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.

Revision #1
Created 2026-09-22 14:24:36 UTC by David Prata
Updated 2026-09-22 14:24:36 UTC by David Prata