

History & History Tasks



History is a function to keep a record of important meetings, conversations, and other agreements between a Contact and yourself, or against a Project.

History Record
✕

Contact

Assignee

Detail

Had a Meeting with Gavin i.r.o. VAT Registration.
Supplied him with a list of all Documents required.

3 Med

Priority

Tracking ^(1:1)

History Date

Activity

Follow Up

Follow Up Date

Follow Up Assignee

Cancel
Create

The example above requires Follow-up Action and will appear on Claudia's To-Do-List on 22 September as a follow-up History Task

☐	Task	Contact	Due	Activity	Status	Actions	★
☐	History Follow Up	Royal Mount	22-Sep	Audit	Active	✓ 👤 📅 ✕	3 Med

- Other possible uses are
- to Follow-up on Quotations
 - monitor the activities of Sales Representatives