Common Mistakes to Avoid

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Creating a duplicate contact

Avoid it: Search by name, email, and phone before using **Add Contact**.

Replacing a real email address with a fake one

Avoid it: Leave information blank or follow the approved Fort Adams process rather than inventing customer data.

Treating marketing consent as a CRM field change

Avoid it: Fort Adams uses Constant Contact and connected automation. An email-address change is not automatically marketing consent.

Deleting a contact to “clean things up”

Avoid it: Contact deletion can remove associated CRM history. Escalate duplicates or questionable records.

Ending the wrong recurring invoice

Avoid it: Verify the customer, amount, product/service, and recurring series before selecting **End**.

Voiding one invoice and assuming recurring billing stopped

Avoid it: A single generated invoice and the recurring schedule are separate. End the recurring schedule when future invoices must stop.

Confusing a subscription with a recurring invoice

Avoid it: Check the billing record type before making a change.

Guessing at billing changes

Avoid it: Confirm authorized amount, frequency, and effective date before changing recurring billing.

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