One Big Media Company

GOHIGHLEVEL SNAPSHOT · PLUMBING

Plumbing Snapshot: Setup & Walkthrough Guide

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

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OVERVIEW

What's inside

A ready-to-launch GoHighLevel system for plumbers: instant replies to missed calls, emergency flagging, estimate follow-up, reviews, memberships and a water heater replacement campaign.

- 21 pre-built workflows written for plumbing companies
- Water Heater Replacement campaign for aging tank water heaters
- Missed-call text-back that tells callers to reply URGENT for active leaks
- Sales pipeline with Service Call Booked, Service Call Completed and Estimate Sent stages
- Customer Journey pipeline from Job Scheduled to Referral Partner
- Plumbing Service Call calendar with reminders
- Service request form with Issue Urgency, Problem Description and Water Heater Age
- Plumbing custom fields: urgency, water heater type and age, home age, membership status, last service date
- Annual water heater flush reminder campaign
- Pre-winter frozen pipe campaign
- Review flow that sends happy customers to Google and routes unhappy ones to the owner
- Referral and database reactivation campaigns
- Setup guide and 6-lesson course outline

Pipelines

Sales Pipeline

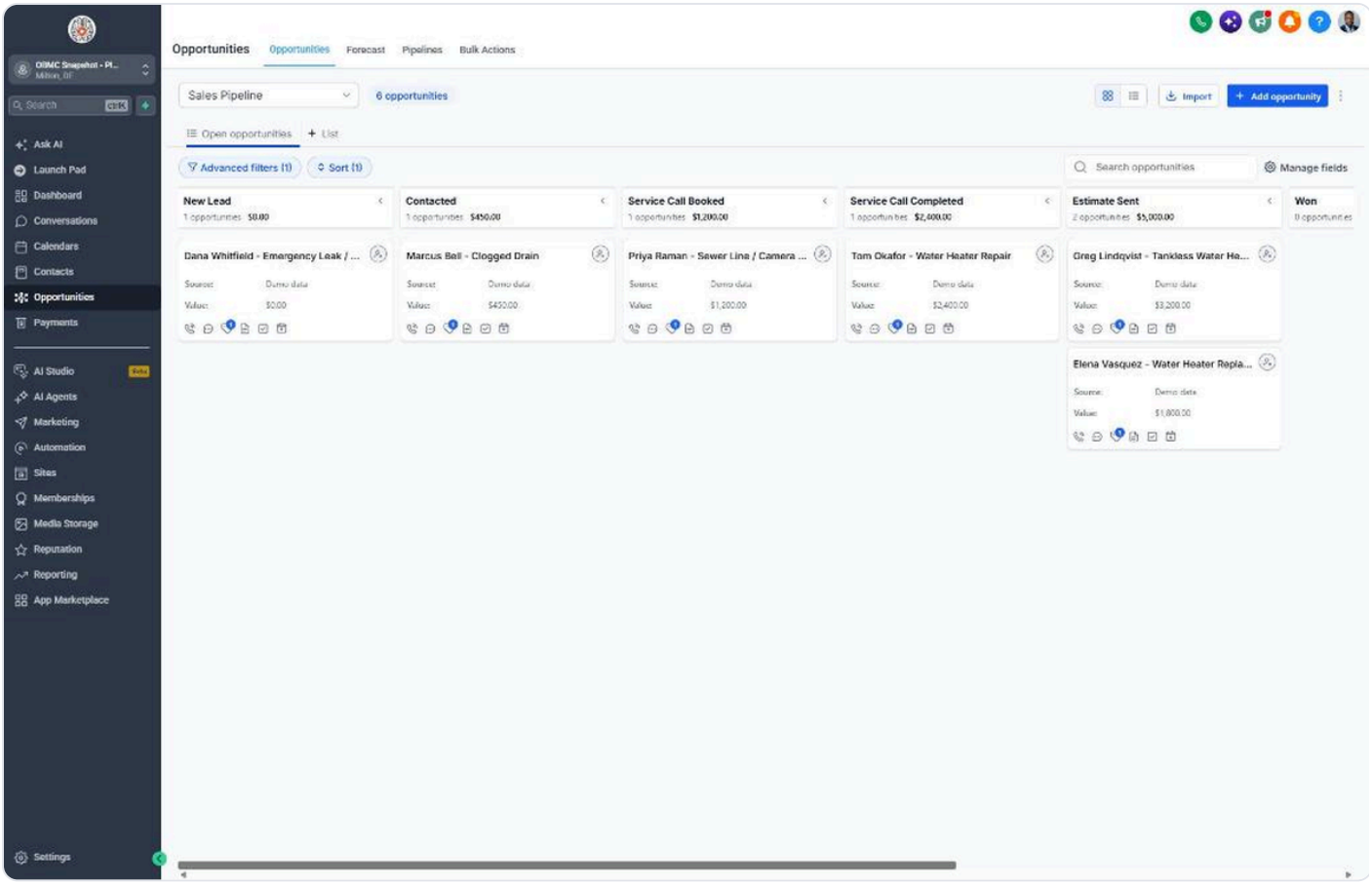
New Lead | Contacted | Service Call Booked | Service Call Completed | Estimate Sent | Won | Lost | Long-Term Nurture

Customer Journey

Job Scheduled | Job In Progress | Job Completed | 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 Call Booked
1 opportunities $1,200.00
Service Call Completed
1 opportunities $2,400.00
Estimate Sent
2 opportunities $5,000.00
Won
0 opportunities
Dana Whitfield - Emergency Leak / ...
Marcus Bell - Clogged Drain
Priya Raman - Sewer Line / Camera ...
Tom Okafor - Water Heater Repair
Greg Lindqvist - Tankless Water He...
Elena Vasquez - Water Heater Repla...
Source: Demo data
Value: $0.00
Value: $450.00
Value: $1,200.00
Value: $2,400.00
Value: $3,200.00
Value: $1,800.00
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**
   From the agency view, go to Sub-Accounts, open the account menu and choose Load Snapshot, or select this snapshot when creating the sub-account. Import all assets and switch into the account.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the business name, address, phone, website, license number if you display it, and time zone.

3. **Set your custom values**
   Go to Settings > Custom Values and fill in business name, owner name, phone, service area and the booking, review, feedback and referral links. Set the water heater, seasonal and reactivation offers to what the shop actually honors.

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

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

6. **Configure the Plumbing Service Call calendar**
   Go to Calendars > Calendar Settings and open Plumbing Service Call. Assign plumbers or a round-robin, set arrival windows and 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, Problem Description and Water Heater 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 your review link and paste it into the review_link custom value.

9. **Import past customers with water heater data**
   Go to Contacts > Import and upload past customers with consent status, last service date, water heater type and age if you have them. This feeds workflows 14, 19 and 21.

10. **Assign staff and alerts**
    Go to Settings > My Staff and add dispatchers, plumbers and the owner with mobile numbers. 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're ready to launch them.

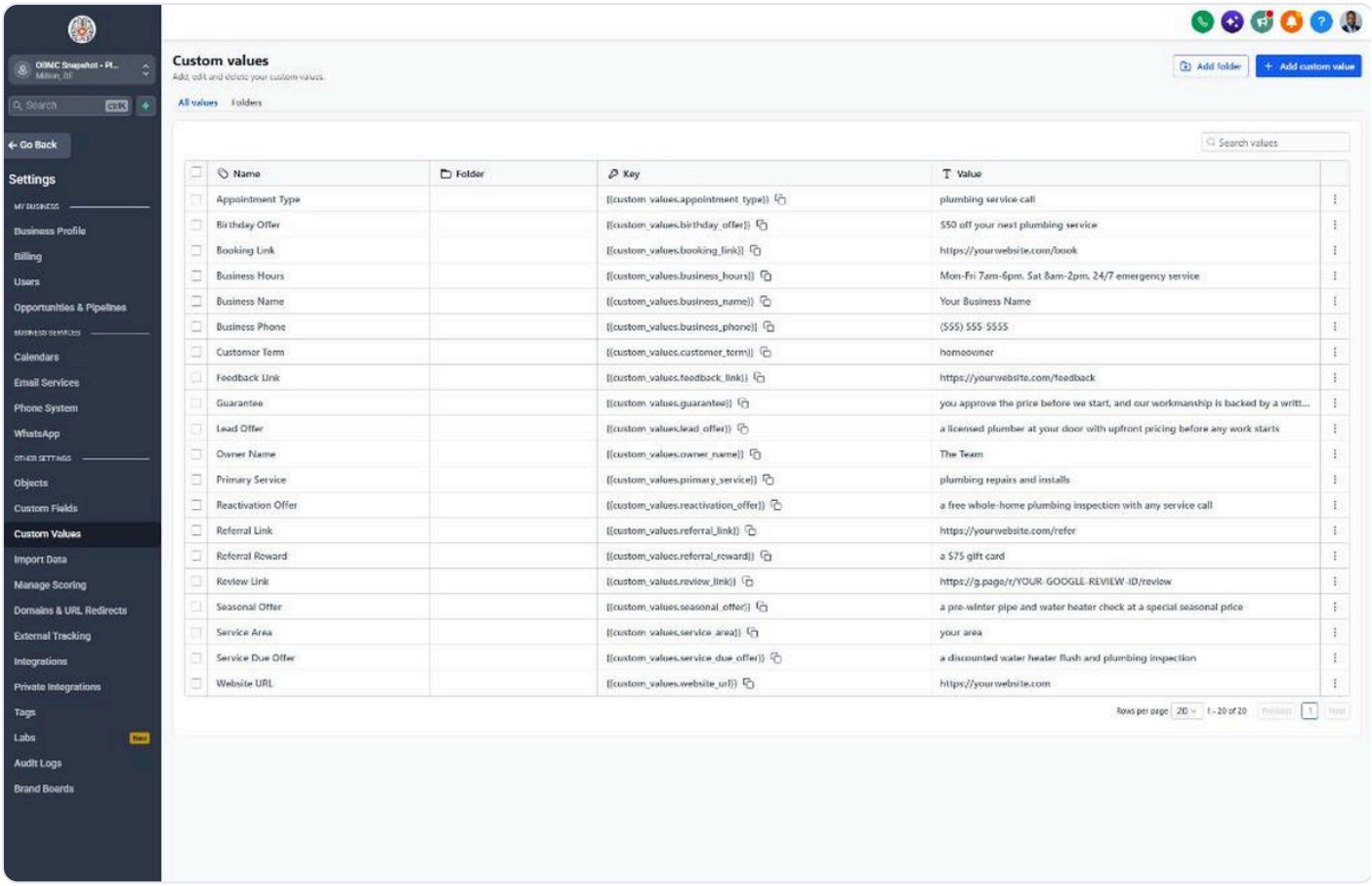
12 **Go live test**
Submit the form, book a service call, call and hang up, and reply URGENT to the text-back. Confirm every SMS, email and team alert fires, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Plumbing 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	plumbing service call
Primary Service	plumbing repairs and installs
Lead Offer	a licensed plumber at your door with upfront pricing before any work starts
Guarantee	you approve the price before we start, and our workmanship is backed by a written warranty
Referral Reward	a $75 gift card
Reactivation Offer	a free whole-home plumbing inspection with any service call
Seasonal Offer	a pre-winter pipe and water heater check at a special seasonal price
Service Due Offer	a discounted water heater flush and plumbing inspection
Birthday Offer	$50 off your next plumbing service
Business Hours	Mon-Fri 7am-6pm, Sat 8am-2pm, 24/7 emergency service


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}}
plumbing service call
Birthday Offer
{{custom_values.birthday_offer}}
$50 off your next plumbing service
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Fri 7am-6pm, Sat 8am-2pm, 24/7 emergency service
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 approve the price before we start, and our workmanship is backed by a writt...
Lead Offer
{{custom_values.lead_offer}}
a licensed plumber at your door with upfront pricing before any work starts
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
plumbing repairs and installs
Reactivation Offer
{{custom_values.reactivation_offer}}
a free whole-home plumbing inspection with any service call
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a $75 gift card
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
a pre-winter pipe and water heater check at a special seasonal price
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a discounted water heater flush and plumbing inspection
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**. Got your request. Is water leaking right now? If so, shut off the main valve and reply URGENT so we call you first. Or book here: **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 likely on a job. How can we help? If water is leaking right now, reply URGENT and we'll call 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 plumbing service call with **business name** is set for **start time**. We'll text when your plumber 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 plumbing visit. No worries. Want to pick a new time? Small leaks and clogs tend to get worse: **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 plumbing estimate from **business name**? Happy to walk you through the options 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. We'll be in touch shortly to confirm your job date and arrival window. 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 plumber 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 who needs a good plumber? 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 helped with your plumbing a while back. Is everything still working well? 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 annual water heater flush and plumbing check is due. 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. Before freezing weather hits **service area**, we're offering **seasonal offer**. Want a spot? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Water Heater Replacement

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**. Water heaters often start to wear out around 8-12 years. If yours is in that range, want a free check and replacement quote before it fails? Reply YES. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	First contact within 5 minutes, and urgent leaks called back right away	Conversations and the contact activity timeline in Contacts
Booked call rate	Steadily increase the share of calls and leads that become booked service calls	Opportunities > Pipelines > Sales Pipeline (New Lead vs Service Call Booked)
Missed call recovery	Every missed call gets a text-back and a human follow-up the same day	Automation > Workflows > 02 Missed Call execution log
Estimate close rate	Track monthly and improve it with consistent follow-up	Opportunities > Pipelines (Estimate Sent vs Won) and Dashboard
Water heater replacements booked	Grow planned replacements from the database every month	Automation > Workflows > 21 stats and Opportunities filtered by Water Heater Replacement
New Google reviews	Ask after every completed job and grow reviews every week	Reputation > Overview

Compliance notes

- Collect clear SMS consent on every form and booking page, and only text past customers who gave you their number for service updates.
- Register A2P 10DLC and describe emergency follow-up, service reminders and promotional campaigns accurately in the campaign use case.
- Be upfront about trip fees and after-hours rates. Avoid 'lowest price' or 'cheapest' claims you can't back up.
- Water heater, gas line and repipe work often requires permits and a licensed plumber. Don't promise same-day installs where permits or inspections are required.
- If you sell memberships with recurring billing, put the terms, renewal and cancellation policy in writing and follow your state's automatic renewal laws.

Mini-course outline

1. **Install the snapshot and brand it for a plumber**: Load the snapshot and make every message sound like the plumbing company.
2. **Missed calls, leads and emergencies**: Make sure every missed call and web lead gets an instant reply and leaks get called first.
3. **Booking service calls and reducing no-shows**: Fill the schedule and keep plumbers from driving to empty houses.

4. **Estimates and the sales pipeline**: Follow up on every water heater, repipe and sewer estimate until it closes.
5. **Reviews, referrals and reactivation**: Turn finished jobs into reviews and past customers into new work.
6. **Launch and run the water heater campaign**: Go live and turn aging water heaters into planned replacement jobs.

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