In SharpSpring, you can add a single contact at a time. You can do so without uploading them from a list or having them fill out a form on your website.

This is useful for when you have someone's business card and want to add them to the Contact Manager. Once you have someone's name or email, you can them as a lead in SharpSpring.

This article details how to add contacts.

Adding a Contact

You can add as many contacts as you need. To prevent against duplicate contacts when adding contacts, SharpSpring will check to make sure the lead is not already a contact in your database. The check uses the lead's email address as the unique identifier to see if the lead already exists in the database. To add a contact, do the following:

- 1. In SharpSpring's top toolbar, click Contacts > Contact Manager.
- 2. In the **Contacts** panel, click **Add Contact**.
- 3. Enter the following required contact information:
 - First Name
 - Last Name
 - Email
- 4. Optionally, enter the any or all of the following contact information:
 - Work Phone
 - Mobile Phone
 - Company Name
- 5. Click Add Contact.
- 6. If necessary, click **Create New Contact**.
- 7. In the contact's page, add information as necessary.

When you manually add a lead, that lead is not being tracked. The best way to begin tracking the lead's behavior is by sending the lead a <u>one-off email</u> in the Contact Manager. Once the lead clicks on the link in the email, SharpSpring can begin tracking that lead.

Cloning a Contact

Click to enlarge.

Note: You cannot manually upload photos for contacts. Contact photos are populated by the contact's <u>Gravatar</u> <u>account</u>. This means that the contact has to have a Gravatar account with a preset account photo for this to occur. Contacts without photos will default to the

standard silhouette.

There may come a time when you want to clone an existing contact for certain purposes. Consider the following example:

Bob has been with Company A for quite some time. During that time, Bob has been added to more than a few lists and has an extended lead history. Bob decides to go and work for Company B. Jane is promoted to Bob's old position in Company A and takes <u>ownership of the role-based email address</u> that Bob had.

Rather than recreating Bob as a new contact, you can clone Bob's existing contact record that is already in your instance. You can then <u>edit the cloned record</u> to update Bob's email address and company information. In addition, you can then <u>edit the existing record</u> to reflect that Jane is now associated with that original email address.

To clone a contact, do the following:

- In SharpSpring's top toolbar, click Contacts > Contact Manager.
- 2. In the **Contacts** panel, click **Add Contact**.
- 3. Enter required and any optional information.
- 4. Click Add Contact.
- 5. In the list of available contacts, locate the contact to be cloned.
- 6. Click **Clone**.
- 7. In the cloned contact's page, add information as necessary.

Cloning Contacts via Profiles

To clone a contact through the contact's profile, do the following:

To add a contact, do the following:

- In SharpSpring's top toolbar, click Contacts > Contact Manager.
- 2. Click the name of the contact to be cloned.
- 3. Click More Options > Clone Lead.
- 4. Enter required and any optional information.
- 5. Click Add Contact.

Click to enlarge.

Click to enlarge.

6. In the cloned contact's page, add information as necessary.