

Add or edit a contact record

This article applies to:

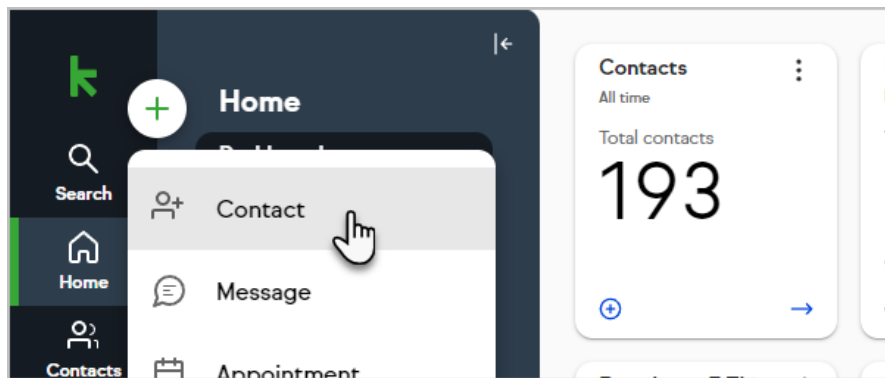
[Pro](#)

[Max](#)

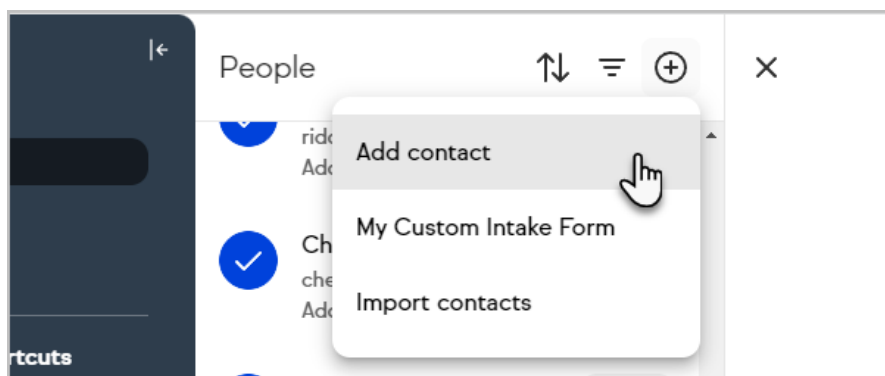
1. [Add a new contact](#)
2. [Edit a contact record](#)
3. [Duplicate contacts](#)

Add a new contact

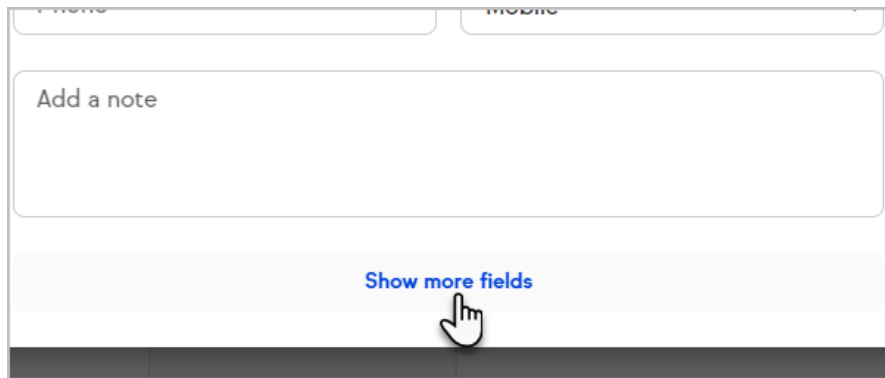
1. Click the **Plus** icon and choose **Contact** from the drop-down



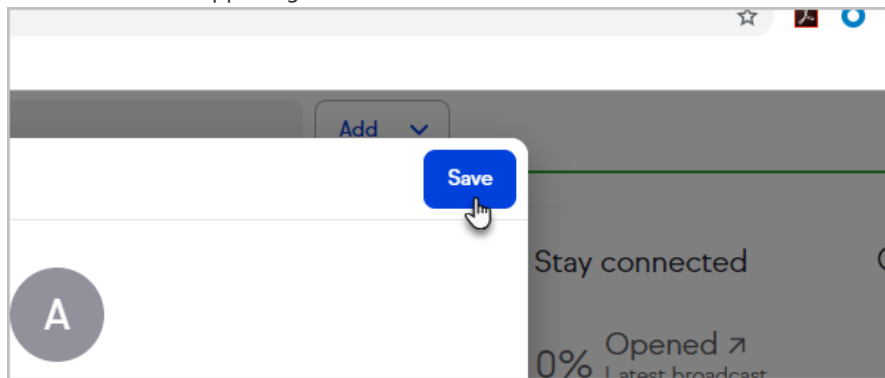
2. Or, if you are currently in the Contacts section, you can click the plus button next to the filter and sort buttons



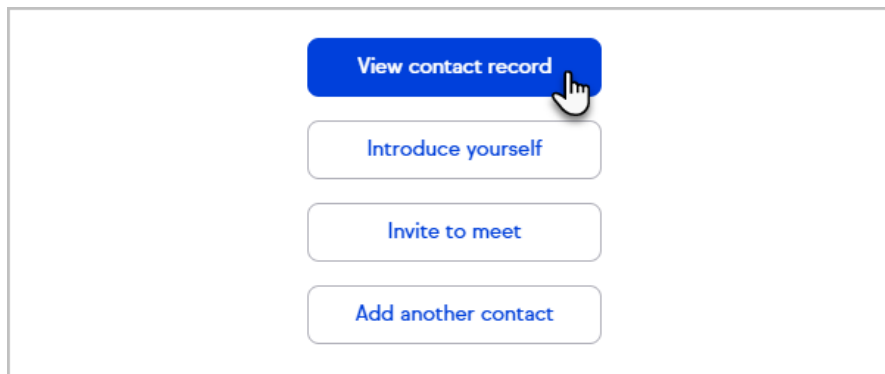
3. Click **Show more fields** at the bottom of the pop-up to access additional contact fields



4. (Optional) Select an [internal form](#) to use to add the new contact or to access your custom fields while adding a contact
5. Complete the form with the contact's information
6. Click **Save** in the upper right hand corner

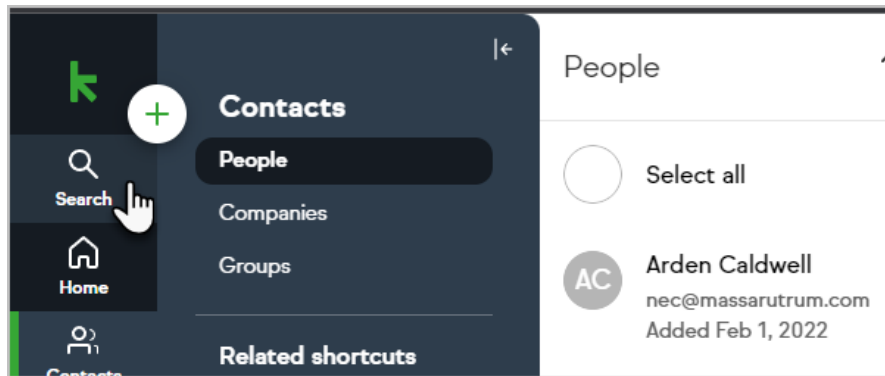


7. Choose to view the contact record, introduce yourself with an email, send an appointment booking link, add another contact, or close the window

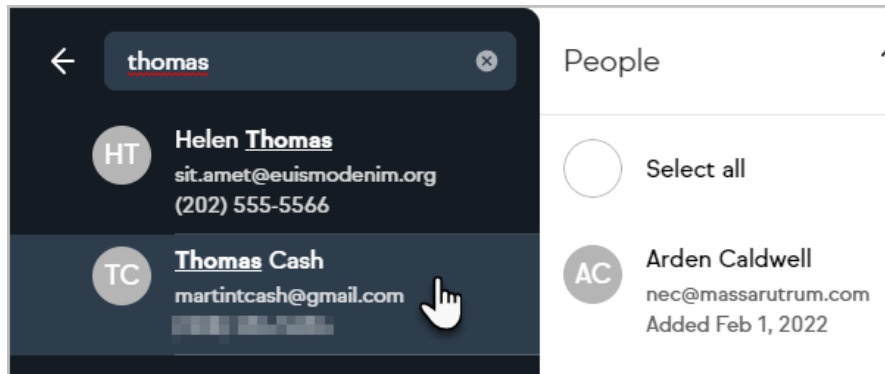


Edit a contact record

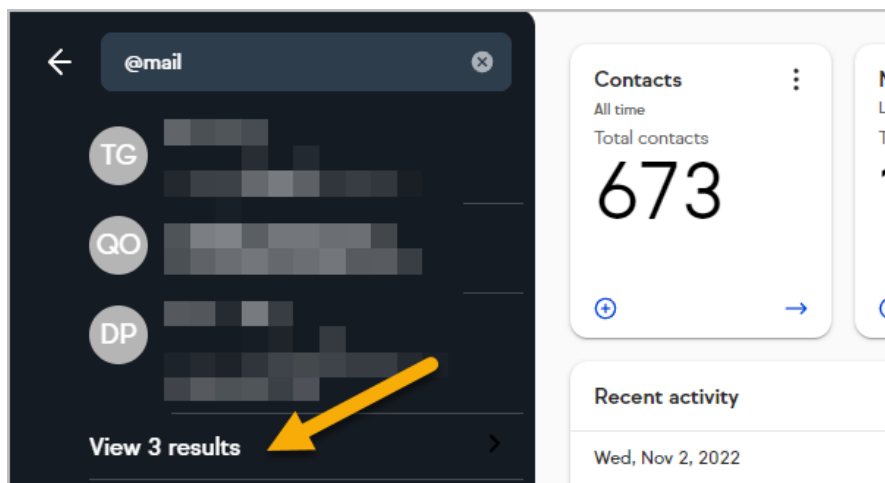
1. Find the contact record by clicking **Search**



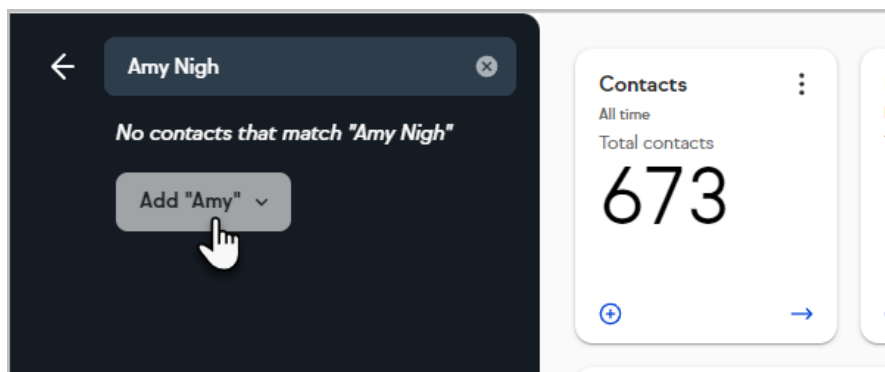
2. Select the contact you want to edit



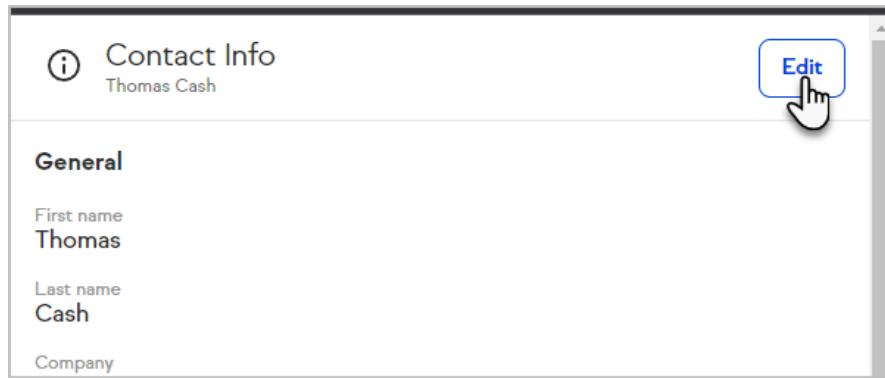
3. (Optional) Note that if you want to view a list of these results, you can click the **View results** button at the bottom. This saves from searching multiple times if you want to look through all the search results.



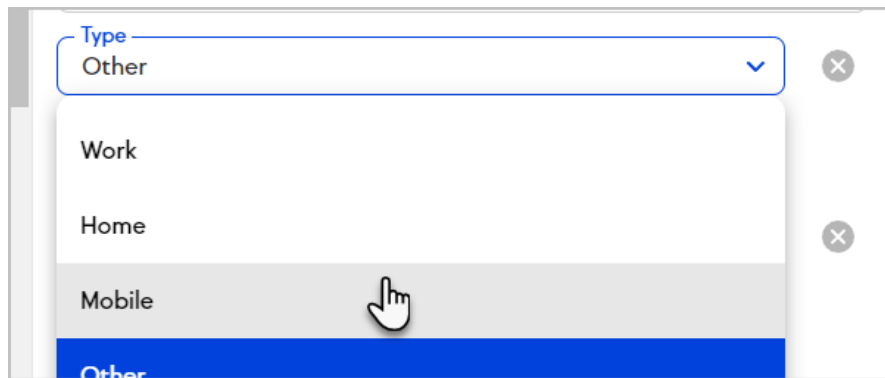
4. (Optional) Also, if there is no record of the contact, you can create one on-the-fly



5. Click the **Edit** button at the top right of the page

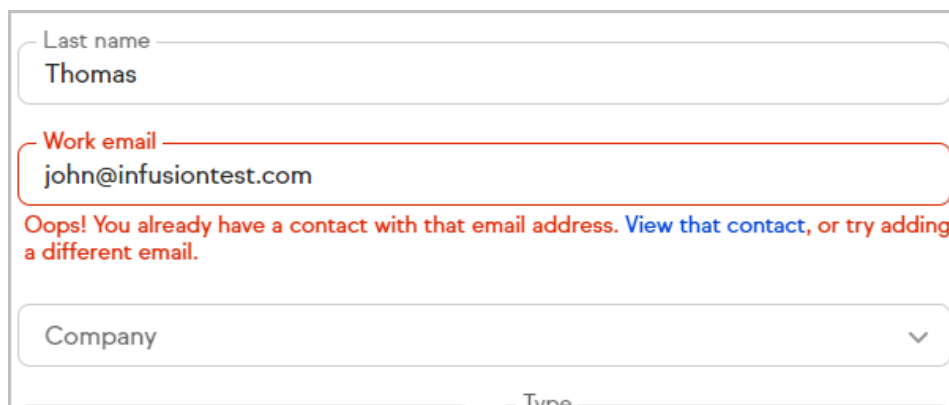


6. **Note:** You might want to verify if the **Phone type** is classified correctly. For example, you might want to change a phone type to **Mobile**. In previous iterations, Keap would default the phone type as **Other** or simply a blank with no option selected. Keap will now default to the **Mobile** phone type when editing a contact and adding a new phone number.



Duplicate contacts

If you attempt to add a contact with an email address that is already in your application, you will see an error with a link to view the existing contact.

A screenshot of a contact form. The 'Last name' field contains 'Thomas'. The 'Work email' field contains 'john@infusiontest.com' and is highlighted with a red border. Below this field, there is an error message: 'Oops! You already have a contact with that email address. View that contact, or try adding a different email.' The 'Company' field is a dropdown menu currently showing 'Company'. At the bottom, there is a 'Type' label.