One Big Media Company

GOHIGHLEVEL SNAPSHOT · TAX & ACCOUNTING FIRMS

Tax & Accounting Snapshot: Setup & Walkthrough Guide

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

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OVERVIEW

What's inside

A complete GoHighLevel system for tax and accounting firms: new client intake, secure document reminders, extension follow-up, bookkeeping upsells, and year-round planning check-ins.

- 21 tax-specific workflows with SMS and email copy written for accounting firms
- Client pipeline from New Inquiry to Engaged Client
- Return journey pipeline from Documents Requested to Filed / Delivered
- Reactivation pipeline for last year's clients and old inquiries
- Consultation form with client type, tax years needed, and IRS notice questions
- Free Tax Consultation calendar with confirmations and reminders
- Tax Season Document Collection campaign with full checklist
- Engagement letter follow-up sequence
- Mid-year planning check-in workflow
- Tax season kickoff early-bird campaign
- Missed-call text-back that sorts returns, bookkeeping, and IRS letters
- Review and referral workflows timed to return filing
- Security-first copy that never asks for SSNs or documents by text
- Setup guide, 6-lesson course, KPIs, and agency sales scripts

Pipelines

Sales Pipeline

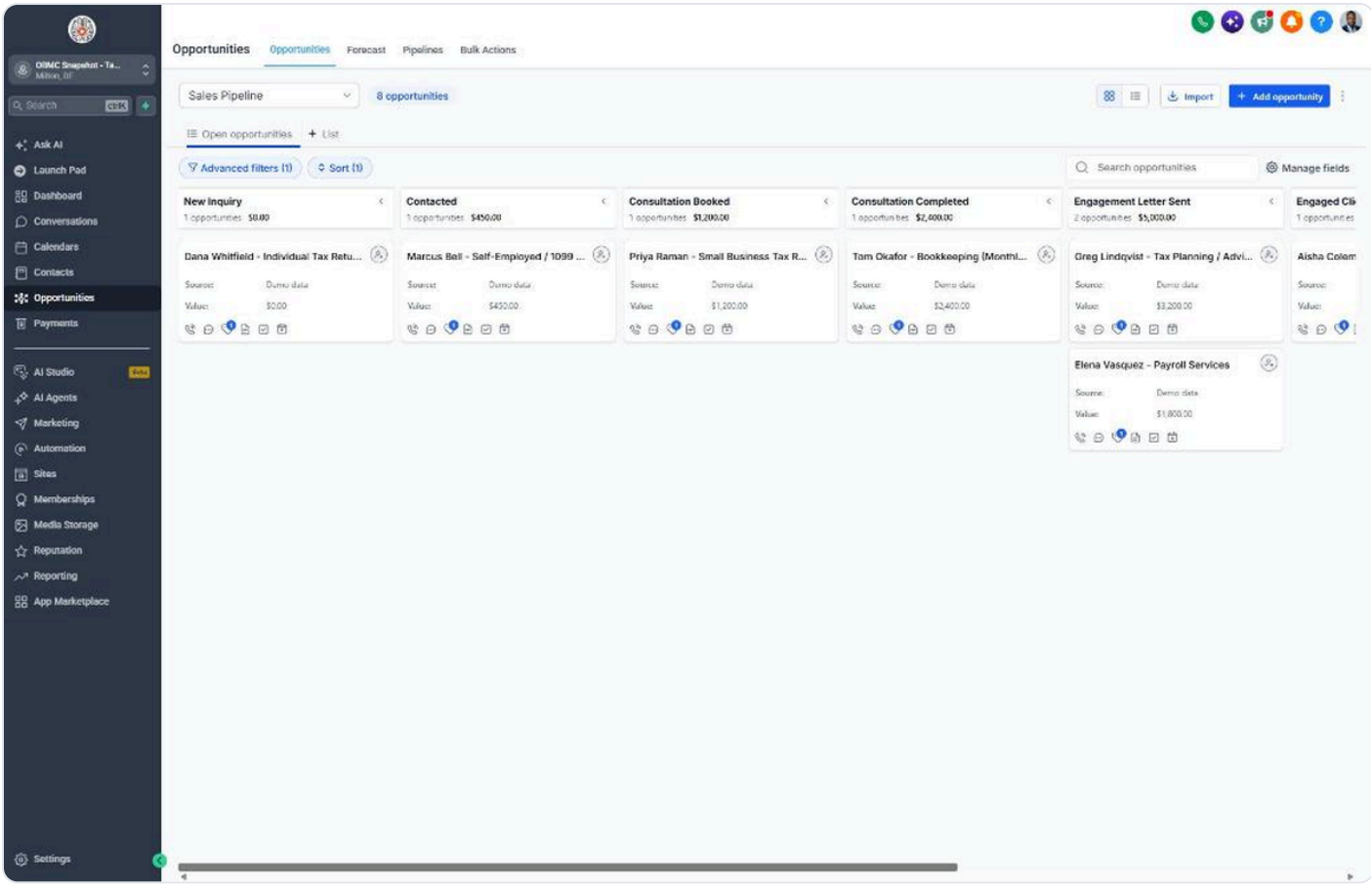
New Inquiry | Contacted | Consultation Booked | Consultation Completed | Engagement Letter Sent | Engaged Client | Not Engaged | Long-Term Nurture

Customer Journey

Documents Requested | Return In Preparation | Filed / Delivered | 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 Inquiry
1 opportunities $0.00
Contacted
1 opportunities $450.00
Consultation Booked
1 opportunities $1,200.00
Consultation Completed
1 opportunities $2,400.00
Engagement Letter Sent
2 opportunities $5,000.00
Dana Whitfield - Individual Tax Retu...
Marcus Bell - Self-Employed / 1099 ...
Priya Raman - Small Business Tax R...
Tom Okafor - Bookkeeping (Monthl...
Greg Lindqvist - Tax Planning / Advi...
Elena Vasquez - Payroll Services
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, find the OBMC Tax & Accounting snapshot, and click Load into the firm's 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 firm name, address, phone, website, and time zone. Add credentials, such as CPA or EA, to the business description where appropriate.

3. **Update custom values**
   Go to Settings > Custom Values and update Business Name, Owner Name, Business Phone, Booking Link, Review Link, Feedback Link, and Referral Link. Adjust Business Hours to show extended tax season hours.

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 Settings > Phone Numbers > Trust Center. Turn on call forwarding to the front desk so missed-call text-back covers peak season.

5. **Set up email sending**
   Go to Settings > Email Services and connect a dedicated sending domain. Add the DNS records, verify, and use the firm's name as the from name so clients recognize it and don't mistake it for phishing.

6. **Configure the consultation calendar**
   Go to Calendars > Calendar Settings, open Free Tax Consultation, assign preparers, and set availability with separate hours for tax season if needed. Copy the calendar link into the Booking Link custom value.

7. **Customize the consultation form**
   Go to Sites > Forms > Builder and open the consultation form. Confirm Client Type, Tax Year(s) Needed, and IRS or State Notice Received, add consent language, and embed it on the website.

8. **Add your secure portal link**
   In Automation > Workflows, open workflows 08 and 21 and add your secure portal URL as a button or link in the emails. Never replace it with an email or text upload option.

9. **Review the pipelines**
   Go to Opportunities > Pipelines and review the client, return journey, and reactivation pipelines. Make sure Documents Requested and Return In Preparation match how your team tracks work.

10 **Connect reviews and team alerts**
Go to Reputation > Settings and connect Google Business Profile, then paste the review link into Custom Values. In Settings > My Staff, add preparers and assign them to notifications in workflows 03, 11, 13, and 18.

11 **Import last year's clients**
Go to Contacts > Import and upload last season's client list with name, email, phone, and Client Type, tagging them 'returning-client'. Only include clients who consented to communications, and keep tax return data out of the import.

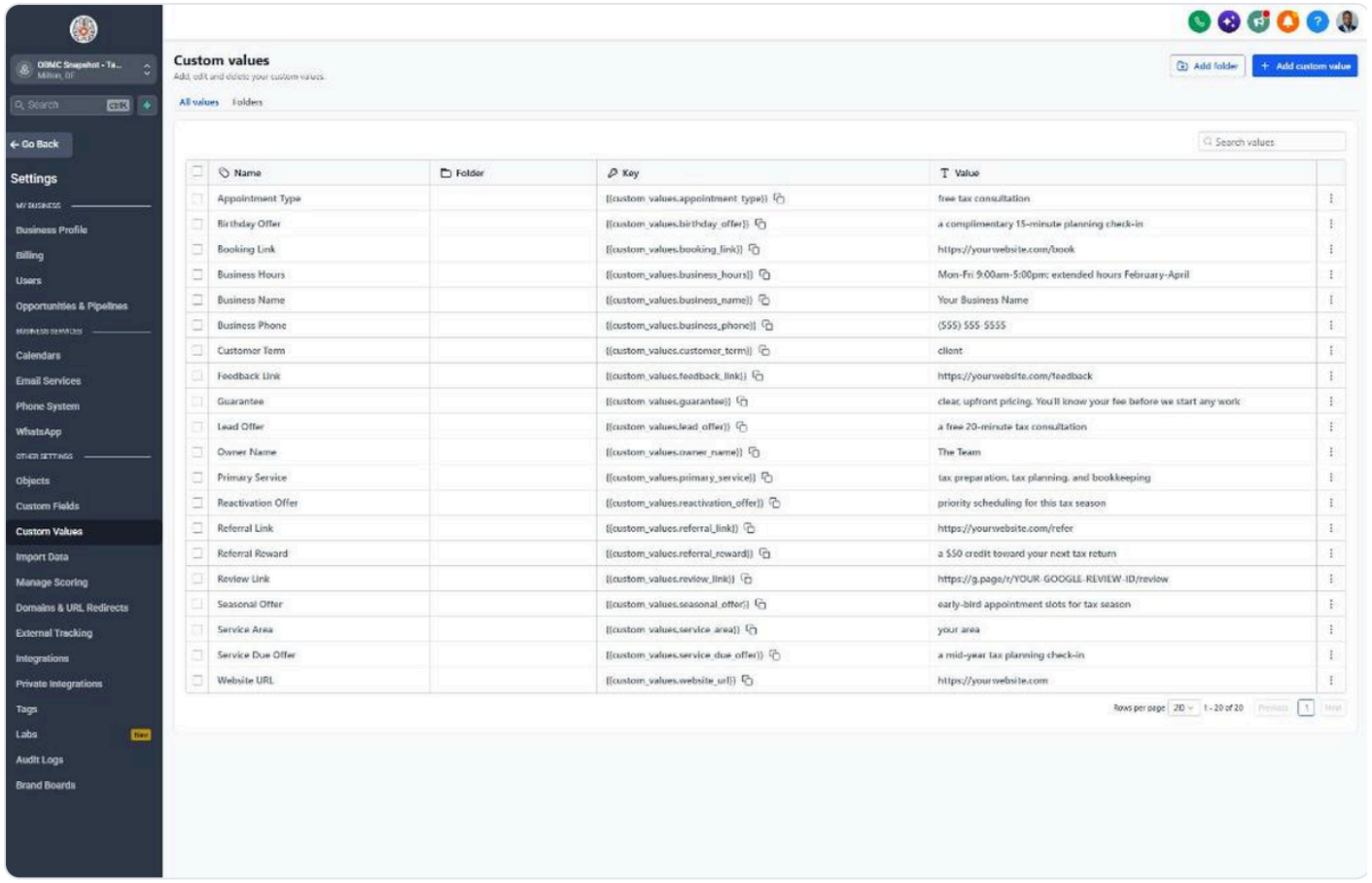
12 **Go live test**
Publish all workflows in Automation > Workflows. Submit the form with your own details, call the number and hang up, book a test consultation, and move a test client to Documents Requested to confirm the checklist and reminders send.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Tax & Accounting 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	free tax consultation
Primary Service	tax preparation, tax planning, and bookkeeping
Lead Offer	a free 20-minute tax consultation
Guarantee	clear, upfront pricing. You'll know your fee before we start any work
Referral Reward	a $50 credit toward your next tax return
Reactivation Offer	priority scheduling for this tax season
Seasonal Offer	early-bird appointment slots for tax season
Service Due Offer	a mid-year tax planning check-in
Birthday Offer	a complimentary 15-minute planning check-in
Business Hours	Mon-Fri 9:00am-5:00pm; extended hours February-April


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}}
free tax consultation
Birthday Offer
{{custom_values.birthday_offer}}
a complimentary 15-minute planning check-in
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Fri 9:00am-5:00pm; extended hours February-April
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, upfront pricing. You'll know your fee before we start any work
Lead Offer
{{custom_values.lead_offer}}
a free 20-minute tax consultation
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
tax preparation, tax planning, and bookkeeping
Reactivation Offer
{{custom_values.reactivation_offer}}
priority scheduling for this tax season
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a $50 credit toward your next tax return
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
early-bird appointment slots for tax season
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a mid-year tax planning check-in
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
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
Go Back
Search
ctrlK

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 **business name**. Thanks for reaching out! Is this for a personal return, a business return, bookkeeping, or an IRS notice? Reply here and we'll point you to the right person. 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! Is this about a tax return, bookkeeping, or an IRS letter? 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

> Hi **first name**, your **appointment type** with **business name** is confirmed for **only start date** at **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 for your tax consultation today. No worries! Want to grab another 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**, your engagement letter and fee quote from **business name** are in your email. Once signed, we'll send your secure document checklist. Questions? 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

> Welcome to **business name**, **first name**! Your secure document checklist is on its way to your email. Please don't text tax documents or SSNs. Use the secure portal link instead.

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**, your return is filed! Thanks for trusting **business name**. How was your experience? It takes about 30 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 choosing **business name**! Know a friend, family member, or business owner who needs tax help? Send them our way: **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 **business name**. We'd love to help with your taxes again this year. Returning clients get **reactivation offer**. Want a spot? Reply YES. 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 a good time for **service due offer** to look at estimated payments and plan ahead, so April has no surprises. 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**, tax season is almost here! **business name** is opening **seasonal offer**. Want first pick of times? Book here: **booking link** Reply STOP to opt out.

21 · Tax Season Document Collection

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**. We're ready to start your return! Your document checklist is in your email. Please upload through our secure portal, never by text. Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to first contact	Reply to every new inquiry in under 5 minutes during business hours, even in peak season	Conversations and contact timelines in Contacts
Consultation-to-engagement rate	Grow the share of consultations that sign an engagement letter each season	Opportunities > Pipelines (Consultation Completed vs. Engaged Client)
Days to complete documents	Shorten the average time from Documents Requested to Documents Status = Complete	Contacts > Smart Lists filtered by Documents Status
Returning client rebook rate	Rebook most of last year's clients before February with workflows 14 and 20	Calendars > Appointments and Contacts tagged 'returning-client'
Off-season engagements	Book planning check-ins and bookkeeping engagements every month from May to December	Workflow 19 stats in Automation > Workflows and Opportunities
New Google reviews	Earn new reviews each week of filing season	Reputation > Overview

Compliance notes

- IRC Section 7216 restricts using or disclosing tax return information for marketing (including cross-selling bookkeeping or planning) without the client's written consent. Segment campaigns using consented data only.
- The FTC Safeguards Rule requires tax preparers to protect client information. Never request SSNs, bank details, or tax documents by SMS or email; route clients to a secure portal.
- Treasury Circular 230 and state board rules prohibit false or misleading advertising. Don't promise refund amounts, 'maximum refunds', or results.
- Register A2P 10DLC and capture express written consent for texts. Brand messages clearly with your firm name so clients don't mistake them for IRS impersonation scams.
- Remind clients that the IRS does not initiate contact by text or social media, and give them a firm phone number to verify any suspicious message.

Mini-course outline

1. **Install the Snapshot and Brand It for the Firm**: Load the snapshot and make every message clearly come from your firm.
2. **Capture Inquiries and Respond During the Rush**: Make sure no tax season call or form goes unanswered.
3. **Book Consultations and Recover No-Shows**: Keep preparer calendars full with prepared prospects.

4. **Track Engagement Letters Through Filing**: See every client by stage from inquiry to filed return.
5. **Reviews, Referrals, and Rebooking Last Year's Clients**: Earn reviews at filing time and fill January with returning clients.
6. **Launch Document Collection and Year-Round Advisory**: Cut document chasing in season and keep revenue coming after April.

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