One Big Media Company

GOHIGHLEVEL SNAPSHOT · AUTO REPAIR & DETAILING

Auto Snapshot: Setup & Walkthrough Guide

Install, configure and launch every workflow, pipeline and form.

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OVERVIEW

What's inside

A done-for-you GoHighLevel system for repair shops and detailers that texts back missed calls, follows up on declined work and reminds customers when service is due.

- 21 pre-built workflows written for auto repair shops and detailers
- Declined work follow-up campaign with free re-check and staged-repair options
- Service-due reminders by time or mileage
- Estimate follow-up sequence that prioritizes safety items and offers staging
- Missed-call text-back for busy service counters
- Sales pipeline with Service Booked, Vehicle Inspected and Estimate Sent stages
- Customer Journey from Vehicle Scheduled to Vehicle Picked Up and Referral Partner
- Winter-ready and spring seasonal check campaigns
- Service request form asking vehicle, mileage and drop-off preference
- 7 auto custom fields including declined work, estimate value and next service mileage
- Review request with private service recovery for unhappy customers
- Reactivation campaign for customers you haven't seen in months
- Setup guide, 6-lesson course outline and agency sales kit

Pipelines

Sales Pipeline

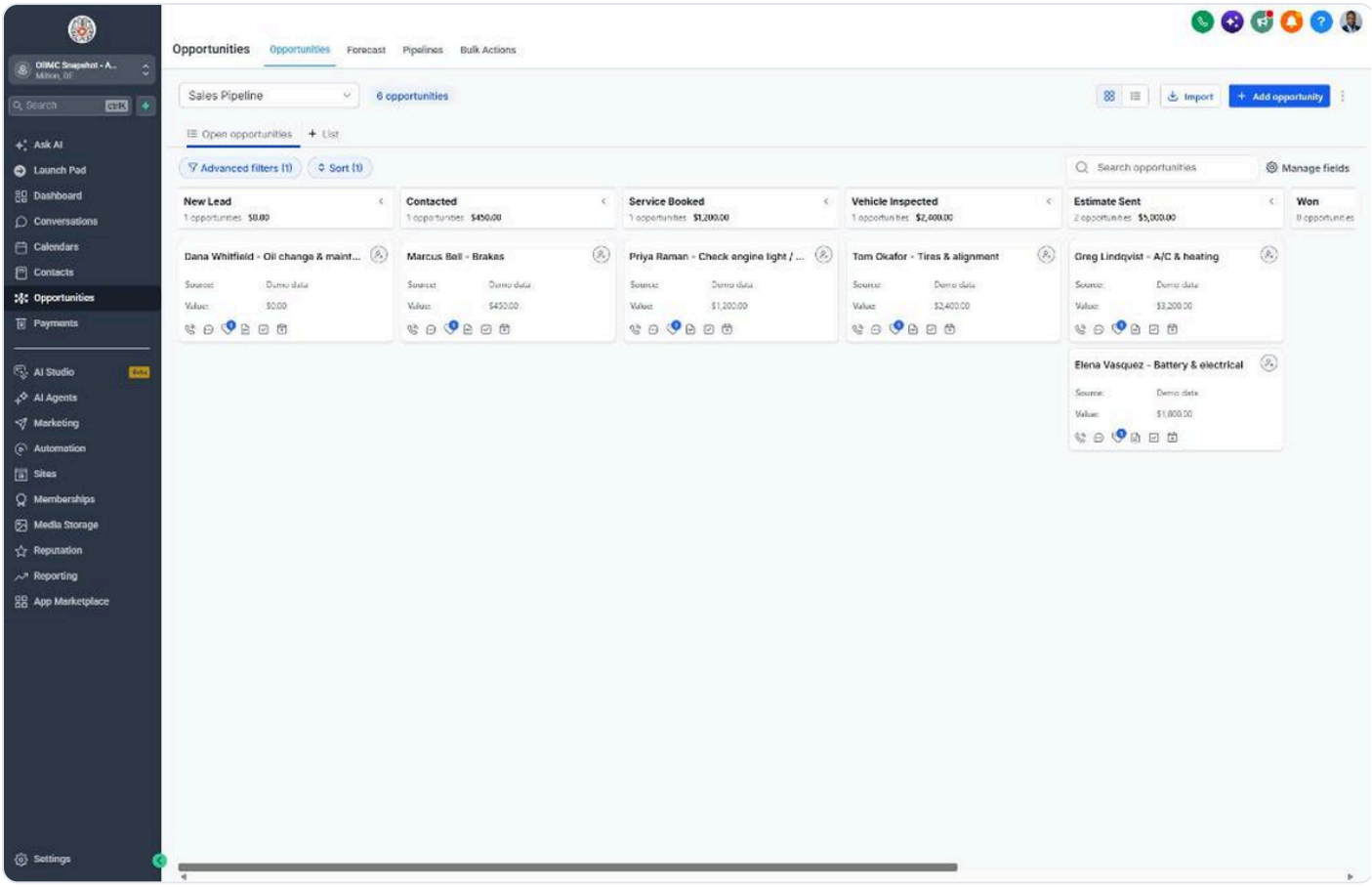
New Lead | Contacted | Service Booked | Vehicle Inspected | Estimate Sent | Won | Lost | Long-Term Nurture

Customer Journey

Vehicle Scheduled | In the Bay | Vehicle Picked Up | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Sales Pipeline
6 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
New Lead
1 opportunities $0.00
Contacted
1 opportunities $450.00
Service Booked
1 opportunities $1,200.00
Vehicle Inspected
1 opportunities $2,400.00
Estimate Sent
2 opportunities $5,000.00
Won
0 opportunities
Dana Whitfield - Oil change & maint...
Marcus Bell - Brakes
Priya Raman - Check engine light / ...
Tom Okafor - Tires & alignment
Greg Lindqvist - A/C & heating
Elena Vasquez - Battery & electrical
Ask AI
Launch Pad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Payments
AI Studio
AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings

INSTALL

12-step setup checklist

1. **Load the snapshot**
   In Agency view, go to Account Snapshots > Imported Snapshots and load the Auto snapshot into a new or existing sub-account. Open the sub-account when the import completes.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the shop's name, address, phone, website and time zone. Reminders send based on this time zone.

3. **Set your custom values**
   Go to Settings > Custom Values and fill in Business Name, Owner Name, Business Phone, Service Area and the four links. Set Primary Service to repair, detailing or both, and adjust the offers to match the shop's pricing.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers, buy or port the shop's number, and complete A2P 10DLC registration in the Trust Center tab using the legal business name and EIN. Wait for approval before sending campaigns.

5. **Connect email sending**
   Go to Settings > Email Services, add a dedicated sending domain and add the DNS records it gives you. Verify before sending reminders.

6. **Configure the appointment calendar**
   Go to Calendars > Calendar Settings and open "Service Appointment." Set slot length and availability to match bay capacity and limit appointments per slot so you don't overbook. Copy the booking link into the Booking Link custom value.

7. **Review the pipelines**
   Go to Opportunities > Pipelines and confirm the Service Booked, Vehicle Inspected and Estimate Sent stages. Enter estimate totals as opportunity values to track open repair dollars.

8. **Connect Google reviews**
   Go to Settings > Integrations and connect Google Business Profile, then copy the review link from Reputation > Settings into the Review Link custom value.

9. **Customize and embed the service form**
   Go to Sites > Forms > Builder and open "01 · Request a Quote / Booking Request." Confirm vehicle, mileage and drop-off questions are included and embed it on the website's appointment page.

10 **Import customers and declined work**
Export customers from your shop management system with last visit date, mileage and declined work. Import in Contacts > Import, mapping Declined Work, Declined Work Estimate, Last Service Date and Next Service Due. Only import customers who agreed to receive texts.

11 **Publish the workflows**
Go to Automation > Workflows, review the copy and publish. Start with 01, 02, 04, 05, 10 and 11, then 19 and 21. Trigger Workflow 21 by adding the 'niche campaign' tag to customers with declined work.

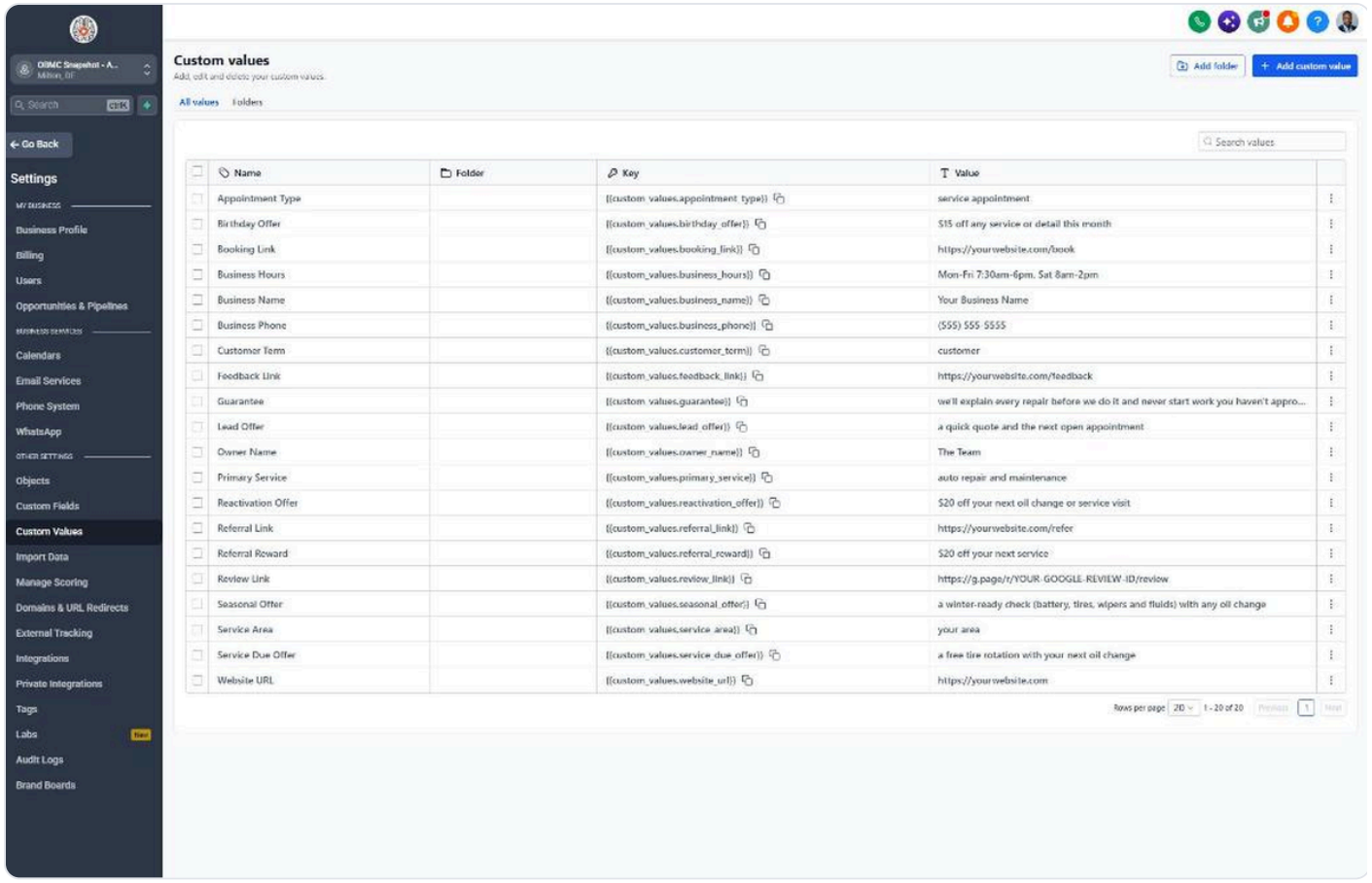
12 **Go live test**
Submit the service form with your own info, call the shop number and let it ring out, and book a test appointment. Confirm each text, email and team alert arrives, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Auto default / what to enter
Business Name	Your business name
Business Phone	Your business phone
Owner Name	Your owner name
Website URL	Your website url
Booking Link	Your booking link
Review Link	Your review link
Feedback Link	Your feedback link
Referral Link	Your referral link
Service Area	Your service area
Customer Term	customer
Appointment Type	service appointment
Primary Service	auto repair and maintenance
Lead Offer	a quick quote and the next open appointment
Guarantee	we'll explain every repair before we do it and never start work you haven't approved
Referral Reward	$20 off your next service
Reactivation Offer	$20 off your next oil change or service visit
Seasonal Offer	a winter-ready check (battery, tires, wipers and fluids) with any oil change
Service Due Offer	a free tire rotation with your next oil change
Birthday Offer	$15 off any service or detail this month
Business Hours	Mon-Fri 7:30am-6pm, Sat 8am-2pm


OBMC Snapshot - A...
Milton, DE
Search ctrlK
Go Back
Settings
MY BUSINESS
Business Profile
Billing
Users
Opportunities & Pipelines
BUSINESS SERVICES
Calendars
Email Services
Phone System
WhatsApp
OTHER SETTINGS
Objects
Custom Fields
Custom Values
Import Data
Manage Scoring
Domains & URL Redirects
External Tracking
Integrations
Private Integrations
Tags
Labs
New
Audit Logs
Brand Boards
Custom values
Add, edit and delete your custom values.
Add folder
Add custom value
All values
Folders
Search values
Name
Folder
Key
Value
Appointment Type
{{custom_values.appointment_type}}
service appointment
Birthday Offer
{{custom_values.birthday_offer}}
$15 off any service or detail this month
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Fri 7:30am-6pm, Sat 8am-2pm
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
customer
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
we'll explain every repair before we do it and never start work you haven't appro...
Lead Offer
{{custom_values.lead_offer}}
a quick quote and the next open appointment
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
auto repair and maintenance
Reactivation Offer
{{custom_values.reactivation_offer}}
$20 off your next oil change or service visit
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
$20 off your next service
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
a winter-ready check (battery, tires, wipers and fluids) with any oil change
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a free tire rotation with your next oil change
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next

WALKTHROUGH

All 21 workflows

01 · New Lead → Speed-to-Lead + 7-Day Follow-Up

TRIGGER Form 01 submitted, or tag 'start lead nurture' added

STEPS Tag new lead → Create opportunity in Sales Pipeline → New Lead → Instant SMS reply with booking link → Instant email: what happens next → Text + email alert to the team → Day 1 SMS follow-up → Day 2 email: why customers choose you → Day 4 SMS: quick question → Day 7 email: close the loop → Move to Long-Term Nurture

Stops when the lead replies

> Hi **first name**, it's **owner name** at **business name**. Got your request! I can get you **lead offer**. What's going on with the vehicle? Or book a time: **booking link** Reply STOP to opt out.

02 · Missed Call → Instant Text-Back

TRIGGER Inbound call is busy, no-answer or voicemail

STEPS Text-back within seconds → Create opportunity → New Lead (source: missed call) → Text alert to the team

Runs every time

> Hi, this is **business name**. Sorry we missed your call, we're probably under a car! What can we help with? Reply here or book a time: **booking link** Reply STOP to opt out.

03 · Customer Replied → Hot Lead Alert

TRIGGER Customer replies (SMS, email, chat)

STEPS Tag hot lead → Text the team the reply so nobody waits

Runs every time

04 · Appointment Booked → Confirm + Reminders

TRIGGER Customer books on the calendar

STEPS Tag appointment booked → Move deal → Appointment Booked → Confirmation SMS + email with reschedule link → Team alert → 24-hour reminder SMS → 2-hour reminder SMS

Runs for every booking

> You're booked, **first name**! Your **appointment type** at **business name** is set for **start time**. Need to change it? **reschedule link**

05 · No-Show → Reschedule Recovery

TRIGGER Appointment status changes to No-show

STEPS Tag no-show → Sorry-we-missed-you SMS + email with booking link → Team alert → Day 1 rebook SMS → Day 3 final SMS

Stops when they reply

> Hi **first name**, we missed you at the shop today! No worries. Want to grab a new time for your vehicle? **booking link**

06 · Appointment Completed → Proposal Prep

TRIGGER Appointment status changes to Showed

STEPS Move deal → Appointment Completed → Thank-you SMS → Team alert: send the proposal within 24 hours

Runs every time

07 · Proposal Sent → Follow-Up Sequence

TRIGGER Deal moves to Proposal Sent

STEPS Day 1 SMS check-in → Day 3 email: questions? → Day 6 SMS: hold your spot → Day 13 final email → Team alert if still no answer

Stops when they reply

> Hi **first name**, did you get a chance to look at the estimate from **business name**? Happy to walk you through it or prioritize what's most important. Just reply here.

08 · Deal Won → Welcome + Customer Journey

TRIGGER Deal moves to Won

STEPS Tag customer, remove lead tags → Create Customer Journey deal → Scheduled → Welcome SMS → Welcome email: what happens next → Team alert

Runs every time

> Thanks for choosing **business name**, **first name**! We'll text you updates while your vehicle is in the shop and when it's ready. Save this number, it's our direct line.

09 · Deal Lost → 30/60/90-Day Nurture

TRIGGER Deal moves to Lost

STEPS Tag lost → Day 30 check-in email → Day 60 SMS → Day 90 email with comeback offer → Move to Long-Term Nurture

Stops when they reply

10 · Job Completed → Feedback Request

TRIGGER Customer Journey deal moves to Completed

STEPS Move → Feedback Requested → Tag review requested → SMS + email asking for a private rating → Day 2 reminder SMS

Runs every time

> Hi **first name**, thanks for choosing **business name**! How's the vehicle running? It takes 20 seconds to tell us how we did: **feedback link** Reply STOP to opt out.

11 · Feedback Submitted → Review Ask or Service Recovery

TRIGGER Form 02 submitted

STEPS If rating is 4-5: tag promoter, send Google review link, move → 5-Star Reviewed → If rating is 1-3: tag detractor, apology message, urgent team alert to fix it privately

Runs every time

12 · Happy Customer → Referral Request

TRIGGER Tag promoter added

STEPS Wait 3 days → Referral SMS with reward → Referral email with reward

Once per contact

> Hi **first name**, thanks for the kind words! Know someone looking for a shop they can trust? Send them our way and we'll thank you with **referral reward**: **referral link** Reply STOP to opt out.

13 · Referral Received → Thank You + Team Alert

TRIGGER Form 03 submitted

STEPS Move referrer → Referral Partner → Tag referral partner → Thank-you SMS → Team alert with the friend's name and phone

Runs every time

14 · Database Reactivation Campaign

TRIGGER Tag 'start reactivation' added (bulk-tag an imported list)

STEPS Create Reactivation deal → Campaign Sent → SMS 1: still looking for help? → Day 2 SMS: past-customer offer → Day 5 email offer → Day 10 last-call SMS → Remove the campaign tag

Stops when they reply

> Hi **first name**, it's **owner name** from **business name**. It's been a while since we've seen your vehicle. Is it due for an oil change or anything else? Reply STOP to opt out.

15 · Invoice Sent → Payment Reminders
TRIGGER Invoice sent
STEPS Wait 3 days → Friendly SMS reminder → Day 6 email reminder → Day 10 team alert for a personal call
Payments workflow (16) stops it when the invoice is paid

16 · Payment Received → Thank You
TRIGGER Payment received
STEPS Tag customer, remove past-due tag → Thank-you SMS → Team alert
Runs every time

17 · Birthday → Gift Offer
TRIGGER Contact's birthday (date of birth on file)
STEPS Birthday SMS with gift offer → Birthday email
Yearly

18 · Stale Deal Alert (7 Days No Movement)
TRIGGER Sales Pipeline deal idle 7+ days
STEPS Text + email alert to the team
Runs every time

19 · Service Due → Rebook Reminder
TRIGGER Tag 'service due' added
STEPS Service-due SMS with offer → Day 3 email → Day 7 final SMS → Remove the tag
Stops when they reply

Hi **first name**, it's **business name**. Based on your last visit, your vehicle is coming due for service by time or mileage. Book now and get **service due offer**: **booking link** Reply STOP to opt out.

20 · Seasonal Promo Campaign
TRIGGER Tag 'seasonal promo' added
STEPS Offer SMS → Day 2 email → Day 5 last-call SMS → Remove the tag
Stops when they reply

Hi **first name**, **business name** here. Cold weather is coming. For a limited time: **seasonal offer**. Want in? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Declined Work Follow-Up

TRIGGER Tag 'niche campaign' added

STEPS Niche SMS → Day 2 email → Day 5 follow-up SMS → Remove the tag

Stops when they reply

Hi **first name**, **owner name** at **business name**. On your last visit we noted some work you chose to hold off on. Want us to re-check it or put it on the schedule? Reply YES. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	Aim to respond to new service requests within 5 minutes during shop hours	Conversations and contact activity
Declined work recovered	Track the dollar value of declined work approved after Workflow 21 and grow it monthly	Opportunities > Sales Pipeline Won deals, plus Workflow 21 stats
Estimate approval rate	Track monthly and aim to improve it each quarter	Opportunities > Sales Pipeline, Estimate Sent to Won
Service-due rebook rate	Aim to rebook a growing share of customers reminded by Workflow 19	Automation > Workflows > 19 enrollment and goal stats
Google reviews	Aim for new reviews every week	Reputation > Overview
No-show recovery	Rebook most no-shows within a week	Workflow 05 stats and the Calendars appointment list

Compliance notes

- Register A2P 10DLC before sending texts. Describe the use case as appointment reminders, service-due reminders, estimate follow-up and promotions.
- Service reminders to existing customers and marketing promos have different consent requirements under the TCPA. Collect written consent to text at drop-off or on the service form.
- Keep declined-work messages factual. Don't describe a vehicle as unsafe by text unless your technician documented it, and never pressure customers into repairs.
- Follow your state's auto repair rules on written estimates and customer authorization before work begins.
- Send campaigns between 8am and 8pm in the customer's local time and honor STOP replies immediately.

Mini-course outline

1. **Install the Snapshot and Brand It for Your Shop**: Load the snapshot and make every message sound like the shop.
2. **Never Miss Another Call at the Service Counter**: Make sure every call and form fill gets an immediate reply.
3. **Book Appointments and Recover No-Shows**: Fill the calendar without overbooking bays, and rebook missed appointments.
4. **Follow Up on Every Repair Estimate**: Move every estimate through the pipeline until it's approved or closed.

5. **Reviews, Referrals and Bringing Customers Back**: Get more Google reviews and bring lapsed customers back to the shop.
6. **Launch the Declined Work and Service-Due Engine**: Turn declined estimates and due maintenance into booked bays every month.

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.