

CARPET CLEANING BUSINESS

GoHighLevel System Development Brief

A complete, client-ready guide to your GHL automation system

Project Overview

This document covers the complete build of your GoHighLevel (GHL) system — from the very first moment a lead contacts you, all the way through to booking, job completion, review collection, and long-term re-engagement. Everything is automated so your team can focus on doing the work, not chasing leads.

Total Timeline	12–15 Days
Phases	Phase 1: Foundation · Phase 2: Workflows · Phase 3: Tag System & Setup

What's Included

- Sales Pipeline — tracks every lead from enquiry to completed job
- Custom Fields — captures job details like service type, rooms, sofa size
- Calendars — for callbacks, quote calls, and reactivation follow-ups
- Quote Form — customers fill this in to request a price
- 11 Automated Workflows — send messages, update pipeline stages, follow up automatically
- 7-Tag System — labels contacts so the right automation fires at the right time
- Reactivation Sequences — wins back past customers at 3, 6, and 12 months

Phase 1: Foundation Setup · Days 1–3

Before any automation can run, the system's core components need to be in place. This phase builds the pipeline, custom fields, calendars, and the quote form that everything else plugs into.

Milestone 1.1 Pipeline & Custom Fields ⌚ 1.5 Days

Tasks

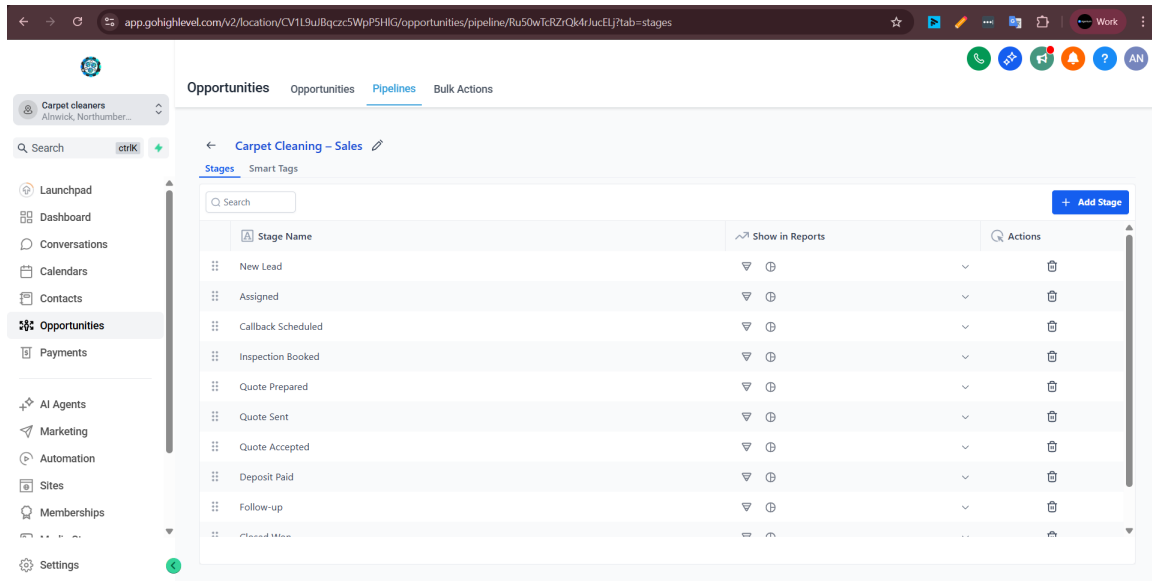
- Create "Carpet Cleaning – Sales" pipeline with 9 locked stages
- Build custom fields: service type, rooms count, sofa size, estimated job value, lead source
- Apply field validation rules

Deliverables

- Fully configured sales pipeline
- All custom fields created and mapped
- Field validation rules applied

 GHLink:

<https://app.gohighlevel.com/v2/location/CV1L9uJBqczc5WpP5HIG/opportunities/pipeline/Ru50wTcRZrQk4rJucELj?tab=stages>



Pipeline stages view — each stage is locked to prevent accidental changes

☐ Service Type	Opportunity		{{ opportunity.service_type }}	2/12/2026 at 8:45 PM
☐ Number Of Rooms	Opportunity		{{ opportunity.number_of_rooms }}	2/12/2026 at 8:52 PM
☐ Sofa Size	Opportunity		{{ opportunity.sofa_size }}	2/12/2026 at 8:56 PM
☐ Number Of Sofas	Opportunity		{{ opportunity.number_of_sofas }}	2/12/2026 at 8:57 PM

Custom fields configured for the carpet cleaning snapshot

Milestone 1.2 Calendars ⌚ 1 Day

Tasks

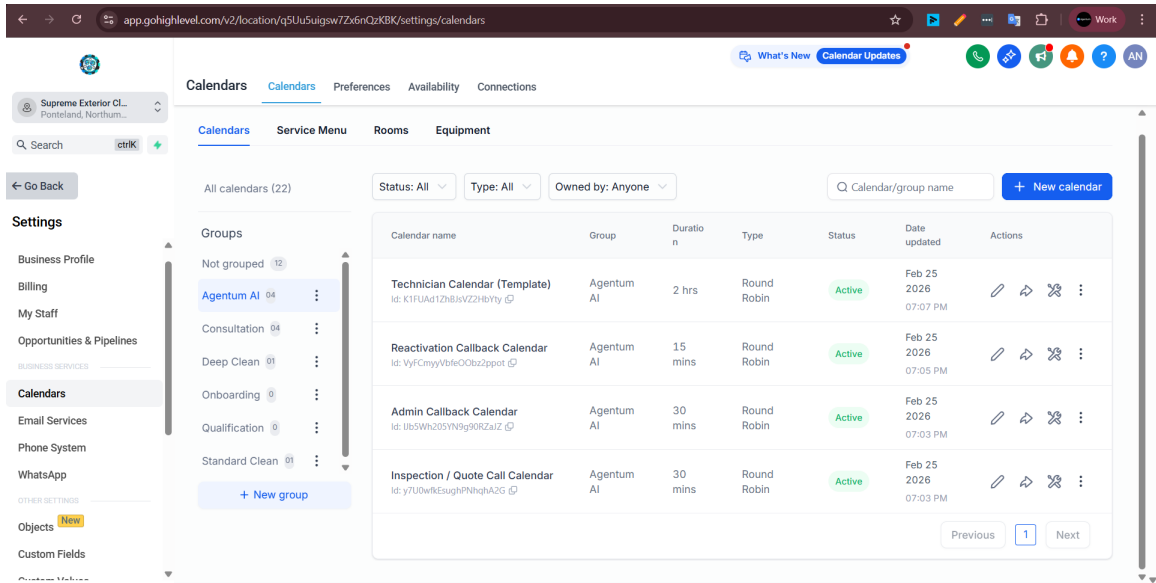
- Admin Callback Calendar
- Inspection / Quote Call Calendar (optional)
- Reactivation Callback Calendar
- Optional Technician Calendar template
- Configure availability, buffer times, and notifications

Deliverables

- 4 calendars fully configured
- Email & SMS notifications for all bookings



GHLink: <https://app.gohighlevel.com/v2/location/q5Uu5uigsw7Zx6nQzKBK/settings/calendars>



Calendars set up inside GHL — each one sends automatic booking confirmations

Milestone 1.3 Quote Request Form ⌚ 0.5 Days

Tasks

- Build the "Instant Carpet Quote" form
- Add all fields with validation
- Enable photo upload so customers can share images
- Set up for website, Facebook, and WhatsApp
- Create a confirmation message shown after submission

Deliverables

- Production-ready form
- Embed code for website
- Facebook lead form integration ready

🔗 GHL Link:

<https://app.gohighlevel.com/v2/location/q5Uu5uigsw7Zx6nQzKBK/form-builder-v2/tzAYcWoVc2VNPEffEaA>

The screenshot shows a web-based form builder for 'Instant Carpet Quote'. On the left, a sidebar titled 'Form Element' contains categories: 'Quick Add', 'Add Object Fields', 'Personal Info' (with fields for Full Name, First Name, Last Name, Date of birth, Phone, Email), 'Submit' (with a Button), and 'Payments'. The main workspace shows a form with the following fields: 'Phone *' (text input), 'Email *' (text input), 'CC - Service Type' (dropdown menu), 'CC - Number of Rooms' (text input with a plus icon), 'What's the type of property you want cleaned?' (text input), 'by when do you need service?' (text input), and a file upload section with 'Choose File' and 'No file chosen' buttons. A large green 'Button' is at the bottom of the form. The top navigation bar includes 'Back', 'Instant Carpet Quote', 'Preview', 'Integrate', and 'Save' buttons.

The Instant Carpet Quote form — the main entry point for new leads

Phase 2: Workflow Development · Days 4–9

This is the heart of the system. Each workflow is a set of automated actions that fires at the right moment — sending the right message, updating the pipeline, and keeping both the client and admin in the loop. There are 11 workflows in total, split across 6 groups.

Group 1 — Lead Capture

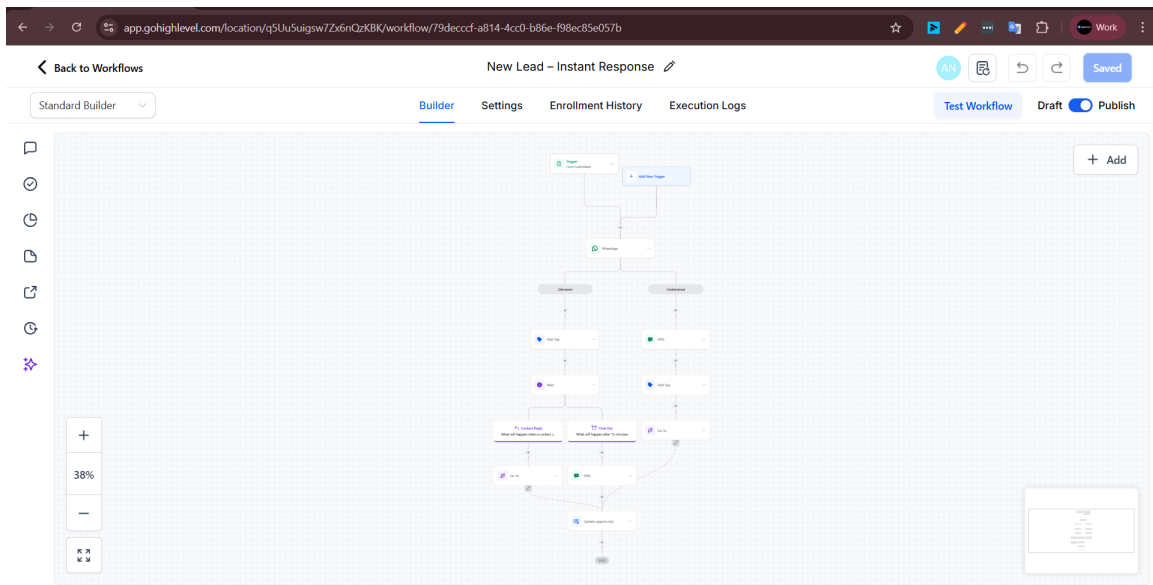
These two workflows fire as soon as a new lead comes in — ensuring no one is left waiting and no missed call goes unanswered.

Workflow A New Lead — Instant Response

Triggered when someone submits the quote form.

What it does

- Sends a WhatsApp template message instantly
- If unread after 15 minutes, sends an SMS fallback
- Updates pipeline stage to "New Lead"



Workflow A — instant response sequence inside GHL

[GHL Link:](https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/79decccf-a814-4cc0-b86e-f98ec85e057b)

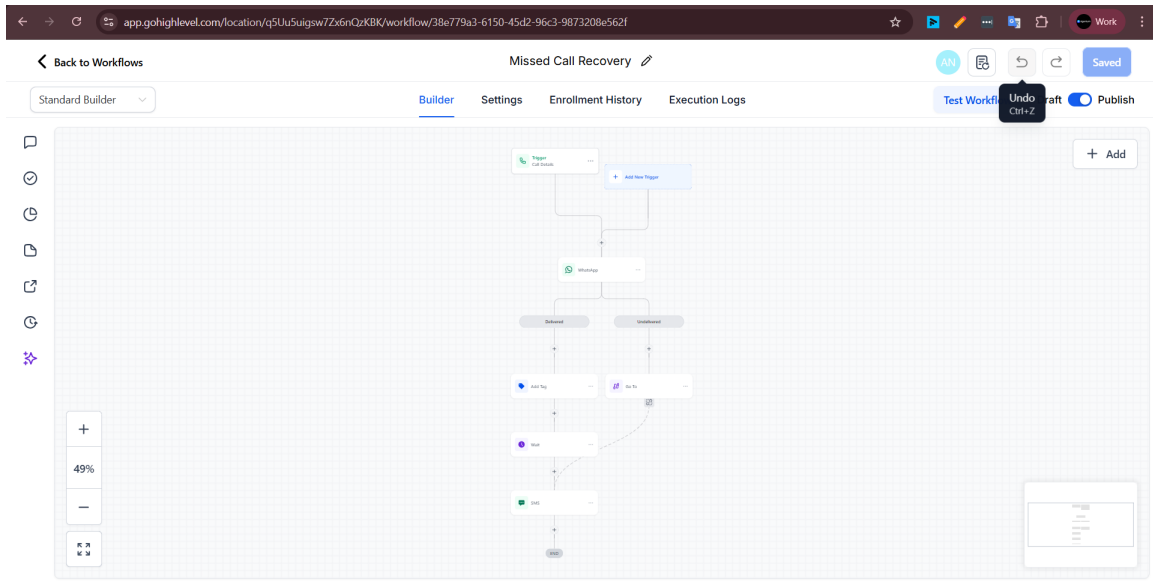
<https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/79decccf-a814-4cc0-b86e-f98ec85e057b>

Workflow B Missed Call Recovery

Triggered when an incoming call is missed.

What it does

- Sends a WhatsApp + SMS sequence to the missed caller
- Includes a call-to-action link back to the quote form



Workflow B — missed call recovery sequence

[GHL Link:](https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/38e779a3-6150-45d2-96c3-9873208e562f)

<https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/38e779a3-6150-45d2-96c3-9873208e562f>

Group 1 Deliverables	2 tested workflows — instant response & missed call recovery
Estimated Time	1 Day

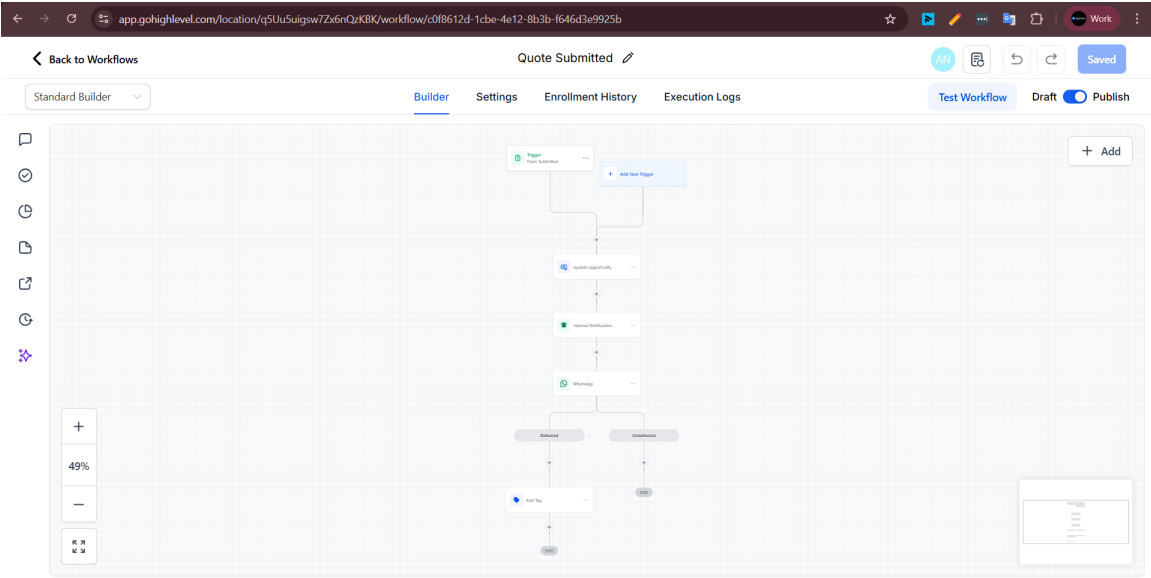
Group 2 — Quoting

Once a quote has been sent, these two workflows manage communication and follow-up automatically.

Workflow C Quote Submitted

Triggered when the quote form is submitted.

What it does	• Moves lead to "Quote Sent" in the pipeline • Notifies admin by email and SMS • Sends a WhatsApp confirmation to the customer • Adds the "Quote-Sent" tag
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Workflow C — overview of the quote submitted flow

Add Contact Tag

Adds specified tags to the Contact

[Learn More](#)

×

ACTION NAME

Add Tag

TAGS

quote-sent ×

⌵

⋮

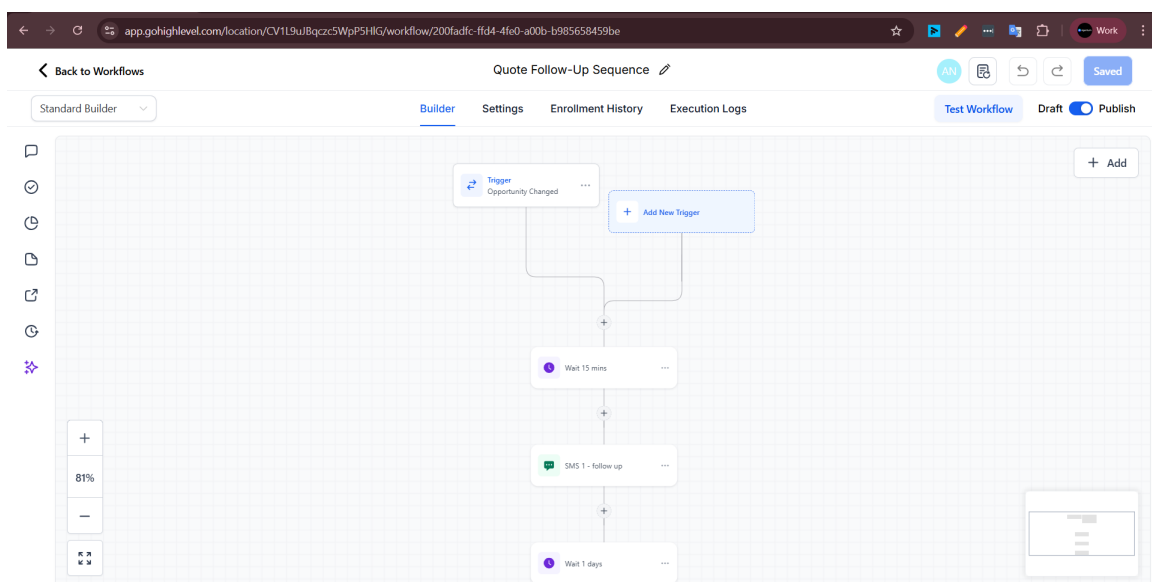
Tag action: adding the Quote-Sent tag to the contact

[GHL Link: https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/c0f8612d-1cbe-4e12-8b3b-f646d3e9925b](https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/c0f8612d-1cbe-4e12-8b3b-f646d3e9925b)

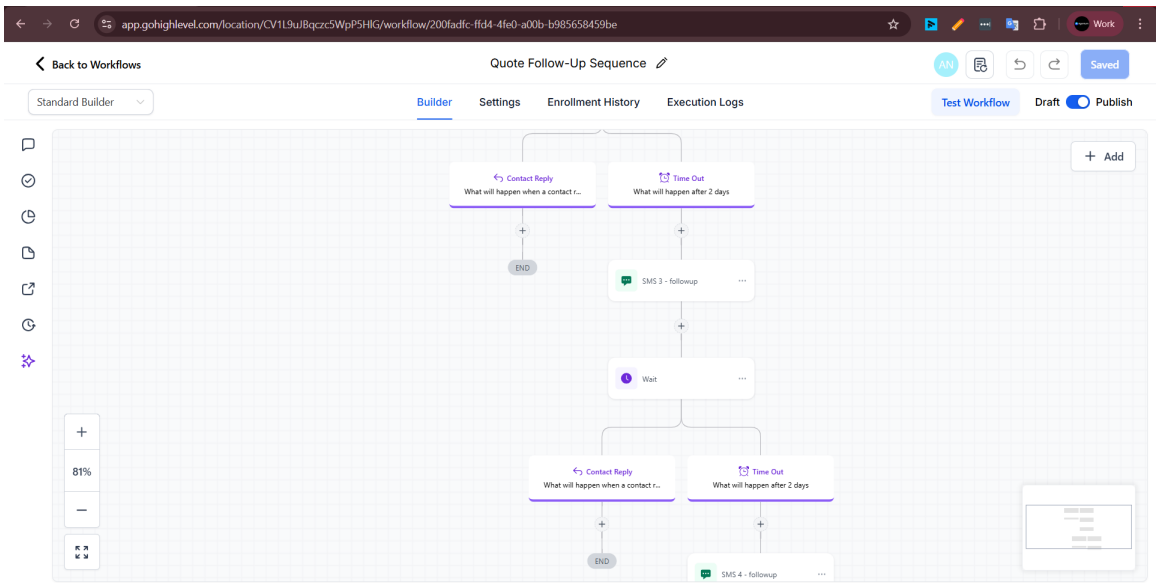
Workflow D Quote Follow-Up Sequence

Triggered after a quote is sent — follows up automatically if there is no response.

Follow-Up Schedule	- Day 0 — First message sent 15 minutes after quote - Day 1 — First follow-up - Day 3 — Objection handler message - Day 5 — Final nudge
Smart Stop Logic	Sequence stops automatically if the customer replies, books, or pays — no awkward chasing after they've already said yes



Workflow D — follow-up sequence (Part 1)



Workflow D — follow-up sequence (Part 2)

Group 2 Deliverables	2 workflows with multi-day sequences and smart stop logic
Estimated Time	1.5 Days

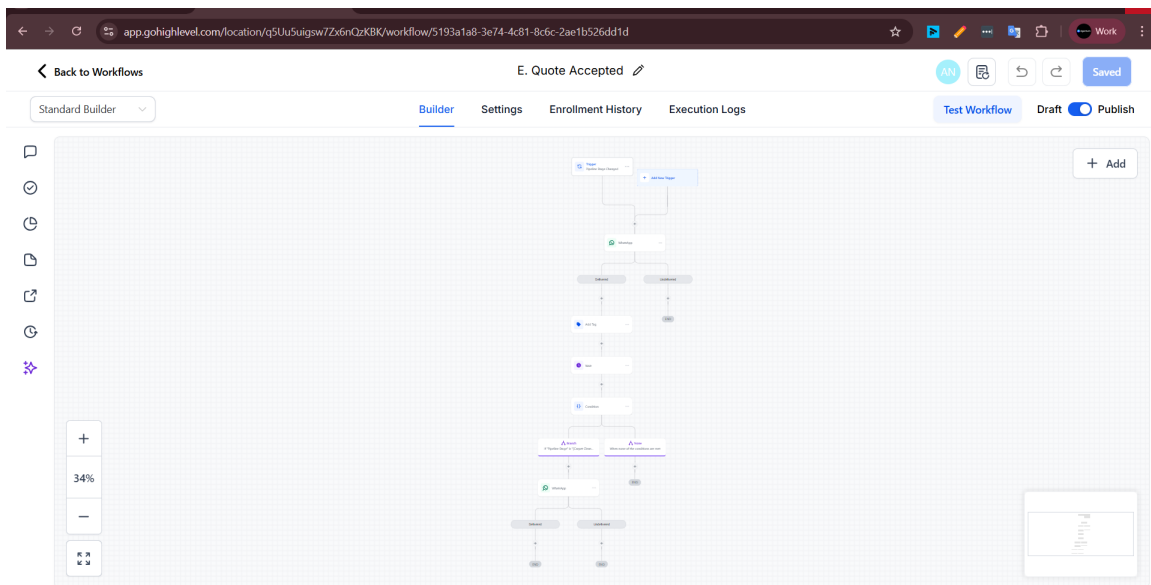
Group 3 — Conversion & Deposit

When a customer is ready to commit, these workflows handle the quote acceptance and deposit collection seamlessly.

Workflow E Quote Accepted

Triggered when the customer accepts the quote.

What it does	• Moves lead to "Quote Accepted" in the pipeline • Sends a deposit payment link to the customer • If no payment within 24 hours, sends an automatic reminder • Adds the "Deposit-Pending" tag
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Workflow E — quote accepted and deposit request flow

Add Contact Tag

Learn More

×

Adds specified tags to the Contact

ACTION NAME

Add Tag

TAGS

deposit-pending ×

Delete

Cancel

Save Action

Tag action: adding the Deposit-Pending tag

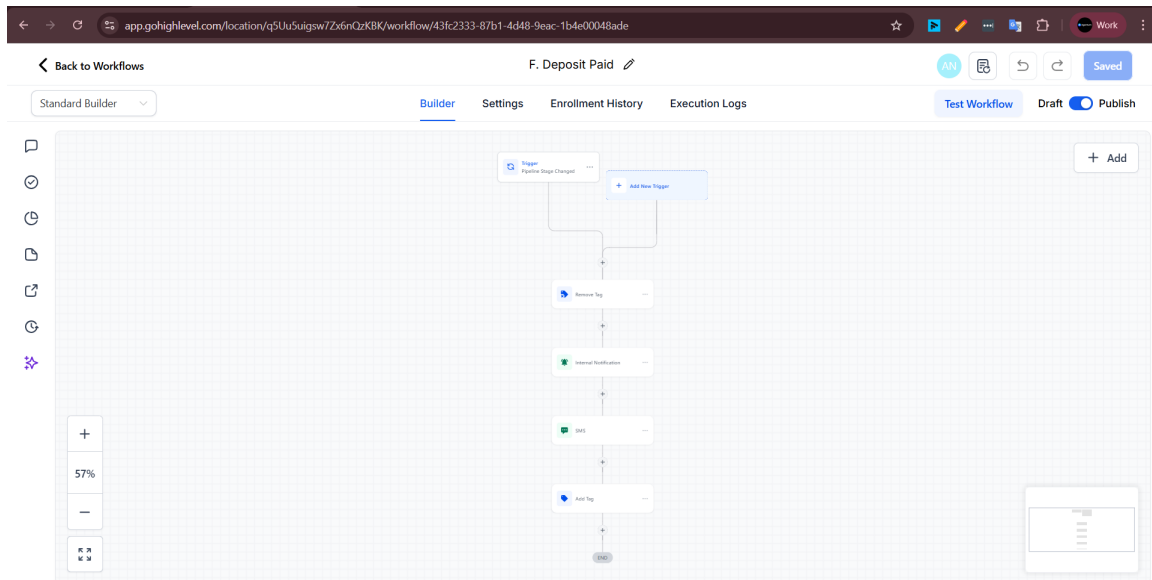
 **GHILink:**
<https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/5193a1a8-3e74-4c81-8c6c-2ae1b526dd1d>

Workflow F Deposit Paid

Triggered when the customer completes the deposit payment.

What it does

- Updates pipeline to "Deposit Paid"
- Sends an admin notification
- Sends the customer a booking confirmation message



Workflow F — deposit paid confirmation flow

Add Contact Tag

Adds specified tags to the Contact

[Learn More](#)
✕

ACTION NAME

Add Tag

TAGS

deposit-paid ✕

⌵

⋮

Delete

Cancel

Save Action

Tag and pipeline update after deposit is received

 **GHL Link:**

<https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/43fc2333-87b1-4d48-9eac-1b4e00048ade>

Important Note	Client must connect their payment gateway and set the deposit amount before these workflows go live.
Group 3 Deliverables	2 workflows — quote acceptance through to deposit collection
Estimated Time	1 Day

Group 4 — Job Booking

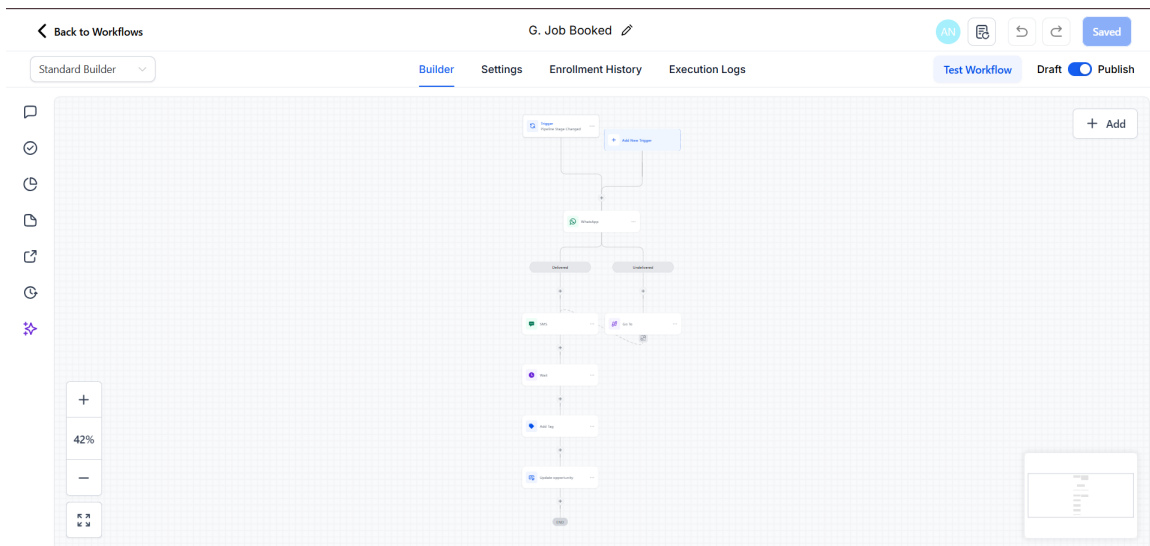
Once the deposit is paid, this workflow confirms the booking and makes sure the customer knows exactly what to expect.

Workflow G Job Booked

Triggered when a job is officially booked following deposit payment.

What it does

- Sends a WhatsApp booking confirmation
- Sends preparation instructions to the customer
- Sends a "Reply YES to confirm" message and waits for their response
- Adds the "Job-Confirmed" tag once they confirm



Workflow G — job booked confirmation and prep sequence

Add Contact Tag

Adds specified tags to the Contact

[Learn More](#)



ACTION NAME

Add Tag

TAGS

job-confirmed X

Tag action: adding the Job-Confirmed tag after customer replies YES

GHL Link:

<https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/717dc6f2-27d5-4c46-996a-2e9497f36716>

Group 4 Deliverables

Job booking workflow with two-way customer confirmation logic

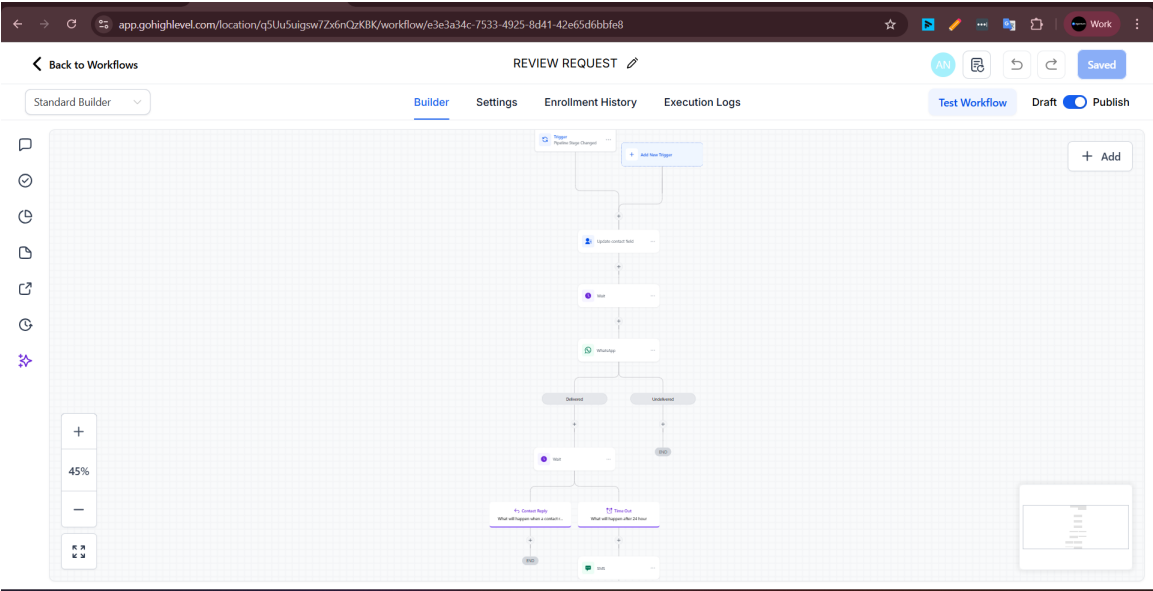
Group 5 — Reviews & Reputation

After every completed job, the system automatically asks for a Google review — building your reputation on autopilot.

Workflow I Review Request

Triggered automatically when a job is marked as completed.

What it does	• Sends a WhatsApp message asking for a Google review, with a direct link • If no action after 24 hours, sends an SMS follow-up • Google review link is a placeholder — client adds their own link before going live
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Workflow I — review request triggered on job completion

Pipeline Stage Changed

[Learn More](#)
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Activates when an Opportunity moves pipeline stage.

CHOOSE A WORKFLOW TRIGGER

Pipeline Stage Changed

▼

WORKFLOW TRIGGER NAME

Pipeline Stage Changed

FILTERS

In pipeline

▼

Carpet Cleaning – Sales Pipeline

⬆⬆

🗑

Pipeline stage

▼

Job Completed

⬆⬆

🗑

⊕ Add filters

Delete

Cancel

Save Trigger

Full workflow view — gets triggered whenever a job is completed

 GHL Link:

<https://app.gohighlevel.com/location/q5Uu5uigsw7Zx6nQzKBK/workflow/e3e3a34c-7533-4925-8d41-42e65d6bbfe8>

Group 5 Deliverables	Review request automation with WhatsApp + 24hr SMS fallback
Estimated Time	0.5 Days

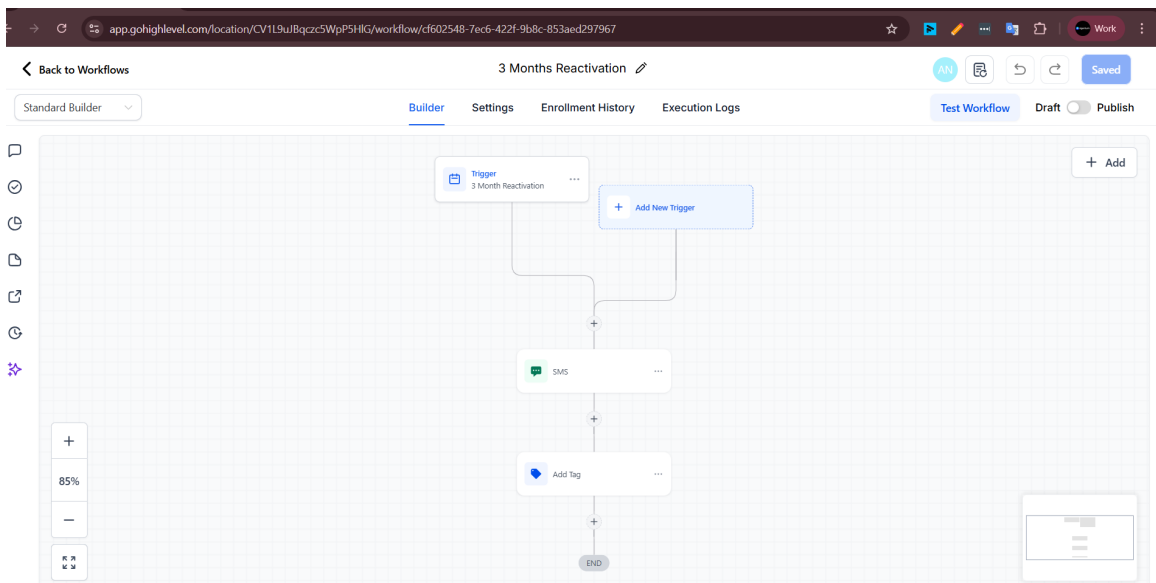
Group 6 — Reactivation Sequences

These three workflows automatically bring past customers back at the right time — turning one-time cleans into repeat business, with zero manual effort.

Workflow — 3-Month Reactivation

Triggered 3 months after the job completion date.

What it does	- Sends a re-engagement message with a seasonal or reminder offer - Adds the "Reactivation" tag
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3-Month Reactivation — workflow overview

3 Months Reactivation

Settings Enrollment History Execution Logs [Test Workflow](#) Draft ☐ Publish

Custom Date Reminder

Enrolls Contacts on a date stored in any custom field.

CHOOSE A WORKFLOW TRIGGER

Custom Date Reminder

WORKFLOW TRIGGER NAME

3 Month Reactivation

FILTERS

Custom Date Field	Job Completed Date	
After no. of days	120	

Add filters

☐ Match on the year along with the day and month

[Delete](#) [Cancel](#) [Save Trigger](#)

Triggered automatically from the job completed date

Add Contact Tag

Adds specified tags to the Contact

[Learn More](#) 

×

ACTION NAME

Add Tag

TAGS

3 month reactivation sent ×

▼

⋮

Delete

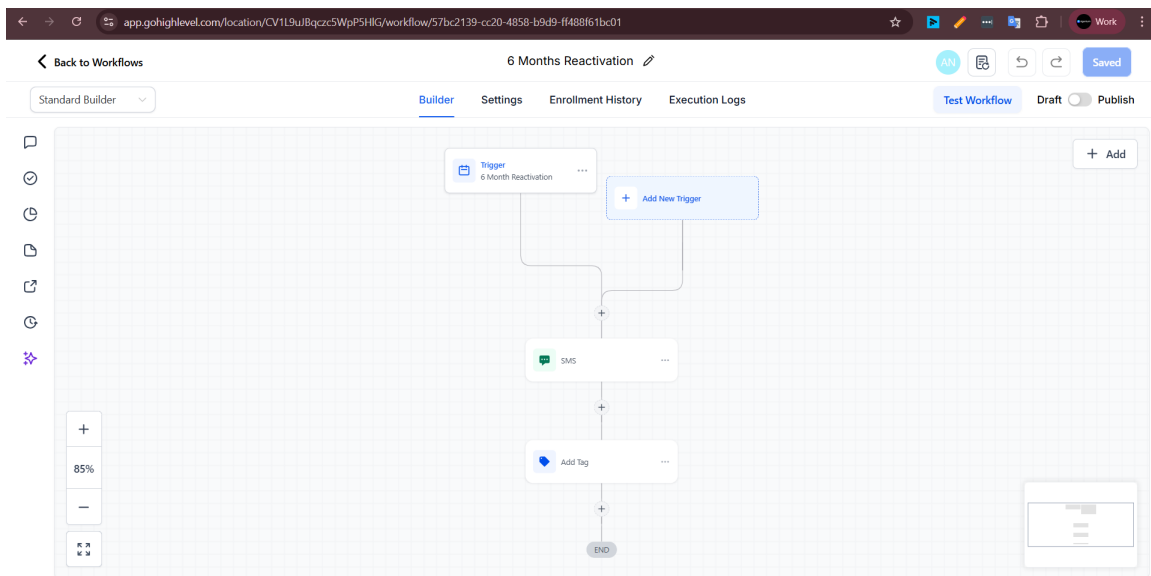
Cancel

Save Action

Tag action: 3-Month Reactivation tag being applied

Workflow — 6-Month Reactivation

Triggered 6 months after job completion. Uses different messaging tailored for the mid-year touchpoint.



6-Month Reactivation — workflow overview

Custom Date Reminder [Learn More](#) ×

Enrolls Contacts on a date stored in any custom field.

CHOOSE A WORKFLOW TRIGGER ⓘ

Custom Date Reminder

WORKFLOW TRIGGER NAME

6 Month Reactivation

FILTERS

Custom Date Field	Job Completed Date	✕
After no. of days	180	✕

⊕ Add filters

☐ Match on the year along with the day and month

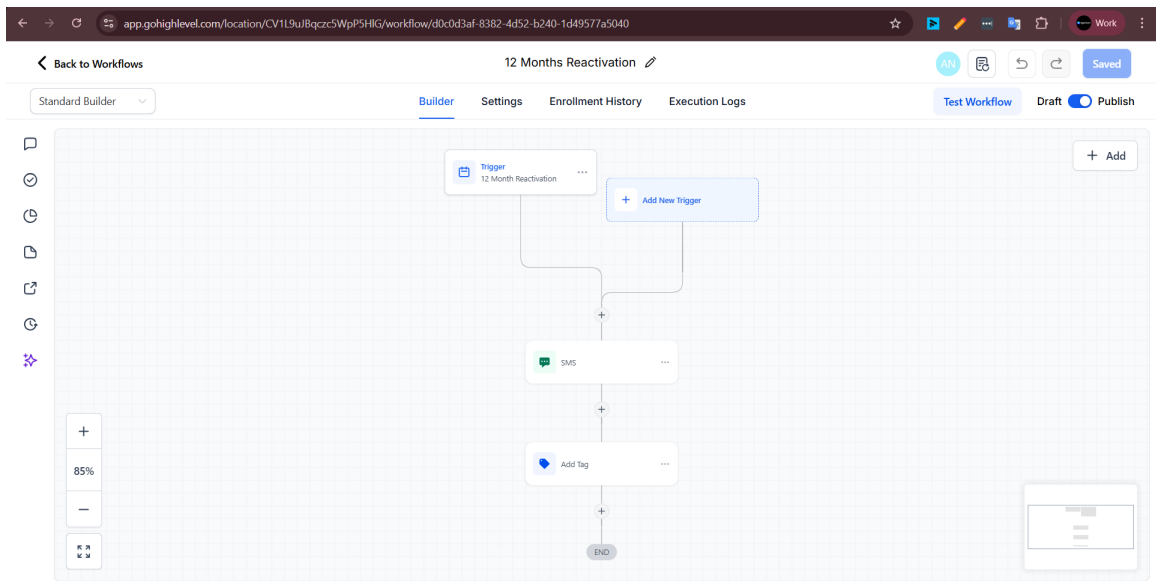
[Delete](#) [Cancel](#) [Save Trigger](#)

Gets triggered by the job completed date at 6 months

[GHL Link: https://app.gohighlevel.com/location/CV1L9uJBqczc5WpP5HIG/workflow/57bc2139-cc20-4858-b9d9-ff488f61bc01](https://app.gohighlevel.com/location/CV1L9uJBqczc5WpP5HIG/workflow/57bc2139-cc20-4858-b9d9-ff488f61bc01)

Workflow — 12-Month Reactivation

Triggered 12 months after job completion. Annual follow-up to encourage a repeat booking.



12-Month Reactivation — workflow overview

f-8382-4d52-b240-1d49577a5040

12 Months Reactivation

Settings Enrollment History Execution Logs Test Workflow Draft Publish

Custom Date Reminder [Learn More](#)

Enrolls Contacts on a date stored in any custom field.

CHOOSE A WORKFLOW TRIGGER

Custom Date Reminder

WORKFLOW TRIGGER NAME

12 Month Reactivation

FILTERS

Custom Date Field	Job Completed Date	
After no. of days	365	

+ Add filters

☐ Match on the year along with the day and month

Delete Cancel Save Trigger

Triggered when 12 months have passed since the job completed date

How They Work	All three are date-triggered from "Job Completed" — the system tracks this automatically and fires the right message at the right time, with different messaging for each timeframe.
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Group 6 Deliverables	3 evergreen reactivation workflows with date-based triggers
Estimated Time	1 Day

Phase 3: Tag System & Final Setup · Day 10

Tags are the glue that holds the automation together. They tell the system where each contact is in the process — so the right workflow fires, duplicates are avoided, and nothing gets sent at the wrong time.

The 7 Core Tags

Tag	When It's Applied
New-Lead	When a new enquiry comes in
Quote-Sent	When a quote has been sent to the customer
Deposit-Pending	Customer accepted but has not yet paid
Deposit-Paid	Payment received, job confirmed
Job-Confirmed	Customer has replied YES to their booking
Completed	Job has been completed
Reactivation	Contact is in a re-engagement sequence

Client Setup Checklist

Before the system goes live, the following items need to be completed by the client:

- **Connect WhatsApp Business to GHL**
 - Required for all WhatsApp automations to work
- **Add your Google Review link**
 - Paste your business review URL into the Review Request workflow
- **Set up your payment gateway and deposit amount**
 - Must be done before Workflows E and F go live
- **Update service prices (optional)**
 - Add your rates to quote templates if you want pricing to appear in messages

How It All Works — End-to-End Summary

Here's the full customer journey from first contact to repeat booking, all handled automatically:

1	Customer submits the Instant Carpet Quote form (or calls and gets missed)
2	System sends an instant WhatsApp/SMS — pipeline moves to "New Lead"
3	Admin reviews and sends a quote — pipeline moves to "Quote Sent"
4	No response? System follows up automatically over 5 days
5	Customer accepts the quote — deposit payment link is sent automatically
6	Deposit paid — admin is notified, customer gets a booking confirmation
7	Job booked — customer receives prep instructions and confirms via WhatsApp
8	Job completed — system sends a Google review request with a direct link
9	3, 6, and 12 months later — system sends re-engagement messages automatically

Questions? Reach out to your GHL developer for support.