Tech Stack Pages

How-to guides for every software tool used at Crowned Credit.

How to Use This Wiki — Navigation Guide

Welcome to the Crowned Credit Knowledge Base! This is your go-to resource for everything you need to do your job. Whether you're brand new or a veteran, this guide will help you find what you need fast.

How the Wiki is Organized

Think of the wiki like a library:

- **Shelves** = Departments or big categories (what you see on the home page)
- **Books** = Topics within a department
- **Pages** = The actual content — scripts, SOPs, guides, etc.

> ◻◻ **Quick Start:** Go to the home page, find your department's shelf, and click into the book that matches what you need. It's that simple.

Find Your Department

Your Role	Start Here	What You'll Find
CSR (Customer Service)	Customer Service Department shelf	Response scripts, escalation procedures, call handling, SMS templates
Sales Closer	Sales Department shelf	Consultation scripts, objection handling, follow-up cadences, pricing presentation
Appointment Setter	Sales Department shelf	Speed-to-call protocol, follow-up sequences, booking process
Billing Team	Billing & Payments shelf	Payment processing, dunning sequences, refunds, reactivation SOPs

Your Role	Start Here	What You'll Find
Onboarding Specialist	Client Journey shelf	Day 0-30 process, portal creation, orientation calls, onboarding calls
Credit Case Specialist	Customer Service Department shelf	Inbox management, dispute pipeline, client communication, cross-department support
Dispute Analyst	Credit Repair Operations shelf	Dispute strategies, account-specific tactics, DisputeFox guide
Team Lead / Manager	HR & Team shelf	Hiring SOPs, training programs, performance KPIs, team structure, policies
Everyone (New Hire)	About Us shelf	Company history, mission, core values, compliance rules

How to Search

The fastest way to find anything:

1. Click the **search icon** (magnifying glass) at the top of any page
2. Type what you're looking for — e.g., "cancellation script" or "failed payment"
3. Results show matching pages across the entire wiki
4. Click any result to go directly to that page

> ⚡ **Pro Tip:** Search works with partial words too. Typing "cancel" will find pages about cancellations, cancellation scripts, and cancellation processes.

How to Navigate

Breadcrumbs

At the top of every page, you'll see a trail like: **Home → Customer Service → CSR Response Scripts → Account Cancellation Scripts**. Click any part of that trail to jump back up to that level.

Sidebar

When you're inside a book, the left sidebar shows all the pages in that book. Use it to jump between pages without going back to the shelf.

Home Button

Click the **Crowned Credit logo** or the **"BookStack"** text at the top-left to go back to the home page (all shelves).

Page Features You Should Know

- **Table of Contents** — Long pages have a sidebar outline on the right. Click any heading to jump to that section.
- **Bookmarks** — Click the bookmark icon (flag) at the top of any page to save it to your favorites for quick access later.
- **Print / Export** — Need a physical copy? Click the three dots (⋮) menu at the top-right of a page and choose Print or Export as PDF.
- **Dark Mode** — Click your profile icon → "Edit Profile" → change the theme if you prefer dark mode.

Understanding Page Icons

Throughout the wiki, you'll notice different colored boxes. Here's what they mean:

> □□ **Blue Box** — Tips, best practices, and helpful information

> ⚠ **Gold Box** — Important warnings or things to be careful about

> □□ **Red Box** — Critical alerts — must read, compliance rules, things that can get you in trouble

> *"Quoted text in gold-bordered boxes like this" — These are scripts and templates. Use them word-for-word or as a starting point.*

Need Help?

If you can't find what you need:

1. **Search first** — 90% of the time, it's already in the wiki
2. **Ask in #ask-questions** on Discord — your question might help us add new content
3. **Talk to your team lead** — they can point you to the right page

> **This wiki is always growing!** When the team asks questions in Discord, we review them and add the answers here. If you notice something missing or incorrect, let your team lead know or post in #improvement-requests.

GoHighLevel Complete Guide

This page covers the essential guidelines and procedures for **GoHighLevel Complete Guide** at Crowned Credit. Use the sections below to quickly find the information you need.

GoHighLevel (GHL) — Complete Guide

GoHighLevel is Crowned Credit's CRM, automation engine, payment processor, and sales pipeline — all in one platform. Every lead, every client, every payment, and every communication flows through GHL. Mastering it is essential for every team member who interacts with clients.

> ⚠ ***CRITICAL RULE — READ FIRST:*** *GHL has 536 workflows, 402 of which are ACTIVE. Modifying, deleting, or pausing any workflow without explicit approval from Jethro can break client communications, billing automations, and sales processes. When in doubt — DON'T TOUCH IT. Ask first.*

What GHL Does for Crowned Credit

GoHighLevel serves as the operational backbone of Crowned Credit. Here is a breakdown of every major function we use:

Function	How We Use It
CRM / Contacts	All leads and clients stored here. Full contact history, notes, tags, pipeline stage.
Pipeline / Opportunities	Lead qualification → Consultation → Closed Won/Lost. Tracks every deal from first touch to payment.
Automations / Workflows	Welcome emails, SMS follow-ups, billing reminders, onboarding sequences (536 total, 402 active).
Payments / Invoices	All client invoices, setup fees, and recurring monthly subscriptions managed here.

Function	How We Use It
Calendar	Appointment scheduling for sales consultations. Integrated with automated SMS confirmations and reminders.
Calls (Closers)	Closers use GHL's built-in dialer for ALL sales calls. NEVER use Aircall for outbound sales — outbound goes through GHL dialer only. Aircall IS used by Sales for inbound transfers from Appointment Setting.
SMS	Automated and manual SMS to clients. Merge tags for personalization by rep name and client name.
Reporting	Close rates, revenue tracking, appointment show rates, and call logs by rep.

Login & Navigation

GHL is a web-based platform. Access it from any browser — no download required for the desktop version.

How to Log In

1. Go to https://hub.viewlinkmgt.com/
2. Enter your assigned email and password
3. If you see multiple sub-accounts, select **"Crowned Credit"**
4. You will land on the Dashboard — this shows a summary of recent activity

> *If you don't have login credentials, contact your direct manager. Do not share login credentials with other team members — each person has their own account for tracking purposes.*

Left Sidebar Navigation

Icon / Label	What It Does	Who Uses It
Contacts	Search, view, and manage all leads and clients	All team members

Icon / Label	What It Does	Who Uses It
Opportunities	Pipeline view — board or list view of all leads (9 Wavv Calls), active clients (00 Dispute Round) and clients with processing issues (00 Processing Issues)	Leads - Sales, Appointment setters Active client pipeline - CSR Processing Issues - CSR
Calendar	View and manage appointments and consultation schedule	Sales, Appointment setters
Automations	All 536 workflows — DO NOT edit without Jethro's approval	Admin only
Payments	Invoices, subscriptions, payment history, failed charges	Billing team, Managers
Marketing	Email and SMS campaigns for leads and existing clients	Marketing team, Admin
Reporting	Close rates, revenue data, rep performance, call logs	Management
⚙ Settings	Sub-account configuration — admin access only	Jethro / Admin

Common Tasks: Step-by-Step

How to Search for a Client

1. Click **Contacts** in the left sidebar
2. Use the search bar at the top — you can search by name, phone number, or email address
3. Click the contact name to open their full profile
4. The profile shows: all activity, notes, tags, current pipeline stage, and full payment history

> **Quick Tip:** You can also search a client faster by clicking the magnifying glass icon on the left hand side while the Conversation tab is open. Be sure to select "Team Inbox" and click "All" to view all conversations. You can filter as well to view the Starred contacts for looking up active clients.

How to View Client History

1. Open the client profile (Contacts → Search → Click name)
2. The activity feed on the right panel shows all interactions: calls, emails, SMS, notes, pipeline moves
3. Scroll down for the full conversation history in chronological order
4. Click the "Appointments" tab to see their full consultation history
5. Click the "Payments" tab to see all invoices and billing history

How to Add a Note to a Client

1. Open the client profile
2. Click the **"Notes"** tab in the profile menu
3. Click **"+ Add Note"**
4. Type your note — make sure to be clear with narrating the details of the note so it will be noted by team members for future interactions. No need to record date and name since it is automatically logged by the system.
5. Example format: "*Client will subscribe to new credit monitoring next month, hold off on following up for now.*"
6. Click **Save**

How to Check Payment Status

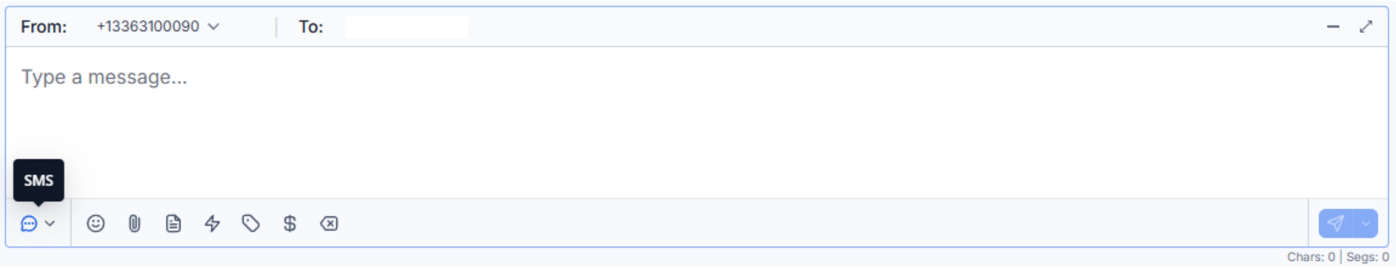
1. Go to **Payments** in the left sidebar
2. Click **Invoices**
3. Search the client's email in the search bar
4. View invoice status: **Paid** / **Pending** / **Failed** / **Void**
5. Click any invoice to see full details: amount, date, payment details (last 4 digits and type of card used), and transaction ID
6. For failed payments, escalate to the billing team (Khryzza or Regine) immediately

> **Quick Tip:** In order to view when a transaction was received, or to view the failed payment history, you can click the "Transactions" tab on the upper part of the Payments window.

How to Move a Contact in the Pipeline

1. Go to **Opportunities** in the left sidebar
2. Find the contact — you can switch between Kanban view (drag cards) or List view
3. In Kanban: drag the card from one column to the next
4. In List: click the contact → select the new stage from the dropdown
5. Moving to "Closed Won" automatically triggers the onboarding workflow — do not do this unless payment has been confirmed

How to Send a Manual SMS



1. Go to **Conversations** in the left sidebar
2. Search for the client's name, email or number in the search bar (You can select "All" to view all conversations.)
3. Make sure that you are using the appropriate number (Main company number for CSR, Sales will have direct numbers assigned to them.)
4. Type your message. Make sure to maintain professionalism and uphold the company's communication standards.
5. Do NOT send SMS that contradict or override automated sequences without checking with your manager
6. Your message will appear in the conversation thread automatically

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Pipeline Stages Explained

The pipeline tracks every prospect from first contact to enrolled client. Understanding each stage helps ensure the right actions happen at the right time.

Stage	Meaning	Who's Responsible	Next Action
New Lead	Lead came in from Meta ad, form submission, or referral	System / Scheduler	Closer calls within 5 minutes of appointment being booked
Consultation Booked	Appointment confirmed in GHL calendar	Closer	Automated confirmation SMS + reminder sequence fires automatically
Consultation Complete	Call happened — verified by call record over 60 seconds	Closer	Send follow-up email + proposal same day
Proposal Sent	Pricing/offer sent to the prospect	Closer	Follow up same day via SMS, and again next morning

Stage	Meaning	Who's Responsible	Next Action
Follow-Up	No decision made after proposal was sent	Closer + Automation	Automated + manual follow-up sequence (multiple touchpoints over 7–14 days)
Closed Won □	Payment received — setup fee confirmed	Closer	Onboarding workflow triggers automatically. DO NOT move here without confirmed payment.
Closed Lost □	No purchase, no response after full follow-up sequence	System	Contact enters long-term nurture sequence (30/60/90-day touchpoints)

Key Workflows (Do Not Modify Without Approval)

GHL runs 402 active workflows. These power nearly every automated communication Crowned Credit sends. Touching the wrong workflow can break client onboarding, billing, or sales follow-up at scale.

Workflow	Purpose	Risk Level	Notes
Initial Payment Automation	Sends welcome email and onboarding instructions when a new client pays their setup fee	□□ Critical — DO NOT touch	Triggers immediately on payment
Monthly Billing Reminders	Notifies clients 3 days before their billing date	□□ Critical	Reduces failed payments and chargebacks
No-Show Follow-Up (25+ versions)	Sends follow-up from rep's individual phone number after missed appointment	□□ Medium — per-rep, intentional	See note below on why there are 25+ versions
Lead Nurture Sequence	Email + SMS follow-up for leads who didn't convert	□□ Medium	Multi-week cadence
Onboarding Checklist	Guides new client through portal setup and SmartCredit sign-up	□□ Critical	First impression for every new client

Workflow	Purpose	Risk Level	Notes
Review Requests	Sends Google and BBB review requests after key milestones	□□ Low risk	Drives 4.9★ rating
Referral Program	Triggers when a client sends a referral	□□ Low risk	Tracks referral commissions
Long-Term Nurture (Closed Lost)	Keeps in touch with unconverted leads over 6–12 months	□□ Low risk	Brings back cold leads

> □□ ***Why 25+ No-Show Workflows?***
> *Each closer sends follow-up messages from their individual phone number. GHL cannot dynamically send from different numbers in one workflow, so each rep has their own dedicated workflow. These are intentional — do NOT consolidate them.*

Reporting: What to Track

GHL's Reporting section gives management full visibility into sales and operational performance. Key reports include:

Report	Where to Find It	What It Shows
Appointment Report	Reporting → Appointments	Total appointments booked, showed, no-showed, and cancellation rate by closer
Opportunity Report	Reporting → Opportunities	Pipeline conversion rates, revenue won, deals in progress by stage
Call Report	Reporting → Calls	Call volume, duration, connected rate per closer — used for performance reviews
Revenue Report	Payments → Transactions	Total revenue, recurring subscription revenue, setup fee revenue by time period

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Troubleshooting Common Issues

Issue	Likely Cause	Fix
Can't find a contact	Wrong spelling or contact is in another sub-account	Try searching by phone number or partial name. Check that you're in the correct Crowned Credit sub-account.
Workflow not firing	Contact missing a required tag or trigger condition not met	Check the workflow trigger conditions. Do NOT manually re-trigger without checking with admin first.
Payment showing as failed	Client's card expired or insufficient funds	Escalate to billing team. Do NOT manually charge from the client profile — follow the billing escalation process.
Client not receiving SMS	Phone number invalid, opted out, or SMS credits exhausted	Verify phone number format in the contact. Check if the client has opted out (look for "Unsubscribed" tag). If opt-out, do not send manual SMS.
Wrong pipeline stage	Contact was moved accidentally	Move it back to the correct stage. Add a note explaining the correction. Never move to "Closed Won" without confirmed payment.
Calendar appointment missing	Booking confirmation didn't save or was deleted	Check under the contact's activity feed. If the appointment is gone, have the client rebook via their confirmation link.

Rules & Etiquette

- **Never edit or pause workflows** without explicit written approval from Jethro.
- **Never move a contact to Closed Won** without confirmed payment receipt.
- **Always add a note** after any significant client interaction when the information is needed for future interaction, this helps other team members with additional context and helps improve consistency in communications.
- **Closers mainly use GHL dialer for outbound sales calls.**
- **Do not share your GHL login.** Each rep has individual tracking tied to their account.
- When in doubt about any action in GHL — **ask before clicking.**

Time Zone Handling in GHL Automations

The Problem

GHL automated messages (appointment confirmations, reminders, follow-ups) may display times in **Eastern Time (EDT/EST)** even when the client is in a different time zone. After Daylight Saving Time changes, this can be off by 1+ hours.

What to Watch For

- **Appointment confirmations** showing the wrong time for clients in Central, Mountain, or Pacific time zones

- **Post-DST shifts** (early March / early November) — automated times may be misaligned for 1-2 days until caches refresh

- **AI bot bookings** — if the bot books at "9:00 AM" without clarifying the client's time zone, it defaults to EDT

What to Do (Team Members)

1. **Always confirm the client's time zone** before booking any appointment

2. **Specify the time zone explicitly** in your notes: "5:00 PM MDT / 7:00 PM EDT"

3. If a client reports a wrong time in their confirmation, **report it immediately** in `#improvement-requests` with:

- Client name

- What time zone they're in

- What time they were expecting vs. what was sent

4. Tag `@Sam` for automation fixes

For Admins (Sam)

- Check GHL workflow timezone settings after every DST change

- Ensure appointment confirmation workflows use the **contact's timezone** field, not a hardcoded timezone

- Test automated messages in multiple time zones quarterly

Stopping Onboarding Automations

The Problem

Clients who have **already completed onboarding** (or already had Round 1 sent) sometimes continue receiving onboarding reminder messages, which confuses them.

How to Stop Onboarding Automations for a Client

1. **Add the tag `ort-done`** to the client's contact in GHL

- This signals that onboarding/orientation is complete

- Automations should check for this tag and stop sending

2. If the automation still fires after tagging:

- Report in `#improvement-requests`

- Tag `@Sam` — the workflow trigger conditions may need updating

Best Practice

- **Tag `ort-done` immediately** when a client completes orientation, not later

- If a client calls/messages confused about onboarding reminders they shouldn't be getting, apologize and fix the tag right away

- Suggested language: *"I apologize for the confusion — that was an automated reminder that should have stopped. Your onboarding is already complete and you're all set!"*

> **Feb's suggestion (approved):** Add "If done, please ignore this message" to the end of onboarding automation messages as a safety net.

AI Bot Assignment & Calendar Issues

Bot Tagging Wrong Team Member

If the AI bot tags you for an appointment that's on someone else's calendar:

1. **Do NOT ignore it** — the client still needs help

2. Check whose calendar it's actually on in GHL

3. Notify the correct team member directly

4. Report in `#improvement-requests` with the client name and what happened

AI Bot Giving Incomplete Answers

If the AI bot's reply was incomplete, didn't answer the question, or gave wrong info:

1. **Jump in and handle the client manually** immediately

2. Report the exact conversation in `#improvement-requests`

3. This helps Sam/Peter fine-tune the bot's prompts

DisputeFox Complete Guide

This page is the complete guide to DisputeFox at Crowned Credit — covering account setup, dispute round management, letter generation, client tracking, and system administration.

This page covers the essential guidelines and procedures for **DisputeFox Complete Guide** at Crowned Credit. Use the sections below to quickly find the information you need.

DisputeFox — Complete Guide

DisputeFox is Crowned Credit's dispute management platform. It is the primary tool used by the Dispute Team (based in the Philippines) to manage every client's credit dispute journey — from initial import to final resolution. Every round of letters, every bureau response, and every item status is tracked here.

> *DisputeFox is used **exclusively by the Dispute Team**. CS reps do not generate letters — they refer clients to the dispute team and update notes in GHL.*

What DisputeFox Does

- Generates professional dispute letters addressed to Equifax, Experian, and TransUnion
- Tracks dispute rounds, bureau responses, and item removal status
- Maintains complete client credit files and full dispute history
- Manages the entire dispute lifecycle from onboarding intake to resolution
- Stores client data securely with role-based team access
- Integrates with SmartCredit report imports for seamless dispute setup

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Login & Access

How to Log In

1. Go to **app.disputefox.com**

2. Enter your assigned credentials — provided by Dianna or your team lead
3. You will land on the Dashboard showing your assigned client list
4. Verify that your company is set to: **Crowned Credit 4**

> ⚠ *If your company shows anything other than **Crowned Credit 4**, stop and contact your team lead immediately. Working in the wrong sub-account will cause data errors and misassignment of client files.*

Dashboard Overview

Dashboard Section	What It Shows
Client List	All active clients assigned to you or your team. Filter by: Active, Archived, Paused.
Import Queue	Clients awaiting credit report import before disputes can begin.
Round Tracker	Overview of which clients are in which dispute round and when responses are due.
Bureau Responses	Incoming bureau responses by client and item status.

How Disputes Work: The Round Flow

Understanding the dispute round cycle is essential to doing this job correctly. Here's how the process works from start to finish:

Round	Timing	What Happens
Round 1	At onboarding (Day 1–3)	Credit report imported from SmartCredit. Negative items identified. First set of dispute letters generated and sent to all three bureaus.
Bureau Response Window	Days 4–35	Bureaus have 30 days (per FCRA) to investigate and respond. Status shows as **Pending** in DisputeFox.

Round	Timing	What Happens
Round 1 Response Review	Days 35–45	Bureau responses arrive. Items are updated: Removed □ , Verified □□, or Failed □ . Client is notified via GHL automation.
Round 2	~Day 35–45	New round opened for items that were not removed. Escalated letter templates used for verified/failed items. Process repeats.
Ongoing Rounds	Every 35–45 days	Continue until all disputable items are resolved, removed, or verified as legitimate.

> □□ ***FCRA Requirement:*** *Bureaus are legally required to respond to disputes within 30 days. If no response comes, that's grounds for an escalated dispute letter referencing their violation of Section 611 of the FCRA.*

Common Tasks: Step-by-Step

How to Create a New Client Profile

1. Click **+ New Client** in the DisputeFox dashboard
2. Enter all required information:
    - First name, Last name, Email address, Phone number
    - Full mailing address (this appears on dispute letters — must be accurate)
    - Last 4 digits of SSN in the Notes field (do NOT enter full SSN)
3. Import the credit report from SmartCredit (see SmartCredit Guide for access instructions)
4. Verify all 3 bureaus are connected: **Equifax, Experian, TransUnion**
5. Tag the client correctly with their plan type: **Essentials / Accelerated / Momentum**
6. Set client status to: **Active**
7. Assign to folder: **Active Client**
8. Assign company to: **Crowned Credit 4**
9. Post in the Dispute Team WhatsApp GC and tag Dianna to notify the team that the new client is ready

How to Generate Dispute Letters

1. Open the client profile in DisputeFox

2. Navigate to the **Credit Report** tab — review all items on the report
3. Identify negative items to dispute: late payments, collections, charge-offs, incorrect balances, unauthorized inquiries
4. Click **New Round** to start a new dispute round
5. Select which bureau(s) to dispute with: Equifax, Experian, TransUnion, or all 3
6. For each item to dispute, select the item and assign the appropriate **reason code**:
   - *Not mine / Identity error*
   - *Never late / Incorrect payment history*
   - *Account already paid / Settled*
   - *Inaccurate balance*
   - *Outdated — past 7-year reporting limit*
   - *Duplicate account*
7. DisputeFox automatically generates the dispute letters — review each one carefully
8. Verify accuracy: client name, address, and every disputed item
9. Print and mail via certified mail OR send electronically via the bureau's online dispute portal
10. Log the round date in the client's file and set the expected response date (+30 days)

How to Track Dispute Progress

Navigate to: **Client Profile → Disputes Tab**

This shows all rounds, disputed items, bureau responses, and current status of each item.

Status	Meaning	Next Action
Pending	Letter sent — awaiting bureau response (within 30 days)	No action needed. Monitor for response.
Removed	Bureau deleted the item from the report	Notify client. Update progress report.
Verified	Bureau confirmed the item as accurate (they investigated and kept it)	Use escalated letter template for next round. May require different reason code.
Failed	Item was not removed and bureau provided no favorable response	Evaluate whether escalation or different dispute strategy is needed. Consult team lead.

How to Reactivate a Paused or Archived Client

> ⚠ ***Before Reactivation:*** *Always get the most recent credit report first (use SmartCredit existing report — NEVER order a new one). Import it into DisputeFox before changing the client's status.*

1. Search for the client in DisputeFox by name or email. If you can't find them, change the filter from "Active" to "All" — they may be archived.
2. Check for **import overdues** on the client profile — if present, pull the latest SmartCredit report and update the file
3. Change client status: **Archived → Active**
4. Move client to folder: **Active Client**
5. Portal Settings: Toggle **ON** (so client can access their portal again)
6. Verify all settings are correct:
   - Status = Slow Delete EM or Accelerated
   - Password format = Name123
   - 3-bureau credit monitoring confirmed active
7. Assign company to: **Crowned Credit 4**
8. Notify the team: post in WhatsApp GC and tag Dianna — Dispute Team
9. Update the **Reactivation Google Sheet Tracker** for commission tracking purposes

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Dispute Letter Types

Letter Type	When to Use	Key Language
Standard Dispute Letter	Round 1 — first-time dispute of an item	Identifies item, states reason for dispute, requests investigation under FCRA Section 611
Escalated / Frivolous Rebuttal	When bureau calls a dispute "frivolous" or returns a form letter	References FCRA rights, demands proper investigation, may cite CFPB complaint process
Method of Verification	When bureau verifies an item but you need proof of how they verified it	Asks bureau to provide the specific method and source used to verify the item
Debt Validation Letter	For collections — send to the collection agency (not the bureau) within 30 days of first contact	Demands proof of the debt, chain of ownership, and client's obligation

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Common Issues & Fixes

Issue	Likely Cause	Fix
Import overdues on client profile	Credit report data is stale or not re-imported after a gap	Pull latest SmartCredit report → re-import into DisputeFox
Bureau not responding to letters	Incorrect mailing address or format issue	Resend via certified mail with tracking. Use escalated letter template referencing FCRA Section 611.
Client portal not working	Portal Settings toggled to OFF	Go to client profile → Portal Settings → Toggle ON
Wrong company assignment	Client assigned to wrong Crowned Credit sub-account	Change to **Crowned Credit 4** in the client's settings dropdown
Can't find a client	Client is archived and not showing in active filter	Change filter from "Active" to "All" to show archived clients
Bureau called dispute "frivolous"	Generic or repetitive dispute reason used	Switch to a different reason code. Use the Frivolous Rebuttal letter template. Add specific evidence if available.
Letters generating with wrong address	Client address entered incorrectly at onboarding	Update client profile address. Regenerate letters before sending.

Rules & Reminders

- **Never order a new SmartCredit report** — always use the existing/most recent one.
- **Always verify client address** before generating and sending letters.
- **Log every action** — every round started, every letter sent, every bureau response.
- **Notify the team** via WhatsApp GC when new clients are added or clients are reactivated.
- **Update the Reactivation Google Sheet** for every reactivated client — this affects commission tracking.
- When a client is paused or archived, make sure to update their status correctly — leaving clients in the wrong status creates confusion for the whole team.

Discord Team Communication Guide

This page is the complete guide to Discord team communication at Crowned Credit — covering server structure, channel purposes, communication etiquette, and daily workflows.

This page covers the essential guidelines and procedures for **Discord Team Communication Guide** at Crowned Credit. Use the sections below to quickly find the information you need.

Discord — Team Communication Guide

Discord is Crowned Credit's primary internal communication platform. With a 45+ person team spread across the Philippines, Nigeria, Colombia, and the Dominican Republic, Discord keeps everyone aligned, organized, and moving in the same direction — without the chaos of sprawling WhatsApp threads.

Every team member is expected to check Discord at the start of their shift, respond to relevant messages promptly, and use the correct channels for every type of communication.

Server Overview

- **Server Name:** Crowned Credit HQ
- **Server ID:** 1484412224037458085
- **Team Size:** 45+ active members
- **Purpose:** Internal operations, task management, billing updates, content coordination, and AI system communication
- **Access:** By invitation only — sent by your manager or team lead during onboarding

Who's on Discord

Team	Location	Primary Use

Dispute Team	Philippines	Dispute coordination, client updates, Dianna's team channels
CS / Support Team	Philippines	Client escalations, billing flags, call coverage coordination
Billing Team	Philippines	Invoice updates, payment issues, #billing-updates
Content / Social Team	Philippines / Nigeria	#blog-seo, #trends-content
Sales Closers	Philippines / Nigeria	Pipeline updates, #general announcements
Leadership (Jethro)	USA	All channels — final say on all decisions
Peter (AI System)	Mac Studio (USA)	#agent-tasks, #ideas-for-peter, automated reports

Channel Structure & When to Use Each One

Channel	Purpose	Who Posts	Posting Rules
#general	Company-wide announcements, policy updates, celebrations	Leadership, Managers	Keep it professional. Team members can react and reply, but don't flood with off-topic messages.
#agent-tasks	Task assignments for Peter (AI system) and automation work	Jethro, authorized managers	Structured task format required. Include context, expected output, and priority.
#ideas-for-peter	Feature requests and ideas for the AI system (Peter)	Anyone	Share ideas clearly. Peter reviews these and Jethro decides what to build.

Channel	Purpose	Who Posts	Posting Rules
#blog-seo	Blog assignments, SEO performance updates, content approvals	Content team, Jethro	New blog briefs must include keyword target, word count, tone guidelines.
#trends-content	Social media trends, viral content references, ad inspiration	Social media team	Share with context: platform, why it's trending, how we could use it.
#billing-updates	Billing flags, payment issues, failed charges, invoice adjustments	Billing team (Khryzza, Regine)	Every billing flag must include: client name, issue, and what action is needed.
#announcements	Company updates that require attention from the whole team	Jethro only	Read-only for most team members. Do not post here unless you are Jethro or have explicit permission.

Private/Direct Messages (DMs)

- Use DMs for personal coordination, sensitive information, or 1-on-1 conversations that don't belong in a channel
- Do NOT use DMs to bypass channel protocols — if something needs to be documented, it should go in the right channel
- When in doubt: use channels for team-wide visibility and DMs for private conversations

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Notification Settings

Getting Discord notifications right is important — too many and you get overwhelmed; too few and you miss critical updates.

Recommended Notification Setup

1. Open Discord → Go to User Settings (gear icon at bottom left)
2. Go to **Notifications**
3. Set **default server notifications** to "Only @mentions"
4. Override individual channels based on your role:
    - **Your team's primary channel:** All Messages (so you catch everything relevant)
    - **#general and #announcements:** All Messages (important company updates)
    - **Other channels:** Only @mentions

5. Enable **mobile notifications** if you're on the Aircall app or mobile — important for urgent alerts during your shift

@Mention Etiquette

- **@everyone** — Only Jethro uses this. It pings all 45+ team members. Do not use unless you have explicit permission.
- **@here** — Pings all currently online members. Use only for time-sensitive, channel-relevant messages. Don't overuse it.
- **@[person's name]** — Direct mention. Use when you specifically need a named person's attention. Always include context so they know what you need.
- Do not mention people just to get a faster response — only mention someone when you genuinely need their attention.

How to Post Effectively

Clear, structured messages get faster responses and better results. Here are the standards for posting in Crowned Credit HQ:

General Message Standards

- Be specific: say what the issue is, who is affected, and what action you need taken
- Use bullet points for multi-point messages — avoid walls of text
- Lead with the most important information (don't bury the key point at the end)
- For urgent issues, use @mentions and label it clearly: "*URGENT:*" or "*ACTION NEEDED:*"
- Follow up in the same thread when an issue is resolved — close the loop

Billing Update Format

When posting in **#billing-updates**, always use this format:

- **Client:** [Full Name]
- **Issue:** [Payment failed / Invoice dispute / Refund request / etc.]
- **Action Needed:** [What needs to happen — retry charge / contact client / escalate to Jethro / etc.]
- **Urgency:** [Standard / Urgent — same day / High Priority]

Blog / SEO Brief Format

When posting a new brief in **#blog-seo**:

- **Topic:** [Blog post topic or title]
- **Target Keyword:** [Primary SEO keyword]
- **Word Count:** [Minimum word count target]
- **Tone:** [Educational / Conversational / Authoritative]
- **Deadline:** [Date]
- **Notes:** [Any specific instructions, competitor examples, or required links]

Discord for Managers & Team Leads

If you are a team lead or manager, your responsibilities in Discord go beyond just communicating:

- **Monitor your team's channels daily** — spot unanswered questions or blocked work before they become problems
- **Respond to escalations within 2 hours** during your shift
- **Pin important messages** in your team's channel for easy reference (right-click → Pin Message)
- **Archive resolved threads** — don't let channels fill up with old, unresolved-looking conversations
- **Report channel-level issues to Jethro** — if team members are using Discord incorrectly, address it in a 1-on-1 DM before making it public

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Bot Integrations

Crowned Credit HQ has active bot integrations that post automated updates directly into Discord:

Bot / Integration	What It Posts	Channel
Peter (AI System)	Daily reports, cost tracking, ad performance updates, morning briefs	#agent-tasks, #general
GHL Webhook	New client enrollments, failed payments, pipeline updates	#billing-updates
Aircall Alerts	Critical call metric alerts (e.g., missed call spike, Saturday coverage failure)	#general, relevant team channels

> *When you see a bot message, do not delete or dismiss it without reading — these are automated alerts that often require human action. If you're unsure whether a bot message is actionable, check with your team lead or Jethro.*

Professionalism Standards

Discord is an internal tool, but it is still a professional workspace. These standards apply at all times:

- Communicate professionally — no offensive language, personal attacks, or inappropriate content
- Disagreements should be handled privately via DM, not argued in public channels
- English is the primary language for all official channels — use it for all work-related communication
- Personal conversations should stay in designated spaces — not in ops channels
- If a client's personal information (name, SSN, address) needs to be shared, do NOT post it in Discord — use a secure method
- Respond to messages directed at you within 2 hours during your shift — going silent without a status update is not acceptable

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Getting Access & Onboarding

1. Your manager or Jethro will send you a Discord invite link during onboarding
2. Create a Discord account (or log in to an existing one) and join the server using the invite link
3. Set your server nickname to your **real name** — not a username or alias. This is required.
4. Read the pinned messages in **#general** before posting anything
5. Your manager will add you to the relevant team channels based on your role
6. Complete the onboarding checklist item for Discord and notify your manager when done

If You Lose Access

- Contact your direct manager via WhatsApp or email to request a new invite link
- Do not create a new account if you lose access — recovering the old account preserves your message history

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Quick Reference: Channel Cheat Sheet

I need to...	Use this channel
See company-wide updates	#general / #announcements
Report a billing issue	#billing-updates
Share a content idea or trend	#trends-content
Get a blog brief assigned	#blog-seo
Request Peter to build something	#ideas-for-peter
Give Peter a task	#agent-tasks (Jethro/authorized only)
Talk to a specific person	Direct Message (DM)

SmartCredit Guide

This page is the complete guide to SmartCredit at Crowned Credit — covering client enrollment, credit report monitoring, score tracking, and integration with our dispute workflow.

This page covers the essential guidelines and procedures for **SmartCredit Guide** at Crowned Credit. Use the sections below to quickly find the information you need.

SmartCredit — Complete Guide

SmartCredit is the credit monitoring platform that Crowned Credit uses to access and review client credit reports. Every client signs up for their own SmartCredit account, and our team accesses it to pull reports, monitor progress, and import data into DisputeFox for dispute processing.

> ⚠️ ***HARD RULE — NON-NEGOTIABLE:*** *NEVER order, refresh, or buy a new credit report in any client's SmartCredit account. Ordering a new report costs the client money from their subscription. ONLY pull the existing/most recent report. This is read-only access. Violation of this rule is grounds for immediate removal from the role.*

What SmartCredit Does

- Provides 3-bureau credit reports (Equifax, Experian, TransUnion) and live credit scores
- Clients sign up through Crowned Credit's branded portal: **smartcredit.com/crownedcredit**
- Our Dispute Team accesses client accounts to review report data and plan disputes
- Clients use it to monitor their own credit progress between dispute rounds
- Preferred over MyFreeScoreNow (MFSN) — SmartCredit provides higher data accuracy and better 3-bureau coverage

SmartCredit vs MFSN Comparison

Feature	SmartCredit	MyFreeScoreNow (MFSN)

3-Bureau Coverage	Yes (with Premium)	Yes
Data Accuracy	Higher	Good
Client Portal	Clean, client-friendly	⚠ Less intuitive
Branded Signup Page	smartcredit.com/crownedcredit	Generic
Preferred by Crowned Credit	Yes — primary tool	Fallback only

How Clients Sign Up

Every new client must sign up for SmartCredit as part of their onboarding. This is initiated during the GHL onboarding sequence.

1. Client receives the onboarding email with the SmartCredit signup link
2. Client goes to: **smartcredit.com/crownedcredit** (Crowned Credit's branded signup page)
3. Client completes registration with their real name, Social Security Number, and billing information
4. SmartCredit sends a confirmation email to the client
5. Client shares their SmartCredit login credentials with their CSR via a secure channel (as instructed during onboarding)
6. CSR verifies that 3-bureau monitoring is active before the Dispute Team begins any work

Basic vs Premium Plans

Plan	Bureaus Covered	What We Need	Action if Client Has Basic
Basic	1 bureau only	Not sufficient for 3-bureau disputes	Ask client to upgrade to Premium. Use the CSR upgrade script below.
Premium	Equifax + Experian + TransUnion	Required for our full service	No action needed — proceed with onboarding.

> ***CSR Upgrade Script:***
> *"To make sure we have everything we need to fight all 3 bureaus on your behalf, we'll need you to upgrade your SmartCredit plan to Premium. It gives us access to all three of your credit*

> *reports so we can dispute items across Equifax, Experian, and TransUnion simultaneously. Here's the link to upgrade: [link]. It only takes a minute and will make a big difference in your results."*

How to Access a Client's Credit Report

SmartCredit uses session-based authentication — you log in directly as the client using their credentials. Each session is tied to a JSESSIONID cookie that identifies the active session.

> ⚠ ***Session-Based Access:*** *You must log in as the client to access their account. Do not share sessions across team members — each login creates a new session. Always use a private/incognito window.*

Step-by-Step: Accessing a Client Report

1. Open a **private/incognito browser window** (Chrome: Ctrl+Shift+N / Mac: Cmd+Shift+N)
2. Go to **smartcredit.com**
3. Log in with the **client's credentials** (username and password provided by the client during onboarding)
4. Once logged in, you are inside their SmartCredit account — you can now view their full credit report
5. Navigate to the **Credit Report** tab in the navigation menu
6. View the **existing report** — **DO NOT click any "Refresh," "Get New Report," "Update Scores," or similar buttons**
7. Review the report data and extract the information needed for DisputeFox import
8. When done: **log out immediately**. Never save client credentials in your browser.

> ***STOP — Before You Click Anything:***
> *If you see a button labeled "Refresh Report," "Get Latest Report," "Update Scores," "Pull New Report," or anything similar —* ***DO NOT CLICK IT.*** *That action will charge the client from their subscription balance. Only use the data from the existing report already displayed on screen.*

How to Read the Credit Report

The SmartCredit report is divided into sections. Here's what to look for in each one:

Section	What It Shows	What to Look For
Credit Scores	Current scores from all 3 bureaus (Equifax, Experian, TransUnion)	Score per bureau, key score factors, score trend over time
Accounts	All open and closed credit accounts	Late payments, collections, charge-offs, incorrect balances, closed accounts still reporting negative
Inquiries	All hard and soft credit pulls	Unauthorized hard inquiries (can be disputed), excessive hard pulls in a short period
Public Records	Bankruptcies, civil judgments, tax liens	Outdated items past their reporting limits (7 years for most, 10 years for Chapter 7 bankruptcy)
Personal Information	Name variations, current and former addresses, employer history	Inaccurate addresses or name variations that could indicate a mixed file or identity issue

Credit Score Range Reference

Score Range	Category	What It Means for Our Clients
800–850	Exceptional	Best available rates, easiest loan approvals — clients with this score rarely need our services
740–799	Very Good	Near-best rates, most lenders approve — goal range for clients we help
670–739	Good	Standard rates, most credit products available — achievable for most of our clients in 6–12 months
580–669	Fair	Higher interest rates, some rejections — where many clients are when they start
300–579	Poor	Worst rates, frequent rejections for credit and housing — most of our clients start here

What Items Are Disputable?

Item Type	Disputable?	Reason
Late payments	▯ Yes	If inaccurate, not yours, or past the 7-year limit
Collections	▯ Yes	If inaccurate, paid, settled, or not yours
Charge-offs	▯ Yes	If inaccurate balance, wrong account info, or past 7 years
Hard inquiries	▯ Yes	If unauthorized or unrecognized
Bankruptcies	⚠ Difficult	Can dispute inaccuracies; harder to remove if legitimate
Accurate, recent negative items	▯ Generally no	Bureaus will verify and maintain accurate information

---

Monitoring Setup & Progress Tracking

SmartCredit's monitoring feature alerts clients when there are changes to their credit report. This is useful for tracking dispute results in real time.

Setting Up Monitoring Notifications for a Client

1. Log into the client's SmartCredit account (incognito window)
2. Go to **Settings → Notifications**
3. Confirm that email alerts are turned ON for:
    - New accounts opened
    - Account derogatory updates
    - Score changes
    - New inquiries
4. Verify the client's email address is correct — alerts go to the client's email
5. Log out

How to Track Client Progress Over Time

- Log in to the client's SmartCredit account at the start of each new dispute round
- Note the **current score for each bureau** and compare to the previous round's scores

- Record the updated scores in the client's DisputeFox profile and in their GHL contact notes
- Share progress updates with clients through GHL SMS or the onboarding communication sequence

Troubleshooting

Issue	Likely Cause	Fix
Can't log in with client credentials	Password changed by client or incorrect credentials shared	Contact the client to reset their password and reshare. Do NOT attempt to reset it yourself.
Only 1 bureau showing (not 3)	Client is on Basic plan	Ask client to upgrade to Premium. Use the upgrade script above.
Report is very old / not updated	Report hasn't refreshed since a past round	Check the report date. If within current round window, use existing data. Do NOT order a new report.
Account shows "suspended" or "on hold"	Client's SmartCredit subscription payment failed	Notify the client that they need to update their billing information with SmartCredit directly.
Wrong client account accessed	Logged into previous client's session still active in browser	Always use incognito mode. Log out immediately when finished. Never use the same browser window for multiple client sessions.

Key Rules Summary

- □□ **NEVER order a new report** — it costs the client money.
- □□ **Always use incognito mode** — never save client credentials in the browser.
- □□ **One session per team member** — do not share sessions.
- □□ **Log out immediately** after you are done accessing a client's account.
- □□ **Update DisputeFox and GHL notes** with score data after every review.
- □□ **Client must upgrade to Premium** before full 3-bureau dispute work begins.

Aircall Guide

Troubleshooting — Common Aircall Issues

Caller Names Not Displaying (Shows Number Only)

Symptom: Incoming calls show only the phone number instead of the client name, even for known contacts.

Possible Causes:

1. **Aircall-GHL sync issue** — Contact sync between Aircall and GoHighLevel may have broken or paused
2. **Browser cache** — Stale data in your Aircall web app
3. **Aircall app needs update** — Desktop or mobile app is outdated

What to Do:

1. **Refresh your Aircall app** — Close and reopen the Aircall desktop app or refresh the browser tab
2. **Check if it affects everyone** — Ask in `#improvement-requests` if others have the same issue
3. **If only you:** Clear browser cache or reinstall the Aircall desktop app
4. **If team-wide:** Tag `@Sam` or your team lead in `#improvement-requests` — this likely requires an admin-level fix (re-syncing the GHL-Aircall integration)

> **Do NOT spend time manually looking up names.** If this issue persists for more than 1 hour, escalate immediately. Speed matters on calls.

Blocking Unwanted or Spam Numbers

When to block: Automated debt collector calls, spam/robocalls, or any number disrupting operations (e.g., calls coming through the wrong line like Spanish line).

How to Block a Number in Aircall:

1. Go to the **Aircall Dashboard** (admin access required — ask Sam)
2. Navigate to **Numbers** → select the affected phone line
3. Go to **Settings** → **Blocked Numbers**
4. Add the phone number you want to block
5. Confirm the block

If you do NOT have admin access:

- Post in `#improvement-requests` with:
    - The number to block
    - Which Aircall line it is calling
    - Why it should be blocked (spam, debt collector, wrong line, etc.)
- Tag `@Sam` for immediate action

Incoming DND (Do Not Disturb):

- Jethro has directed that incoming DND should be enabled where needed
- This prevents certain numbers/times from ringing through
- Admin-only setting — request via `#improvement-requests`

> **Note:** Never block a client number without verifying first. Only block confirmed spam/automated/debt-collector numbers.

GHL Automation Troubleshooting — Wrong Contacts Receiving Workflows

Overview

Sometimes GHL automations/workflows fire on contacts who should NOT be receiving them — for example, clients who have already completed onboarding receiving messages telling them to complete onboarding. This page explains what to do when you notice this happening.

Common Scenarios

- **Onboarding automation sent to already-onboarded clients** — Client completed onboarding and orientation, but still receives automated messages asking them to complete it
- **Follow-up sequences firing after a client is already active** — Drip campaigns continue even though the client has moved past that stage
- **Reactivation messages sent to active clients** — Clients who are paying and enrolled receive win-back messages

What to Do (Team Members)

1. **Do NOT try to fix the automation yourself.** GHL has 536 workflows (402 active). Touching the wrong one can break things for hundreds of clients.
2. **Report it immediately in #improvement-requests.** Include:
   - The client name or contact ID affected
   - What message/automation they received (screenshot if possible)
   - What stage the client is actually in (e.g., "already completed onboarding")
   - When you noticed it
3. **Tag @Sam** — Sam manages GHL automations and can diagnose the workflow trigger.
4. **Reassure the client if they respond confused.** Use this script:

> "Hi [Name], we apologize for the confusion! That message was sent in error — our records show you have already completed [onboarding/orientation/etc.]. Please disregard that message. Your account is in good standing and our team is actively working on your file. Thank you for your patience!"

What Causes This

- **Contact not moved to the correct pipeline stage** — If a contact stays in an earlier stage, the automation for that stage keeps firing
- **Workflow trigger conditions too broad** — The workflow may not have proper exclusion filters (e.g., "only fire if contact has NOT completed onboarding")
- **Manual pipeline move was missed** — Someone forgot to move the contact to the next stage after completing a step
- **Tag-based triggers misapplied** — Contact has or is missing a tag that controls workflow enrollment

For Admins (Sam / Jethro)

- Check the workflow trigger conditions — add exclusion filters for contacts who have already passed the relevant stage
- Verify pipeline stage automation — ensure "move to next stage" actions are firing correctly
- Audit affected contacts — check if this is a one-off or affecting multiple clients
- If multiple clients affected: pause the workflow, fix the trigger, then re-enable

Prevention

- Always move contacts to the correct pipeline stage after completing any milestone
- When onboarding is complete, verify the contact has the correct tags and stage before moving on
- If you notice a pattern of automation misfires, report it — even if it seems minor. Small issues compound.

Page created: April 13, 2026 — triggered by team report in #improvement-requests

Aircall Call Transfers

Overview

This guide covers how to transfer calls within Aircall, since team members frequently need to hand off calls to other departments or closers.

Transferring Calls in Aircall

Aircall is our primary phone system. To transfer a call:

1. **Warm Transfer:** Click the *Transfer* button on the active call → Select the teammate or team queue → Click *Transfer*. The caller hears hold music while you briefly speak to the receiving agent.
2. **Cold Transfer:** Click *Transfer* → Select the recipient → Click *Transfer Now* (without speaking to the recipient first). Use this when the receiving agent is available and no context handoff is needed.
3. **Transfer to External Number:** Click *Transfer* → Enter the external phone number → Transfer. Use sparingly.

Can You Transfer Calls from GHL?

GHL does not natively support live call transfers. If you receive a call through a GHL number or are on a GHL-initiated call:

- Take down the caller's name, phone number, and reason for calling
- Post in the appropriate Discord channel (e.g., **#general** for sales, **#customer-support** for billing/CS) tagging the relevant team or person
- Let the caller know someone will call them back within 5-15 minutes

Best Practice

For seamless handoffs:

- Always use **Aircall** for inbound calls when possible — it supports transfers
- Post the client info in Discord **immediately** so no one falls through the cracks

- Use the format: `Name | Phone | Reason | Urgency`

Related Pages

- Call Handling

GHL Pipeline — Stale Leads (Promise to Pay & Closed) in No-Answer Pipelines

Problem

Leads with a **"Promise to Pay"** status are still appearing in the **No-Answer pipelines**. This causes reps to re-contact leads who have already committed to paying, creating a confusing and unprofessional experience.

Why This Happens

GHL pipelines and workflow automations can conflict when a lead's pipeline stage is updated manually (e.g., moved to Promise to Pay) but the automated no-answer follow-up sequence was already triggered and not stopped.

How to Fix (Admin/Ops)

1. **Add an exclusion filter** to all No-Answer workflows: `Pipeline Stage IS NOT "Promise to Pay"`
2. **Add a workflow trigger**: When a lead moves to "Promise to Pay" → automatically remove them from the No-Answer sequence/campaign
3. **Audit existing leads:** Run a filter in GHL → Contacts → Pipeline Stage = Promise to Pay → check if any are still enrolled in No-Answer automations → remove manually

For Reps

If you see a lead in your No-Answer queue that you know has already committed to paying:

- **Do NOT call them again** about the missed payment — this damages trust
- Post in **#improvement-requests** tagging `@Ops` with the contact name so the automation can be fixed

- If the lead hasn't actually paid yet and the promise window has passed (48+ hours), you may follow up once

Prevention

- Always update the pipeline stage **immediately** when a lead promises to pay
- Ops team should audit No-Answer automations monthly to catch these overlaps

Closed / Disqualified Leads Still in No-Answer Pipelines

Reported Apr 21, 2026 (Paul Adrian): Leads that were closed out (e.g. no-show final, disqualified, not interested) are still reappearing in no-answer pipelines the next day.

Root Cause

Same pattern as Promise-to-Pay overlap: the no-answer workflow does not auto-remove a contact when their opportunity status moves to *Lost*, *Abandoned*, or *Closed*. The automation only keys off pipeline *stage*, not opportunity *status*.

Fix (Admin/Ops)

- Add exclusion to all No-Answer workflows: **Opportunity Status IS NOT Lost AND Opportunity Status IS NOT Abandoned**
- Add workflow trigger: **When Opportunity Status = Lost/Abandoned → remove contact from all No-Answer sequences**
- Run daily audit filter: Opportunity Status = Lost + Active in No-Answer automation → bulk remove

For Reps

- If you see a lead in your no-answer queue that you closed yesterday, do **not** re-contact. Post in `#improvement-requests` tagging @Ops with the contact name and the date you closed it.
- Confirm the opportunity was moved to *Lost/Abandoned* status (not just the stage) — this is what the automation reads.

GHL SMS Delivery Troubleshooting — Texts Not Reaching Clients

When GHL shows a message as "sent" but the client never receives it, use this guide to diagnose and resolve the issue. This is a high-priority problem — if clients do not receive your texts, they may think you are a scam when you call.

Symptoms

- GHL shows message status as "sent" or "delivered" but client says they never got it
- Client does not respond to any texts but answers calls
- Client accuses you of being a scam because they have no text history from you
- Contact is NOT on DND in GHL but still not receiving messages

Step-by-Step Troubleshooting

Step 1: Verify in GHL

- Go to the contact record → Conversations tab
- Confirm the message shows as **"Delivered"** (not just "Sent" or "Failed")
- Check if the contact has **DND enabled** — toggle it off if so
- Verify the phone number is correct and includes the country code
- Check if the number is a landline (landlines cannot receive SMS)

Step 2: Check for Carrier Spam Filtering

This is the **#1 cause** of undelivered texts. Mobile carriers (T-Mobile, AT&T, Verizon) aggressively filter business SMS.

> **Common reasons carriers block texts:**
> • Message contains spam trigger words (see SMS Guidelines page for blocked words list)
> • Too many messages sent to the same number in a short period

> • Client previously marked your number as spam
> • A]2P (Application-to-Person) filtering flagged the message pattern
> • Your sending number has a low trust score with the carrier

Step 3: Ask the Client to Check

When you get the client on a call, ask them to:

- **Check their spam/junk folder** — some phones auto-filter unknown numbers
- **Search for your number manually** in their Messages app
- **Check if they blocked the number** accidentally
- **Check their carrier settings** — some carriers have spam filtering that can be adjusted

> **Pro Tip:** Have the client text YOU first from their phone. This establishes a two-way conversation and significantly reduces the chance of future messages being flagged as spam.

Step 4: Workarounds

- **Have the client save your number** as a contact — this dramatically reduces spam filtering
- **Send a shorter, simpler first message** — avoid links, emojis, and marketing language in the first text
- **Try calling first, then text** — once a call is established, texts are less likely to be filtered
- **Use email as backup** — if SMS is consistently blocked, switch to email + phone calls

Step 5: Escalate if Persistent

If the issue affects **multiple clients** or persists after the steps above:

- Report in **#improvement-requests** with: client name, phone number, what you tried, screenshots
- Tag **@Sam** — he can check the GHL sending reputation and A2P registration status
- Include whether this is a one-off or affecting multiple contacts

Prevention Tips

- Always introduce yourself and the company in the first message
- Avoid spam trigger words (see SMS Guidelines → Compliance section)

- Do not send rapid-fire multiple messages — compose one clear message
- Encourage clients to save your number during onboarding calls
- If a client is not responding to texts at all, switch to phone calls immediately — do not keep texting into the void

Script — When Client Thinks You Are a Scam

```
"Hi [Name], I completely understand your concern — I want to assure you that I
am [Your Name] from Crowned Credit. You signed up with us on [date] for credit
repair services. I have been sending you updates via text but it seems they may
not have come through on your end. I can verify your account details right now
if you would like. You can also check our website at getcrownedcredit.com or
call our main line at 336-310-0090 to confirm. We are absolutely legitimate and
here to help you."
```

Page created: April 17, 2026 — triggered by team report in #improvement-requests (Reggie: clients not receiving GHL texts, thinking team is a scam)

Client-Side Fixes (When Sends Show Delivered But Client Says Nothing Received)

Added 2026-04-20 from #improvement-requests thread (Reggie + Orlie). Use these when GHL shows the message as sent/delivered but the client swears they never got it and accuses us of being a scam.

1. **Have the client manually search for our number** in their Messages app. On iPhone and Android, carrier spam filtering will often silently drop our texts into a hidden/filtered folder instead of the main inbox. The message is on their phone — they just cant see it in the normal thread.
2. **Ask them to save our number as a contact** (e.g., "Crowned Credit – 336-310-0090" and the closers direct line). Once saved, their carrier is far less likely to flag future messages as spam, and the messages will land in the main inbox instead of the filtered folder.
3. **If they still cant find anything after steps 1–2**, it is almost certainly their carrier blocking at the network level. Switch to calling from the main company line (336-310-0090) first, introduce yourself on the phone, then ask them to text `Start` to that number to re-enable delivery on their side.

Common symptoms this fixes: "Your texts keep going to my spam," "I thought you were a scam," "I never got any message from you," and "Your number shows as spam even though I have it saved" (this last one almost always means the number was saved *after* the carrier had already flagged it — have them delete and re-add).

AI Chatbot Troubleshooting — Facebook & Instagram Bot Issues

Our AI chatbot handles initial responses on Facebook Messenger and Instagram DMs. When it sends wrong, incomplete, or off-topic responses, follow this guide to report and handle it.

Common Issues

- **Wrong response** — Bot sends an answer that does not match the question asked
- **Incomplete response** — Bot starts answering correctly but cuts off or misses key info
- **Off-topic response** — Bot responds to something the lead did not ask about
- **No response** — Bot does not reply at all (check if it is running)
- **Repeated responses** — Bot sends the same message multiple times

What to Do (Team Members)

1. **Screenshot the conversation** — capture the lead question and the bot response
2. **Take over the conversation manually** — respond to the lead correctly so they are not left hanging
3. **Report in #improvement-requests** with:
   - Screenshot of the wrong bot response
   - What the lead actually asked
   - What the correct response should have been
   - Platform (Facebook Messenger or Instagram)
4. **Tag @Sam or @Peter** — bot prompt/logic adjustments require admin access

> ⚠ **Important:** Do NOT ignore a bad bot response. If a lead gets a wrong answer and nobody corrects it, we lose that lead. Always jump in and respond correctly, then report the issue.

For Admins

- Bot prompt and logic are managed in GHL → Conversations AI or the external bot configuration
- When a wrong response is reported, review the conversation log to understand what triggered the bad reply
- Update the bot prompt or FAQ knowledge base to handle the scenario correctly
- After changes, test with sample messages before re-enabling

Escalation Script — When a Lead Got a Bad Bot Response

```
"Hey [Name]! Sorry about that earlier message — our system hiccuped. I am [Your
Name] from Crowned Credit and I am here to help you personally. [Answer their
actual question]. Let me know if you have any other questions!"
```

Page created: April 17, 2026 — triggered by repeated reports in #improvement-requests (HeyBlu: AI bot wrong/incomplete responses on Facebook, Apr 6 & Apr 15)

Known Recurring Incidents

- **Apr 27, 2026 — Repeated replies:** HeyBlu reported the bot was sending the same reply multiple times to the same lead. Cause: prompt loop when the lead message contained ambiguous intent. Fix: prompt-side dedupe rule added — bot now suppresses identical sends within a 60-second window per contact.
- **Apr 25, 2026 — Bot sent the literal word "test":** A test prompt accidentally went to a live lead during a prompt-tuning session. Process fix: prompt edits now go through the staging bot in #ai-bots first, never directly on the live config.
- **Apr 5, 2026 — Repetitive opener phrasing:** Bot used the same "Late night goals mode" opener twice in a single batch (contacts 967/968/973/974). Prompt strengthened with tone-matching rules.
- **Apr 5, 2026 — Existing client misclassification:** Frederick Cooper (already an active client) received a sales-angle opener before the bot self-corrected. Prompt updated: existing clients must be identified in message 1, zero sales pitch.

If the same incident type recurs after a fix, escalate immediately to Peter — the bot prompt may have regressed.

Aircall Troubleshooting — Caller ID Not Displaying Client Names

Aircall Troubleshooting — Caller ID Not Displaying Client Names

Problem

Incoming calls show only the phone number instead of the client's name. This makes it hard to prepare for the call or look up the client's account before answering.

Why This Happens

1. **GHL-Aircall sync issue** — The Aircall-GHL integration syncs contact names from your GHL contact list. If the sync is broken or delayed, Aircall falls back to showing just the number.
2. **New or unsynced contact** — If the client was recently added to GHL or their phone number was updated, it may not have synced to Aircall yet.
3. **Aircall cache** — Sometimes Aircall's local cache on your browser or desktop app is stale.
4. **Multiple numbers** — If the client is calling from a number that doesn't match what's in GHL, no name will display.

How to Fix It

Step 1: Refresh Aircall

- Log out of Aircall and log back in
- If using the desktop app, close it completely and reopen
- If using the browser, clear your Aircall tab cache (hard refresh: Ctrl+Shift+R / Cmd+Shift+R)

Step 2: Check the Contact in GHL

- Search for the client's phone number in GHL
- Verify the number matches exactly (including country code)
- If the contact exists but the number is different, update it in GHL

Step 3: Force a Re-Sync

- Go to **GHL → Settings → Integrations → Aircall**
- Check that the integration is active (green/connected)
- If it shows disconnected, reconnect it
- After reconnecting, it may take 15-30 minutes for contacts to sync

Step 4: Escalate if Still Broken

- If the issue persists after the above steps, report it in **#improvement-requests** and tag Sam
- Include: your Aircall username, a screenshot of the call showing just the number, and the client's name/number from GHL

Quick Workaround

While waiting for a fix, you can quickly look up the incoming number in GHL by:

1. Copying the phone number from the Aircall notification
2. Pasting it into the GHL search bar
3. This gives you the client's name and account info before you answer

When to Escalate

- If **multiple team members** are experiencing this at the same time → likely a system-wide sync issue, escalate immediately
- If it's just one person → likely a local cache or login issue, try the fix steps first

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Page created by Peter (Wiki Builder) — April 17, 2026 Source: Team Discord #improvement-requests (Tommy, April 8, 2026)

GHL Timezone & Daylight Saving Time (DST) Troubleshooting

GHL Timezone & Daylight Saving Time (DST) Troubleshooting

Problem

Automated messages, appointment confirmations, or reminders show the wrong time — usually off by 1 hour during DST transitions, or showing Eastern time when the client is in a different timezone.

Common Scenarios

1. Automated Appointment Confirmations Show Wrong Time

Example: Client in Mountain Time (MDT) books for 5:00 PM their time (7:00 PM EDT). The automated confirmation says 5:00 PM EDT instead of 5:00 PM MDT or 7:00 PM EDT.

Why: GHL automations may default to the sub-account's timezone (Eastern) instead of the client's local timezone when sending confirmations.

2. Reminders Sent at Wrong Hours

Example: A "morning reminder" sends at 6:00 AM Eastern, which is 3:00 AM Pacific — waking up West Coast clients.

Why: Workflow time-based triggers use the account timezone unless specifically configured otherwise.

3. DST Transition Confusion

Example: After clocks spring forward or fall back, appointment times are off by 1 hour for a few days.

Why: Some cached calendar data or third-party integrations may not immediately adjust for DST.

How to Handle It

For Appointment Booking (Setters & Closers)

1. **ALWAYS confirm the client's timezone** before booking — ask: "What time zone are you in?"
2. **State the time in BOTH timezones** when confirming: "That's 5:00 PM your time, which is 7:00 PM Eastern"
3. **Add a note in GHL** on the contact record with their timezone (e.g., "Client TZ: Pacific")
4. If using the AI bot or Peter for booking: make sure the timezone is explicitly stated in the booking request

For Automation/Workflow Issues

- Report to **#improvement-requests** and tag Sam with:
  - Client name
  - What time was shown in the automated message
  - What time it should have been
  - Client's timezone
- Sam can adjust the workflow to use the contact's timezone field instead of the account default

GHL Timezone Settings (Admin Reference)

- **Account timezone:** Settings → Business Info → Timezone (set to America/New_York)
- **Contact timezone:** Each contact can have a timezone field — automations can reference this with custom values
- **Calendar timezone:** Settings → Calendars → each calendar has its own timezone setting
- **Workflow time triggers:** Can be set to "Contact's timezone" instead of "Account timezone" in the trigger settings

Best Practice

- When in doubt, **state times in Eastern AND the client's timezone**
- During DST transitions (March & November), be extra careful with appointments booked the week before the change
- If a client complains about a wrong-time message, apologize and rebook — don't argue about timezones

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Page created by Peter (Wiki Builder) — April 17, 2026 Source: Team Discord #improvement-requests (Heinz, April 6 & March 31, 2026)

AI Booking Agent — Appointment Reassignment & Missing Closer Records

Our AI booking agent automatically assigns inbound leads to closers on the Consultation calendar (round-robin). Sometimes the appointment record in GHL shows a different closer than the one whose name appears on the automated confirmation messages. This page explains what is happening, how to verify it, and what to do.

The Symptom

- Automated GHL confirmation / reminder messages were sent out under **Closer A's** name (e.g. "Hi, this is Abby from Crowned Credit...")
- But the actual appointment in GHL → Calendar → Appointments is now assigned to **Closer B** (e.g. Ehman)
- There is **no visible record of Closer A** on the contact card — no appointment history, no reassignment log, nothing in the audit trail
- GHL does not allow appointments to be deleted, so a missing appointment feels wrong

> **□□ Real Example (April 23, 2026):** Client *Telisha Sostre* received automated booking messages from *Abby Rafael* on Apr 22. By Apr 23 the only appointment on her contact was with *Ehman*, with no record of Abby. Reported by Paul Adrian (@lxr6831) in `#improvement-requests`.

Why It Happens (Known Causes)

1. **AI agent re-routed the lead.** If the lead messaged back after the first booking, or missed the original slot, the AI can re-book them into a new slot with a different closer (round-robin rotation). The old appointment can be auto-removed by the rebooking flow.
2. **Active client rule.** If the contact is already an active client, a new inbound appointment is **automatically routed to the CSR team**, not a closer. The original closer's confirmation messages already went out before the system recognized them as active. (Sam Oludayo, Ops, Apr 23 2026.)

3. **Manual calendar move by Ops/Admin.** Sam or an admin moves the appointment to the correct owner when a misassignment is spotted. This can happen silently without a visible audit entry.
4. **GHL bug / limitation.** Appointment transfers between users do not always leave a trail on the contact timeline. Still under investigation.

How to Verify What Happened

1. Open the contact in GHL → **Conversations** tab. Look at the *sender name* on the automated confirmation/reminder messages — that is who the AI originally booked.
2. Check **Contact → Appointments**. Note the current assignee and the appointment time.
3. Check the contact's **Tags** for `active-client`, `ort-done`, or CSR pipeline tags. If present, the active-client rule (above) likely re-routed them.
4. Check **Activity Log** on the contact for any "Appointment updated" / "Appointment deleted" entries (not always present).

What to Do (Team Members)

1. **Do not re-book the lead again.** Multiple appointments on the same contact confuses closers and the client.
2. **Respect the current assignee.** Whichever closer is on the appointment right now owns the call, even if a different name appears in the old automated messages.
3. **Flag it in `#improvement-requests`** if it looks wrong, with:
   - Client name
   - Who the automated messages came from
   - Who the appointment is assigned to now
   - Tag @Sam (Ops)
4. **Do not delete the appointment.** Ops will adjust if needed.

For Admins / Ops

- Confirm whether the contact is an active client — that explains most reassignments to CSR.
- If the appointment was moved manually, leave a **contact note** explaining who moved it, when, and why, so the next person does not think it is a bug.
- If this pattern repeats with *non-active* leads, escalate to Peter — the AI booking flow may need prompt/logic adjustment in GHL.
- Ongoing: investigate why GHL does not log appointment reassignments visibly on the contact timeline.

Related Pages

- AI Chatbot Troubleshooting — Facebook & Instagram Bot Issues
- GHL Timezone & DST Troubleshooting
- GoHighLevel Complete Guide
- ORT-Done Tagging Protocol

Created 2026-04-23 from `#improvement-requests` incident (Telisha Sostre / Abby Rafael → Ehman). Source: Paul Adrian + Sam Oludayo exchange.

Calendar Slot Duration — Why Appointments Block 30 Minutes

Closers occasionally notice that a single inbound appointment "eats" a 30-minute block on the Consultation calendar — even when the actual call is much shorter, or the lead does not show up. This page explains why that happens and what to do.

□□ **Trigger:** Paul Adrian (@lxr6831) asked in #improvement-requests on Apr 25, 2026: "bro can you check why some appointments are eating 30 minutes?" Documenting here so closers and admins have a single answer.

How the Consultation Calendar Is Configured

- **Default appointment slot:** 30 minutes per booking. This is set on the calendar itself, not per-lead.
- **Buffer time:** The calendar may add a small buffer between bookings to prevent back-to-back overruns. That buffer counts toward the closer's blocked time, even though it does not appear on the appointment card.
- **Round-robin assignment:** When the AI books a lead, GHL picks the next available closer with an open 30-minute slot. If a closer has a 30-minute slot blocked, they are skipped on this lead.

Why an Appointment Can "Eat" 30 Minutes

1. **Slot length is fixed at 30 min.** Even a 5-minute call still locks the 30-min block on the calendar. The slot does not auto-shrink to actual call length.
2. **No-shows still hold the slot.** If the lead does not pick up, the booked block stays on the calendar until manually rescheduled or marked no-show. The closer cannot take a new lead in that time window.
3. **Reassigned appointments leave the original block held.** When the AI re-routes a lead to another closer (see *AI Booking Agent — Appointment Reassignment*), the new closer gets a fresh 30-min block. If the old block was not cleared cleanly, both closers can show the time as blocked.

4. **Active-client re-route.** If the lead is already an active client, the appointment moves to CSR. The original closer's 30 min may stay reserved on their calendar view until the move syncs.
5. **Double-booking from manual entry.** If a closer or admin manually adds an appointment on top of an AI-booked slot, the calendar shows back-to-back 30-min blocks even if it is the same client.

What to Do (Closers)

- **Do not panic about a "long" booking.** A 30-min slot is normal. The call itself is rarely 30 min — most consults run 10–20 min.
- **If the lead no-shows or reschedules:** mark the appointment status (No Show / Rescheduled) so the slot frees up for the next round-robin lead.
- **If you see two 30-min blocks for the same client back-to-back:** flag in #improvement-requests with client name + closer names + appointment times. Tag @Sam (Ops). Do not delete either; ops will reconcile.
- **If you think your calendar is showing time blocked that is not actually a real appointment:** screenshot the calendar view + open the appointment card so the actual booking record is visible. Post in #improvement-requests with @Sam and @Peter.

What to Do (Admins / Ops)

- Verify on the calendar settings: slot length should be 30 min, buffer should be set deliberately (not accidentally inflated).
- Review the contact's appointment history: every "lost" 30 min should map to a booking record. If you see blocked time with no record, that is a sync bug — log it and tag Peter.
- If the same closer keeps reporting "eaten" time, audit their last 20 appointments: count no-shows still marked as Confirmed (not closed out), reassignments, and double-bookings.
- If no-shows are the main driver, that is a process gap — closers must close out no-shows in real time so round-robin can re-fill the slot.

Related Pages

- AI Booking Agent — Appointment Reassignment & Missing Closer Records
- GHL Timezone & DST Troubleshooting
- Speed-to-Call Protocol
- GoHighLevel Complete Guide

Page created 2026-04-29 from #improvement-requests question (Paul Adrian, Apr 25 2026). Owner: Sam (Ops) for calendar config, Peter for booking-flow logic.