Customer Calls About Their Contact Information

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Use this checklist when a customer asks you to update their contact information.

Procedure

1. Ask for enough information to identify the correct customer.
2. Search **Contacts**.
3. Verify you have the correct record.
4. Review the current information.
5. Update only the information the customer has corrected.
6. Confirm the changed information is saved.
7. Add a brief note when the change needs context for other staff.

Email-address changes

Be especially careful with email changes because HighLevel is connected to other Fort Adams systems.

Changing a CRM email address does not automatically mean the customer has given permission for marketing email.

If you cannot confidently identify the record

Do not guess. Ask for another identifier or refer the issue to an administrator.

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