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Cool software that heats up your business

COOL SOFTWARE. HOT RESULTS.

THE COMPLETE PRACTICAL GUIDE

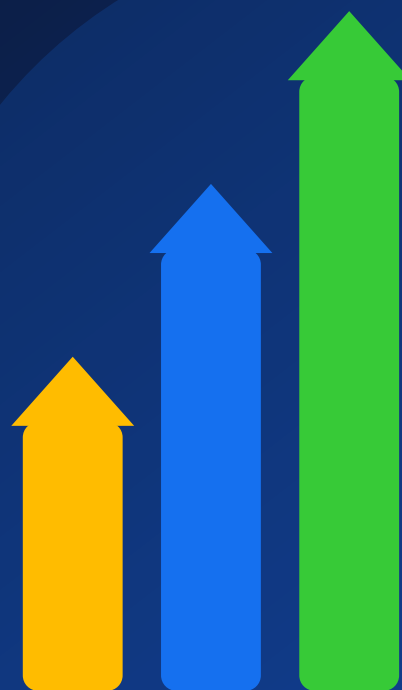
Getting Started with GoHighLevel

Learn how it all fits together, one building block
at a time, and get set up the right way

24/7 live Zoom support. You never get stuck.

Start free 14-day trial >

Plans from \$97/month. Unlimited contacts and users.
CRM, automation, funnels, reviews, and AI agents in one.



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NOTE: How this guide works

Each chapter introduces one idea and builds on the one before it, so read them in order. Chapters 1 to 3 set the stage. Chapters 4 to 12 teach the building blocks, starting with contacts, because everything else in GoHighLevel is built on them. Chapter 13 follows one customer through the whole system, and Chapter 14 gives you a step-by-step plan for setting up your own account. **Affiliate disclosure:** this guide contains affiliate links; FrostyStack may earn a commission at no extra cost to you.

CHAPTER 1

The Big Picture: What GoHighLevel Actually Does

Before touching a single button, it helps to understand what GoHighLevel is for and how its pieces relate. Once the big picture clicks, the menus start to make sense.

Every business that sells to customers does the same few things over and over. It attracts people who might buy. It collects their details. It talks to them by phone, text, and email. It books them for appointments or calls. It tracks which ones are close to buying. It closes the sale, asks happy customers for reviews, and stays in touch so they come back. Most small businesses do these things with a patchwork of tools: a contact list in one place, texts on the owner's phone, a booking app, a website builder, an email newsletter service, and a lot of sticky notes. Nothing talks to anything else, so follow-ups fall through the cracks.

GoHighLevel (also called HighLevel, or GHL for short) puts all of those jobs into one system. That is useful, but the real point is that every part of GoHighLevel shares the **same list of people**. When a text arrives, it is attached to the person who sent it. When someone books an appointment, it lands on that same person's record. When they pay, leave a review, or open an email, that shows up there too. Because everything lives in one place, GoHighLevel can also **act on its own**: it can notice that someone just filled out a form and text them back within seconds, or notice that someone missed an appointment and send them a link to reschedule.

So the simplest way to think about GoHighLevel is this: **it is a database of people, plus a set of tools that talk to those people, plus automations that watch what happens and respond for you.** The diagram below shows the idea. Contacts sit in the middle, and every other part of the platform connects to them.



Everything in GoHighLevel connects to your contacts. Learn contacts first, and the rest of the platform makes sense.

Why there is a learning curve

GoHighLevel can do a great deal, and that breadth is exactly what makes it feel overwhelming at first. There are many menus, and often several ways to accomplish the same thing. New users frequently open the app, see dozens of options, and do not know where to start. The fix is to learn the concepts in the right order, which is what this guide does, and to lean on HighLevel's live support whenever you get stuck, which is what the next chapter is about.

Try GoHighLevel free for 14 days

Every plan includes unlimited contacts, unlimited users, and 24/7 live support, including Zoom calls.

[Start free 14-day trial >](#)

CHAPTER 2

You Will Never Be Stuck: 24/7 Live Zoom Support

This is the most important practical fact about GoHighLevel, and the reason the learning curve is manageable.

Most software companies give you a help center and a ticket form, and then you wait a day or two for an emailed answer. HighLevel does something unusual: at any hour of the day or night, seven days a week, you can **join a live Zoom video call with a HighLevel support agent** straight from inside the app. You share your screen, explain what you are trying to do, and a real person walks you through it. They can show you how to build an automation, connect your website domain, fix a form that is not working, set up a calendar, or untangle a problem you created. In practice, they can show you how to do almost anything in the platform.

This changes how you should approach learning GoHighLevel. You do not need to master everything before you start, and you do not need to spend an evening searching forums for an answer. When you hit a wall, you open a support call, and a few minutes later you are moving again. Many experienced GoHighLevel users say this support is the single best thing about the platform.

How to reach it

Inside the app on a desktop computer, click the **blue question-mark icon** in the top right corner. That menu offers a live Zoom support call, live chat, and support tickets. HighLevel also offers phone support at +1 (888) 732-4197, mainly for login, billing, and sales questions. HighLevel reports typical waits of a few minutes for chat and Zoom. All of this is included in every plan; an optional paid Premium Support add-on shortens waits further.

How to get the most out of a support call

Before you join, open the screen where you are stuck. When the agent arrives, describe the result you want rather than just the symptom. "When someone books a consultation, I want them to get a confirmation text and show up as Booked" gets a far better answer than "my calendar isn't working." Ask the agent to show you how to do it rather than doing it for you, because you will learn faster and need them less next time. Take notes, and finish by asking whether there is a better way to do what you are doing. Agents often know about templates and shortcuts you would never find on your own.

NOTE: If an agency set up your account

Some people use GoHighLevel through a marketing agency, often under the agency's own brand name. In that case your agency usually handles your support, so ask them how it works. If you own the account yourself, you have direct access to HighLevel's 24/7 support.

CHAPTER 3

How Your Account Is Organized, and Which Plan You Need

GoHighLevel was designed for marketing agencies that manage many client businesses. That history explains one structural idea you need to understand on day one.

A GoHighLevel subscription has two levels. The top level is the **agency account**. It handles billing, branding, and the list of businesses you manage. Underneath it are **sub-accounts** (sometimes called locations). A sub-account is a complete, separate workspace for one business, with its own contacts, phone numbers, calendars, websites, and automations. Sub-accounts are walled off from each other, so one business never sees another's customers. Almost all of the real work described in this guide happens inside a sub-account. You switch between sub-accounts using the account switcher at the top left of the screen.

If you run a single business, this structure is simple: you have one agency account, and you create one sub-account for your business. If you are an agency, each client gets their own sub-account, and you manage them all from the agency level.

The plans

	Starter	Unlimited	Agency Pro
Price	\$97/month (\$970/year)	\$297/month (\$2,970/year)	\$497/month (\$4,970/year)
Sub-accounts	Up to 3	Unlimited	Unlimited
Best for	One business	Agencies with many clients	Agencies reselling GHL as their own software

All three plans include every core feature in this guide, unlimited contacts and users, and 24/7 support. Prices as of October 2026; see [GoHighLevel's plans](#) for current details.

For a **single business**, Starter is the right choice. You will use one sub-account for your business, and the spare sub-accounts are handy for a second brand or as a private test area where you can practice building automations without any risk of texting real customers.

Agencies usually choose Unlimited, which removes the sub-account limit and lets you pass texting and calling costs through to clients. Agency Pro adds SaaS mode, which lets you sell GoHighLevel to clients as your own branded software. Agencies also rely on **snapshots**, which copy a complete sub-account setup into a new client in minutes, so you build your best system once and reuse it.

Whichever plan you choose, budget a little extra for usage. Texts, phone calls, phone numbers, and email sending are charged per use, usually fractions of a cent to a few cents each, and AI features are either pay-per-use or an optional monthly add-on per sub-account.

CHAPTER 4

Building Block 1: Contacts, the Heart of the System

If you understand contacts, you understand GoHighLevel. Everything else in the platform either creates contacts, talks to contacts, or reacts to something a contact did.

A **contact** is one person: a lead who filled out a form, a customer who bought last year, a caller who never booked. GoHighLevel keeps one record for each person, and that record is far more than a name and phone number. Open any contact and you see their details on one side and, in the middle, a **timeline** of everything that has happened with them: every text and email sent and received, every call, every form they filled out, every appointment, every payment, and every note your team left. This is what people mean when they say GoHighLevel is a **CRM**, short for customer relationship management. It is your business's memory of every relationship.

This single, shared record is what makes the rest of GoHighLevel work. Because the texts, calendar, and payments all attach to the same record, anyone on your team can open a contact and instantly see the whole story. And because the system knows the whole story, automations can make decisions based on it, such as "send this only to people who have not booked yet."

What is stored on a contact

Every contact has standard **fields** such as first name, last name, email, phone, and address. Fields are simply named boxes that hold one piece of information. You can also create **custom fields** for anything your business cares about: the service a lead is interested in, their budget, their vehicle model, the date their contract renews. Custom fields are useful because you can later sort and filter by them, and you can insert them into messages, so a text can say "Hi Maria, about your kitchen remodel..." automatically.

Contacts also carry **notes**, which are written comments from your team, and **tasks**, which are to-dos assigned to a team member with a due date, such as "Call Maria back Thursday." Notes and tasks keep everyone coordinated without a separate project tool.

How contacts get into GoHighLevel

Contacts arrive in several ways, and you will rarely type them in by hand. You can import your existing customer list from a spreadsheet. A new contact is created automatically when someone fills out one of your forms, books on your calendar, calls or texts your business number, messages you on Facebook or Instagram, or chats on your website. GoHighLevel matches incoming activity to an existing contact by phone number or email, so a returning customer is recognized instead of duplicated.

NOTE: Try it now

Go to **Contacts** and add yourself as a contact with your real phone and email. Open your record and look around: the details panel, the timeline, notes, and tasks. You will use this "test contact" throughout the guide to safely try everything on yourself first.

STUCK? JUMP ON A LIVE ZOOM WITH SUPPORT

If the contact screen feels confusing, ask support: "Can you give me a quick tour of a contact record and explain what each part is for?"

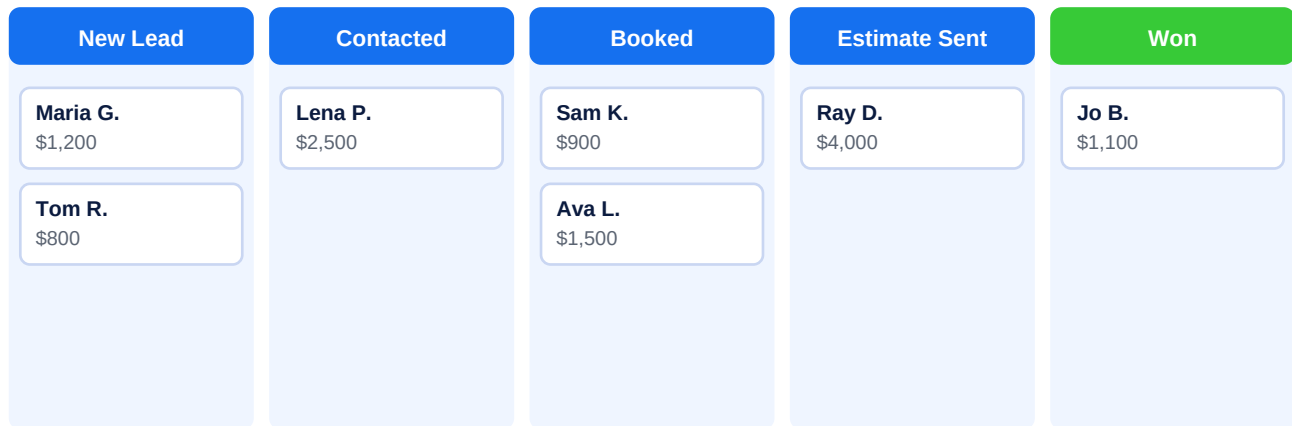
CHAPTER 5

Building Block 2: Opportunities and Pipelines

A contact is a person. An opportunity is a potential sale. Keeping those two ideas separate is one of the most useful habits in GoHighLevel.

Imagine a homeowner named Maria. She is one person, so she is one contact. But over the years she might ask you for a kitchen remodel quote, then later a bathroom quote, then a deck. Each of those is a separate potential sale with its own value and its own outcome. In GoHighLevel, each potential sale is an **opportunity** (some people call it a deal). An opportunity is always linked to a contact, and it records what the deal is worth, who on your team owns it, and how far along it is.

Opportunities are organized into **pipelines**. A pipeline is a picture of your sales process, laid out as a row of columns called **stages**. Each stage is a step a deal passes through on its way to being won or lost, and each opportunity appears as a card in the column for its current stage. Moving a card from one column to the next records that the deal has progressed.



A pipeline shows every potential sale as a card, organized by stage, with its value. You can see at a glance where every deal stands.

Pipelines answer the questions every business owner asks: How many new leads came in this week? How many have we actually talked to? How many are booked? How much money is sitting in quotes we have sent but not closed? Because each card carries a value, GoHighLevel adds up the totals per stage, which gives you a simple sales forecast.

Your stages should mirror how you actually sell. A contractor might use New Lead, Contacted, Appointment Booked, Estimate Sent, and Won. A coach might use New Lead, Discovery Call Booked, Proposal Sent, and Enrolled. Keep it to a handful of stages that describe real steps; too many stages and nobody keeps the board up to date. Every opportunity eventually ends with a status of won or lost, so you can measure how many deals you close.

You can move cards by hand, but later you will see that automations can move them for you. When someone books an appointment, their card can jump to Booked on its own. That is how a pipeline stays accurate without anyone remembering to update it.

NOTE: Try it now

Go to **Opportunities**, create a pipeline with four or five stages that match your sales process, and add an opportunity for your test contact. Drag the card from stage to stage and watch the totals change.

STUCK? JUMP ON A LIVE ZOOM WITH SUPPORT

Ask: "Here's how I sell. Can you help me design pipeline stages that fit, and show me how to manage the board?"

CHAPTER 6

Building Block 3: Tags, the Labels That Power Everything

Now that you know what a contact is, tags will make sense. They are one of the simplest features in GoHighLevel and one of the most important.

A **tag** is a short label you attach to a contact, like a sticky note on a file folder. A contact can have many tags at once, and you can add or remove them at any time. Examples: *facebook-lead*, *interested-botox*, *customer*, *vip*, *attended-webinar*, *do-not-text*. Tags do not store detailed information; they simply mark a contact as belonging to some group or having some status.

Why tags are so useful

Tags do three jobs. First, they let you **find groups of people**. Want to send a holiday offer only to past customers? Filter your contacts for the *customer* tag. GoHighLevel lets you save filters like this as **Smart Lists**, so "all customers tagged vip" is always one click away and updates itself as tags change.

Second, tags **remember facts** about a contact that are not obvious from their details: where they came from, what they are interested in, or what they have done. Someone who downloaded your price guide gets *downloaded-price-guide*, and six months later you can still see it.

Third, and most powerful, tags act as **switches for automations**. As you will see in Chapter 9, an automation can start the moment a tag is added to a contact, and automations can add and remove tags as people move through your process. For example, when a lead books an appointment, an automation can remove the *new-lead* tag and add the *booked* tag. Any other automation that is waiting on *booked* then kicks in, and the follow-up sequence aimed at unbooked leads stops, because the person no longer has the *new-lead* tag. In this way, tags become the language your automations use to coordinate with each other.

Tags versus custom fields

New users often wonder when to use a tag and when to use a custom field. A good rule: use a **tag** for a yes/no label you want to filter by or trigger automations from, and use a **custom field** for a value you want to store and display. "Interested in teeth whitening" works well as a tag. "Preferred appointment day: Tuesday" or "Budget: \$5,000" belong in custom fields.

Keep tags tidy

Because tags are so easy to create, accounts can end up with hundreds of inconsistent ones ("FB lead," "facebook," "fb-lead") that make filtering unreliable. Avoid this with a simple naming habit: lowercase words joined by hyphens, and a few consistent prefixes, such as *source-* for where someone came from, *interest-* for what they want, and *status-* for where they are. You do not need a perfect system on day one; just be consistent.

NOTE: Try it now

Open your test contact and add two tags, such as *source-test* and *interest-consultation*. Then go back to the contact list, filter by one of those tags, and save the filter as a Smart List.

CHAPTER 7

Building Block 4: Conversations, One Inbox for Every Channel

Customers reach you in many ways. GoHighLevel gathers all of them into one inbox and attaches every message to the right contact.

The **Conversations** area is a shared inbox. Text messages, emails, phone calls and voicemails, website chat, Facebook Messenger, Instagram direct messages, and WhatsApp all arrive in the same place. Each conversation is tied to a contact, so when you reply you see the person's full history alongside the message. Your whole team can work from the same inbox, assign conversations to each other, and see who has already replied, and the LeadConnector mobile app lets you answer from your phone.

To make this work, you connect your channels once. You get a **business phone number** inside GoHighLevel, which is used for calling and texting. You set up **email sending**, ideally on a dedicated sending address for your domain, so your messages reach inboxes rather than spam folders. You connect your **Facebook page and Instagram account**, and you add a **chat widget** to your website.

WATCH OUT: Texting in the US requires registration

Before you text customers in the United States, your business must be registered with the phone carriers, a process called **A2P 10DLC registration**. Unregistered texts are filtered or blocked. Approval can take several days and details must match your business records exactly, so start it in your first week. This is a perfect thing to do on a support call; the agents handle it every day.

One small feature deserves special mention because it pays for itself quickly: **Missed Call Text-Back**. When someone calls and you cannot answer, GoHighLevel instantly texts them ("Sorry we missed your call. How can we help?"). Most callers who reach voicemail simply call the next business on the list; a quick text keeps them with you.

STUCK? JUMP ON A LIVE ZOOM WITH SUPPORT

Ask: "Can you help me set up my business phone number, start A2P registration, connect my email and Facebook, and turn on Missed Call Text-Back?"

CHAPTER 8

Building Block 5: Calendars and Appointments

For most service businesses, the goal of every conversation is a booked appointment. GoHighLevel's calendars let customers book themselves.

A GoHighLevel **calendar** is a booking page with your availability. You decide how long appointments last, which hours are open, how much notice you need, and what questions to ask at booking. Customers pick a time from a link you send them or a widget on your website, and the appointment appears both in GoHighLevel and on the booking person's contact record. If you connect your Google or Outlook calendar, GoHighLevel checks it so you are never double-booked, and your appointments show up there too.

Calendars come in a few styles. A personal calendar books one person. A **round-robin** calendar spreads bookings across a team, so leads go to whoever is available. Other types handle group classes, meetings that need several people, and businesses that book specific services and staff, such as salons and clinics.

Booking is only half the job. People forget appointments, so GoHighLevel sends **confirmations and reminders** by text and email, and each message can include a link to reschedule or cancel. Reminders are usually built as a small automation, which is a good first taste of what the next chapter covers.

NOTE: Try it now

Create a calendar for your most common appointment, connect your Google or Outlook calendar, and book a test appointment for yourself using the booking link. Then look at your test contact: the appointment is on their timeline.

CHAPTER 9

Building Block 6: Automations (Workflows)

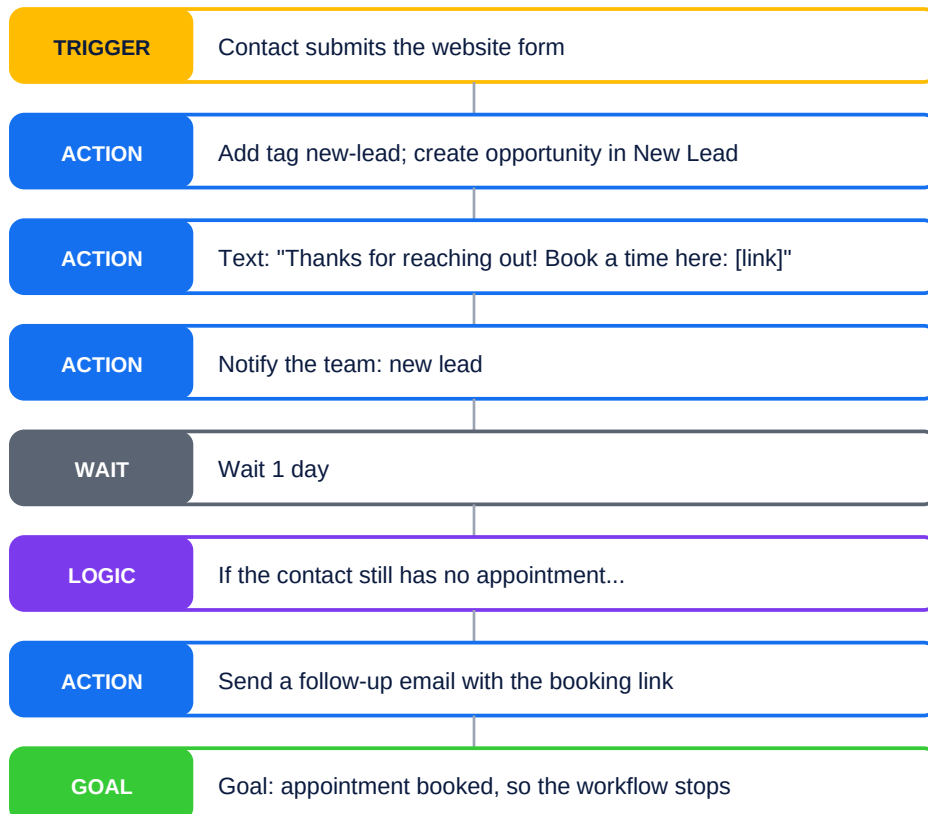
This is where GoHighLevel starts doing work for you. Everything you have learned so far, contacts, opportunities, tags, conversations, and calendars, comes together here.

An **automation**, which GoHighLevel calls a **workflow**, is a set of instructions that says: **when this happens, do these things**. The "when this happens" part is the **trigger**. It is an event in the system, such as a form being submitted, an appointment being booked, a tag being added, a customer replying, a payment arriving, or an opportunity moving to a new stage. The "do these things" part is a list of **actions**: send a text, send an email, wait a day, add or remove a tag, create or move an opportunity, assign the lead to a team member, create a task, or notify someone.

Think of a workflow as a recipe a tireless assistant follows for every single contact, at any hour, without ever forgetting. A person might reply to a new lead within an hour on a good day; a workflow replies in seconds, every time, including at midnight on a Sunday.

A first workflow, step by step

Here is a classic workflow that nearly every business should have. It responds to new leads instantly and keeps following up until they book. Notice how it uses each building block from the earlier chapters.



A speed-to-lead workflow. The trigger starts it; actions, waits, and a condition do the work; the goal ends it when the lead books.

Walk through what happens. Maria fills out the form on your website. The form submission is the **trigger**, so the workflow starts for her. It immediately adds the tag *new-lead* to her contact, which records that she is a new, unbooked lead, and creates an opportunity for her in the New Lead stage of your pipeline. Within seconds she receives a friendly text with your booking link, and your team gets a notification. Then the workflow **waits** a day. If she has booked by then, the **goal** is reached and the workflow stops, so she never gets a pointless follow-up. If she has not, a **condition** (an if/else check) sends her down the follow-up path with an email reminding her to book.

How tags and workflows work together

Now you can see why tags matter so much. Suppose Maria books. A second, separate workflow is triggered by the appointment being booked. It **removes** the *new-lead* tag, **adds** a *booked* tag, moves her opportunity to the Booked stage, and starts her appointment reminders. By flipping these tags, the workflows coordinate with each other: anything aimed at new, unbooked leads no longer applies to her, and anything aimed at booked clients now does. Later, when her appointment is marked complete, another workflow might add *customer*, move her opportunity to Won, and ask for a review.

This pattern, where workflows set and clear tags to mark where each person is, is the backbone of a well-run GoHighLevel account. If you ever wonder why a contact received a certain message, look at their tags and the workflows those tags trigger.

Building workflows safely

Workflows are powerful precisely because they act on many people at once, so a mistake can reach many people at once too. Build in a test sub-account or test on your own contact first, read every message before publishing, and start simple. One reliable workflow that responds to new leads is worth more than ten half-finished ones. GoHighLevel also offers ready-made workflow recipes and a Workflow AI feature that drafts a workflow from a plain English description; both are good starting points as long as you review each step.

STUCK? JUMP ON A LIVE ZOOM WITH SUPPORT

Workflows are the most common support topic, and agents are excellent at them. Ask: "Here's what I want to happen when a new lead comes in. Can you build it with me and explain each step?"

CHAPTER 10

Building Block 7: Getting People In with Forms, Funnels, and Websites

Contacts have to come from somewhere. GoHighLevel includes everything you need to capture new leads online.

A **form** is a set of questions on a web page: name, phone, email, and perhaps a question or two that helps you qualify the lead, such as which service they want. When someone submits a form, GoHighLevel creates or updates their contact, saves each answer into the matching field, and fires any workflow that uses that form as its trigger. Surveys (forms spread over several steps) and quizzes (which score answers to sort people into groups) work the same way.

Forms need a home. GoHighLevel includes a drag-and-drop builder for full **websites**, single **landing pages**, and **funnels**, with hosting included. The difference is purpose. A website is a set of pages people browse to learn about your business. A funnel is a short, deliberate sequence of pages that guides a visitor toward one action: for example, an offer page with a form, then a booking page, then a thank-you page. Funnels are what you typically send ad traffic to, because they remove distractions and focus on one goal. You connect your own domain name so pages appear at your address.

The website **chat widget** is another capture point. Visitors can type a question, leave their phone number, and continue the conversation by text, all landing in your Conversations inbox (and, as Chapter 12 explains, an AI agent can answer when you are busy).

The key idea is that every one of these tools feeds the same contact database and can trigger the same workflows. A lead from a Facebook ad funnel and a lead from your website contact page can follow the exact same speed-to-lead process, tagged with different sources so you can see which channel works best.

NOTE: Try it now

Build a short form (name, phone, email, and one question), add a consent checkbox for texts and email, and place it on a simple landing page. Submit it yourself and watch your test contact update.

STUCK? JUMP ON A LIVE ZOOM WITH SUPPORT

Ask: "Can you help me connect my domain and make sure my form triggers my new-lead workflow?"
Domain setup is a classic quick fix on a Zoom call.

CHAPTER 11

Building Block 8: Staying in Touch with Marketing and Reviews

Once you have a list of contacts with useful tags, you can market to the right people and turn happy customers into reviews.

Email and SMS marketing

Workflows handle messages that happen automatically in response to events. **Campaigns** (sometimes called broadcasts or bulk messages) are different: they are messages you decide to send to a group at a particular time, such as a monthly newsletter, a holiday promotion, or a note that you have openings next week. This is where tags and Smart Lists pay off. Instead of emailing everyone, you send the spring offer only to past customers tagged *interest-lawn-care*, which makes the message more relevant and the results better.

GoHighLevel includes an email builder with templates and a way to send texts to a list. Two cautions apply. Deliverability matters: send email from a properly set up sending domain and remove addresses that bounce. And permission matters: email must include an unsubscribe link and your business address, and texts should go only to people who agreed to receive them, with STOP requests honored (GoHighLevel handles opt-outs automatically).

Reputation and reviews

Online reviews, especially on Google, strongly influence whether local customers choose you. GoHighLevel's **Reputation** tools do two things. They **ask for reviews** by sending a text or email with a direct link to your Google review page, ideally triggered automatically by a workflow a few hours after a job is finished. And they **gather your reviews** from Google and Facebook in one place, so you can read and reply to them from inside GoHighLevel, with AI help drafting replies if you want it.

The best results come from asking every customer promptly and personally. Avoid offering rewards for reviews or filtering out unhappy customers, which break Google's rules.

STUCK? JUMP ON A LIVE ZOOM WITH SUPPORT

Ask: "Can you connect my Google Business Profile and set up an automatic review request after each completed appointment?"

CHAPTER 12

Building Block 9: AI Agents

GoHighLevel's AI agents are best understood as new team members who work in the same system as everyone else.

Everything you have learned applies to AI too. An AI agent reads and writes the same contacts, answers in the same Conversations inbox, books on the same calendars, and can trigger the same workflows. What it adds is availability: it answers instantly, around the clock.

GoHighLevel's main AI tools are **Voice AI**, a phone agent that answers calls, asks qualifying questions, books appointments, and transfers urgent calls to a person; **Conversation AI**, which replies to texts, website chat, and social messages; **Reviews AI**, which drafts review replies; and **Content AI**, which helps write emails, posts, and page copy. An **Ask AI** assistant inside the app can also answer how-to questions about GoHighLevel itself.

Setting up an agent is mostly a matter of teaching it about your business: your services, hours, service area, common questions, and what it should and should not say. You then tell it which calendar to book on and when to hand off to a human. Start cautiously. Conversation AI can run in a suggestive mode, where it drafts replies that you approve, before you let it answer on its own. Read the transcripts of its conversations every day for the first few weeks and keep refining its instructions.

AI is pay-per-use by default, or you can add an AI Employee plan per sub-account (about \$50 or \$97 a month, depending on the level). Voice AI works with phone numbers purchased through GoHighLevel's phone system, and normal calling and texting charges still apply.

STUCK? JUMP ON A LIVE ZOOM WITH SUPPORT

Ask: "Can you help me set up a Voice AI agent that answers my business line, books on my calendar, and transfers urgent calls to me?"

CHAPTER 13

Putting It Together: One Customer's Journey

The best way to see how the building blocks fit is to follow one person all the way through.

Maria sees a Facebook ad for a free kitchen design consultation and taps it. She lands on your **funnel**, reads the offer, and fills out the **form**. At that moment, GoHighLevel creates a **contact** for her, saves her answers into **custom fields**, and tags her *source-facebook* and *interest-kitchen*. The form submission **triggers** your new-lead **workflow**, which adds the *new-lead* tag, creates an **opportunity** in the New Lead stage of your **pipeline**, texts her a booking link, and notifies your team.

Maria replies by text with a question. It appears in your **Conversations** inbox on her contact record. It is late evening, so your **Conversation AI** answers her question and offers available times. She books on your **calendar**. The booking triggers a second workflow, which removes *new-lead*, adds *booked*, moves her opportunity to Booked, and schedules reminders. Because she no longer has the *new-lead* tag, the follow-up sequence for unbooked leads stops automatically.

Maria receives a reminder the day before and shows up. Your designer marks the appointment as completed and moves her opportunity to Estimate Sent, with a value of \$18,000. A week later she signs, and the opportunity is marked Won. That triggers a third workflow: it adds the *customer* tag and, once the project wraps up, sends a **review request**. Maria leaves five stars on Google, and Reviews AI drafts a thank-you reply for you to approve.

Months later, you send a **campaign** about a bathroom remodeling promotion to everyone tagged *customer*. Maria opens it and books again. A brand-new opportunity is created for the bathroom project, on the same contact, with her entire history visible to your team.

Every step of that story used the building blocks from this guide, and almost none of it required someone to remember to do something. That is what GoHighLevel is for.

CHAPTER 14

Getting Started: A Systematic Plan

Do not try to set up everything at once. Build your account in layers, in the same order this guide taught the concepts, and make sure each layer works before adding the next.

Phase 1: Foundations (week 1)

Start your trial and create your sub-account. Fill in your business profile (name, address, hours, time zone, and logo), because GoHighLevel uses it in messages, forms, and AI agents. Add your team as users. Get a business phone number and start A2P registration right away, since approval takes time. Set up your email sending domain, connect your Google calendar, Google Business Profile, Facebook, and Instagram, and install the mobile app. Then book a Zoom support call and ask the agent to check that all of this is set up correctly. Doing this on day one saves days of confusion.

Phase 2: Your data (week 1 to 2)

Decide on a short list of tags and a few custom fields, using the naming habit from Chapter 6. Create your pipeline with stages that mirror your sales process. Import your existing contacts from a spreadsheet, tagging them by where they came from. Create two or three Smart Lists you know you will use, such as new leads and past customers.

Phase 3: Your core system (week 2 to 3)

Build the system that captures and converts leads: one calendar with reminders, one form on a landing page or your website, the speed-to-lead workflow from Chapter 9, and a booking workflow that flips tags and moves the pipeline card. Turn on Missed Call Text-Back. Test the whole path on yourself, from filling out the form to receiving the reminder. When it works, point real traffic at it. This core system alone usually pays for GoHighLevel.

Phase 4: Growth (week 4 and beyond)

With the core running, add one improvement at a time: automatic review requests, a monthly newsletter to segmented lists, a win-back campaign for past customers, and finally AI agents for after-hours calls and chats. Each addition is easier now, because it builds on contacts, tags, and workflows you already understand.

TIP: The rule that makes it all manageable

Learn one building block, set it up, test it on yourself, and only then move on. Whenever you are unsure, open a Zoom support call. You never need to stay stuck.

CHAPTER 15

Common Questions

What if I get stuck?

Open the blue question-mark menu in the app and join a live Zoom call with HighLevel support, any time of day or night. They can show you how to do almost anything.

Is there a free trial?

Yes, 14 days. [Start your free trial.](#)

Which plan do I need for one business?

Starter, at \$97 a month, includes every core feature, unlimited contacts and users, and up to three sub-accounts.

What is the difference between a contact and an opportunity?

A contact is a person. An opportunity is a potential sale for that person, tracked in a pipeline. One contact can have several opportunities over time.

Why do tags matter so much?

They let you find groups of people, remember facts about them, and, most importantly, start and coordinate automations.

How long does it take to learn?

Most people feel comfortable within a few weeks if they learn the building blocks in order and use support calls when they get stuck.

Run your whole business from one platform

Try GoHighLevel free for 14 days, with 24/7 live Zoom support whenever you need a hand.

[Start free 14-day trial >](#)



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