Find and Open a Contact

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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

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