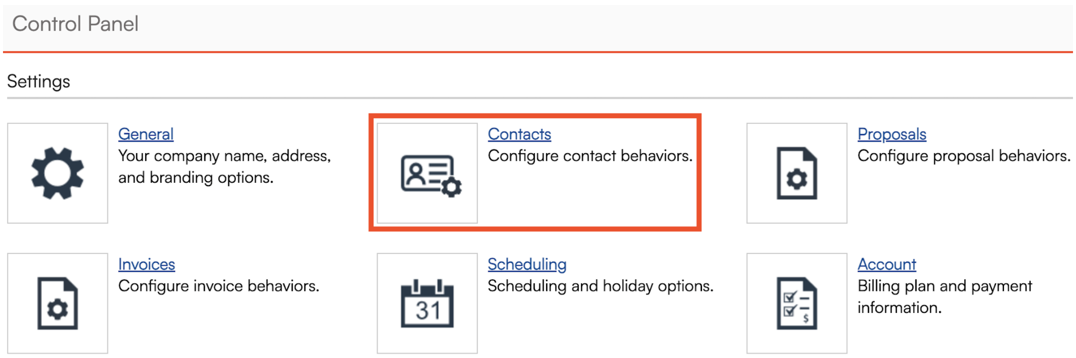
Contact Settings

09/02/2025 8:12 am CDT

Overview

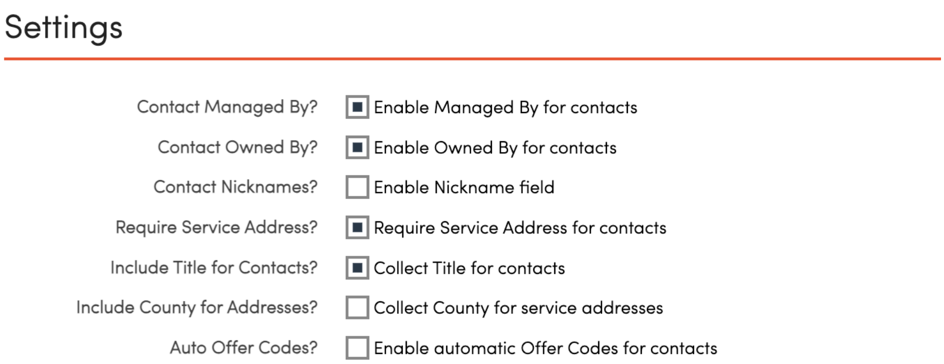
Contact Settings can be found in the Control Panel.



This article will review:

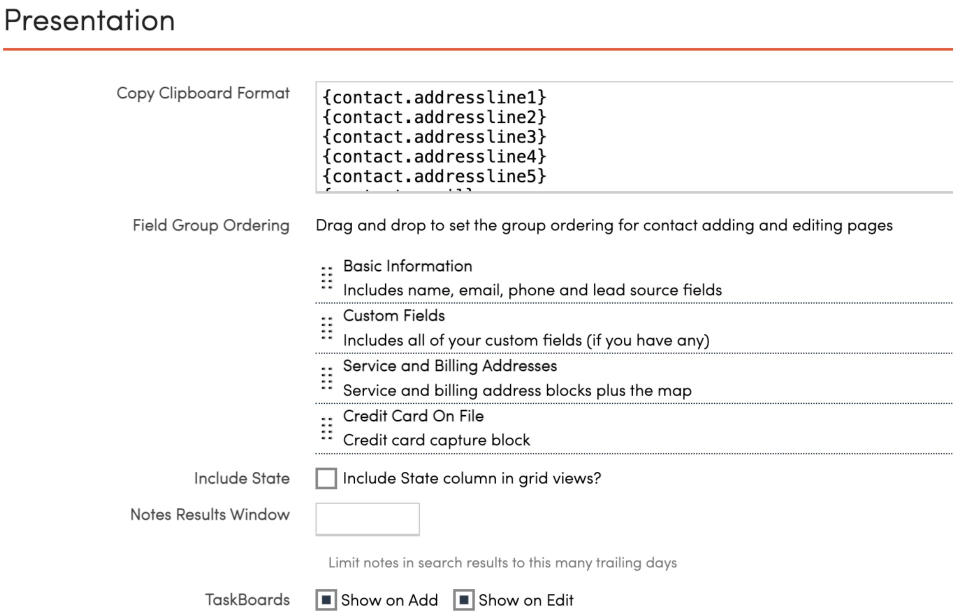
- General Settings
- Presentation
- Defaults

General Settings



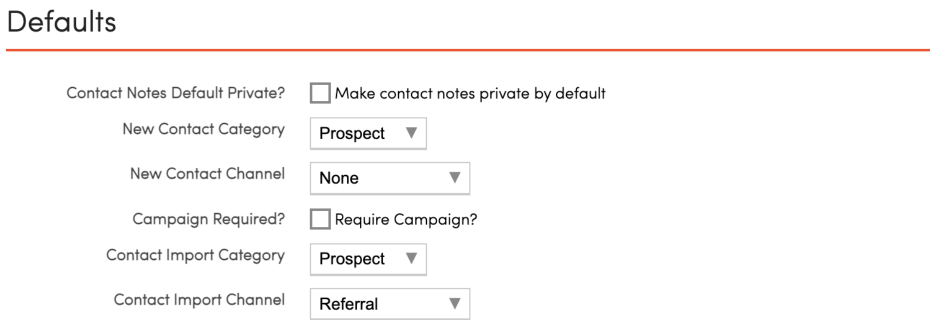
- Learn more about **Contact Managed By** and **Contact Owned By** in the article Managing and Merging Contacts.
- **Contact Nicknames -** Enable an additional field that collects nicknames or alternative names for contacts
- **Require Service Address for contacts -** Make the service address field required when adding a new contact
- **Collect Title for contacts -** Enable the Title field for contacts
- **Collect County for service addresses -** Enable the County field for contact addresses
- **Enable Automatic Offer Codes for contacts -** Enable the ability to automatically apply offer codes to contacts

Presentation



- **Copy Clipboard Format -** Use shortcodes to customize what copies to your clipboard when clipping **Copy** next to the contact's address
- **Field Group Ordering** - Rearrange how the groups of information display when adding or editing a contact
- **Include State column in grid views -** Choose to show or hide the state column in any grid that displays contact information. You may choose to turn this off if all of your contacts live in the same state and you don't need to see that data.
- **Notes Results Window -** Limit notes in search results to this many trailing days
- **TaskBoards -** Show or hide TaskBoards on contact add/edit screens

Defaults



- **Contact Notes Default Private? -** Make contact notes private by default
- **Require Campaign -** Make selecting a **campaign** required upon contact creation

Creating new contacts, whether manually or through data import, can be repetitive, especially when many contacts share similar traits. This section helps reduce manual work by letting you set default values for commonly used fields:

- **Contact Category**
- **Channel** (Lead Source)

These defaults will automatically populate when:

- **Manually** creating a new contact
- **Importing** contact data without a specified category or channel

You can also choose to make the **Campaign** (Lead Source) field required during manual contact creation, helping ensure consistent data collections