Notes, Tasks, and Contact History

Notes, Tasks, and Contact History

Use the contact record to leave useful internal context for other Fort Adams staff.

Notes

Use **Notes** for information another staff member may need later. Good notes are factual, short, and related to the customer interaction.

Example

> Customer called to confirm billing address. Updated address from information provided by customer.

Avoid putting sensitive payment-card information, passwords, or credentials in notes.

Tasks

Use **Tasks** when a future staff action is required. A useful task should have a clear action, an owner when appropriate, and a due date when appropriate.

Example

Call customer about recurring invoice before next billing date.

When the task is finished, mark it complete rather than deleting the history.

Activity history

Before contacting a customer about an issue, review recent activity. Another staff member may already have contacted the customer, changed their information, recorded a note, sent an invoice, or created a follow-up task.

Official reference

HighLevel — Contact Detail Page

Revision #1
Created 2026-09-22 14:24:35 UTC by David Prata
Updated 2026-09-22 14:24:35 UTC by David Prata