HighLevel CRM — Fort Adams Staff Guide

A practical staff guide to the Fort Adams HighLevel CRM, focused on **Contacts** and **Recurring Invoices**. Use this book for day-to-day customer record management, recurring billing, common procedures, and safe escalation.

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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

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

2. Contacts

How Fort Adams staff should find, review, create, and update contact records in HighLevel.

Find and Open a Contact

Find and Open a Contact

Always search for an existing contact before creating a new one.

Find a contact

1. Open **Contacts** from the HighLevel left menu.
2. Open the main contact list or Smart List.
3. Use the search field to look for the customer.
4. Search using the most reliable information you have:
   - full name;
   - email address;
   - phone number.
5. Open the matching contact by clicking the contact's name.

Before deciding there is no match

Try more than one search value.

For example, if searching for **Robert Jones** returns nothing, try the customer's email address or phone number. A record may use a nickname or alternate spelling.

Why searching first matters

Duplicate contacts can split a customer's history across multiple records. That makes it harder to understand prior conversations, invoices, payments, bookings, notes, tasks, and communication preferences.

If you find two records for the same person

Do **not** delete one casually.

If you are certain they are duplicates and you have permission to merge contacts, follow the Fort Adams duplicate-contact procedure. Otherwise, ask an administrator to review the records.

Smart Lists

A **Smart List** is a saved filtered view of contacts. Smart Lists update automatically as contact data changes.

Use Smart Lists when one has already been created for a staff purpose. Do not change shared Smart List filters unless you understand who else relies on that list.

Official references

- HighLevel — Create and Manage Contacts
- HighLevel — Smart Lists

Understand the Contact Record

Understand the Contact Record

The contact record is the best place to understand one customer's relationship with Fort Adams.

Left panel — contact information

This area contains the customer's core information. Depending on Fort Adams configuration, it may include name, email, phone, mailing address, tags, custom fields, and communication preferences.

Tags

Tags help categorize contacts or support automation. Do not add or remove a tag unless you know what it is used for. A tag may be connected to a workflow or integration.

When editing tags in the current HighLevel contact view, use **Apply** to confirm changes.

Center panel — conversations and activity

Use this area to review the history of interactions with the contact. Depending on permissions and configuration, you may see email, SMS, calls, notes, appointments, opportunity activity, and other

CRM activity.

Right panel — action modules

The right side can contain **Activities, Associations, Opportunities, Tasks, Notes, Appointments, Documents, and Payments**.

The exact order may differ because HighLevel allows administrators to customize contact layouts.

Payments module

For staff handling billing, the **Payments** area is especially important. It can show invoices, subscriptions, payment methods, and transactions related to that customer.

Auto-save

HighLevel's current contact detail page auto-saves many field changes when you leave the field. After changing important information such as an email address or phone number, pause and verify that the new value remains visible before leaving the record.

Official reference

HighLevel — Contact Detail Page

Create a New Contact

Create a New Contact

Create a contact manually only when you have first confirmed the person is not already in HighLevel.

Before creating the contact

Search by name, email address, and phone number. If you find an existing record, update that record instead.

Create the contact

1. Go to **Contacts → Smart Lists**.
2. Click **+ Add Contact**.
3. Enter the available customer information.
4. At minimum, enter the information needed to identify the person accurately.
5. Review the record for spelling and typing errors.
6. Click **Save**.

The fields displayed in the form may vary because Fort Adams can configure custom fields and layouts.

Recommended data-entry habits

- Use the person's real first and last name when known.
- Verify email spelling before saving.
- Include the correct area code with phone numbers.
- Do not use fake placeholder email addresses.
- Do not put internal comments into name or address fields.

- Put internal context in **Notes**, not in customer identity fields.

Forms and integrations may create contacts automatically

HighLevel can create contacts from forms and automated integrations. Fort Adams also uses connected systems. That is another reason to search before manually creating a record.

Official reference

HighLevel — Create and Manage Contacts

Edit Contact Information

Edit Contact Information

Update a contact when you receive corrected or newer customer information.

Typical changes

Staff may commonly update name spelling, email address, phone number, mailing address, and appropriate Fort Adams custom fields.

Update a contact

1. Go to **Contacts**.
2. Search for and open the contact.
3. Find the field that needs to change.
4. Enter the corrected information.
5. Move out of the field.
6. Confirm the new value remains visible.

HighLevel's current contact detail page auto-saves many field changes.

Be careful with email addresses

A customer's CRM email address can affect connected communication systems.

Before replacing an email address, confirm the customer gave you the new address, check spelling carefully, and do not use a made-up address simply to satisfy a form.

Fort Adams has separate processes around marketing email and Constant Contact. Changing a CRM email address is not the same as granting marketing consent.

Be careful with tags and communication settings

Tags and DND/communication settings can affect automation. Only change them when the procedure specifically calls for it.

Official references

- HighLevel — Create and Manage Contacts
- HighLevel — Contact Detail Page

Notes, Tasks, and Contact History

Notes, Tasks, and Contact History

Use the contact record to leave useful internal context for other Fort Adams staff.

Notes

Use **Notes** for information another staff member may need later. Good notes are factual, short, and related to the customer interaction.

Example

> Customer called to confirm billing address. Updated address from information provided by customer.

Avoid putting sensitive payment-card information, passwords, or credentials in notes.

Tasks

Use **Tasks** when a future staff action is required. A useful task should have a clear action, an owner when appropriate, and a due date when appropriate.

Example

Call customer about recurring invoice before next billing date.

When the task is finished, mark it complete rather than deleting the history.

Activity history

Before contacting a customer about an issue, review recent activity. Another staff member may already have contacted the customer, changed their information, recorded a note, sent an invoice, or created a follow-up task.

Official reference

HighLevel — Contact Detail Page

Deleting and Duplicate Contacts — Use Caution

Deleting and Duplicate Contacts — Use Caution

Deleting a contact is a significant action.

What deletion can affect

HighLevel documents that deleting a contact can also remove associated information such as conversations, notes, opportunities, tasks, appointments, and manual actions. It can also stop active campaigns and workflows for that contact.

HighLevel currently allows deleted contacts to be restored for a limited period, but deletion should still be treated as an exception rather than routine cleanup.

Fort Adams staff rule

> **Do not delete a contact merely because the information looks old, duplicated, or incorrect.**

If a contact appears to be a duplicate:

1. open both records;
2. compare email address and phone number;

3. review activity and payment history;
4. ask an administrator to merge or resolve the records if you are not certain.

Why this matters

One duplicate may contain the billing history while another contains the conversation or booking history. Deleting the wrong record can create unnecessary recovery work.

Official reference

HighLevel — Create and Manage Contacts

3. Recurring Invoices

Staff procedures for creating, reviewing, and safely ending recurring invoices in HighLevel.

Recurring Invoice Basics

Recurring Invoice Basics

A **recurring invoice** is a billing template that automatically generates invoices on a schedule.

Use a recurring invoice when the customer should receive repeated invoices, such as monthly or annual billing.

Recurring invoice vs. one-time invoice

Need	Use
Charge or bill the customer once	One-time invoice
Generate invoices repeatedly on a schedule	Recurring invoice

Recurring invoice vs. subscription

HighLevel also has **Subscriptions**. Subscriptions and recurring invoices are not the same feature.

This guide focuses on **Recurring Invoices** under **Payments → Invoices & Estimates**.

If the customer is on a subscription rather than a recurring invoice, use the subscription procedure or ask an administrator before changing anything.

What a recurring invoice controls

A recurring invoice can include customer, products or services, quantities and pricing, taxes where configured, frequency, start date, end condition, payment options, and optional auto-pay when supported and configured.

Before creating one

Confirm:

1. you have the correct contact;
2. a recurring invoice does not already exist;
3. the product/service and amount are correct;
4. the billing frequency is correct;
5. the first billing date is correct.

Official reference

HighLevel — Create and Manage Recurring Invoices

Create a Recurring Invoice

Create a Recurring Invoice

Start the recurring invoice

1. Open **Payments**.
2. Select **Invoices & Estimates**.
3. Click **+ New**.
4. Select **New Recurring Invoice**.

Select the customer

Choose the correct customer/contact. Double-check the name and email address before continuing.

Add the product or service

Add the applicable Fort Adams product or service and verify description, quantity, price, and applicable tax settings.

Do not invent a new product or change standard pricing unless your role authorizes it.

Set the frequency

Choose how often the invoice should recur. Examples can include weekly, monthly, yearly, or a supported custom interval.

Set the start and end

Review the starting date carefully. Depending on the configured recurring invoice, the schedule may continue until manually ended, end after a defined number of occurrences, or end on a configured date.

Review before activation

Before finalizing the recurring invoice, verify customer, amount, product/service, frequency, start date, end condition, and payment method or auto-pay option if applicable.

> **“ The draft stage is the safest time to catch a billing mistake.**

HighLevel's current recurring-invoice documentation notes that active or scheduled recurring templates have restrictions on editing key billing details.

Official reference

HighLevel — Create and Manage Recurring Invoices

Recurring Invoice Statuses

Recurring Invoice Statuses

Recurring invoice templates can have different statuses.

Draft

The recurring invoice has been created but has not been activated. This is the best stage for reviewing and correcting products, prices, dates, and billing frequency.

Scheduled

The recurring invoice is set to begin in the future. Treat a scheduled template as committed billing. If something material is wrong, review the available actions before trying to modify it.

Active

The recurring invoice is currently generating invoices according to its schedule. To permanently stop future invoices, **end the recurring schedule**.

Canceled

The series will not generate additional invoices. It remains available for reference.

Completed

The recurring series reached its configured ending condition.

Important distinction

The status of the **recurring template** is different from the payment status of an individual invoice generated by that template.

A customer might have an active recurring schedule while one generated monthly invoice is still unpaid, paid, voided, or otherwise handled separately.

Official reference

HighLevel — Create and Manage Recurring Invoices

Review a Customer's Recurring Billing

Review a Customer's Recurring Billing

There are two useful starting points.

Start from the customer

Use this method when someone calls or emails and you already know who the customer is.

1. Go to **Contacts**.
2. Find and open the contact.
3. Open the **Payments** area on the contact record.
4. Review the available invoice, subscription, and transaction information.

Start from Payments

Use this method when you need to work from the billing list.

1. Open **Payments**.
2. Go to **Invoices & Estimates**.
3. Open the recurring-invoice area/tab.
4. Find the customer's recurring template.
5. Open it to review its details.

View history

HighLevel provides **View History** for recurring invoice templates. Use history to review invoices generated from the recurring schedule, including relevant invoice dates and payment status.

When investigating a billing question

Check all of the following before answering the customer:

- Is the recurring template active?
- What is the next scheduled billing occurrence?
- What invoices have already been generated?
- What is the status of the invoice in question?
- Is the customer actually on a recurring invoice, or on a subscription?

Official references

- HighLevel — Create and Manage Recurring Invoices
- HighLevel — Billing from the Contact Profile

End a Recurring Invoice

End a Recurring Invoice

Ending a recurring invoice stops **future invoices** from being generated by that recurring schedule. It does not erase invoices that were already generated.

End the recurring series

1. Go to **Payments → Invoices & Estimates**.
2. Open the recurring-invoice area.
3. Find the customer's active recurring schedule.
4. Open the **More Options (⋮)** menu.
5. Select **End** or **End Recurring Invoice**.
6. Confirm that you selected the correct customer and schedule before completing the action.

Important: voiding one invoice does not end the series

Voiding or canceling a single generated invoice affects that invoice. It does **not** automatically stop the underlying recurring schedule.

If the customer should no longer receive future recurring invoices, make sure the **recurring schedule itself is ended**.

Before ending

Confirm customer identity, which recurring series is being ended, whether the customer has more than one recurring series, and whether there are outstanding invoices that still need attention.

After ending

Review the recurring list or template to verify that it is no longer active. Leave a note on the customer record if Fort Adams procedure requires context about why billing was stopped.

Official reference

HighLevel — Create and Manage Recurring Invoices

Changing an Existing Recurring Invoice

Changing an Existing Recurring Invoice

Billing changes deserve extra care. Examples include changing the amount, product/service, billing frequency, billing start/end, or replacing an old recurring arrangement with a new one.

First check the status

If the recurring invoice is still a **Draft**, make the correction before activation.

For **Active** or **Scheduled** recurring templates, HighLevel's current recurring-invoice documentation places restrictions on editing key billing details.

Safe staff procedure

When a material change is needed:

1. Review the current recurring template.
2. Review the history so you understand what has already been generated.
3. Confirm the customer's requested new terms.
4. If your permissions and Fort Adams procedure allow it, end the old series at the appropriate point.
5. Create or clone a new recurring invoice with the corrected terms.
6. Carefully verify the new start date to avoid duplicate billing or a billing gap.
7. Confirm the old recurring series is no longer active when it should have ended.

If you are uncertain, stop and ask an administrator before making the change.

Never “fix” billing by guessing

Do not change an amount, billing date, tax, product, or payment option based on an assumption. Billing changes should come from an authorized Fort Adams instruction or a clearly documented customer arrangement.

Official reference

HighLevel — Create and Manage Recurring Invoices

Auto-Pay and Payment Methods

Auto-Pay and Payment Methods

Some recurring invoices can use **Auto-Pay**, depending on the payment-provider setup and the customer's available payment method.

What Auto-Pay does

When configured, Auto-Pay can charge the selected saved/provided card when the recurring invoice becomes due.

Before relying on Auto-Pay

Verify that Auto-Pay is actually enabled for the recurring template, a valid payment method is available, and the next scheduled occurrence is correct.

If a payment fails

Do not assume the recurring schedule itself is broken. A failed charge can be related to the customer's payment method or payment provider while the recurring schedule remains active.

Review the generated invoice, payment/transaction status, recurring-template status, and available customer payment method information.

Follow the approved Fort Adams payment-failure procedure or escalate when necessary.

Do not collect card numbers in notes

Never place full payment-card numbers, security codes, passwords, or other credentials in CRM notes. Use the approved HighLevel/payment-provider flow for payment information.

Official reference

HighLevel — Auto Payments for Recurring Invoices

4. Events

How Fort Adams staff can create and manage HighLevel Events, including ticketed and RSVP events, registrations, notifications, and attendee check-in.

Events Overview

Events Overview

HighLevel **Events** lets Fort Adams create and manage public-facing events directly inside the CRM.

Events can include:

- a public event page;
- free RSVP registration;
- paid or free ticket types;
- attendee registration;
- schedules and speakers;
- event confirmation and reminder emails;
- attendee check-in;
- registration and revenue reporting.

Where to find Events

From the HighLevel left sidebar:

Memberships → Events

The Events dashboard shows the events available in the Fort Adams account and their current status.

Two event types

Ticketed

Use a **Ticketed** event when attendees need to select a ticket.

Ticketed events can include:

- paid tickets;
- free tickets;
- multiple ticket levels;
- limited quantities;
- ticket sale start and end dates.

RSVP

Use an **RSVP** event when the event is free and guests simply need to confirm attendance.

Important

> **You cannot change an event from Ticketed to RSVP, or from RSVP to Ticketed, after the event is created.**

If the wrong type is selected, a new event must be created.

Event location types

An event can be:

- **In-person** — a physical location is shown to attendees, including a map and directions link.
- **Online** — attendees receive access to an online meeting or event link.

Events are different from calendars

HighLevel Events are intended for public events that need registration, tickets, attendee tracking, or check-in.

They are different from:

- appointment/event calendars used for booking time slots;

- Community Events hosted inside HighLevel Communities.

Official reference

HighLevel — How to Create and Manage Events

Create a New Event

Create a New Event

Start the event

1. Go to **Memberships → Events**.
2. Click **+ Create Event**.
3. Choose **Ticketed** or **RSVP**.

Choose carefully. The event type cannot be changed after creation.

Add the event details

Enter:

- **Event name**
- **Cover image**
- **Short summary**
- **Event description**

The event name appears prominently on the public event page.

HighLevel currently recommends a **1920 × 1080** cover image with a maximum file size of **5 MB**.

Set date and time

Enter:

- start date;
- start time;
- end date;

- end time;
- timezone;
- 12-hour or 24-hour display format.

Be especially careful with timezone

Ticket sale periods, session times, and coupon active periods use the event timezone.

For Fort Adams events, verify the timezone before publishing.

Set the location

Choose:

In-person

Enter the physical location.

The public page can show the venue on a map and provide a **Get directions** link.

Online

Enter the online session details and meeting URL.

HighLevel can hide the meeting link until the event begins or reveal it on a custom schedule.

Add organizer information

Provide the organizer information that attendees should see, including:

- organizer name;
- email address;
- optional phone;
- optional website;
- organizer image if desired.

Save the event

Click **Create event**.

The new event is saved as a **Draft** and is not public until it is published.

Fort Adams staff rule

Before publishing, have another staff member review:

- event title;
- date;
- time;
- timezone;
- location;
- registration type;
- ticket price, if applicable.

Official reference

HighLevel — How to Create and Manage Events

Tickets, Registration, and Capacity

Tickets, Registration, and Capacity

Ticketed events can contain multiple ticket types.

Add a ticket type

Open the event and go to:

Tickets → + Add Ticket Type

Configure:

- ticket name;
- Fixed Price or Free;
- price;
- available quantity;
- sale start date/time;
- sale end date/time.

Examples might include:

- General Admission
- Member Admission
- VIP
- Volunteer
- Free Admission

Only create ticket levels that have been approved for the event.

Ticket status

HighLevel can show ticket types as:

- **On Sale**
- **Paused**
- **Hidden**
- **Not Yet on Sale**
- **Sale Ended**

Event capacity

Under the event's **Settings**, you can set the maximum total number of registrations.

A capacity of **0** means unlimited.

The event-level capacity applies across the event's ticket types.

Registration deadline

The registration deadline determines when new registrations stop.

HighLevel currently defaults the deadline to the event start time.

Confirm the deadline before publishing, especially when Fort Adams needs registration to close earlier.

Coupons

Ticketed events can use event-specific percentage discount codes.

A coupon can include:

- internal name;
- coupon code;
- percentage discount;

- active period;
- total usage limit;
- restriction to specific ticket types.

Event coupons apply only to HighLevel Events and not to unrelated HighLevel products.

Checkout fields

Under **Pages & Design**, the event checkout can collect additional information.

First name, last name, and email remain required.

Additional custom fields may be added when Fort Adams needs more attendee information.

Official reference

HighLevel — How to Create and Manage Events

Publish and Share an Event

Publish and Share an Event

A Draft event is not visible to the public.

Before publishing

Review:

- event name and description;
- cover image;
- date and time;
- timezone;
- location;
- ticket prices;
- ticket quantities;
- ticket sale periods;
- registration deadline;
- capacity;
- organizer details;
- confirmation and reminder emails;
- public event page.

For paid events, make sure the event is configured for **Live mode** before accepting real registrations.

When Live mode is off, HighLevel uses test behavior and does not process real payments.

Publish

When setup is complete:

1. Open the event.
2. Click **Publish event**.
3. Confirm the event is available through its public URL.

After publishing

HighLevel allows staff to:

- share the event link;
- duplicate an event;
- unpublish an event;
- archive an event;
- delete an event.

Unpublish vs. delete

Unpublish

Takes the public event offline while preserving its existing registrations.

Archive

Removes the event from the active list while keeping it available to restore.

Delete

Permanently removes the event.

> Do not delete an event simply because it has ended. Archive it unless there is a specific reason to permanently remove it.

Important refund warning

Unpublishing or canceling an event does **not** automatically refund attendees.

Refunds must be handled separately from the event's registration records.

Official reference

HighLevel — How to Create and Manage Events

Manage Registrations and Attendees

Manage Registrations and Attendees

After an event is published, use the **Registrations** area to manage attendees.

Registrations tab

The Registrations tab can show:

- registered attendees;
- total tickets issued;
- revenue;
- refunded registrations.

You can search by:

- attendee name;
- email address.

You can also filter registration records by status or date range.

Manually add an attendee

Staff can use **Add Attendee** to register someone manually without requiring them to complete public checkout.

Use this only when appropriate for the event.

Before manually adding someone, check that they are not already registered.

Ticket transfers

HighLevel does not currently provide attendee self-service ticket transfers.

If a ticket must be transferred, the organizer can:

- manually update attendee information; or
- cancel the original registration and manually add the replacement attendee.

Follow Fort Adams policy before changing a paid attendee registration.

Refunds

Refunds are initiated by the organizer from the **Registrations** area.

Attendees do not initiate the refund directly through the HighLevel event system.

Important

> Canceling or unpublishing the event does not automatically issue refunds.

If an event is canceled, staff must separately review affected paid registrations and process refunds as required.

Payment processing and refund timing are controlled by the connected payment provider.

Official reference

HighLevel — How to Create and Manage Events

Check In Attendees

Check In Attendees

For in-person events, HighLevel supports attendee check-in.

QR code check-in

QR code check-in is enabled by default for in-person events.

Attendees can present their event QR code and staff can scan it from a mobile device.

Before event day

Check:

- the event is published;
- attendee registrations are visible;
- the check-in settings are correct;
- the staff device can access HighLevel;
- the staff member has appropriate permissions;
- the camera works for QR scanning.

Check-in eligibility

The event settings determine which payment statuses may be checked in.

For example, Fort Adams may choose to allow attendees whose payment status is **Succeeded**.

Do not override payment restrictions without authorization.

During the event

Use the **Check-in** tab to:

1. locate or scan the attendee;
2. confirm the correct person;
3. check them in;
4. verify that the check-in was recorded.

If the QR code will not scan

Use the registration search to locate the attendee by name or email before assuming the registration is missing.

Do not create a duplicate attendee simply because a QR code cannot be read.

Official reference

HighLevel — How to Create and Manage Events

Event Notifications

Event Notifications

HighLevel Events can send notifications to attendees and organizers.

Attendee notifications

Available event notifications include:

- registration confirmation;
- event reminder email.

Organizer notifications

Available organizer notifications include:

- new registration alerts;
- daily registration summary.

HighLevel currently sends the daily summary at **9:00 AM in the event timezone**.

Sender settings

Event notification settings include:

- From email;
- From name.

Use the approved Fort Adams sender information.

Do not change the sender identity without confirming that the address is approved and properly configured.

Before publishing

Review the attendee-facing confirmation and reminder messages.

Check that they contain accurate:

- event name;
- date and time;
- location;
- registration details;
- any arrival instructions.

Online events

For online events, confirm when the meeting link becomes visible to registered attendees.

HighLevel can:

- hide the join link until the event begins; or
- show it according to a custom schedule.

Official reference

HighLevel — How to Create and Manage Events

Events Quick Reference

Events Quick Reference

Find Events

Memberships → Events

Create an event

Events → + Create Event

Choose:

- **Ticketed** for ticket-based registration;
- **RSVP** for free attendance confirmation.

Remember: the type cannot be changed later.

Add tickets

Open event → **Tickets → + Add Ticket Type**

Verify price, quantity, and sale period.

Set registration capacity

Open event → **Settings → Registration settings**

A capacity of **0** means unlimited.

Publish

Review the event → **Publish event**

For paid events, confirm **Live mode** is enabled before going live.

Find attendees

Open event → **Registrations**

Search by attendee name or email.

Manually add attendee

Registrations → Add Attendee

Search first to prevent duplicates.

Check in

Open event → **Check-in**

Scan the attendee QR code or locate their registration.

Refund

Open the affected registration and process the refund through the organizer controls.

Remember:

> Canceling or unpublishing an event does not automatically refund attendees.

Something looks wrong

Do not delete an event or registration just to correct a problem.

Record what happened and ask an administrator when:

- payments do not match registrations;
- duplicate charges are reported;
- the wrong event type was selected;
- attendee records appear duplicated;
- a refund cannot be completed;
- event notifications are not being delivered.

5. Daily Staff Procedures

Quick procedures for the most common Fort Adams contact and recurring-billing situations.

Customer Calls About Their Contact Information

Customer Calls About Their Contact Information

Use this checklist when a customer asks you to update their contact information.

Procedure

1. Ask for enough information to identify the correct customer.
2. Search **Contacts**.
3. Verify you have the correct record.
4. Review the current information.
5. Update only the information the customer has corrected.
6. Confirm the changed information is saved.
7. Add a brief note when the change needs context for other staff.

Email-address changes

Be especially careful with email changes because HighLevel is connected to other Fort Adams systems.

Changing a CRM email address does not automatically mean the customer has given permission for marketing email.

If you cannot confidently identify the record

Do not guess. Ask for another identifier or refer the issue to an administrator.

Customer Calls About a Recurring Invoice

Customer Calls About a Recurring Invoice

Use this workflow before making any billing change.

1. Find the customer

Open **Contacts** and confirm the customer's identity.

2. Review billing

Open the contact's **Payments** information and/or the recurring-invoice list.

3. Identify the billing mechanism

Confirm whether the customer has a recurring invoice, a subscription, or only a one-time invoice. Do not treat these as interchangeable.

4. Review history

Check recurring-template status, invoices already generated, invoice/payment status, and next scheduled billing occurrence where available.

5. Understand the customer's request

Examples include: “Why did I receive this invoice?”, “Please stop future invoices.”, “My card failed.”, “The amount should change.”, or “I need a copy of the invoice.”

6. Take only the action required

Do not end a recurring series merely because one payment failed. Do not void a single invoice when the customer's actual request is to permanently stop future recurring billing.

7. Record useful context

If the situation could matter to another staff member, add a concise note or task to the contact record.

Common Mistakes to Avoid

Common Mistakes to Avoid

Creating a duplicate contact

Avoid it: Search by name, email, and phone before using **Add Contact**.

Replacing a real email address with a fake one

Avoid it: Leave information blank or follow the approved Fort Adams process rather than inventing customer data.

Treating marketing consent as a CRM field change

Avoid it: Fort Adams uses Constant Contact and connected automation. An email-address change is not automatically marketing consent.

Deleting a contact to “clean things up”

Avoid it: Contact deletion can remove associated CRM history. Escalate duplicates or questionable records.

Ending the wrong recurring invoice

Avoid it: Verify the customer, amount, product/service, and recurring series before selecting **End**.

Voiding one invoice and assuming recurring billing stopped

Avoid it: A single generated invoice and the recurring schedule are separate. End the recurring schedule when future invoices must stop.

Confusing a subscription with a recurring invoice

Avoid it: Check the billing record type before making a change.

Guessing at billing changes

Avoid it: Confirm authorized amount, frequency, and effective date before changing recurring billing.

When to Ask an Administrator

When to Ask an Administrator

Ask for help when an action could affect automation, payment processing, or historical data.

Escalate these situations

- Two contact records appear to be duplicates and both contain history.
- A customer exists in FareHarbor or another connected system but cannot be found correctly in HighLevel.
- Contact information keeps changing back unexpectedly.
- A tag or field appears to be controlled by automation.
- A recurring invoice appears to be generating incorrectly.
- You cannot tell whether billing is a recurring invoice or subscription.
- A customer reports duplicate billing.
- A billing schedule needs a complicated mid-cycle change.
- Auto-Pay behaves differently from the expected configuration.
- A payment-provider option is missing.
- You think a workflow, integration, API, n8n process, Constant Contact sync, or FareHarbor connection is failing.

What to provide when asking for help

Include contact name, contact email or phone when appropriate, invoice number or recurring-template name if available, what you expected to happen, what actually happened, approximate date/time, and a screenshot when useful.

Do **not** send passwords, API keys, payment-card data, or other secrets in a ticket, note, or screenshot.

Quick Reference

Quick Reference

Find a customer

Contacts → Search → Open contact

Search by name, email, or phone.

Add a customer

Contacts → + Add Contact

Search first to avoid duplicates.

Update a customer

Open contact → edit the applicable field → confirm the auto-saved value.

Add an internal note

Open contact → **Notes** → add a concise factual note.

Create a recurring invoice

Payments → Invoices & Estimates → + New → New Recurring Invoice

Verify customer, product, amount, frequency, and start date before activation.

Review recurring billing

Open the customer → **Payments**, or:

Payments → Invoices & Estimates → Recurring

Stop future recurring invoices

Find the recurring schedule → ⋮ → **End**

Remember: voiding one generated invoice does **not** end the recurring series.

Something looks wrong

Do not guess. Record what you found and ask an administrator.

6. Check Gifts (Annual Appeal 2026)

How staff record Annual Appeal check donations with the Manual Gift Entry Form, and what the CRM does automatically after each entry.

Enter a Check Gift

Enter a Check Gift

Use the **Manual Gift Entry Form** to record every Annual Appeal 2026 check donation. You don't need to log in to the CRM to use the form. Open it in any browser:

https://crm.fortadams.org/widget/form/ssJZyqa3ilpRD0ls3tE5

Submit **one form per check**. The screenshots below use a sample donor (Jane Example). Always enter the real donor's information.

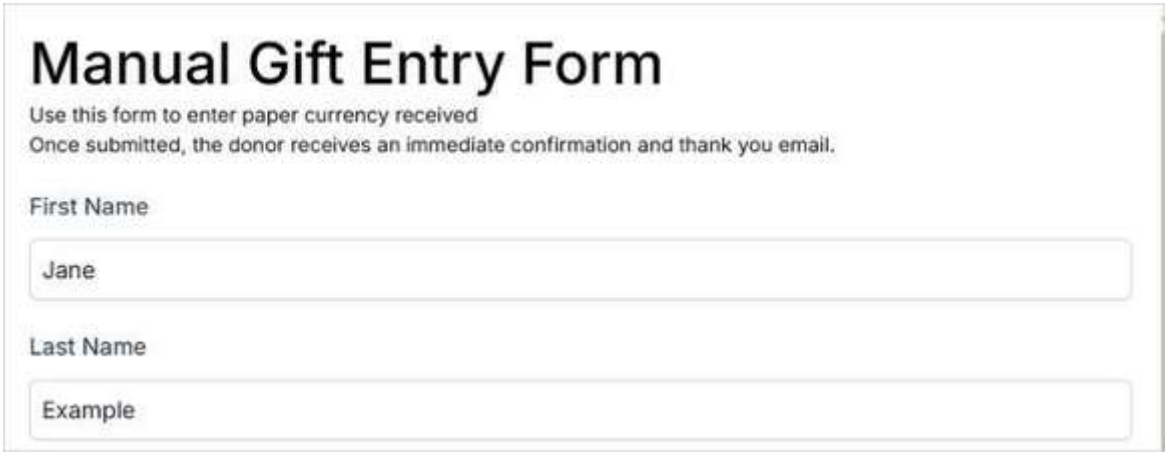
Before you start

Have these ready:

- the check;
- the donor's email address as it already appears on their contact record in the CRM;
- the date the check arrived.

Step 1: Enter the donor's name

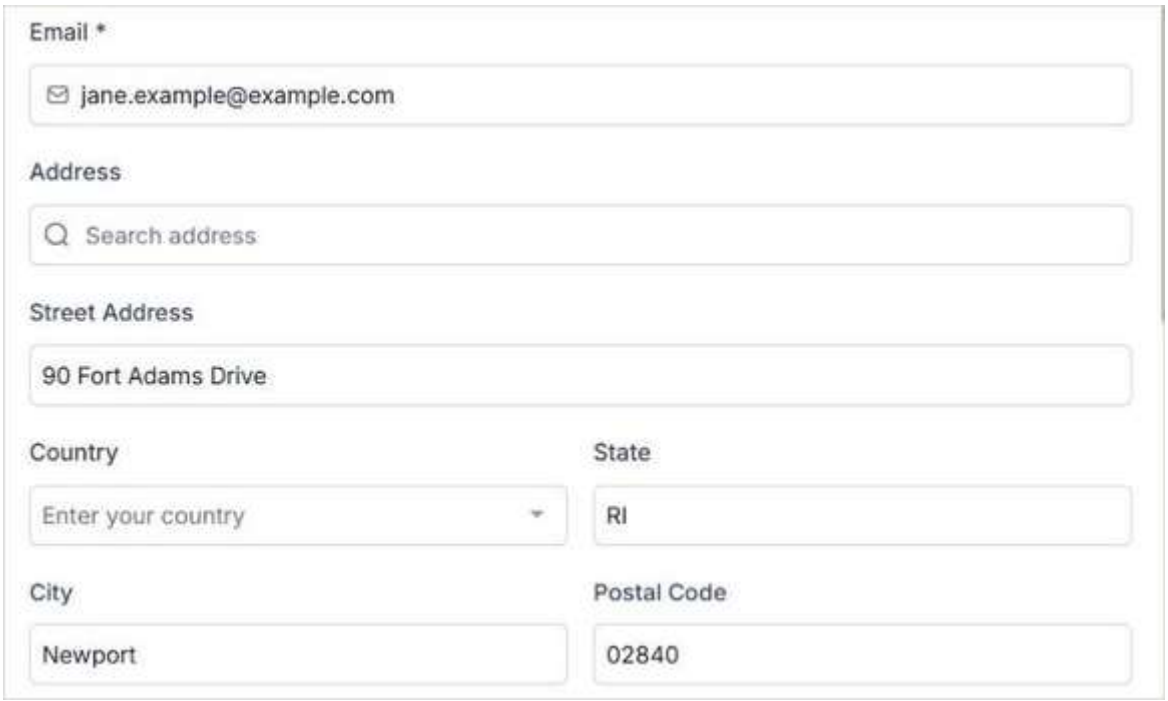
Enter the donor's **First Name** and **Last Name** as they appear on the check. If the check is from a trust or a business, enter the person's name. Phone is optional.



Step 2: Enter the email and address

Email is required. Use the email that is already on the donor's record. The CRM uses the email to find the existing contact, and the thank-you email is sent to that address. A different email creates a duplicate contact.

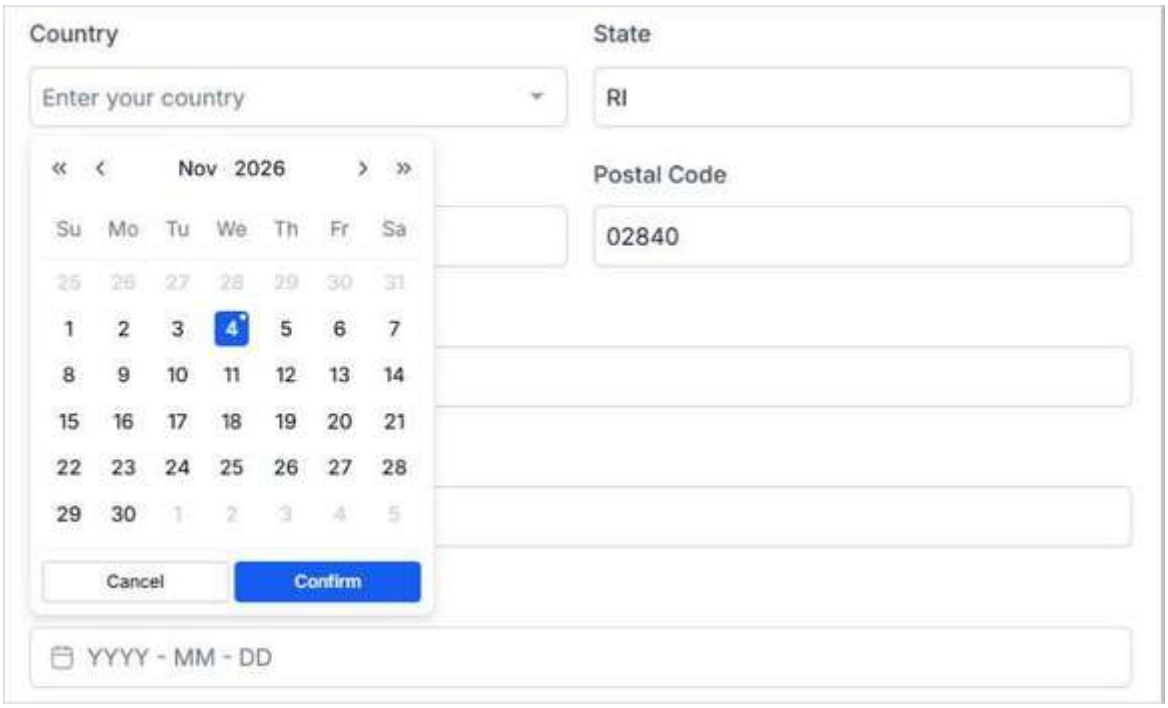
The address is optional. Start typing in the **Address** search box and pick the match, or fill in Street Address, City, State and Postal Code yourself. If the check shows a new address, use the new one.



Step 3: Enter the check details

- **Check Gift Amount** (required): the amount written on the check. Enter numbers only, without a $ sign or commas. Example: **12000.00**.
- **Check Number**: the number printed in the top-right corner of the check.
- **Check Date Received** (required): the date the check **arrived**, not the date written on it. This becomes the gift date in reports.

To set the date, click the **Check Date Received** field, pick the day on the calendar, then click **Confirm**.



Step 4: Check your entry and submit

Check the amount, check number and date against the check, then click **Submit** once.



See **What Happens After You Submit** for what the CRM does next.

Fort Adams staff rules

- **Submit each check only once.** A second submission records the gift twice and sends the donor a second email.
- **Made a mistake?** Don't resubmit. Ask an administrator to correct the gift record in the CRM.
- **No email for the donor?** Email is required. Ask an administrator before entering the gift. Never type a placeholder or someone else's email.
- **Use this form for Annual Appeal checks only.** Online card gifts are logged automatically. Do not submit any other earmarked donations on this form.

What Happens After You Submit

What Happens After You Submit

When you submit the Manual Gift Entry Form, the CRM does all of the following automatically, usually within a minute. You don't need to do anything else.

1. The donor's contact is found or created

The CRM matches the donor by **email**.

- For an existing donor, it updates their name and address from the form.
- For a new donor, it creates a contact.

The check amount is also saved to the contact's **Annual Appeal** field.

2. The gift is logged in the Private Giving pipeline

A gift record (an **opportunity**) is added to the **Private Giving** pipeline at the **Donation Received** stage:

Field	Value
Name	AA 2026 Check: *Donor Name*
Value	The Check Gift Amount
Appeal	Annual Appeal 2026
Gift Method	Check
Gift Date	The Check Date Received
Transaction / Check #	The Check Number

3. The donor gets a thank-you email

The donor receives an email with the subject **"We received your gift - thank you"**. It thanks them by first name, confirms the gift was received by check, and shows a gift summary with the amount, the date received and the check number.

It is a thank-you letter, not an invoice, and it does not ask for payment.

4. The donor is tagged

The tag **annual-appeal-2026** is added to the contact. This puts the donor in Annual Appeal donor lists and follow-ups.

5. The gift shows on the Annual Appeal 2026 dashboard

Open the **Annual Appeal 2026 dashboard** (you need to be logged in to the CRM). You can also go to **Dashboard** and choose **Annual Appeal 2026**. The new gift is counted in:

- **Total Raised**: all Annual Appeal gifts;
- **Check Gifts**: check gifts only;
- **Card Gifts**: online card gifts only;
- **Number of Gifts**: how many gifts;

- **Average Gift**: total divided by number of gifts.

Gift amounts on the dashboard don't include online processing fees.

Double-check an entry

1. Go to **Opportunities**.
2. Choose the **Private Giving** pipeline.
3. In the **Donation Received** column, find **AA 2026 Check: *Donor Name***.
4. Click it to see the amount, gift date and check number.

Fort Adams staff rule

If a gift record is wrong, don't submit the form again. Ask an administrator to correct the existing record.