intended record.	The required record has not been selected.	Locate the activity and use Select before choosing Attach , Tickets , Export , or Delete .

Related pages

- [Getting Started with Activities](#)
- [Activities — Overview](#)
- [Activities — Learning Path](#)