2. Contacts

How Fort Adams staff should find, review, create, and update contact records in HighLevel.

- Find and Open a Contact
- Understand the Contact Record
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- Edit Contact Information
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Find and Open a Contact

Find and Open a Contact

Always search for an existing contact before creating a new one.

Find a contact

1. Open **Contacts** from the HighLevel left menu.
2. Open the main contact list or Smart List.
3. Use the search field to look for the customer.
4. Search using the most reliable information you have:
   - full name;
   - email address;
   - phone number.
5. Open the matching contact by clicking the contact's name.

Before deciding there is no match

Try more than one search value.

For example, if searching for **Robert Jones** returns nothing, try the customer's email address or phone number. A record may use a nickname or alternate spelling.

Why searching first matters

Duplicate contacts can split a customer's history across multiple records. That makes it harder to understand prior conversations, invoices, payments, bookings, notes, tasks, and communication preferences.

If you find two records for the same person

Do **not** delete one casually.

If you are certain they are duplicates and you have permission to merge contacts, follow the Fort Adams duplicate-contact procedure. Otherwise, ask an administrator to review the records.

Smart Lists

A **Smart List** is a saved filtered view of contacts. Smart Lists update automatically as contact data changes.

Use Smart Lists when one has already been created for a staff purpose. Do not change shared Smart List filters unless you understand who else relies on that list.

Official references

- HighLevel — Create and Manage Contacts
- HighLevel — Smart Lists

Understand the Contact Record

Understand the Contact Record

The contact record is the best place to understand one customer's relationship with Fort Adams.

Left panel — contact information

This area contains the customer's core information. Depending on Fort Adams configuration, it may include name, email, phone, mailing address, tags, custom fields, and communication preferences.

Tags

Tags help categorize contacts or support automation. Do not add or remove a tag unless you know what it is used for. A tag may be connected to a workflow or integration.

When editing tags in the current HighLevel contact view, use **Apply** to confirm changes.

Center panel — conversations and activity

Use this area to review the history of interactions with the contact. Depending on permissions and configuration, you may see email, SMS, calls, notes, appointments, opportunity activity, and other CRM activity.

Right panel — action modules

The right side can contain **Activities, Associations, Opportunities, Tasks, Notes, Appointments, Documents, and Payments**.

The exact order may differ because HighLevel allows administrators to customize contact layouts.

Payments module

For staff handling billing, the **Payments** area is especially important. It can show invoices, subscriptions, payment methods, and transactions related to that customer.

Auto-save

HighLevel's current contact detail page auto-saves many field changes when you leave the field. After changing important information such as an email address or phone number, pause and verify that the new value remains visible before leaving the record.

Official reference

HighLevel — Contact Detail Page

Create a New Contact

Create a New Contact

Create a contact manually only when you have first confirmed the person is not already in HighLevel.

Before creating the contact

Search by name, email address, and phone number. If you find an existing record, update that record instead.

Create the contact

1. Go to **Contacts → Smart Lists**.
2. Click **+ Add Contact**.
3. Enter the available customer information.
4. At minimum, enter the information needed to identify the person accurately.
5. Review the record for spelling and typing errors.
6. Click **Save**.

The fields displayed in the form may vary because Fort Adams can configure custom fields and layouts.

Recommended data-entry habits

- Use the person's real first and last name when known.
- Verify email spelling before saving.
- Include the correct area code with phone numbers.
- Do not use fake placeholder email addresses.
- Do not put internal comments into name or address fields.
- Put internal context in **Notes**, not in customer identity fields.

Forms and integrations may create contacts automatically

HighLevel can create contacts from forms and automated integrations. Fort Adams also uses connected systems. That is another reason to search before manually creating a record.

Official reference

HighLevel — Create and Manage Contacts

Edit Contact Information

Edit Contact Information

Update a contact when you receive corrected or newer customer information.

Typical changes

Staff may commonly update name spelling, email address, phone number, mailing address, and appropriate Fort Adams custom fields.

Update a contact

1. Go to **Contacts**.
2. Search for and open the contact.
3. Find the field that needs to change.
4. Enter the corrected information.
5. Move out of the field.
6. Confirm the new value remains visible.

HighLevel's current contact detail page auto-saves many field changes.

Be careful with email addresses

A customer's CRM email address can affect connected communication systems.

Before replacing an email address, confirm the customer gave you the new address, check spelling carefully, and do not use a made-up address simply to satisfy a form.

Fort Adams has separate processes around marketing email and Constant Contact. Changing a CRM email address is not the same as granting marketing consent.

Be careful with tags and communication settings

Tags and DND/communication settings can affect automation. Only change them when the procedure specifically calls for it.

Official references

- HighLevel — Create and Manage Contacts
- HighLevel — Contact Detail Page

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

Deleting and Duplicate Contacts — Use Caution

Deleting and Duplicate Contacts — Use Caution

Deleting a contact is a significant action.

What deletion can affect

HighLevel documents that deleting a contact can also remove associated information such as conversations, notes, opportunities, tasks, appointments, and manual actions. It can also stop active campaigns and workflows for that contact.

HighLevel currently allows deleted contacts to be restored for a limited period, but deletion should still be treated as an exception rather than routine cleanup.

Fort Adams staff rule

> **Do not delete a contact merely because the information looks old, duplicated, or incorrect.**

If a contact appears to be a duplicate:

1. open both records;
2. compare email address and phone number;
3. review activity and payment history;
4. ask an administrator to merge or resolve the records if you are not certain.

Why this matters

One duplicate may contain the billing history while another contains the conversation or booking history. Deleting the wrong record can create unnecessary recovery work.

Official reference

HighLevel — Create and Manage Contacts