

Northgate Home Buyers

GoHighLevel CRM - Operating Manual

Workflows · Pipelines · Tags · Dashboards · Inbox Views

Prepared for Jordan Blake

August 2026

(Loom walkthrough videos were delivered alongside this manual)

1. System Overview

Your CRM has two separate pipelines, two dashboards, three inbox views, and a set of automations that handle lead routing, follow-up, and nurturing. Here's how it all fits together.

Two Pipelines

PPC Campaign — holds all Google Ads (PPC) leads from the client's ad agency, pushed in via Zapier. Stages: New Lead → Attempted Contact → Contacted/Qualifying → Appointment Set → No Answer → Offer Made → Under Contract → Closed → Long-Term Nurture → Retail Lead → Dead.

NAC Pipeline — holds all cold-caller leads (outsourced calling team) from the NAC intake form. Stages: New Lead → Contacted → No Answer → Offer Sent → Closed → Retail Lead → Long Term Nurture.

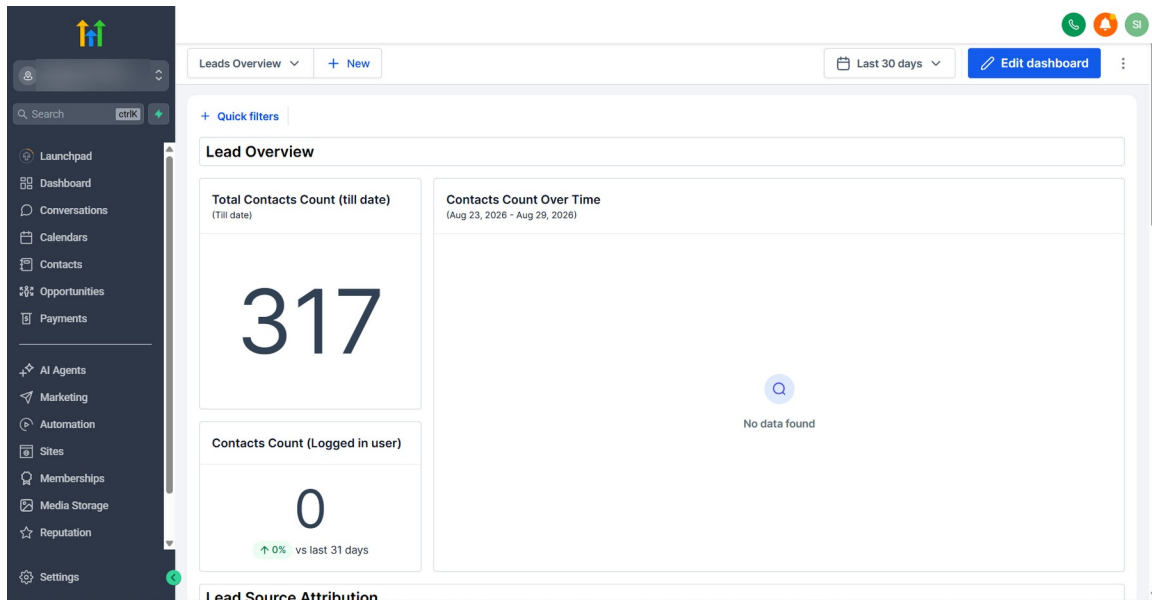
Two Dashboards

Switch between them from the dropdown at the top of the Dashboard page.

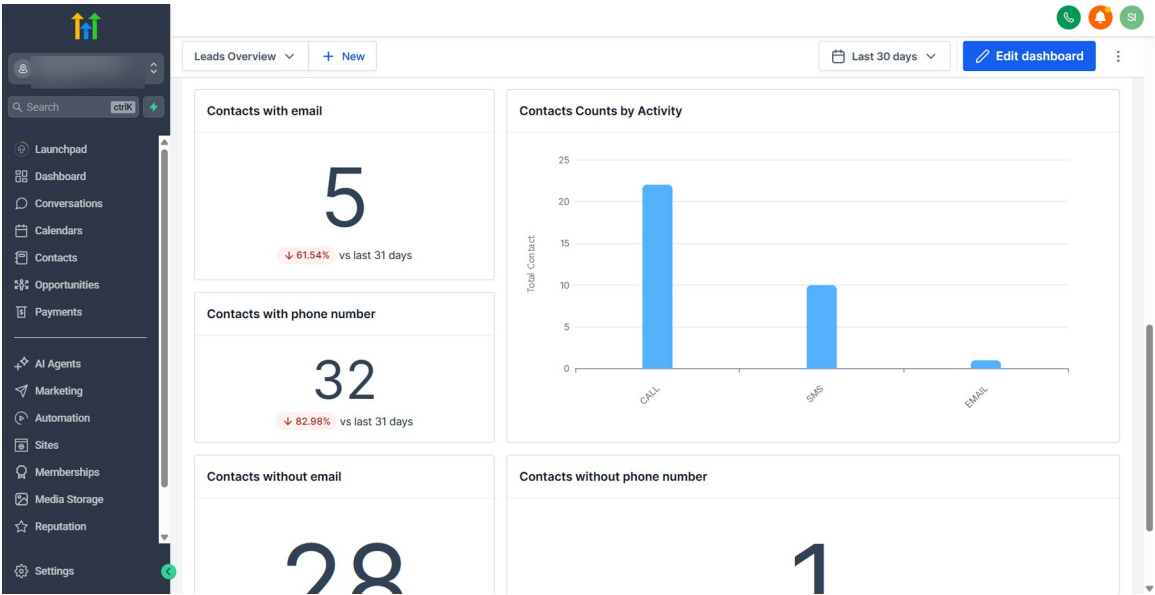
Leads Overview — total contacts, contacts by activity (calls, SMS, email), and lead source attribution.

Opportunity Overview — pipeline funnel (stage distribution + values), opportunities by source, revenue over time, and won opportunities.

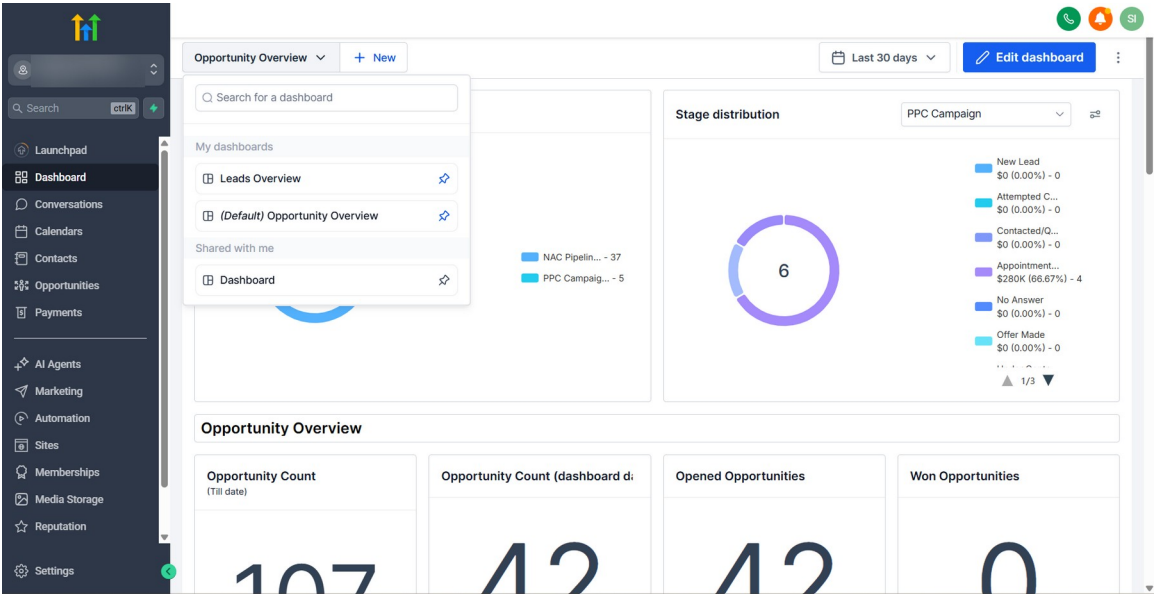
Leads Overview dashboard



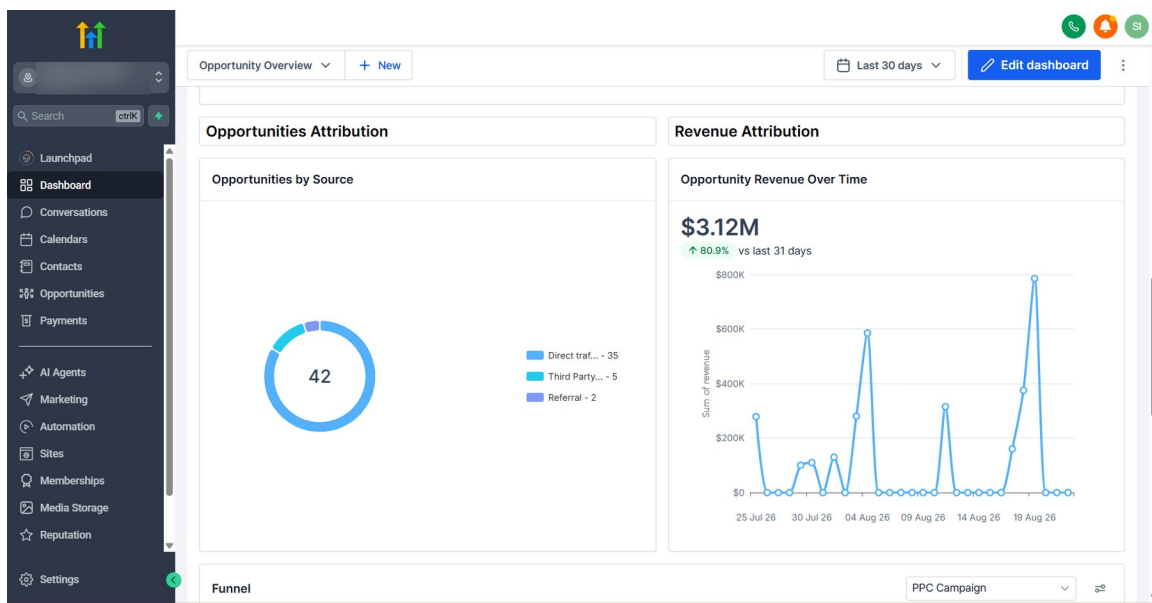
Leads Overview — contact stats



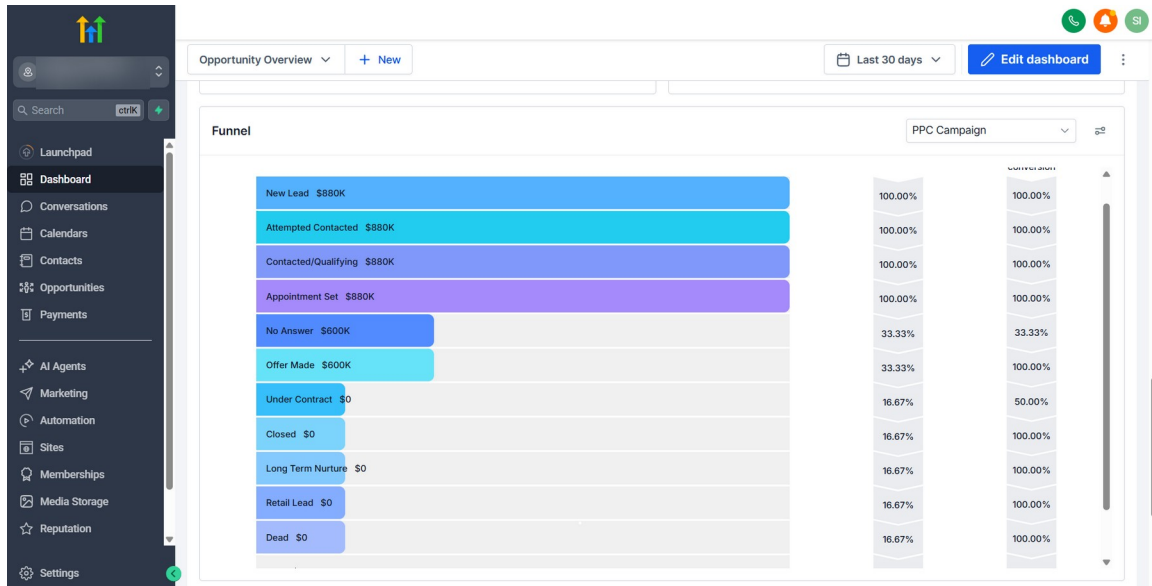
Opportunity Overview — stage distribution



Opportunity Overview — attribution + revenue



Opportunity Overview — PPC funnel



Three Inbox Views

In Conversations (left sidebar), under Views, you'll find three saved filters. Click any to instantly see only that group:

- NAC Leads — all conversations with contacts tagged source-nac
- PPC Leads — all conversations with contacts tagged source-ppc
- Hot Leads — all conversations with contacts tagged hot-lead

Key Conventions

- Time zone: everything runs on Pacific time. No offset math anywhere.
- Tag naming: always lowercase, hyphenated — source-nac, source-ppc, hot-lead, timeline-long, etc.
- Finding the right deal: automations use "Find Opportunity" by pipeline + most recently created. Never filtered by stage.

- Two pipelines: NAC and PPC leads live in separate pipelines. Workflows are split accordingly.

2. Workflows

Each workflow below includes what it does, what triggers it, and what happens if it's turned off. Screenshots of the actual builder follow each description.

Active workflows folder

Automation Workflows Global Workflow Settings

Advanced filters

Back / ACTIVE WORKFLOWS - Shahmeer and Taha (Vector)

☐	Name	Status	Total enrolled	Active enrolled	Last updated	Created on	Stats
☐	Alert - Hot Lead	Published	21	0	Jul 22 2026, 12:46 PM	Jul 04 2026, 3:02 PM	> ⋮
☐	Appointment - No Show	Draft	0	0	Jul 14 2026, 3:26 PM	Jul 04 2026, 5:49 PM	> ⋮
☐	Bulk - Assign to	Published	715	0	Aug 04 2026, 5:17 AM	Jul 04 2026, 4:27 PM	> ⋮
☐	DRAFT - Reminder - Appointment Bookings - NAC	Draft	0	0	Aug 04 2026, 8:50 AM	Aug 04 2026, 8:41 AM	> ⋮
☐	Follow-Up - Seller Sequence - NAC	Draft	0	0	Aug 04 2026, 8:35 AM	Aug 04 2026, 8:27 AM	> ⋮
☐	Follow-Up - Seller Sequence - PPC	Draft	0	0	Aug 04 2026, 8:32 AM	Jun 30 2026, 4:30 PM	> ⋮
☐	Instant Text and Email - NAC	Published	13	0	Aug 04 2026, 8:26 AM	Aug 04 2026, 8:25 AM	> ⋮

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All workflow folders

Automation Workflows Global Workflow Settings

Workflows list

Create folder Build using AI Create workflow

All workflows Needs review (0) Deleted + New smart list

Advanced filters

Home

☐	Name	Status	Total enrolled	Active enrolled	Last updated	Created on	Stats
☐	ACTIVE WORKFLOWS - Shahmeer and Taha (Vector)				Aug 04 2026, 7:44 AM	Jun 26 2026, 3:16 PM	⋮
☐	Old Workflows				Jul 22 2026, 12:43 PM	Jul 22 2026, 12:43 PM	⋮
☐	New Workflow : 1785176755688	Draft	5	0	Aug 04 2026, 4:08 AM	Jul 27 2026, 11:25 AM	> ⋮

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Instant Text and Email — PPC

Status: ● Published

Purpose: Sends the first text and email to a new PPC lead within seconds of their deal entering the pipeline.

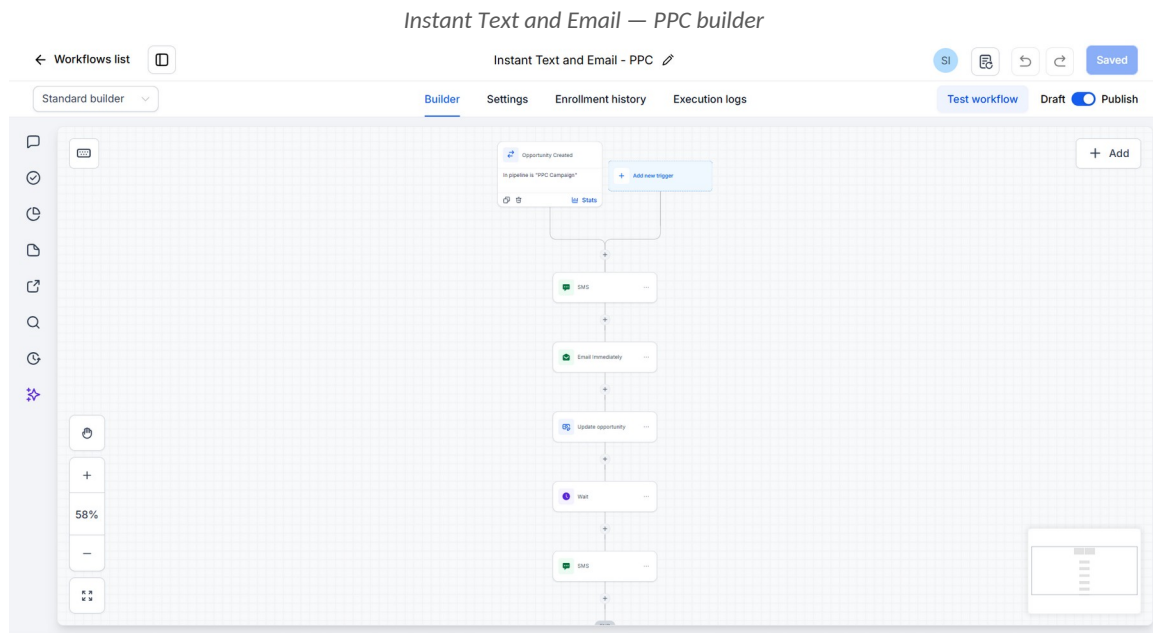
Trigger: Opportunity Created — in PPC Campaign pipeline

What it does:

- Sends an SMS introducing Jordan / Northgate Home Buyers with a booking link.
- Sends an email ("Received Your Inquiry") immediately after.
- Updates the opportunity (moves stage forward).
- Waits ~20 minutes, then sends a second follow-up SMS if no reply.

Tags: Reads: source-ppc

⚠ If turned OFF: New PPC leads receive NO instant text or email. Speed-to-lead drops to zero — the single biggest conversion risk if disabled.



Instant Text and Email — NAC

Status: ● Published

Purpose: Same instant response, but fires for NAC leads entering the NAC Pipeline.

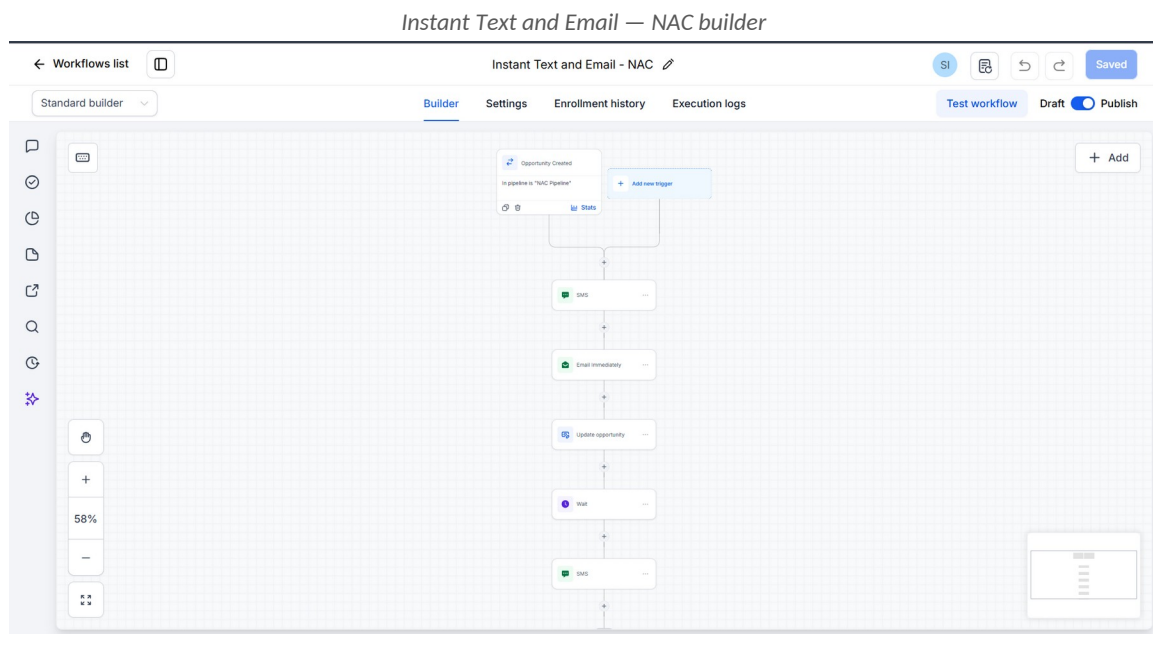
Trigger: Opportunity Created — in NAC Pipeline

What it does:

- Sends an SMS with booking link.
- Sends an email immediately after.
- Updates the opportunity.
- Follow-up SMS after a wait if no reply.

Tags: Reads: source-nac

⚠ If turned OFF: New NAC leads receive no instant response. Leave ON while NAC callers are active.



Lead Routing — NAC

Status: ● Published

Purpose: Routes incoming NAC form submissions: checks for an existing opportunity, creates one if needed, assigns ownership to Jordan, and adds a formatted note with all lead details.

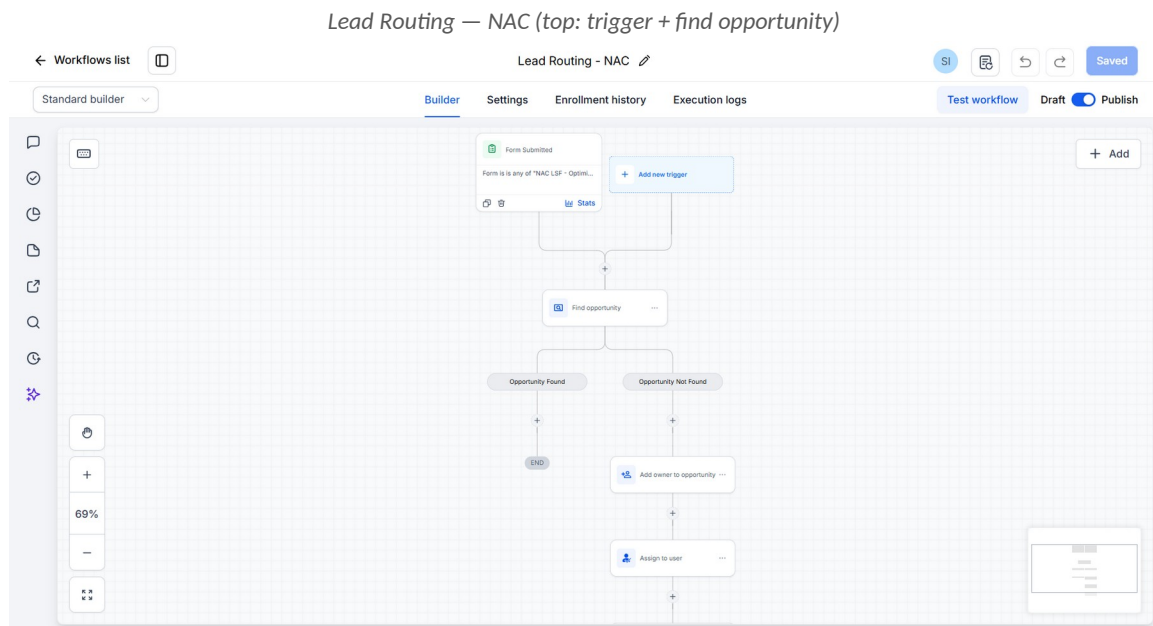
Trigger: Form Submitted — NAC LSF - Optimized

What it does:

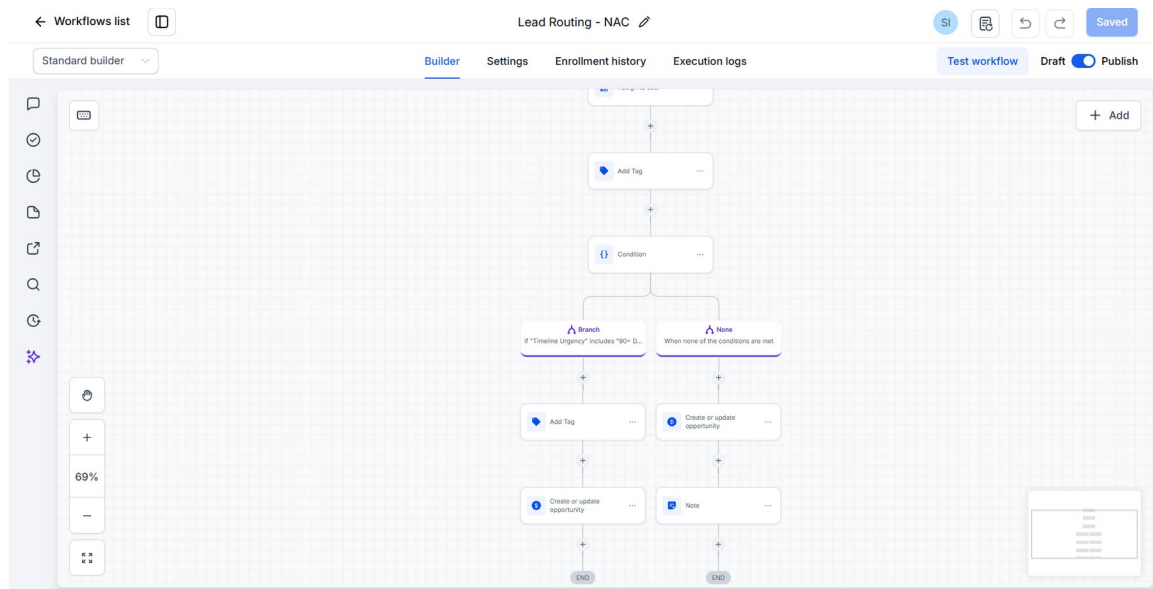
- Finds if an opportunity already exists in the NAC Pipeline (prevents duplicates).
- If none found: checks timeline urgency — if 90+ days, creates opportunity in Long-Term Nurture stage; otherwise New Lead.
- Adds a formatted Note to the opportunity with all lead details (VA Notes, property info, motivation, etc.).
- Assigns owner to Jordan.
- Adds source-nac tag.

Tags: Adds: source-nac. Reads: Timeline Urgency field.

⚠ If turned OFF: NAC form submissions will not create opportunities or route leads. They'll sit as contacts only, invisible on the pipeline.



Lead Routing — NAC (bottom: timeline branch + create/note)



Lead Routing — PPC (Zapier)

Status: 🟡 Draft

Purpose: Routes incoming PPC leads from the ad agency's Zapier: creates an opportunity in the PPC pipeline and adds a follow-up task.

Trigger: Contact Tag added — tag includes "source-ppc"

What it does:

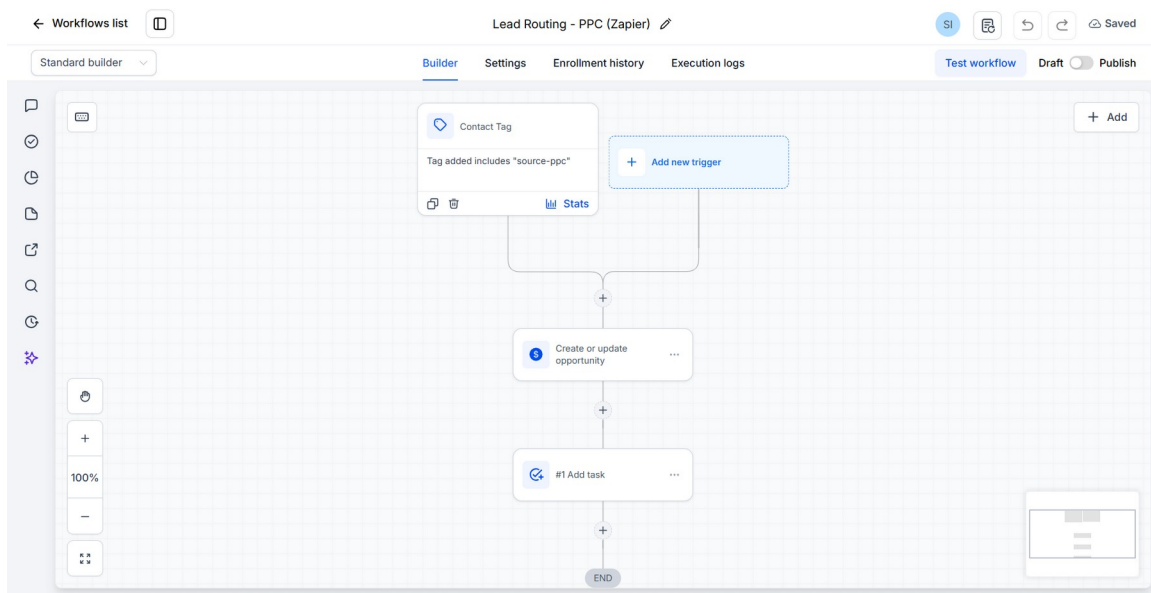
- Creates or updates an opportunity in the PPC Campaign pipeline, New Lead stage.
- Adds a task for Jordan to follow up.

Tags: Reads: source-ppc

⚠️ If turned OFF: PPC leads arriving via Zapier would not get an opportunity created automatically.

Note: Currently in Draft. PPC opportunities are primarily created by the ad agency's Zapier integration directly.

Lead Routing — PPC (Zapier) builder



NAC Old Form — Opportunity Rescue (gated)

Status: ● Published (transitional)

Purpose: Catches leads from the old NAC form and creates opportunities with duplicate protection across both pipelines.

Trigger: Form Submitted — NAC LSF (old form only)

What it does:

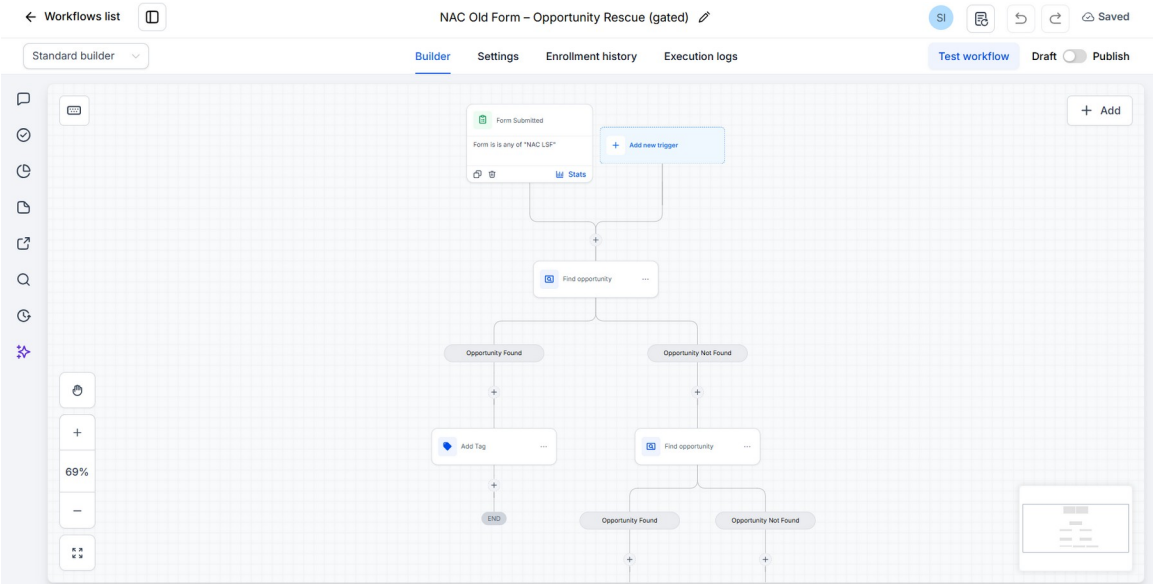
- Checks the NAC Pipeline for an existing opportunity.
- If found: adds source-nac tag only (no duplicate created).
- If not found: checks PPC Campaign pipeline too (older leads may have been created there when only one pipeline existed).
- If found in PPC: adds tag only (the misplaced opp gets relocated manually later).
- If not found anywhere: creates a new opportunity in the NAC Pipeline, adds source-nac tag, updates contact fields.
- Duplicate-opportunity toggle is set to OFF as an extra safeguard.

Tags: Adds source-nac

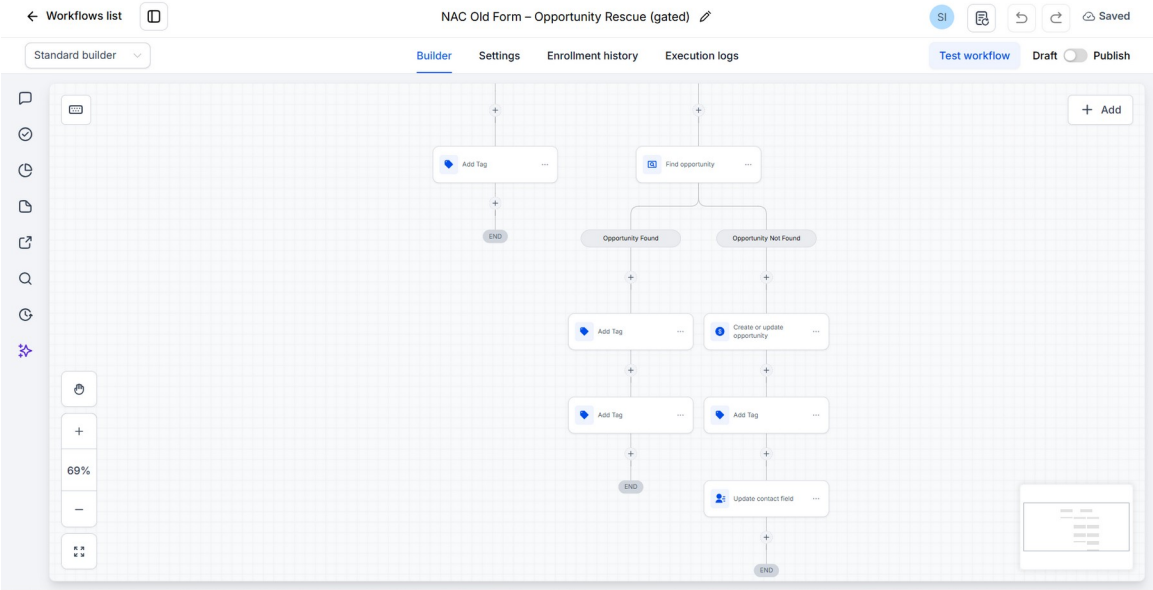
⚠ If turned OFF: Old-form NAC leads sit as contacts without any opportunity — invisible on the pipeline, getting no automation.

Note: Transitional workflow. Rescues the old-form backlog and catches stragglers during the switch to the optimized form. Can be archived once the old form is fully retired.

NAC Rescue — top (trigger + NAC gate)



NAC Rescue — bottom (PPC check + create + tag + update)



Tagging — Lead Reply Sort

Status: ● Published

Purpose: When a lead replies, sorts them into Positive / Negative / No-answer branches and updates their opportunity stage across both pipelines.

Trigger: Customer replies (inbound message)

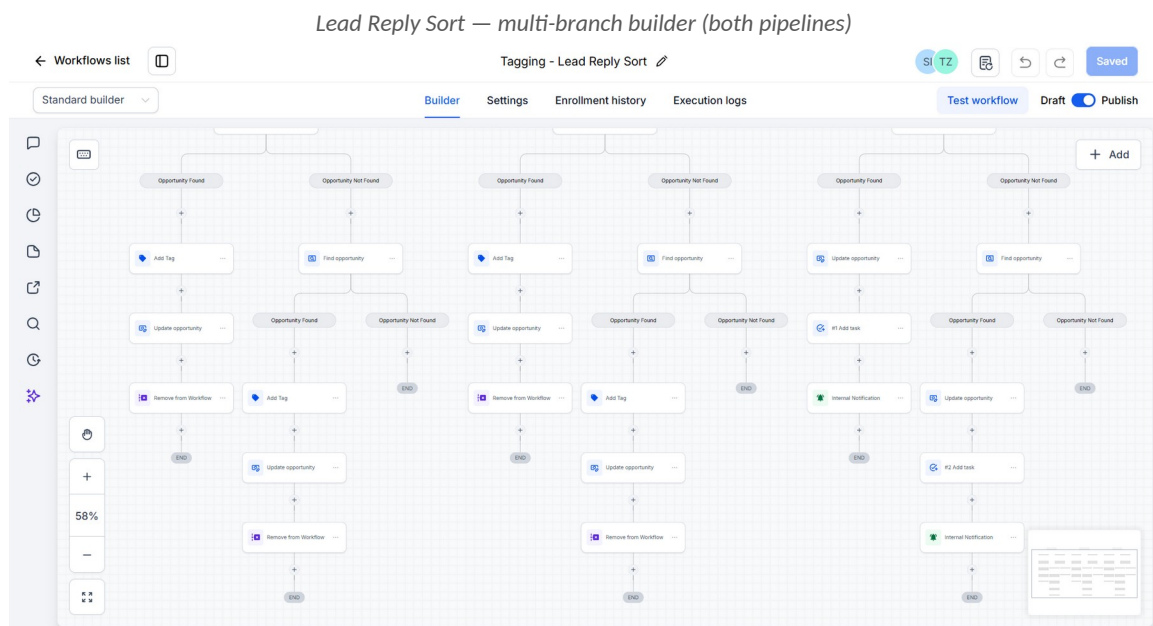
What it does:

- Evaluates the reply against keyword conditions.
- Positive reply (yes, interested, etc.): finds the opportunity (checks NAC then PPC) → updates stage → removes from follow-up workflows.
- Negative reply (no, not interested, stop): finds opportunity → updates stage → adds not-interested tag → removes from workflows.
- No clear answer: finds opportunity → adds no-answer tag → updates stage to No Answer.
- Sends internal notifications and creates tasks for follow-up.

Tags: Reads/adds: hot-lead, not-interested, no-answer. Uses Find Opportunity across both pipelines.

⚠ If turned OFF: Replies are no longer auto-sorted. Someone must manually read and route every response — high risk of missing hot leads.

Note: This workflow deliberately has Re-entry ON so a lead can be re-sorted on each new reply.



Follow-Up — Seller Sequence — NAC

Status: ● Draft

Purpose: Multi-touch nurture sequence for NAC leads who haven't responded to the instant text/email.

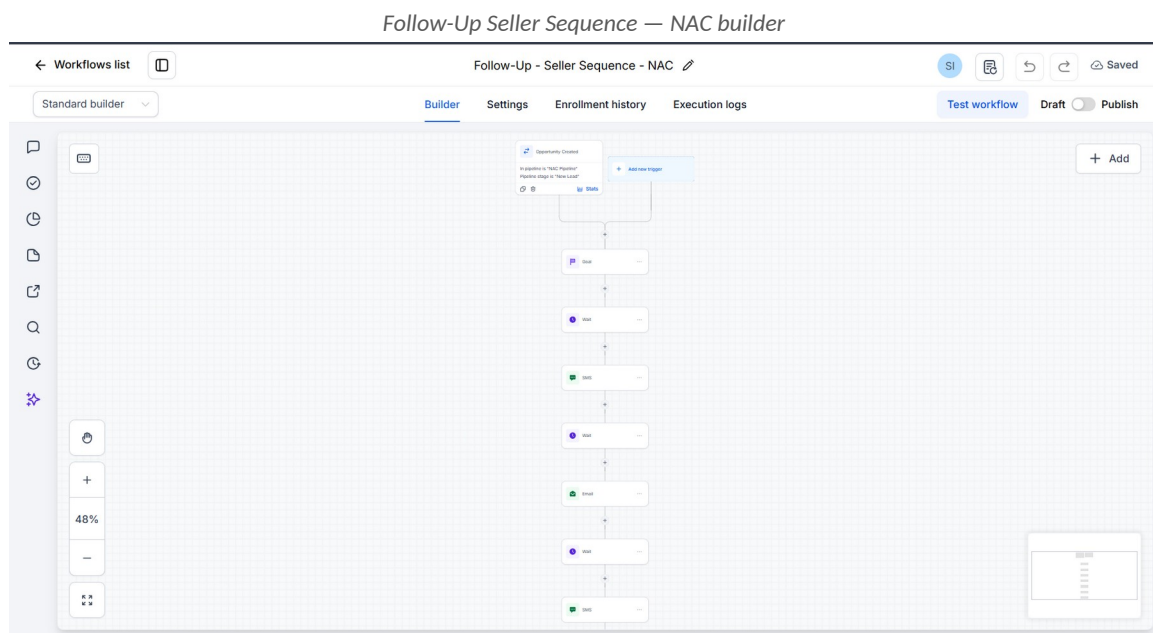
Trigger: Opportunity Created — NAC Pipeline, stage New Lead

What it does:

- Sets a Goal (exit condition if the lead responds or books).
- Runs a timed sequence: Wait → SMS → Wait → Email → Wait → SMS (spaced over days).
- At the end, if still no response, adds timeline-long tag → moves lead to Long-Term Nurture.

Tags: Adds at end: timeline-long

⚠ If turned OFF: Unresponsive NAC leads get no follow-up beyond the instant text — they simply go cold.



Follow-Up — Seller Sequence — PPC

Status: 🟡 Draft

Purpose: Same multi-touch nurture structure as the NAC version, but for PPC leads.

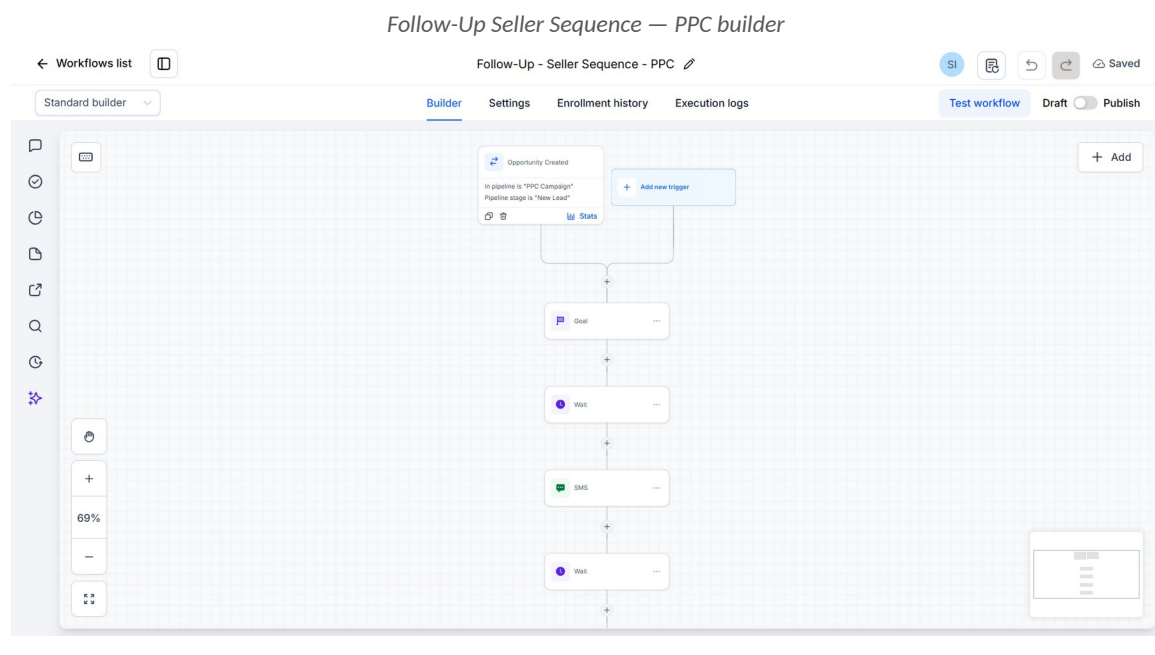
Trigger: Opportunity Created — PPC Campaign, stage New Lead

What it does:

- Sets a Goal (exit condition).
- Runs a timed sequence: Wait → SMS → Wait → Email → Wait → SMS.
- At the end, adds timeline-long tag → moves to Long-Term Nurture.

Tags: Adds at end: timeline-long

⚠️ **If turned OFF:** Unresponsive PPC leads get no follow-up and go cold.



Alert — Hot Lead

Status:  Published

Purpose: Notifies Jordan immediately when a lead is flagged as hot, so he can act fast on the highest-intent sellers.

Trigger: Tag added: hot-lead

What it does:

- Sends Jordan an internal alert (SMS or notification).
- Creates a task to follow up with the hot lead immediately.

Tags: Reads: hot-lead

 **If turned OFF:** Jordan receives no priority alerts on high-intent sellers. The best leads may sit unworked.

Nurture — Long Term — NAC

Status:  Published

Purpose: Keeps long-horizon NAC sellers (not ready to sell now) warm with periodic, low-pressure touches over months.

Trigger: Dual trigger: (1) Tag added "timeline-long" OR (2) Pipeline Stage Changed to "Long-Term Nurture" in NAC Pipeline

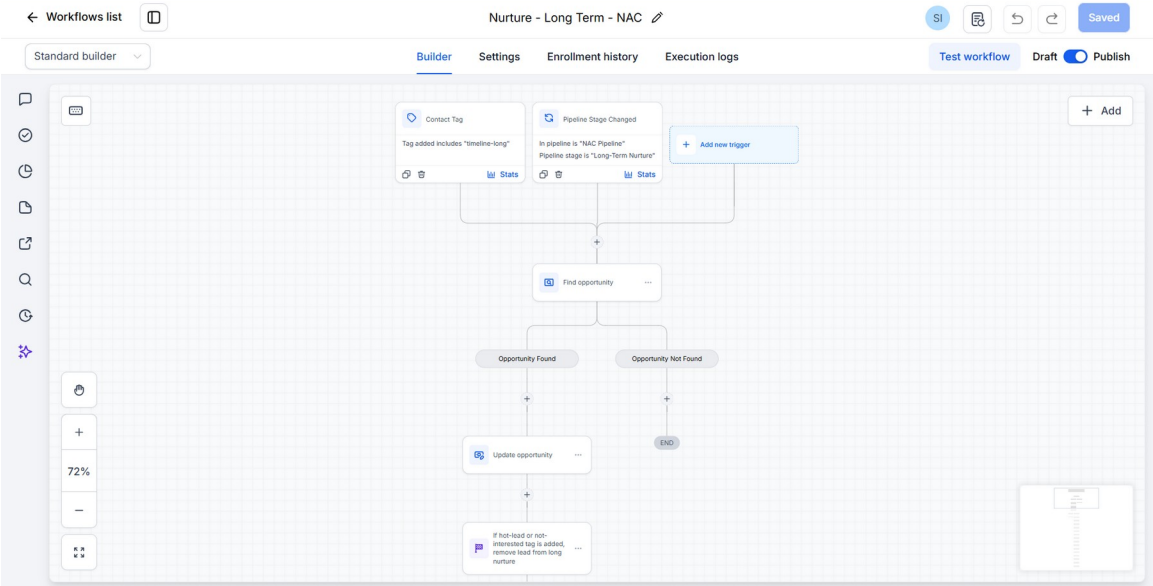
What it does:

- Finds the opportunity in the NAC Pipeline.
- If found: updates opportunity stage to Long-Term Nurture.
- Checks if hot-lead or not-interested tag is added — if so, exits the lead from nurture (they've re-engaged or declined).
- If neither: enters a long nurture loop — Wait 7 days → SMS → Email → Wait 21 days → SMS → Wait 30 days → Email → Wait 90 days → loops back.

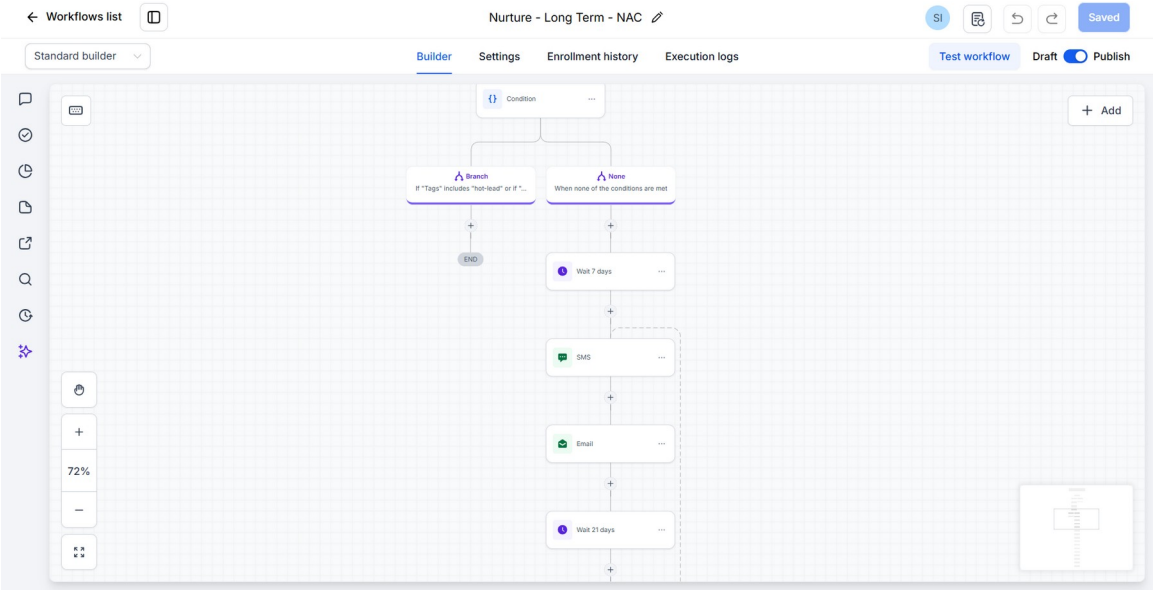
Tags: Reads: timeline-long, hot-lead, not-interested

 **If turned OFF:** Long-term NAC leads go completely silent — no periodic touches, likely forgotten.

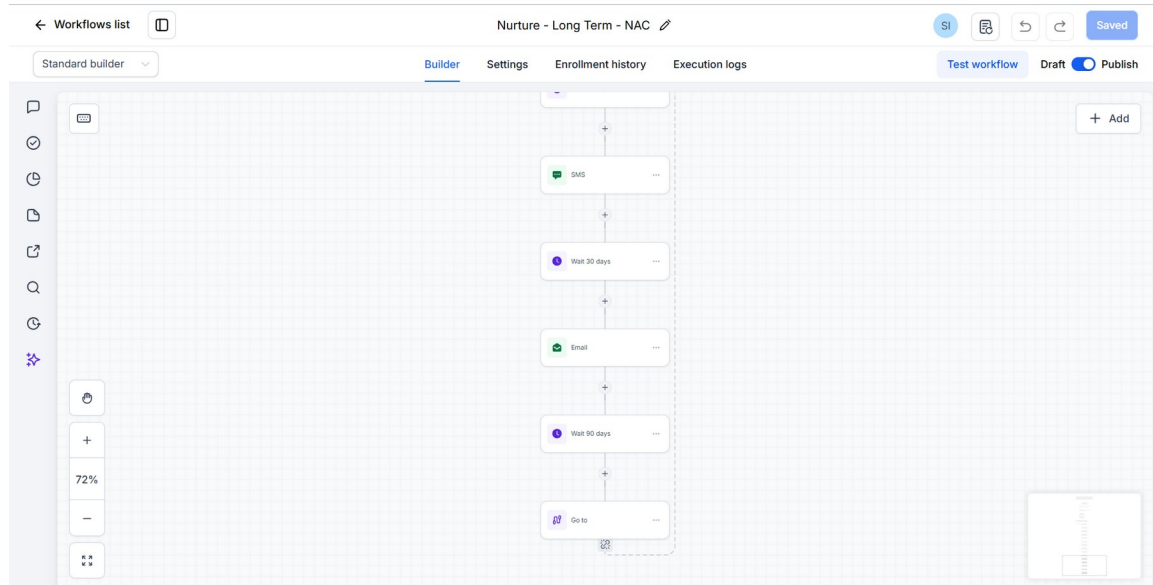
Nurture NAC — triggers + find opportunity



Nurture NAC — condition branch + nurture loop



Nurture NAC — extended loop (SMS → email → wait → loop)



Nurture — Long Term — PPC

Status: ● Published

Purpose: Same long-horizon nurture for PPC leads in the PPC Campaign pipeline.

Trigger: Dual trigger: (1) Tag added "timeline-long" OR (2) Pipeline Stage Changed to "Long-Term Nurture" in PPC Campaign

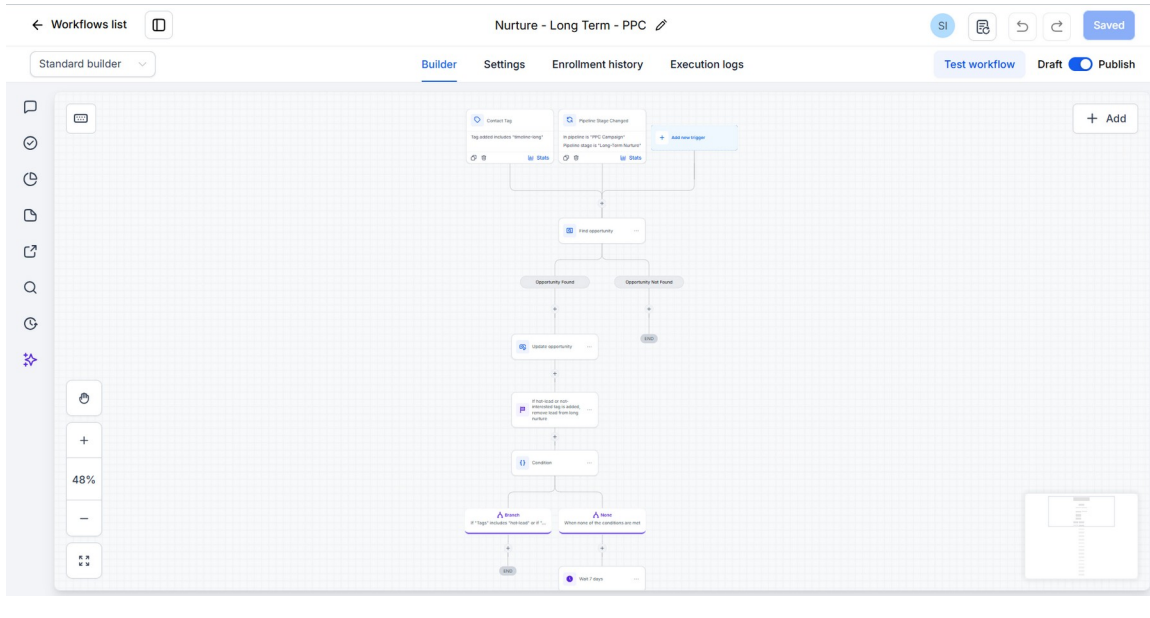
What it does:

- Finds opportunity in PPC Campaign pipeline.
- Updates stage, checks for exit tags (hot-lead / not-interested).
- Enters same nurture loop: Wait 7d → SMS → Email → Wait 21d → SMS → Wait 30d → Email → Wait 90d → loops.

Tags: Reads: timeline-long, hot-lead, not-interested

⚠️ If turned OFF: Long-term PPC leads go silent and are forgotten.

Nurture — Long Term — PPC builder



Reminder — Appointment Bookings

Status: ● Published

Purpose: Sends reminder messages before a scheduled Seller Consultation to reduce no-shows.

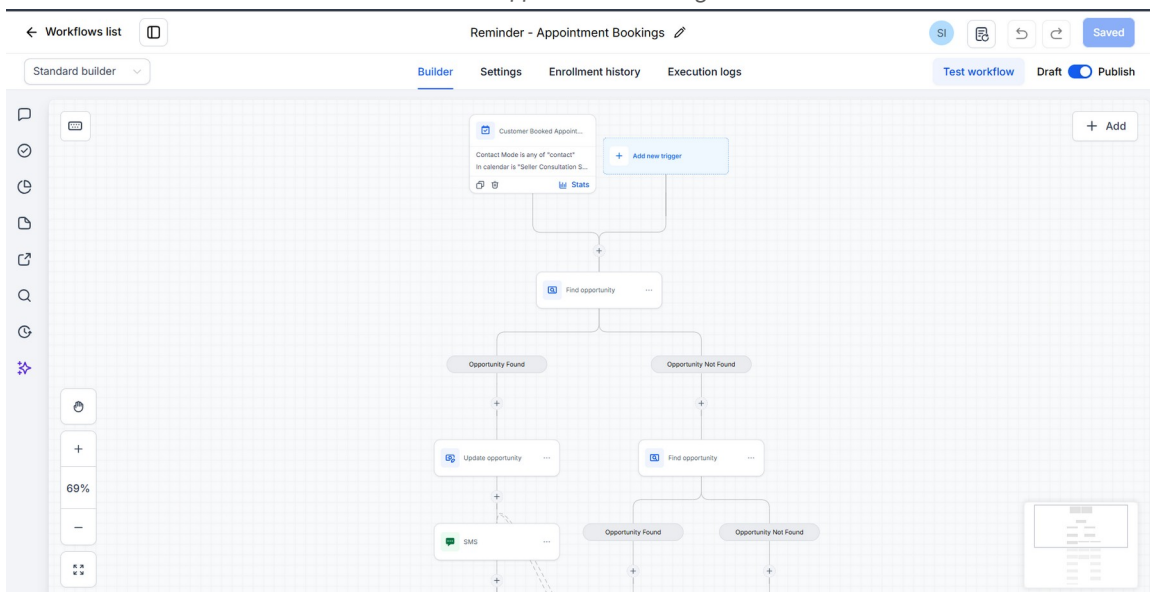
Trigger: Customer Booked Appointment — calendar is "Seller Consultation"

What it does:

- Finds the opportunity across both pipelines (checks NAC first, then PPC).
- If found: updates opportunity stage to Appointment Set.
- Sends an SMS reminder.

! If turned OFF: No reminders before appointments. No-show rate likely rises.

Reminder — Appointment Bookings builder



Missed Call — Text Back

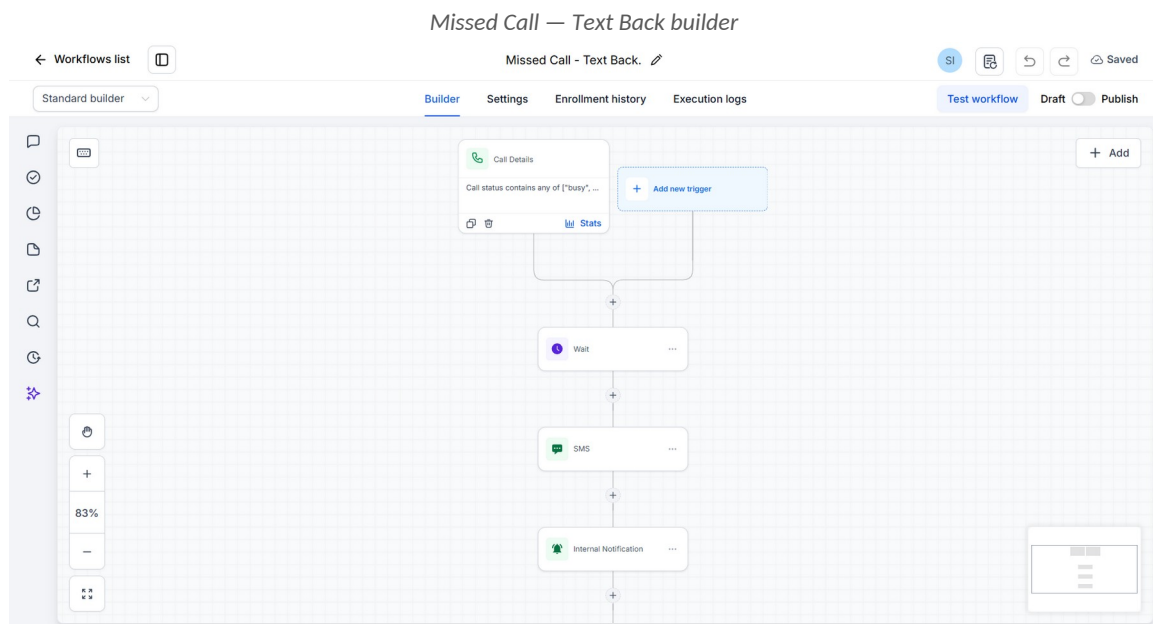
Status: 🟡 Draft

Purpose: Automatically texts a lead back when they call and nobody picks up.

Trigger: Call Details — call status is "busy" or "no-answer"

What it does:

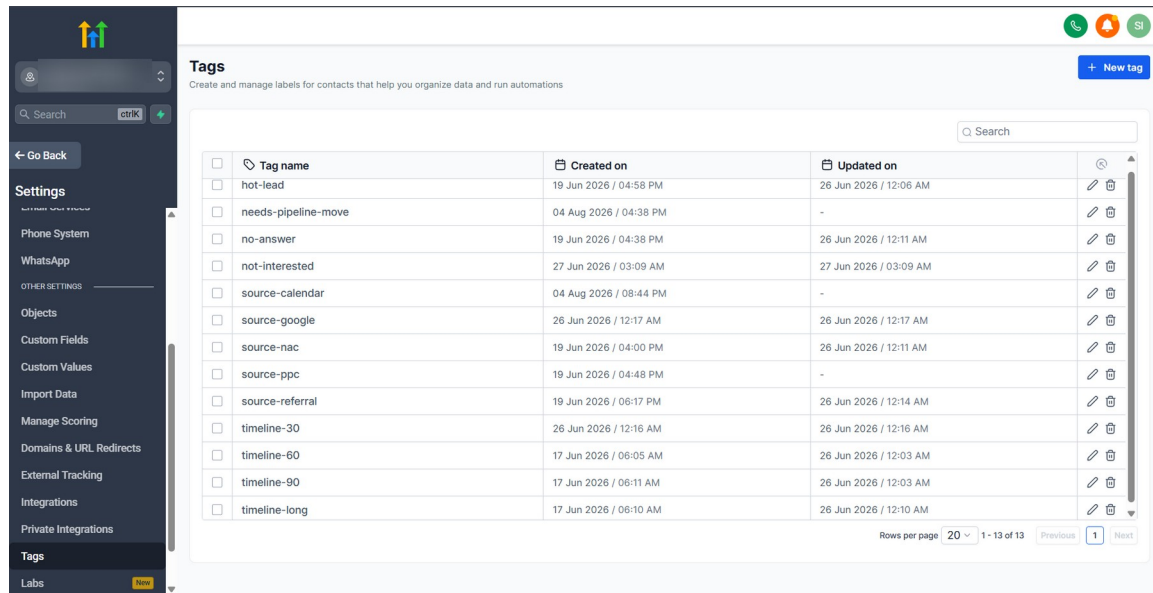
- Waits briefly (prevents double-contact if someone calls back quickly).
 - Sends SMS: "Sorry we missed your call — reply here and we'll help right away" with booking link.
 - Sends internal notification so Jordan knows a call was missed.
- ⚠️ **If turned OFF:** Missed calls go completely unacknowledged until someone manually notices.



3. Tags

Every tag in use, what it means, and what sets it. All tags follow the lowercase-hyphenated naming convention.

Tags list in GHM



☐	Tag name	Created on	Updated on	
☐	hot-lead	19 Jun 2026 / 04:58 PM	26 Jun 2026 / 12:06 AM	
☐	needs-pipeline-move	04 Aug 2026 / 04:38 PM	-	
☐	no-answer	19 Jun 2026 / 04:38 PM	26 Jun 2026 / 12:11 AM	
☐	not-interested	27 Jun 2026 / 03:09 AM	27 Jun 2026 / 03:09 AM	
☐	source-calendar	04 Aug 2026 / 08:44 PM	-	
☐	source-google	26 Jun 2026 / 12:17 AM	26 Jun 2026 / 12:17 AM	
☐	source-nac	19 Jun 2026 / 04:00 PM	26 Jun 2026 / 12:11 AM	
☐	source-ppc	19 Jun 2026 / 04:48 PM	-	
☐	source-referral	19 Jun 2026 / 06:17 PM	26 Jun 2026 / 12:14 AM	
☐	timeline-30	26 Jun 2026 / 12:16 AM	26 Jun 2026 / 12:16 AM	
☐	timeline-60	17 Jun 2026 / 06:05 AM	26 Jun 2026 / 12:03 AM	
☐	timeline-90	17 Jun 2026 / 06:11 AM	26 Jun 2026 / 12:03 AM	
☐	timeline-long	17 Jun 2026 / 06:10 AM	26 Jun 2026 / 12:10 AM	

hot-lead — High-intent lead needing priority attention. (Set by: Hot Lead Signals / Lead Reply Sort)

needs-pipeline-move — Flags an opportunity needing manual pipeline relocation. (Set by: NAC Old Form Rescue)

no-answer — Lead hasn't responded to outreach. (Set by: Lead Reply Sort)

not-interested — Seller declined or said no. (Set by: Lead Reply Sort)

source-calendar — Lead came through a calendar booking. (Set by: Calendar / Booking workflows)

source-google — Lead source is Google (some PPC leads). (Set by: Ad Agency Zapier / GHM auto-detection)

source-nac — Lead came from NAC cold-callers. (Set by: Lead Routing — NAC / NAC Rescue)

source-ppc — Lead came from Google Ads / PPC. (Set by: Ad Agency Zapier / Lead Routing — PPC)

source-referral — Lead came from a referral. (Set by: Manual / import)

timeline-30 — Seller timeline is ~30 days. (Set by: Lead Routing — NAC)

timeline-60 — Seller timeline is ~60 days. (Set by: Lead Routing — NAC)

timeline-90 — Seller timeline is ~90 days. (Set by: Lead Routing — NAC)

timeline-long — Seller not ready near-term; enters long-term nurture. (Set by: Follow-Up Seller Sequence / Lead Routing)

4. If Something Goes Wrong

Common situations and the first thing to check.

? A new lead didn't get a text/email

→ Is the correct "Instant Text and Email" (NAC or PPC version) published and ON? Does the lead have a source tag? Check the workflow's Enrollment History for that contact.

? A seller got the same message twice

→ Check for duplicate opportunity cards on that contact. The duplicate-opportunity toggle should be OFF. Check that the paused rogue workflow is still in Draft.

? A text shows a number instead of a name

→ That lead's name field holds the address (an ad agency/Zapier mapping issue). Don't re-add first-name personalization until the ad agency's mapping is confirmed fixed.

? A lead is stuck in a stage

→ Check whether the workflow that should move it is ON. Verify Find Opportunity is filtering by the correct pipeline.

? Jordan didn't get a hot-lead alert

→ Is "Alert — Hot Lead" published? Does the contact have the hot-lead tag?

? Can't find NAC leads

→ Make sure you're viewing the NAC Pipeline (switch the dropdown on the Opportunities page). Or use the NAC Leads inbox view.

? Appointment reminder didn't send

→ Is "Reminder — Appointment Bookings" published? Was the appointment booked on the Seller Consultation calendar?

? Booking confirmation went to spam

→ Check domain authentication (SPF/DKIM/DMARC) in Settings → Email Services.

5. What This System Does For You

The point of everything in this manual, in plain terms.

Now handled automatically:

- Every new lead gets an instant text and email within seconds — no more racing to respond first.
- Leads are automatically tagged by source, assigned to Jordan, and placed in the correct pipeline.
- Unresponsive leads get a full multi-touch follow-up, then roll into long-term nurture — no lead goes cold from neglect.
- High-intent (hot) leads trigger an instant alert so the best opportunities get worked first.
- Consultations are booked, confirmed, and reminded automatically — cutting no-shows.
- Replies are auto-sorted into interested / not-interested, so attention goes only to live conversations.
- The pipeline boards and dashboards give a real-time picture without building a single report.

What you just keep an eye on:

- Glance at the two dashboards a few times a week — lead volume and pipeline health at a glance.
- Work the hot-lead alerts and tasks as they come in — these are your highest-value moments.
- Keep an eye on the pipeline board so deals keep moving from stage to stage.
- Check that PPC leads are flowing correctly and the ad agency's feed is clean.
- For any change to the automations, reach out to us rather than editing live workflows.

In short: your job shifts from doing the chasing, sorting, and reminding to watching the numbers and working the live opportunities, which is exactly where an owner's time is best spent.