One Big Media Company

GOHIGHLEVEL SNAPSHOT · SOLAR INSTALLERS

Solar Snapshot: Setup & Walkthrough Guide

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

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OVERVIEW

What's inside

A GoHighLevel system built for the long solar sales cycle: instant lead response, consultation booking, proposal follow-up, long-term nurture and a utility rate increase campaign.

- 21 pre-built workflows written for residential solar
- Utility Rate Increase Alert campaign for old leads, proposals and lost deals
- Sales pipeline with Consultation Booked, Consultation Completed and Proposal Sent stages
- Customer Journey pipeline from Site Survey Scheduled to System Activated
- Solar Savings Consultation calendar with bill-ready reminders
- Quote form with Average Monthly Electric Bill, Home Ownership and Utility Company questions
- Solar custom fields: bill range, utility, ownership, roof condition, shade, financing preference, timeline, site survey date
- Proposal follow-up that explains cash, loan, lease and PPA options
- Welcome sequence that walks new customers through survey, permits, install and utility approval
- Annual system health check reminders
- Battery backup seasonal campaign
- Review, referral and reactivation flows
- Setup guide, compliance notes and 6-lesson course outline

Pipelines

Sales Pipeline

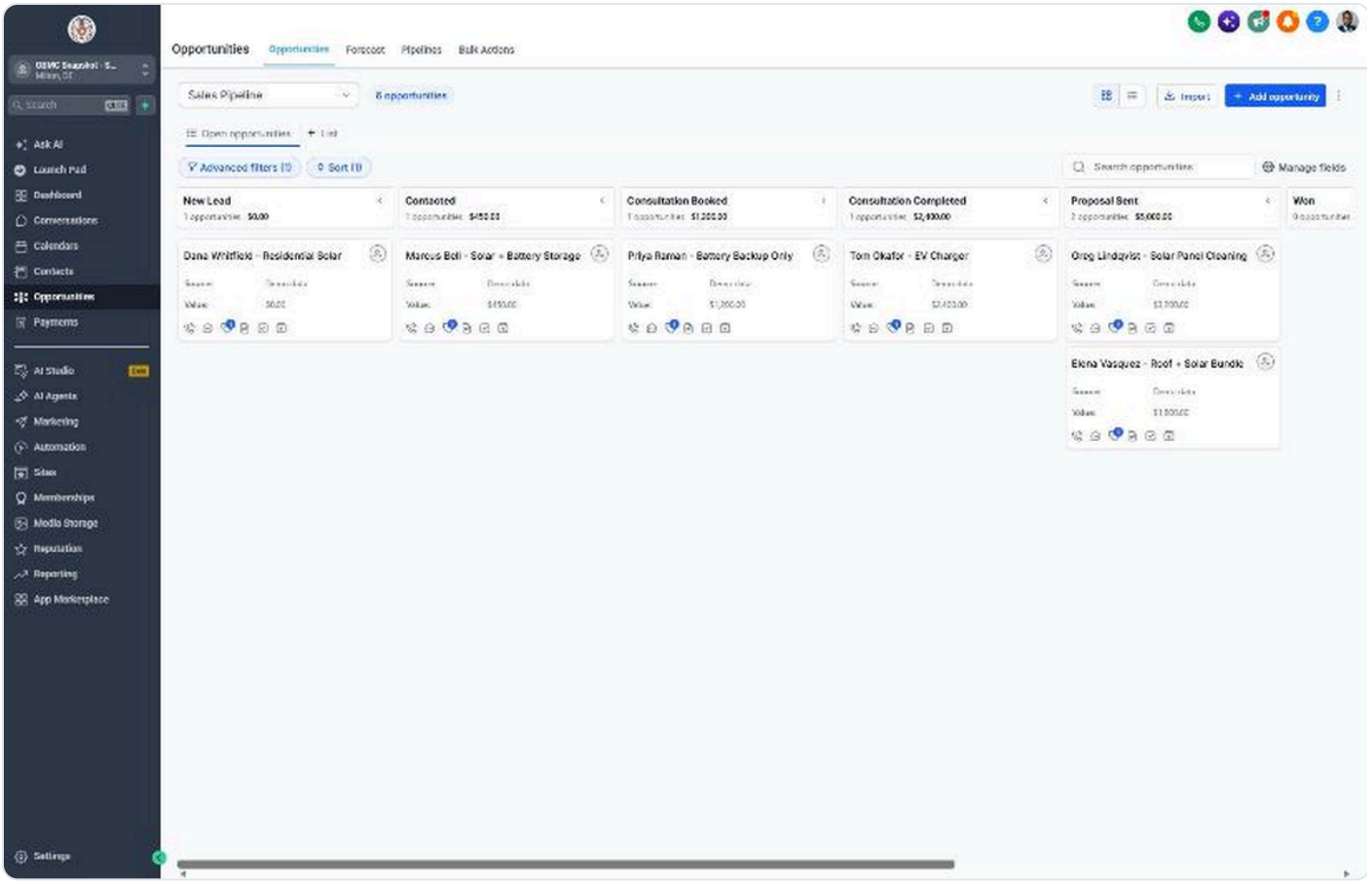
New Lead | Contacted | Consultation Booked | Consultation Completed | Proposal Sent | Won | Lost | Long-Term Nurture

Customer Journey

Site Survey Scheduled | Permitting & Install | System Activated | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Sales Pipeline
8 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
New Lead
Contacted
Consultation Booked
Consultation Completed
Proposal Sent
Won
Dana Whitfield - Residential Solar
Marcus Bell - Solar + Battery Storage
Priya Raman - Battery Backup Only
Tom Okafor - EV Charger
Greg Lindqvist - Solar Panel Cleaning
Elena Vasquez - Roof + Solar Bundle
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 displayed, 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. Review the lead offer, referral reward and seasonal offer and change them to what the installer actually provides.

4. **Connect a 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. Use accurate sample messages and opt-in language. Solar is a closely watched category with carriers.

5. **Set up email sending**
   Go to Settings > Email Services and add a dedicated sending domain. Add the DNS records and verify it, since long-term nurture emails need good inbox placement.

6. **Configure the Solar Savings Consultation calendar**
   Go to Calendars > Calendar Settings and open Solar Savings Consultation. Assign energy consultants or a round-robin, choose in-home or video location, set buffers for travel, then copy the booking link into the booking_link custom value.

7. **Customize the quote form**
   Go to Sites > Forms > Builder and open Request a Quote / Booking Request. Confirm the bill range, Home Ownership and Utility Company questions, add a clear SMS and call consent checkbox, and embed it on the website or landing page.

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. **Import old leads and proposals**
   Go to Contacts > Import and upload past leads and unsigned proposals with consent status, utility company and bill range. Tag them so you can target workflows 14 and 21 later.

10 **Assign staff and alerts**
Go to Settings > My Staff and add energy consultants, the install coordinator 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 have a reason to launch them, such as a real rate increase announcement.

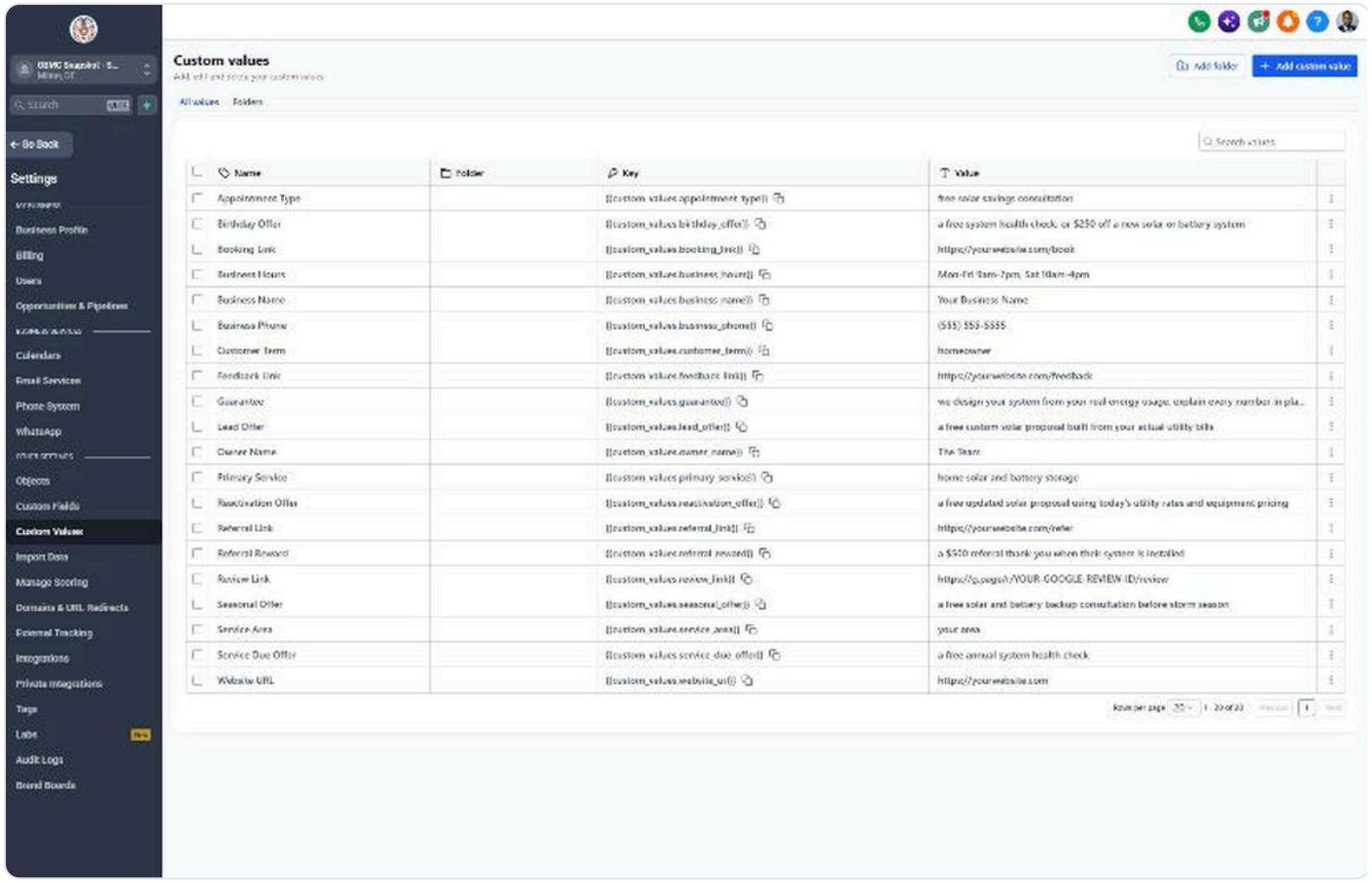
12 **Go live test**
Submit the form with your own number, book a consultation, call and hang up, and reply to a text. Confirm every SMS, email and alert fires, then delete the test contact.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Solar 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	free solar savings consultation
Primary Service	home solar and battery storage
Lead Offer	a free custom solar proposal built from your actual utility bills
Guarantee	we design your system from your real energy usage, explain every number in plain English, and never pressure you to sign
Referral Reward	a $500 referral thank-you when their system is installed
Reactivation Offer	a free updated solar proposal using today's utility rates and equipment pricing
Seasonal Offer	a free solar and battery backup consultation before storm season
Service Due Offer	a free annual system health check
Birthday Offer	a free system health check, or $250 off a new solar or battery system
Business Hours	Mon-Fri 9am-7pm, Sat 10am-4pm


Custom values
Add, edit and store your custom values
Add folder
Add custom value
All values
Folders
Search values
Name
Folder
Key
Value
Appointment Type
{{custom_values.appointment_type}}
free solar savings consultation
Birthday Offer
{{custom_values.birthday_offer}}
a free system health check, or $250 off a new solar or battery system
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Fri 9am-7pm, Sat 10am-4pm
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}}
we design your system from your real energy usage, explain every number in pla...
Lead Offer
{{custom_values.lead_offer}}
a free custom solar proposal built from your actual utility bills
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
home solar and battery storage
Reactivation Offer
{{custom_values.reactivation_offer}}
a free updated solar proposal using today's utility rates and equipment pricing
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a $500 referral thank you when their system is installed
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR_GOOGLE_REVIEW_ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
a free solar and battery backup consultation before storm season
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a free annual system health check
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
1 - 20 of 20
Previous
Next
Settings
Business Profile
Billing
Users
Opportunities & Pipelines
Calendars
Email Services
Phone System
WhatsApp
Objects
Custom Fields
Custom Values
Import Data
Manage Scoring
Domains & URL Redirects
External Tracking
Integrations
Private Integrations
Tags
Labs
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 your interest in solar! I can build you **lead offer**. When's a good time for a quick call? 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. Are you asking about going solar or about an existing system? Reply here and we'll get right back to you. 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 solar savings consultation with **business name** is set for **start time**. Please have a recent electric bill handy. 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 for your solar consultation today. No worries, life happens. Want to pick a new time? It only takes about 30 minutes: **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 review your solar proposal from **business name**? Happy to walk through the numbers, financing options or system design 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 choosing us for your solar system. Next up is your site survey, and we'll reach out shortly to schedule it. 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**, congrats on your new solar system! How was your experience with **business name**? 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 a neighbor curious about solar? 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 talked about solar for your home a while back. Has anything changed with your electric bills since then? 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 time for **service due offer** on your solar system. We'll review your production and check that everything's running right: **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 outage season, we're offering **seasonal offer** in **service area**. Want one? Reply YES or book: **booking link** Reply STOP to opt out.

21 · Utility Rate Increase 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 **business name**. Your utility has announced a rate increase for **service area**. Want to see how solar would compare at the new rates? Reply YES and we'll run your numbers. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to lead	First contact within 5 minutes of every new lead	Conversations and the contact activity timeline in Contacts
Lead to consultation rate	Steadily increase the share of leads that book a consultation	Opportunities > Pipelines > Sales Pipeline (New Lead vs Consultation Booked)
Consultation show rate	Aim for 80% or more of booked consultations completed	Calendars > Appointments (Showed vs No-Show)
Proposal to signed rate	Track monthly and improve it with follow-up and nurture	Opportunities > Pipelines (Proposal Sent vs Won) and Dashboard
Revived deals	Win deals every quarter from Long-Term Nurture and reactivation	Opportunities > Reactivation pipeline and Long-Term Nurture stage
Install timeline updates	Every signed customer hears from you at each Customer Journey stage	Opportunities > Pipelines > Customer Journey

Compliance notes

- Only text contacts with documented SMS consent from your company. Shared, aged and purchased solar leads are a common source of TCPA complaints, and carriers scrutinize solar traffic closely under A2P 10DLC.
- Never guarantee savings, bill elimination or a specific return. Describe savings as estimates based on stated assumptions, and follow FTC guidance and state solar consumer protection rules.
- Don't promise tax credits or incentives. Federal credit rules for homeowner-owned systems have changed, so tell homeowners to confirm eligibility with a tax professional and only mention programs you've verified.
- Avoid 'free solar' or 'no-cost' language for leases and PPAs. Clearly disclose that these are financing or third-party ownership agreements with long-term payments.
- Follow state disclosure and cancellation rules for home solicitation and solar contracts, including required right-to-cancel notices for in-home sales.

Mini-course outline

1. **Install the snapshot and brand it for a solar company**: Load the snapshot and make every message sound like the installer.
2. **Lead capture and speed-to-lead**: Contact every solar lead within seconds and collect the utility bill early.

3. **Consultation booking and no-show recovery**: Fill consultants' calendars and recover no-shows with video options.
4. **Proposals, pipeline and long-term nurture**: Follow up on every proposal and keep not-ready homeowners in nurture.
5. **Reviews, referrals and reactivation**: Turn activated systems into reviews and neighbor referrals, and revive old leads.
6. **Launch and run the rate increase playbook**: Go live and be ready to launch the Utility Rate Increase Alert when rates change.

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