1. Getting Started

A short orientation to the Fort Adams HighLevel CRM and the parts staff will use most often.

- Welcome to the Fort Adams CRM
- CRM Navigation for Staff

Welcome to the Fort Adams CRM

Welcome to the Fort Adams CRM

This guide is written for Fort Adams staff who use **HighLevel** for day-to-day customer relationship management and billing.

The two areas covered most heavily are:

- **Contacts** — finding people, reviewing their information, updating records, adding notes, and reviewing their history.
- **Recurring invoices** — creating and reviewing scheduled invoices for customers who are billed repeatedly.

What HighLevel does for staff

HighLevel is the central CRM used to keep customer information and related activity together. A contact record can include basic information such as a person's name, email address, and phone number along with activity, conversations, notes, tasks, appointments, payments, invoices, and other connected records.

Other Fort Adams systems may send information into HighLevel automatically. Because of that, staff should normally **search before creating a new contact**.

The safest rule

> **Search first. Update second. Create only when needed.**

Before creating a contact or recurring invoice, verify that the customer and billing record do not already exist.

What this book does not cover

This is a staff guide, not a system-administration manual. It does not cover:

- editing n8n workflows;
- changing FareHarbor integrations;
- changing Constant Contact synchronization;
- changing API credentials;
- changing payment-provider configuration;
- modifying HighLevel workflows or automations.

Those items belong in the **Admin Guide**.

HighLevel can change

HighLevel updates its interface frequently. Button names or locations may change slightly. If the screen looks different from the wording in this guide, look for the same feature name before assuming something is broken.

Official reference

HighLevel — Contacts Support

CRM Navigation for Staff

CRM Navigation for Staff

Most staff work covered by this guide starts in one of two places.

Contacts

Use **Contacts** when you need to:

- find a person;
- review or correct contact information;
- see conversations and activity;
- add a note;
- create or complete a task;
- review invoices, subscriptions, or transactions associated with a contact.

HighLevel's current contact screen uses a multi-panel layout:

- **Left panel:** contact information such as name, email, phone, tags, and custom fields.
- **Center panel:** conversations and activity history.
- **Right panel:** modules such as tasks, notes, appointments, documents, opportunities, and payments.

Many changes to contact fields are **auto-saved** when you leave the field.

Payments → Invoices & Estimates

Use **Payments → Invoices & Estimates** when you need to:

- create a one-time invoice;
- create a recurring invoice;
- find an existing recurring billing schedule;
- review invoice history;
- end a recurring invoice series.

Contact → Payments

You can also review billing information from an individual contact record. This is often the easiest place to start when you already have the customer open.

Staff tip

If your goal begins with a person's name — for example, “What is Jane Smith being billed?” — start in **Contacts**.

If your goal begins with billing — for example, “Show me all recurring invoices” — start in **Payments**.

Official references

- HighLevel — Contact Detail Page
- HighLevel — Create Subscriptions & Invoices from a Contact