One Big Media Company

🔑 GOHIGHLEVEL SNAPSHOT · MORTGAGE BROKERS & LOAN OFFICERS

Mortgage 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 loan officers and brokers: instant lead follow-up, pre-approval nurture, secure document reminders, realtor referral handling and rate-watch refinance alerts.

- 21 mortgage-specific workflows, from speed-to-lead to rate-watch refinance alerts
- Sales pipeline built for lending: Strategy Call Booked, Application Started, Pre-Approval Issued
- Loan journey pipeline from processing through underwriting to Closed / Funded
- Reactivation pipeline for old leads and past clients
- Pre-Approval Strategy Call calendar with confirmation, 24-hour and 2-hour reminders
- Lead form with loan purpose, first-time buyer status and referring agent
- Post-closing feedback form that routes happy clients to Google reviews
- Referral form and same-day realtor and client referral alerts
- Annual mortgage checkup workflow on each loan anniversary
- Spring homebuyer readiness campaign
- Lending custom fields including Loan Purpose, Current Interest Rate and Referring Agent
- Copy written to avoid rate promises, with secure-document and equal-housing-aware language
- 20 pre-filled custom values so the whole system re-brands in minutes
- 12-step setup guide, 6-lesson install course and agency sales kit

Pipelines

Sales Pipeline

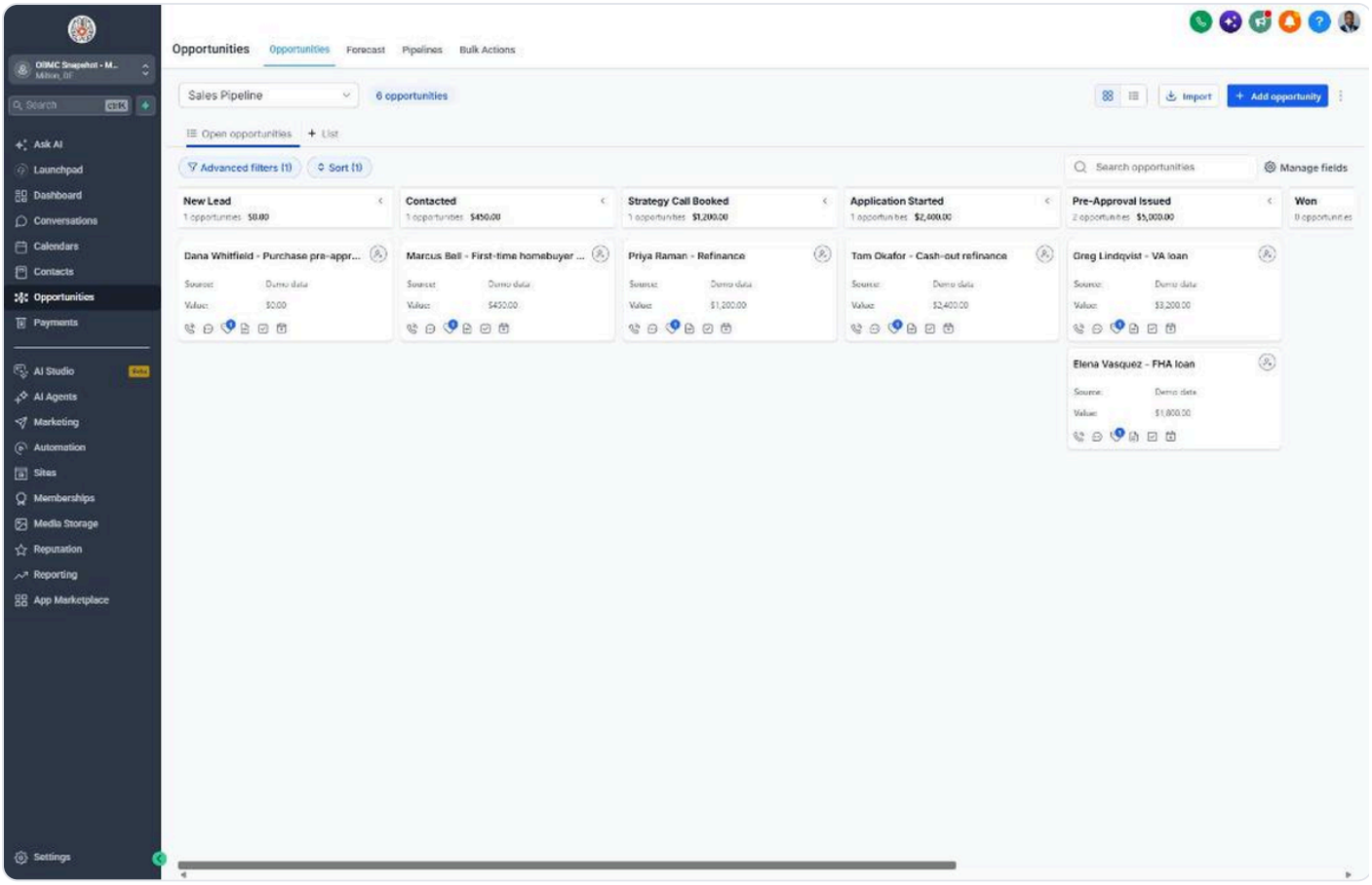
New Lead | Contacted | Strategy Call Booked | Application Started | Pre-Approval Issued | Won | Lost | Long-Term Nurture

Customer Journey

Loan in Processing | Underwriting | Closed / Funded | 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
Strategy Call Booked
1 opportunities $1,200.00
Application Started
1 opportunities $2,400.00
Pre-Approval Issued
2 opportunities $5,000.00
Won
0 opportunities
Dana Whitfield - Purchase pre-appr...
Marcus Bell - First-time homebuyer ...
Priya Raman - Refinance
Tom Okafor - Cash-out refinance
Greg Lindqvist - VA loan
Elena Vasquez - FHA loan
Source:
Demo data
Value:
$0.00
$450.00
$1,200.00
$2,400.00
$3,200.00
$1,800.00
Ask AI
Launchpad
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**
   Open the snapshot share link while logged in to your agency to import it. Go to Account Snapshots > Imported Snapshots, open the actions menu on the Mortgage snapshot and choose Push to Sub-Account, or pick it when creating a sub-account under Sub-Accounts > Create Sub-Account.

2. **Complete the business profile**
   In the loan officer's sub-account, go to Settings > Business Profile. Add the loan officer or company name, address, phone, logo and time zone.

3. **Fill in custom values**
   Go to Settings > Custom Values and update the business name, the loan officer's name as owner, phone and service area. Keep offers free of rates, payments and guarantees, and keep the Referral Reward non-monetary.

4. **Add required disclosures**
   Add the individual and company NMLS IDs, licensing states and an Equal Housing Opportunity or Equal Housing Lender statement to the email signature under Settings > My Profile or the user's signature settings, and to any landing pages.

5. **Get compliance approval**
   Export or screenshot the workflow messages from Automation > Workflows and send them to the lender's compliance team before publishing. Adjust any wording they flag.

6. **Connect the phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port a number, then complete A2P 10DLC registration in the Trust Center. Describe the use case accurately (mortgage inquiries, appointment reminders and client updates) and include sample messages.

7. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain such as mail.lendername.com. Verify the DNS records so emails reach the inbox.

8. **Configure the strategy call calendar**
   Go to Calendars > Calendar Settings, edit Pre-Approval Strategy Call, set availability including some evenings, and add a phone or video meeting option. Copy the booking link into the booking_link custom value.

9. **Customize the forms and partner links**
   Go to Sites > Forms > Builder to review the lead and referral forms, then embed them on the website. Create a link for each realtor partner so the Referring Agent field fills in automatically.

10 **Review the pipelines**
Go to Opportunities > Pipelines and walk through Strategy Call Booked, Application Started and Pre-Approval Issued. Move cards to Won when the buyer goes under contract or a refinance application is locked.

11 **Set up anniversary and rate-watch tagging**
Import past clients with Loan Closing Date and Current Interest Rate. Build a yearly date trigger that tags them 'service due', and a smart list by rate so you can tag the right group 'niche campaign' when rates move.

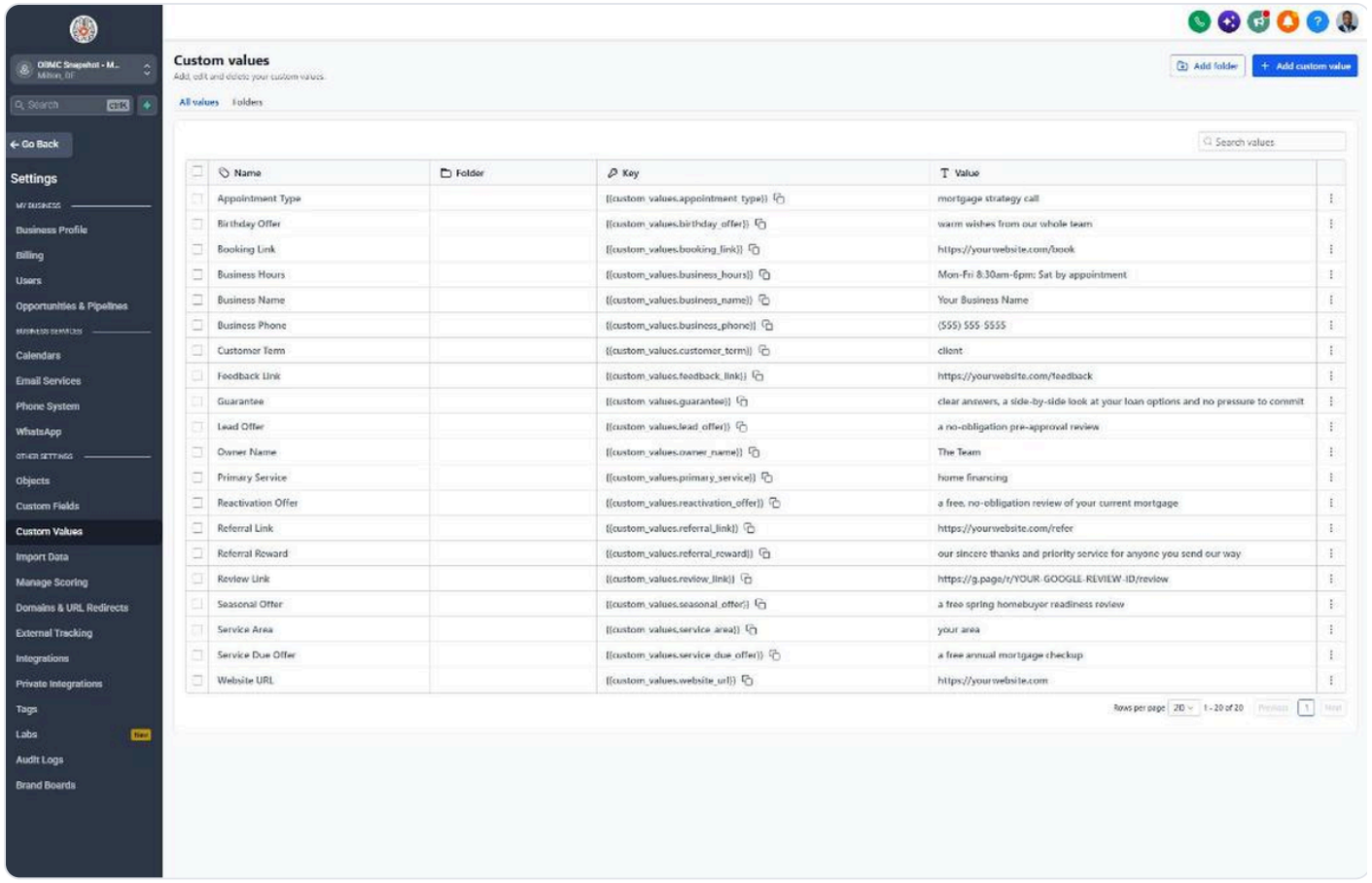
12 **Go live test**
Connect the Google Business Profile under Settings > Integrations, publish all workflows, then submit the form as a test lead, call the number and let it ring out, and book a test call. Check Conversations for every message, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Mortgage 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	client
Appointment Type	mortgage strategy call
Primary Service	home financing
Lead Offer	a no-obligation pre-approval review
Guarantee	clear answers, a side-by-side look at your loan options and no pressure to commit
Referral Reward	our sincere thanks and priority service for anyone you send our way
Reactivation Offer	a free, no-obligation review of your current mortgage
Seasonal Offer	a free spring homebuyer readiness review
Service Due Offer	a free annual mortgage checkup
Birthday Offer	warm wishes from our whole team
Business Hours	Mon-Fri 8:30am-6pm; Sat by appointment


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}}
mortgage strategy call
Birthday Offer
{{custom_values.birthday_offer}}
warm wishes from our whole team
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Fri 8:30am-6pm; Sat by appointment
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
client
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
clear answers, a side-by-side look at your loan options and no pressure to commit
Lead Offer
{{custom_values.lead_offer}}
a no-obligation pre-approval review
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
home financing
Reactivation Offer
{{custom_values.reactivation_offer}}
a free, no-obligation review of your current mortgage
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
our sincere thanks and priority service for anyone you send our way
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
a free spring homebuyer readiness review
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a free annual mortgage checkup
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next
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

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**. Thanks for reaching out! Are you buying, refinancing or just exploring? Reply here or book a quick call: **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, it's **owner name** with **business name**. Sorry I missed your call! I'm likely with a client. How can I help? Reply here or book a time to talk: **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** with **business name** is **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**, sorry we didn't connect today! No worries, schedules get busy. Want to pick a new time for your **appointment type**? **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**, congrats on your pre-approval! How's the home search going? When you find a home you love, call me before you write the offer so I can update your letter.

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

> Congrats on going under contract, **first name**! I'll guide you from here to closing. Save this number, it's my direct line for anything you need. - **owner name**

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

> Congratulations on closing, **first name**! It was a pleasure working with you. How did we do? It takes about 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**, thank you for the kind words! If a friend or family member is thinking about buying or refinancing, I'd be glad to help them too. Easy way to introduce us: **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** with **business name**. Quick check-in: are you still thinking about buying or reviewing your mortgage this year? 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**. It's been a year since your loan closed! Time for **service due offer**. Book here: **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**, **owner name** here. Thinking about buying this spring? I'm offering **seasonal offer**. Want one? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Rate Watch → Refinance Review Alert

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 **owner name** with **business name**. Rates have moved since you got your loan, so I'm checking whether a refinance could make sense for you. Want me to look? Reply YES. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	Reply to every new lead within 5 minutes, including evenings	Conversations and opportunity timelines in the Sales Pipeline
Lead-to-application rate	Grow the share of new leads that start an application every quarter	Opportunities > Pipelines, New Lead vs Application Started
Pre-approval to contract	Keep pre-approved buyers with you through to their accepted offer	Opportunities > Pipelines, Pre-Approval Issued vs Won
Realtor referrals	Track referrals by partner and grow the number of active referring agents	Contacts filtered by Referring Agent and the Referral Partner stage
Refinance reviews booked	Book review calls from every rate-watch send	Automation > Workflows > 21 > Execution Logs and Calendars > Appointments
New Google reviews	Ask every closed client and earn new reviews every month	Reputation > Overview

Compliance notes

- No rate promises or guarantees: never state or imply a specific rate, payment, approval or savings in automated messages. Quoting rates or payments in ads can trigger Regulation Z disclosure requirements, so leave pricing to one-on-one conversations.
- Equal housing and fair lending: include an Equal Housing Opportunity or Equal Housing Lender statement and NMLS IDs on emails and landing pages, and never target or discourage applicants based on protected characteristics.
- RESPA Section 8: don't give cash, gift cards or anything of value for referrals of mortgage business, from clients or realtor partners. Co-marketing with agents must split costs in proportion to each party's share.
- Data security: never request Social Security numbers, account numbers or loan documents by SMS or email. Send borrowers to your secure portal or LOS for documents.
- TCPA and A2P 10DLC: only text leads with documented consent, keep 'Reply STOP to opt out' on first messages, complete A2P registration with an accurate financial-services use case, and get the lender's compliance approval before launch.

Mini-course outline

1. **Install and brand the mortgage snapshot**: Get the snapshot into the loan officer's sub-account with the right branding and disclosures.
2. **Capture leads and respond in seconds**: Make sure every web lead, referral and missed call gets an instant, compliant response.

3. **Book strategy calls and cut no-shows**: Set up the strategy call calendar so booked leads actually get on the phone.
4. **From application to closing**: Use the pipelines to keep every borrower moving from application to Closed / Funded.
5. **Reviews, referrals and your database**: Turn closings into reviews and referrals and restart conversations with old leads and past clients.
6. **Launch rate watch and loan anniversaries**: Go live with refinance alerts and annual checkups, and track what produces closings.

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