Understand the Contact Record

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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

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