

# Client Contact Info Update SOP — Phone Number & Email Changes

This SOP covers the step-by-step process for updating a client's phone number or email address across all Crowned Credit systems when a client reports a change.

“ **Why This Matters:** If contact info is not updated across ALL systems, the client will miss important communications — onboarding messages, dispute updates, payment reminders, and follow-ups. This directly causes churn and client complaints.

## When to Use This SOP

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- Client calls in with a new phone number or email
- CSR discovers a bounced email or undeliverable SMS
- Client reports they are not receiving messages
- Sales/closer notes a different number than what is in the system

## Step-by-Step Process

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### Step 1: Verify the Client's Identity

Before making any changes, confirm the client is who they say they are:

- Ask for their **full name** and **date of birth**
- Confirm the **last 4 digits of their SSN** or the **email address on file**
- If the request comes via text/email (not a live call), call the client's **existing number on file** to confirm

### Step 2: Update GoHighLevel (GHL)

1. Open the client's contact record in GHL
2. Update the **Phone** or **Email** field with the new information

3. Add the old number/email to the **Notes** field with today's date: "*Previous phone: (xxx) xxx-xxxx — updated [DATE]*"
4. **Check Active Workflows:** Go to the contact's workflow history. If any active automations are running, verify they will now send to the new contact info. If a workflow is mid-sequence and already sent to the old number, manually trigger the missed step to the new number.

## Step 3: Update DisputeFox

1. Open the client's profile in DisputeFox
2. Update the phone number and/or email
3. Confirm the client portal login still works (email-based logins may need updating)

## Step 4: Update SmartCredit (If Applicable)

If the client's email changed, their SmartCredit login may need updating. Direct the client to update their email in SmartCredit settings, or contact SmartCredit support if needed.

## Step 5: Notify the Team

Post in the **#customer-support** Discord channel:

“ 📄 **Contact Update:** [Client Name] — new phone: (xxx) xxx-xxxx (was: old number). Updated in GHL + DisputeFox. Active workflows verified.

This ensures anyone working with this client knows the info has changed.

## Step 6: Confirm with the Client

Send a test SMS or email to the **new** contact info confirming the update was successful. Example:

“ "Hi [First Name], this is Crowned Credit confirming your contact info has been updated. You'll receive all future communications at this number/email. Let us know if you need anything!"

## Common Mistakes to Avoid

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- **Only updating GHL but not DisputeFox** — Client gets texts but portal communications go to the old email

- **Not checking active workflows** — The automation keeps sending to the old number and the client thinks they are being ignored
- **Not noting the old info** — If there is ever a dispute about who authorized the change, the old info is gone
- **Skipping identity verification** — Security risk. Always verify before changing contact info.

# Systems Checklist

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System	What to Update	How
GoHighLevel	Phone, Email, Notes	Contact record → edit fields
DisputeFox	Phone, Email	Client profile → edit
SmartCredit	Email (client self-service)	Direct client to settings or SmartCredit support

*Created by Peter (AI) — April 15, 2026. Triggered by team Discord observation: client not contacted after signup due to outdated phone number on file.*

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