One Big Media Company

❄ GOHIGHLEVEL SNAPSHOT · HVAC (HEATING AND COOLING)

HVAC Snapshot: Setup & Walkthrough Guide

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

© One Big Media Company, LLC · onebigmediacompany.com · Licensed for use in your own agency's client accounts. Not affiliated with HighLevel Inc.

OVERVIEW

What's inside

A ready-to-launch GoHighLevel system for heating and cooling companies: instant lead response, emergency call routing, estimate follow-up, reviews and a maintenance plan enrollment campaign.

- 21 pre-built workflows written for heating and cooling companies
- Maintenance Plan Enrollment campaign to grow recurring service agreements
- Missed-call text-back that asks about no-heat or no-cool emergencies
- Sales pipeline with Visit Booked, Visit Completed and Estimate Sent stages
- Customer Journey pipeline from Job Scheduled to Referral Partner
- HVAC Service Visit calendar with tech-on-the-way style reminders
- Service request form with Issue Urgency, System Type and System Age questions
- HVAC custom fields: system type, age, urgency, plan member status, last tune-up date, brand, ownership
- Spring AC and fall furnace tune-up reminder campaigns
- Replacement estimate follow-up covering options, rebates and financing
- Review request flow that sends happy customers to Google and unhappy ones to the owner
- Referral and database reactivation campaigns
- Step-by-step setup guide and 6-lesson course outline

Pipelines

Sales Pipeline

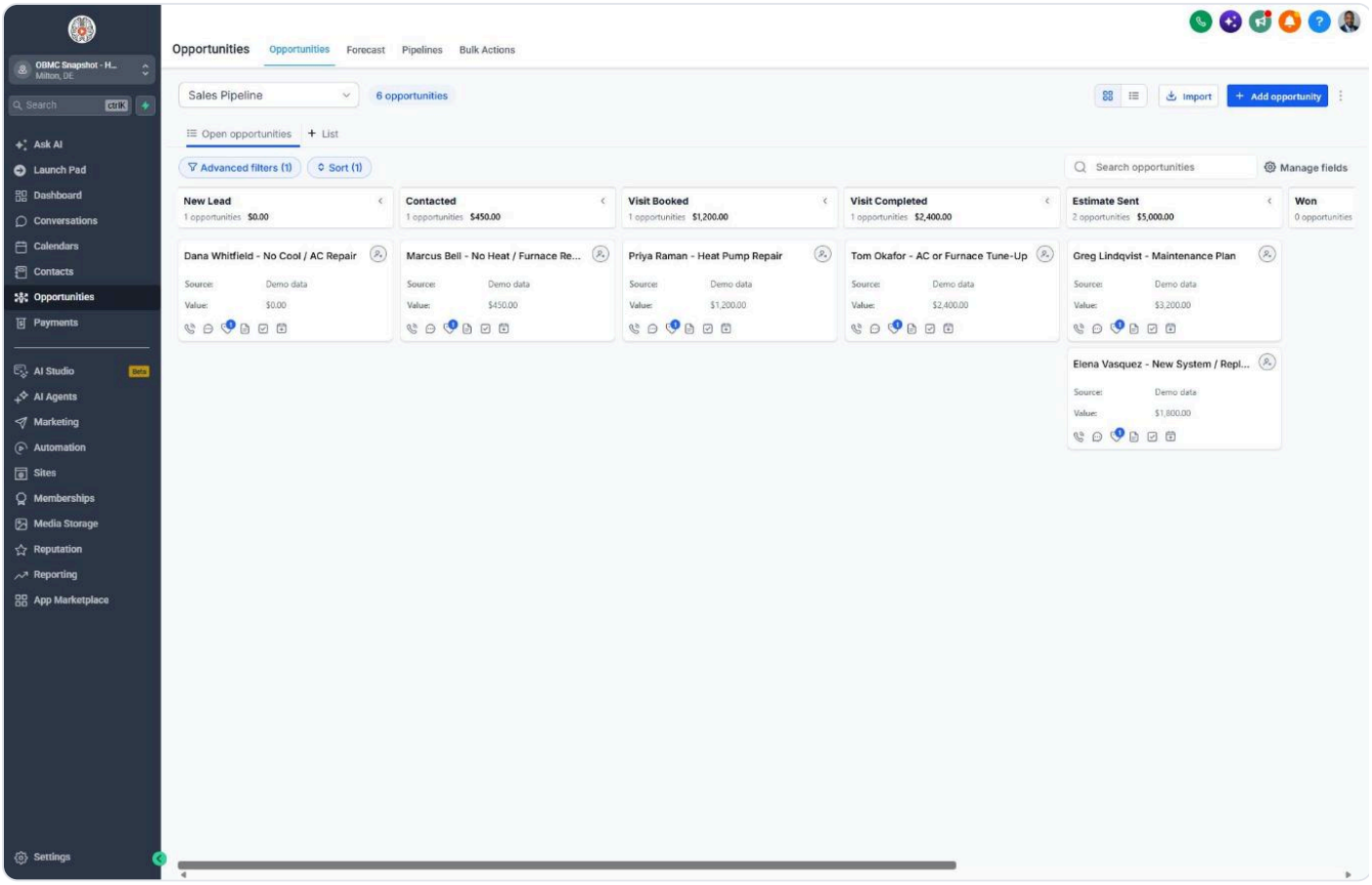
New Lead | Contacted | Visit Booked | Visit Completed | Estimate Sent | Won | Lost | Long-Term Nurture

Customer Journey

Job Scheduled | Install In Progress | Job Completed | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


OBMC Snapshot - H...
Milton, DE
Search
ctrlK
Ask AI
Launch Pad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Payments
AI Studio
Beta
AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings
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
Visit Booked
1 opportunities $1,200.00
Visit Completed
1 opportunities $2,400.00
Estimate Sent
2 opportunities $5,000.00
Won
0 opportunities
Dana Whitfield - No Cool / AC Repair
Source: Demo data
Value: $0.00
Marcus Bell - No Heat / Furnace Re...
Source: Demo data
Value: $450.00
Priya Raman - Heat Pump Repair
Source: Demo data
Value: $1,200.00
Tom Okafor - AC or Furnace Tune-Up
Source: Demo data
Value: $2,400.00
Greg Lindqvist - Maintenance Plan
Source: Demo data
Value: $3,200.00
Elena Vasquez - New System / Repl...
Source: Demo data
Value: $1,800.00

INSTALL

12-step setup checklist

1. **Load the snapshot**
   From the agency view, go to Sub-Accounts, open the account menu and choose Load Snapshot, or pick this snapshot while creating a new sub-account. Import all assets, then switch into the sub-account.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the business name, address, phone, website and time zone. The time zone controls quiet hours for texts and the calendar display.

3. **Set your custom values**
   Go to Settings > Custom Values and fill in business name, owner name, phone, service area and your booking, review, feedback and referral links. Set the tune-up, reactivation and maintenance plan offers to what the shop actually sells.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port a number, and turn on missed-call text-back routing. Complete A2P 10DLC registration in the Trust Center before sending any campaign.

5. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain. Add the DNS records and verify so tune-up reminders and estimates land in the inbox.

6. **Configure the HVAC Service Visit calendar**
   Go to Calendars > Calendar Settings and open HVAC Service Visit. Assign techs or a round-robin, set arrival windows and service hours, then copy the booking link into the booking_link custom value.

7. **Customize the service request form**
   Go to Sites > Forms > Builder and open Request a Quote / Booking Request. Confirm Issue Urgency, System Type and System Age, add the SMS consent checkbox, and embed it on the website.

8. **Connect Google Business Profile and reviews**
   Go to Settings > Integrations and connect Google Business Profile. Then go to Reputation > Settings, copy the review link and paste it into the review_link custom value.

9. **Tag existing maintenance plan members**
   Import your customer list under Contacts > Import and map the Maintenance Plan Member and Last Tune-Up Date fields. This keeps current members out of the enrollment campaign and feeds the tune-up reminders.

10 **Assign staff and alerts**
Go to Settings > My Staff and add dispatchers, comfort advisors and the owner with mobile numbers. Then update the alert steps in workflows 01, 02, 03 and 13 under Automation > Workflows.

11 **Publish the workflows**
Go to Automation > Workflows, review each workflow's copy and switch it from Draft to Publish. Keep 14, 20 and 21 in draft until you decide when to launch each campaign.

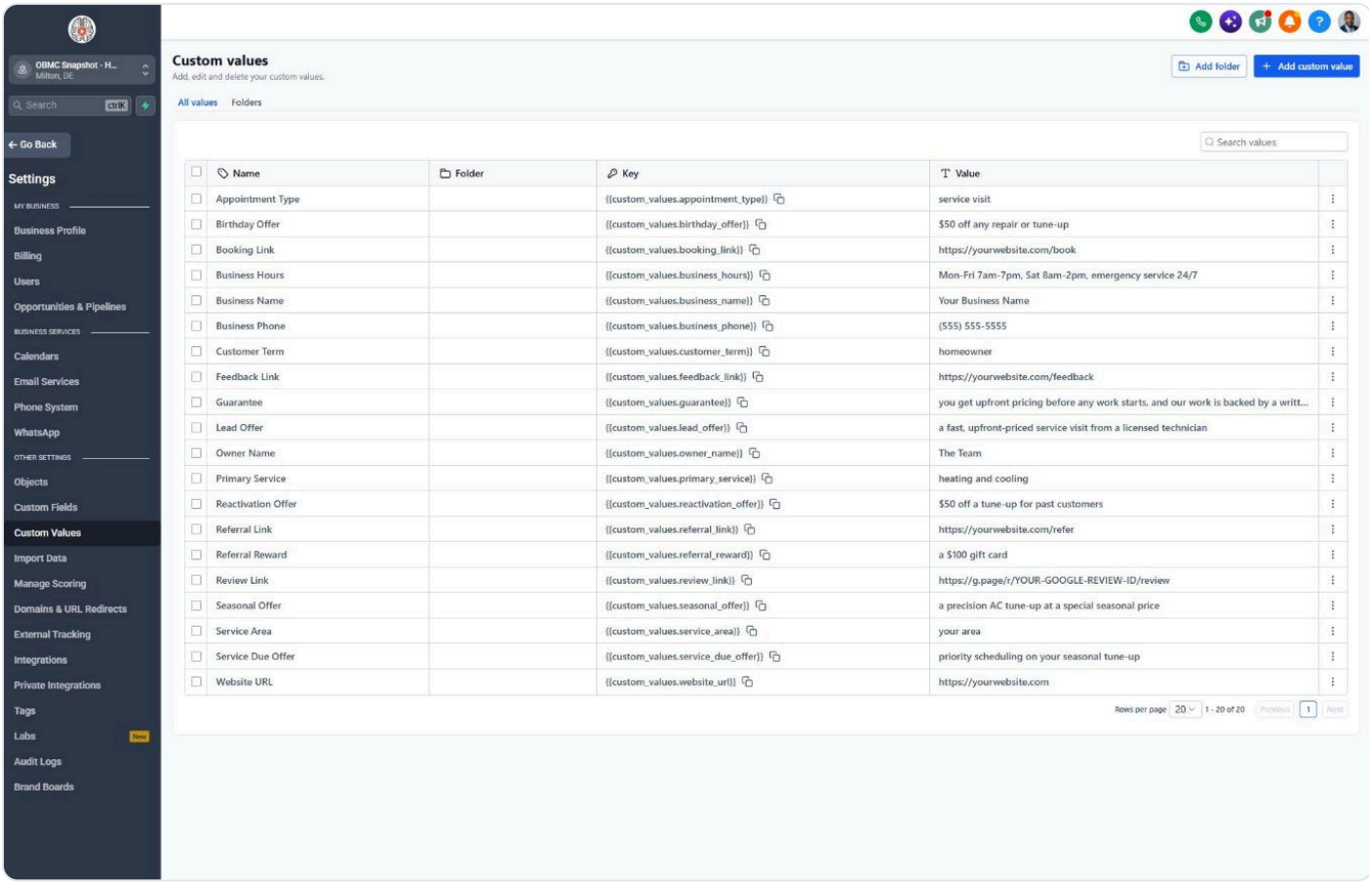
12 **Go live test**
Submit the form with your own number, book a visit, call and hang up, and reply URGENT to the text-back. Confirm every SMS, email and team alert fires, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	HVAC 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	homeowner
Appointment Type	service visit
Primary Service	heating and cooling
Lead Offer	a fast, upfront-priced service visit from a licensed technician
Guarantee	you get upfront pricing before any work starts, and our work is backed by a written workmanship warranty
Referral Reward	a $100 gift card
Reactivation Offer	$50 off a tune-up for past customers
Seasonal Offer	a precision AC tune-up at a special seasonal price
Service Due Offer	priority scheduling on your seasonal tune-up
Birthday Offer	$50 off any repair or tune-up
Business Hours	Mon-Fri 7am-7pm, Sat 8am-2pm, emergency service 24/7


OBMC Snapshot - H...
Milton, DE
Search
ctrK
← 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 visit
Birthday Offer {{custom_values.birthday_offer}} $50 off any repair or tune-up
Booking Link {{custom_values.booking_link}} https://yourwebsite.com/book
Business Hours {{custom_values.business_hours}} Mon-Fri 7am-7pm, Sat 8am-2pm, emergency service 24/7
Business Name {{custom_values.business_name}} Your Business Name
Business Phone {{custom_values.business_phone}} (555) 555-5555
Customer Term {{custom_values.customer_term}} homeowner
Feedback Link {{custom_values.feedback_link}} https://yourwebsite.com/feedback
Guarantee {{custom_values.guarantee}} you get upfront pricing before any work starts, and our work is backed by a writt...
Lead Offer {{custom_values.lead_offer}} a fast, upfront-priced service visit from a licensed technician
Owner Name {{custom_values.owner_name}} The Team
Primary Service {{custom_values.primary_service}} heating and cooling
Reactivation Offer {{custom_values.reactivation_offer}} $50 off a tune-up for past customers
Referral Link {{custom_values.referral_link}} https://yourwebsite.com/refer
Referral Reward {{custom_values.referral_reward}} a $100 gift card
Review Link {{custom_values.review_link}} https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer {{custom_values.seasonal_offer}} a precision AC tune-up at a special seasonal price
Service Area {{custom_values.service_area}} your area
Service Due Offer {{custom_values.service_due_offer}} priority scheduling on your seasonal tune-up
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** with **business name**. Got your request. Is your system down right now, or is this routine? If it's not heating or cooling, reply URGENT and we'll call first. Book: **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. How can we help? If your home has no heat or no AC right now, reply URGENT and we'll call you right back. 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 HVAC service visit with **business name** is set for **start time**. We'll text when your tech is on the way. Reschedule: **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**, sorry we missed you today for your HVAC visit. No worries, life happens. Want to pick a new time? **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 over your HVAC estimate from **business name**? Happy to walk through the system options, efficiency levels or financing by phone.

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

> Welcome to **business name**, **first name**! Thanks for trusting us with your home comfort. We'll be in touch shortly to confirm your install date. 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 did your technician do today? It takes 20 seconds: **feedback link**

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 again for the kind words! Know anyone whose AC or furnace is giving them trouble? Send them our way and we'll thank you with **referral reward**: **referral link**

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**. We worked on your heating and cooling a while back. How's the system running these days? 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**. Your seasonal tune-up is due. Book now and get **service due offer** before the busy season: **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. Before summer heat hits **service area**, we're offering **seasonal offer**. Want a spot? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Maintenance Plan Enrollment

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**, it's **business name**. Our maintenance plan members get two tune-ups a year, priority service when it's 100 or 10 degrees out, and member pricing on repairs. Want the details? Reply YES. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	First contact within 5 minutes, and emergencies called back right away	Conversations and the contact activity timeline in Contacts
Booked call rate	Steadily increase the share of leads and calls that become booked visits	Opportunities > Pipelines > Sales Pipeline (New Lead vs Visit Booked)
Visit show rate	90% or more of booked visits completed	Calendars > Appointments (Showed vs No-Show)
Replacement estimate close rate	Track monthly and improve it with consistent follow-up	Opportunities > Pipelines (Estimate Sent vs Won) and Dashboard
Maintenance plan enrollments	Grow the member count every month	Contacts filtered by Maintenance Plan Member = Yes, plus workflow 21 stats in Automation > Workflows
New Google reviews	Ask after every completed call and grow reviews every week	Reputation > Overview

Compliance notes

- Collect clear SMS consent on every form and in the booking flow. Don't add purchased lists or contacts without consent to text campaigns.
- Register A2P 10DLC and describe tune-up reminders and maintenance plan offers accurately in your campaign use case.
- Don't promise specific energy savings or bill reductions. Phrase efficiency as 'can help' and point to the equipment's rated efficiency instead.
- Rebates and tax incentives change often. Only mention rebates you've confirmed are currently available in the service area, and tell homeowners eligibility depends on the program.
- Spell out maintenance plan terms (what's included, renewal, cancellation) in writing, and follow your state's automatic renewal rules if you bill members on a recurring basis.

Mini-course outline

1. **Install the snapshot and brand it for an HVAC shop**: Load the snapshot and make every message sound like the HVAC company.
2. **Lead capture, missed calls and emergencies**: Make sure every web lead and missed call gets an instant reply and emergencies get called first.
3. **Booking service visits and reducing no-shows**: Fill the tech schedule and keep techs from driving to empty houses.

4. **Replacement estimates and the sales pipeline**: Follow up on every replacement estimate until it's won or lost.
5. **Reviews, referrals and reactivation**: Turn service calls into reviews and past customers into booked tune-ups.
6. **Launch and grow the maintenance plan**: Go live and use the Maintenance Plan Enrollment campaign to build recurring revenue.

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