

LevelUp 2026 Cheat Sheet

The 30 new HighLevel features worth your time, and where to turn each one on.

Automate the ordinary. Humanize the extraordinary.

GoHighLevel + AI tutorials · with Jason Plotkin



PART 1: LEADS THAT GO COLD

1

AI agents that text new leads first

LABS

The AI agent texts new leads and missed calls first, then tries to book them.

Where Settings > Labs (look for the Conversation AI Outbound card); AI Agents > Conversation AI > Deploy > Outbound > Triggers

Tip: SMS only for now; needs a sending number with texting registration done.

2

AI campaigns that wake up old leads

LABS

Pick an old list and the AI writes each person a first message from their history.

Where Contacts > AI Campaign

Tip: Contacts on Do Not Disturb are skipped.

3

Build an AI agent just by describing it

LABS

Describe the agent you want, or start from a template, and HighLevel sets it up.

Where Settings > Labs > Conversation AI: Build with AI; AI Agents > Conversation AI > Create Agent > Create with AI

Tip: Saving doesn't turn it on; outbound is a separate step.

4

A visual flow builder for Conversation AI

One chatbot routes each conversation to the right specialist agent, with branches and waits.

Where AI Agents > Conversation AI > Create Bot > Flow Based Builder

Tip: Incoming conversations only; turn it on under Deploy.

5 Date, time and time zone awareness

The agent understands today and tomorrow, so it stops offering times that already passed.

Where Agent settings; Settings > Labs > Advanced Time Zone Support

Tip: Advanced Time Zone Support is its own Labs switch.

PART 2: AI AGENTS THAT FORGET

6 Agents that remember and learn

LABS

Managed agents remember facts about each person and save the procedures they learn.

Where Settings > Labs (look for the Managed Agents memory card); Agent Studio > Managed Agents > agent > Memory

Tip: Memory is per person and per agent, not shared.

7 Waits and scheduled follow-ups

The agent waits minutes or days, then follows up on its own, even around appointments.

Where Agent Studio > Managed Agents > agent > Edit agent

Tip: Waits run 5 minutes to 30 days; waiting is free.

8 Start agents from webhooks

Another app can start your agent by sending data to a unique webhook URL.

Where Agent > Triggers > Add trigger > Inbound webhook

Tip: Works only while the agent is published.

9 Turn n8n workflows into agents

BETA

Import an n8n workflow export and get a draft managed agent that mirrors its logic.

Where Agent Studio > Managed Agents > Import from > n8n

Tip: Credentials and API keys don't come over; reconnect your apps.

10 Agents that browse the web and handle files

Give an agent its own computer to browse sites, manage files and run scripts.

Where Agent > Capabilities > Computer

Tip: Payments and deletions always need your approval.

PART 3: MISSED CALLS AND WEBSITE CHAT

11 Voice AI answers WhatsApp calls

Voice AI picks up incoming WhatsApp calls, as the main receiver or as a backup.

Where Settings > WhatsApp > Calling

Tip: Incoming calls only; WhatsApp calling must be on the number.

12 WhatsApp call recording and transcripts

Record WhatsApp calls and get speaker-labeled transcripts in Conversations.

Where Settings > WhatsApp > Calling > Recording and transcription

Tip: Free for now; Meta may charge later. Get consent first.

13 Rebuilt calling in the mobile app

Play recordings, filter missed calls, add notes and transfer calls from your phone.

Where Mobile app > Call Dialer > Recents

14 Video avatars in the chat widget

A short looping video next to your chat button replaces the plain text prompt.

Where Sites > Chat Widget > Style > Appearances > Enable Video avatar

Tip: MP4 or WebM, up to 60 seconds and 25 MB.

15 Chat widget analytics

See how many visitors open your chat and turn into leads.

Where Sites > Chat Widget > Insights

Tip: Click any number to see the records behind it.

PART 4: EMAILS LANDING IN SPAM

16 A spam check before you send

Scan a campaign's content, sender setup and reputation for spam risks before it goes out.

Where Marketing > Emails > Campaigns > Send or schedule > Check now

Tip: A clean result doesn't guarantee the inbox.

17 Automatic email domain warm-up

BETA

HighLevel's warm-up mailboxes email each other and slowly ramp up, so a new domain builds a good reputation.

Where Email Services > Dedicated Domain and IP > Domain Warm-Up

Tip: Beta by request; your domain needs a verified SSL certificate.

18**Inbox Preview in real email apps****LABS**

See how your email looks in apps like Gmail and Outlook before you send.

Where Settings > Labs > Inbox Preview; email builder > Inbox preview

Tip: Each email app you pick uses one preview.

19**AI email editor and sequences****LABS**

Describe an email and AI builds it from your brand colors, or writes a whole sequence.

Where Marketing > Emails > Create with AI; Email sequences > Create with AI

Tip: Nothing sends until you confirm the audience and start time.

20**A/B testing in workflows**

Split new contacts across workflow paths and send everyone new down the winner.

Where Automation > Workflows > Add action > A/B Test

Tip: 2 to 10 paths; ties go to the first path.

PART 5: SOCIAL, REVIEWS AND YOUR INBOX

21**Social comments in Conversations**

Comments on your Social Planner posts land in your inbox with the post for context.

Where Marketing > Social Planner > Settings > Comments

Tip: Only posts made through Social Planner sync.

22**More control over the reviews AI**

Set the reviews AI's brand voice and guardrails, and hold sensitive reviews for approval.

Where Reputation > Settings > Reviews AI

Tip: Your role needs the Manage Reviews AI Agents permission.

23**TikTok lead ads in Ad Manager**

Build and run TikTok lead generation campaigns from inside HighLevel.

Where Ad Manager > Create Campaign > TikTok

Tip: Your instant form must already exist in TikTok Ads Manager.

24**Keyword search across conversations**

Search words, names, emails or phone numbers across your whole inbox.

Where Conversations > search icon

Tip: Needs at least 3 characters; current sub-account only.

25 Call or text Ask AI from your phone

Look up a contact, check your calendar or start a workflow by call or text.

Where Ask AI > Dispatch > Connect Phone

Tip: Set a 6-digit PIN for voice calls.

PART 6: GETTING AND KEEPING CUSTOMERS

26 AI search visibility score LABS

Scores out of 100 how easily ChatGPT, Claude, Perplexity and Gemini can find a business.

Where Settings > Labs (look for the AI search visibility card); Marketing > Prospecting > Marketing Audit Report

Tip: A good score doesn't guarantee AI will recommend the business.

27 Meeting Room video calls

Video calls inside HighLevel with transcripts, AI summaries and breakout rooms.

Where Meeting Room > My room; Calendars > meeting location > Meeting Room

Tip: Turn on transcription during the meeting; recording alone won't create one.

28 QR codes with scan limits and expiry

Set a scan limit or an expiry date on a dynamic QR code without reprinting it.

Where Sites > QR Codes > Create QR Code

Tip: Duration counts from when you create the code.

29 Paid tiers for communities

Offer several paid plans in one community, each with its own channels, events and courses.

Where Memberships > Communities > Settings > Subscriptions > Add plan

Tip: Turning on 'Make this community free' pauses paid plans.

30 HubSpot import with filters

Import only the HubSpot contacts, deals, companies and tasks you need, filtered by date.

Where Contacts > Import > Import from HubSpot > Preview and import

Tip: Leaving filters empty imports everything.

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Affiliate link: I earn a commission if you sign up, at no extra cost to you.

