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

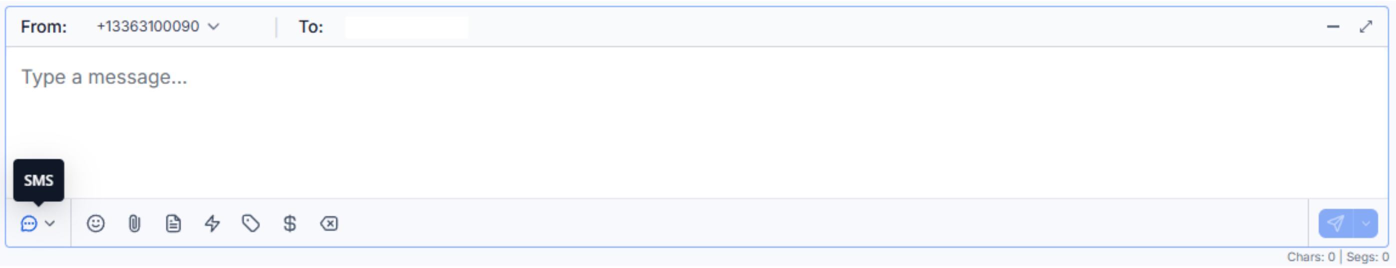
1. Go to **Payments** in the left sidebar
2. Click **Invoices**
3. Search the client's email in the search bar
4. View invoice status: **Paid** / **Pending** / **Failed** / **Void**
5. Click any invoice to see full details: amount, date, payment details (last 4 digits and type of card used), and transaction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

Revision #12
Created 2026-03-23 18:17:15 UTC by Admin
Updated 2026-04-28 21:05:36 UTC by Admin