

ORT-Done Tagging Protocol — Marking Onboarding Complete in GHL

“ **Why this page exists:** Clients were not being tagged properly after onboarding completion, causing the system to show incorrect pipeline status. This is a mandatory step.

What Is the "ort-done" Tag?

The `ort-done` tag in GoHighLevel indicates that a client's onboarding process has been fully completed. This tag:

- Removes the client from onboarding automation sequences
- Updates their pipeline status correctly
- Ensures they don't receive duplicate onboarding messages
- Allows accurate reporting on onboarding completion rates

When to Add the Tag

Add the `ort-done` tag **immediately** after completing all onboarding steps for a client:

1. Welcome call completed
2. Client information verified
3. Credit reports pulled and reviewed
4. Dispute strategy explained to client
5. First round of disputes prepared or sent
6. Client understands next steps and timeline

Do NOT wait — tag the client as soon as step 6 is done.

How to Add the Tag

1. Open the client's contact in GoHighLevel
2. Go to the **Tags** section
3. Type `ort-done` and select it
4. Save the contact

“ ⚠ **The system will NOT auto-update.** You must manually add this tag.

Who Is Responsible?

The **onboarding specialist** who completes the final onboarding step is responsible for adding the `ort-done` tag. This is not optional.

Team leads should verify tagging compliance weekly.

What Happens If You Don't Tag?

- Client stays in onboarding pipeline incorrectly
- They may receive duplicate onboarding messages
- Pipeline reports show inaccurate numbers
- Other team members waste time re-checking completed clients

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