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GHL Lead Management System

Technical Build Documentation

A process-first GoHighLevel practice build documenting CRM architecture, pipeline logic, workflow handoffs, exception handling, testing, and production considerations.

Client: The Purple Pipeline

Project Type: Internal Capstone / Demonstration Build

Platform: GoHighLevel

Focus: CRM Architecture · Workflow Automation · Lead Lifecycle Design



Document Guide

This document provides a detailed view of the system's structure, workflow responsibilities, deliberate human-review points, and the considerations required before production use.

System	GHL Lead Management System
Environment	Practice/capstone build
Pipeline	Practice Sales
Workflow count	14 focused workflows
Testing	7 end-to-end scenarios, all passed before documentation
Communication cost	No paid communication or premium actions used in the capstone

Contents

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- 02 CRM & pipeline architecture
- 03 Workflow register
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- 05 Key design decisions
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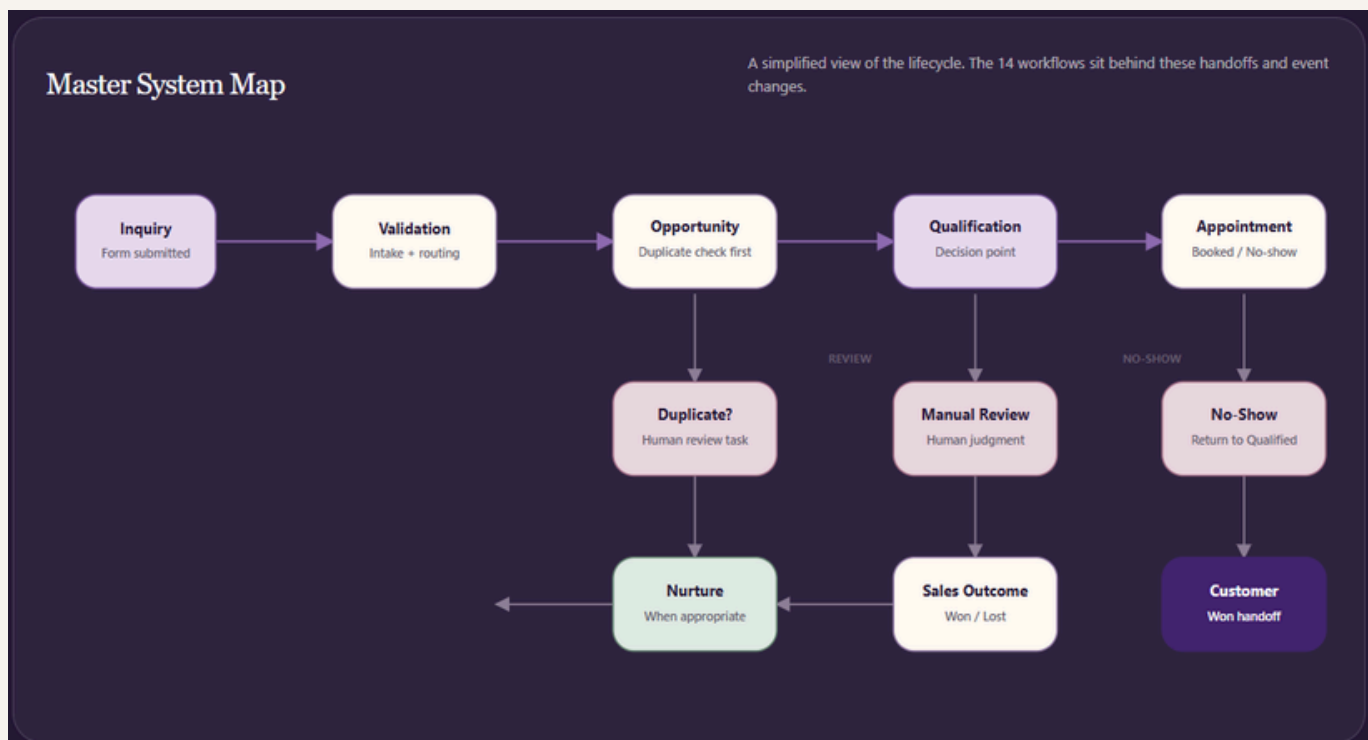


01. System Overview

The system connects inquiry intake, validation, opportunity creation, qualification, pipeline progression, appointment handling, Won/Lost outcomes, long-term nurture, and duplicate control. Individual workflows hand off through tags, opportunity events, field changes, and stage changes.

Design principles

- Process first: understand the work before deciding what to automate.
- Clarity over workflow count: each workflow has a clear trigger and primary responsibility.
- Human judgment stays human: the system can route, remind, update and flag; a person still makes contextual decisions.
- Pipeline stages remain the source of truth for opportunity progression; tags support routing, segmentation and temporary workflow state.
- Build for real use: readable names, defined handoffs, testing, documentation and production checks matter as much as automation.



02. CRM & Pipeline Architecture

Practice Sales pipeline

Stage	Meaning in this capstone	Automation role
New Lead	A valid new opportunity has entered the pipeline.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.
Contacted	A contact attempt or progression event has occurred.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.
Engaged	A meaningful engagement state when used by the operating process.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.
Qualified	Qualification is complete and the lead is ready for a next sales step.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.
Appointment Booked	A qualifying appointment has been booked.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.
Proposal Sent	A proposal has been issued for review.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.
Payment Pending	Commercial decision has progressed to payment review.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.
Won	The opportunity has converted to a customer.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.
Lost	The opportunity is closed without a sale.	Stage/event workflows keep CRM state, tasks, tags and notes aligned.

Practice Sales pipeline

Core custom fields and tags support routing and handoffs. Qualification Status is particularly important because it separates Qualified, Manual Review, Unqualified and nurture-oriented outcomes without forcing every decision into a pipeline stage.

- Tags support source identification, lead-state handoffs, segmentation and temporary markers.
- Contact Status is updated to reflect the current CRM state.
- Opportunity stage remains the authoritative sales-progression state.
- Tasks preserve human ownership where review or follow-up is still required.
- Notes provide an audit-friendly explanation of key automated transitions.



New Lead

2 opportunities \$0.00

test contact

Source: FORM

Value: \$0.00

Belle Rubi

Source: FORM

Value: \$0.00

Contacted

1 opportunities \$0.00

Rona Test

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Engaged

0 opportunities \$0.00

Qualified

3 opportunities \$0.00

Dammy Dup

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Dummy Capstone

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Belle Dummy

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Appointment Booked

1 opportunities \$0.00

Capstone Dummy 01

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Proposal Sent

0 opportunities \$0.00

Payment Pending

0 opportunities \$0.00

Won

2 opportunities \$0.00

Lost

1 opportunities \$0.00

Long-Term Nurture

2 opportunities \$0.00

Dammy Capstone

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Dummy Jepoy Dummy

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Dammy Midrange

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Lost reason: Not a Fit

Dammy Nurture

Source: PIPE – Practice Sales Lead Form

Value: \$0.00

Oliver Crisolo

Source: FORM

Value: \$0.00

Lost reason: Not Ready

Contact Details

DC Dammy Capstone

Owner: Belle Rubi

Followers: [Avatar]

Tags (4): source – website, service – crm setup, appointment – booked, customer – active

All fields, DND, Actions

Search fields and folders

Contact: First name: Dammy, Last name: Capstone, Email: capstone.dummy02@gmail.com, Phone: 0917, Date of birth:

Conversations

DC Dammy Capstone

Sep 19

Opportunity Dammy Capstone created in PIPE – Practice Sales - ... Details Sep 19, 2026

Opportunity Dammy Capstone moved from New Lead → Qualified... Details Sep 19, 2026

Appointment Dammy Capstone created for Sep 21, 2026 09:00PM Details Sep 19, 2026

Opportunity Dammy Capstone moved from Qualified → Appointm... Details Sep 19, 2026

Opportunity Dammy Capstone moved from Appointment Booked ... Details Sep 19, 2026

Opportunity Dammy Capstone moved from Proposal Sent → Pay... Details Sep 19, 2026

Opportunity Dammy Capstone moved from Payment Pending → ... Details Sep 19, 2026

Activity (CST)

SEP 19, 2026

Page visited: Source: Direct traffic: PIPE – Practice Sales Lead Form /widget/forms/XYT3aDjw4q:U0P8yJ0DM ⌵ Sep 19 at 4:14 AM

Page visited: Source: Direct traffic: PIPE – Practice Sales /widget/bookings/pipe-practice-sales ⌵ Sep 19 at 4:09 AM

Appointment booked: Source: Direct traffic: PIPE – Practice Sales /widget/bookings/pipe-practice-sales ⌵ Sep 19 at 4:09 AM

Appointment form submitted: Source: Direct traffic: PIPE – Practice Sales /widget/bookings/pipe-practice-sales ⌵ Sep 19 at 4:09 AM

Contact Created: Source: Direct traffic: From: PIPE – Practice Sales Lead Form /widget/forms/XYT3aDjw4q:U0P8yJ0DM ⌵ Sep 19 at 4:08 AM

Form submitted: Source: Direct traffic: PIPE – Practice Sales Lead Form /widget/forms/XYT3aDjw4q:U0P8yJ0DM ⌵ Sep 19 at 4:08 AM

Your agency grows. Your system follows through

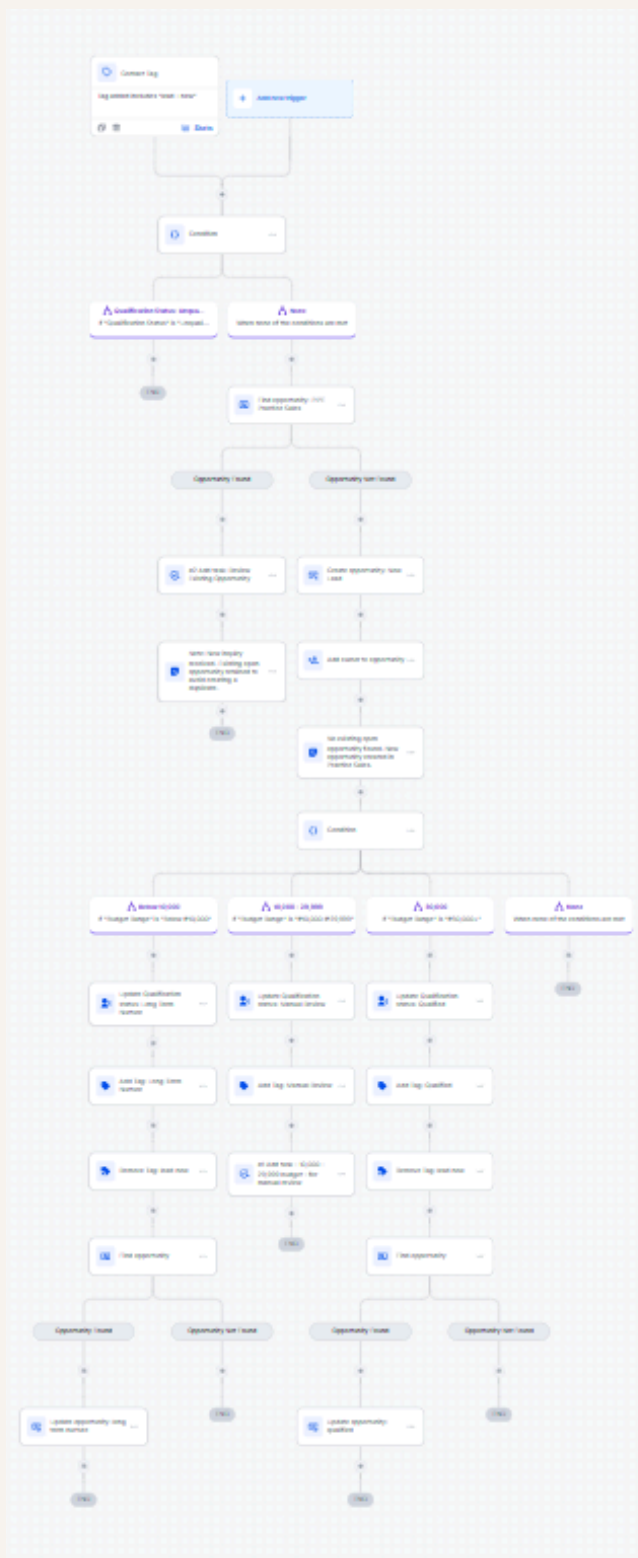
03. Workflow register

The register below uses the current user-confirmed numbering where WF07 is Lead - Unqualified Processing. The older screenshot pack shows an earlier numbering sequence, so WF06 and downstream screenshot labels should be checked against the final GHL account before this document is treated as production handover.

WF	Workflow	Primary responsibility
1	Lead - New Inquiry Intake - Practice Form	Validate intake and route valid new inquiries.
2	Lead - New Lead Opportunity Setup	Prevent duplicate open opportunities, create the opportunity when appropriate, and route qualification.
3	Lead - New Lead Review - SLA	Create a human review task when a new lead still needs attention after the SLA wait.
4	Pipeline - New Lead Actions	Normalize CRM state when an opportunity enters New Lead.
5	Pipeline - Contacted Lead Sync	Synchronizes the contact record when an opportunity moves to the Contacted pipeline stage by applying the Contacted tag, removing previous lead-status tags, updating the contact status to Contacted, and recording the stage change in the contact notes.
6	Lead - Qualification Routing	Qualification decision / routing workflow. Final workflow name should be confirmed in GHL.
7	Lead - Unqualified Processing	Convert an Unqualified qualification outcome into the correct Lost opportunity state.
8	Appointment - Booked CRM Update	Synchronize appointment booking with CRM tags, opportunity stage, task and note.
9	Appointment - No-Show CRM Update	Return a missed appointment to Qualified and create the rebooking action.
10	Sales - Proposal Sent Actions	Synchronize Proposal Sent stage, proposal status, review task and note.
11	Billing - Payment Pending Actions	Synchronize Payment Pending stage and create a review task / note.
12	Customer - Won Opportunity	Convert a Won opportunity into active-customer state and start onboarding handoff.
13	Sales - Lost Opportunity	Apply Lost state, refresh opportunity context, require Lost Reason and route Not Ready to nurture.
14	Lead - Long-Term Nurture Organization	Organize nurture contacts, opportunity stage, task and note.



Workflow 01: WF - Lead - New Inquiry Intake - Practice Form



Primary responsibility: Validate a form submission before it can launch new-lead opportunity setup.

Trigger / entry: Practice form submitted.

Handoff / outcome: Valid new lead continues to opportunity setup; exceptions stop or move to human review.

Core actions:

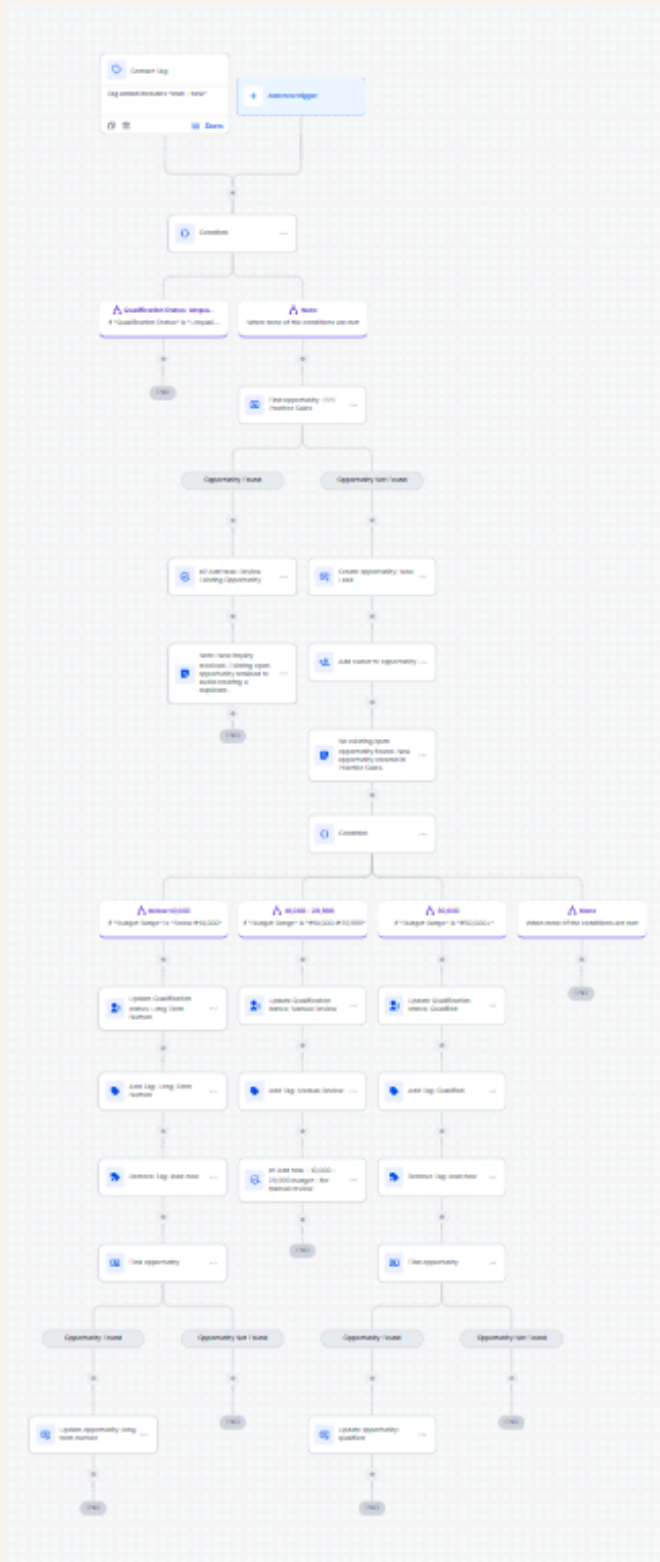
- Check whether the submitting contact is already an active customer.
- If active, create an Existing Customer Inquiry task and end the new-lead path.
- Validate required contact information, including email and phone.
- If required information is incomplete, apply Manual Review and create a Complete Missing Information task.
- For valid submissions, apply Source – Website and update the contact's Lead Source.
- Evaluate the selected Service of Interest.
- Route Website Setup, CRM Setup, Workflow Automation, and SaaS Setup inquiries through their corresponding service branches.
- Apply the appropriate Service and Lead-New tags.
- Assign the lead to the designated user.
- Create the appropriate Review New Client task.
- Add a note recording that the lead entered through the practice website form.
- End submissions with no matching Service of Interest without forcing them into an incorrect service route.

Implementation notes

This workflow acts as the intake gatekeeper for the lead-management system. The Lead-New handoff state is applied only after validation and service routing, preventing incomplete or existing-customer submissions from launching standard new-lead opportunity setup.



Workflow 02: WF - Lead - New Lead Opportunity Setup



Primary responsibility: WF - Lead - New Lead Opportunity Setup

Trigger / entry: WF - Lead - New Lead Opportunity Setup

Handoff / outcome: Opportunity exists once, then qualification routing determines the next state.

Core actions:

- Stop if Qualification Status is already Unqualified.
- Find an Open opportunity in the Practice Sales pipeline.
- If found, create a Review Existing Opportunity task and note instead of another deal.
- If not found, create a New Lead opportunity.
- Route by qualification / budget logic to nurture, manual review or qualified outcomes.

Implementation notes

Duplicate prevention is deliberately placed before opportunity creation.



Workflow 03: WF - Lead - New Lead Review - SLA

Primary responsibility: Surface new leads that remain unresolved after the review window.

Trigger / entry: New-lead handoff tag / state is added.

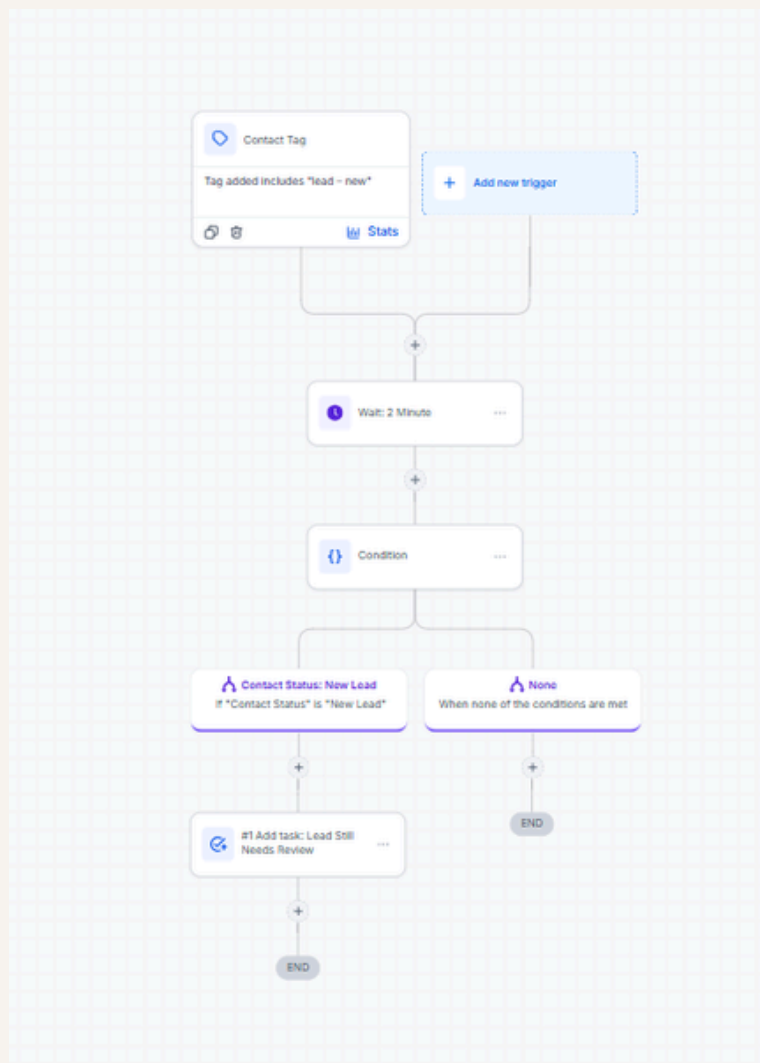
Handoff / outcome: Human owner receives a review task only when the lead still needs attention.

Core actions:

- Wait for the configured SLA interval.
- Check whether Contact Status is still New Lead.
- If still New Lead, create a Lead Still Needs Review task.
- Otherwise, end without unnecessary tasking.

Implementation notes

The screenshot source shows a short practice wait; production SLA should be set from the client operating rules.



Workflow 04: WF - Pipeline - New Lead Actions

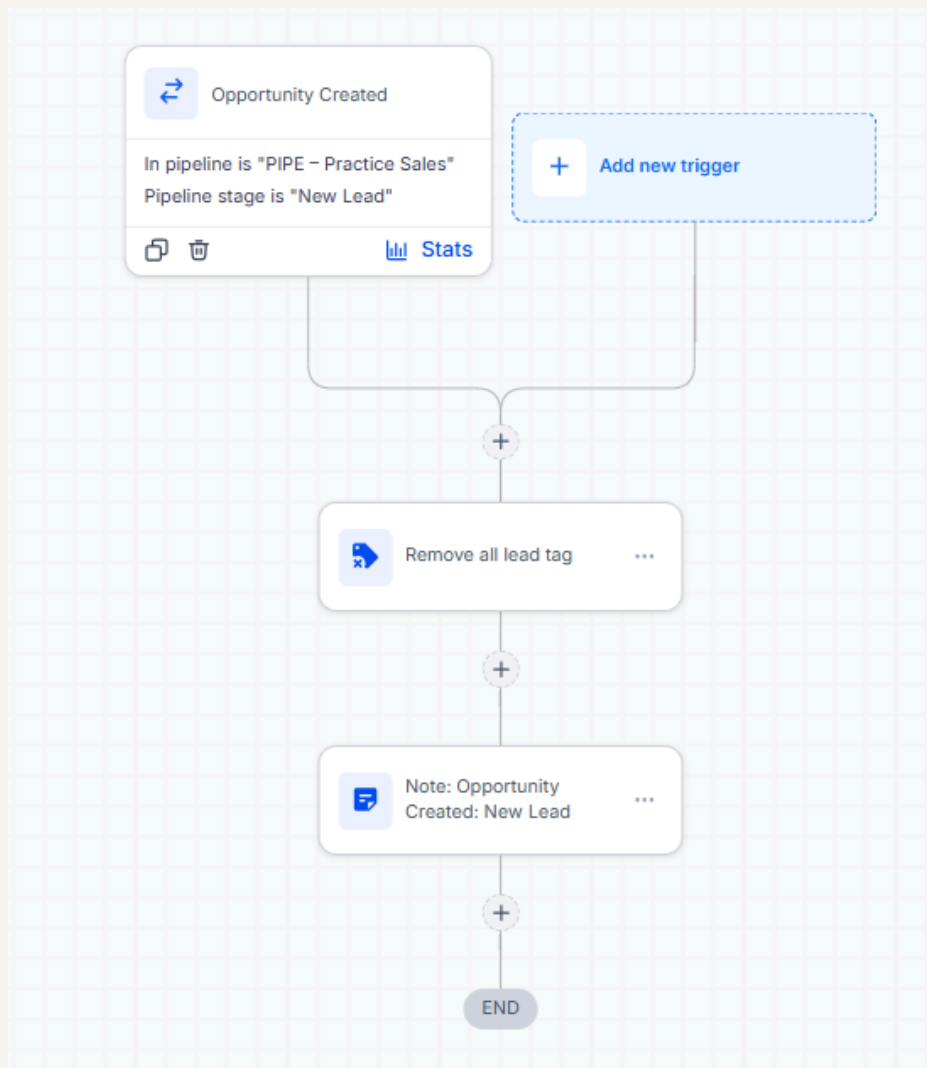
Primary responsibility: Normalize CRM state when a new opportunity is created in the New Lead stage.

Trigger / entry: Opportunity created in Practice Sales with stage New Lead.

Handoff / outcome: Contact and opportunity begin from a clean New Lead state.

Core actions:

- Remove stale lead-state tags.
- Add a note that the opportunity was created as New Lead.
- Keep pipeline stage as the source of truth for opportunity progression.



Workflow 05: WF – Pipeline – Contacted Lead Sync

Primary responsibility: Synchronize the contact record when the opportunity moves to the Contacted stage.

Trigger / entry: Opportunity stage changes to Contacted in the PIPE – Practice Sales pipeline.

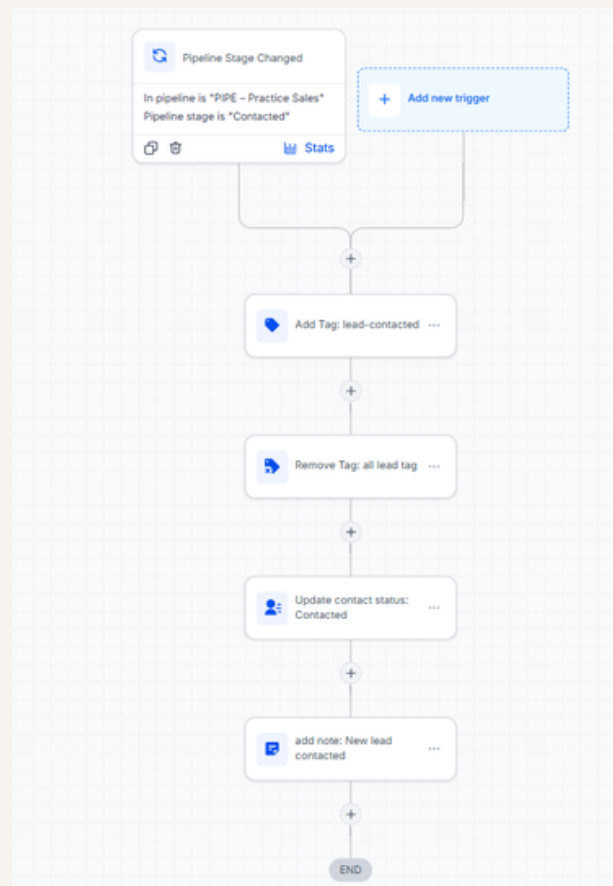
Handoff / outcome: The contact record is updated to reflect that the lead has been contacted, keeping the CRM contact status aligned with the opportunity's pipeline stage.

Core actions:

- Apply the lead-contacted tag.
- Remove previous lead-state tags.
- Update the Contact Status to Contacted.
- Add a note recording that the new lead has been contacted.

Implementation notes

This workflow keeps the contact-level lead status synchronized with pipeline movement. When an opportunity reaches Contacted, the previous lead-state tags are cleared and the contact record is updated to reflect the current stage, maintaining a consistent status across the CRM and sales pipeline.

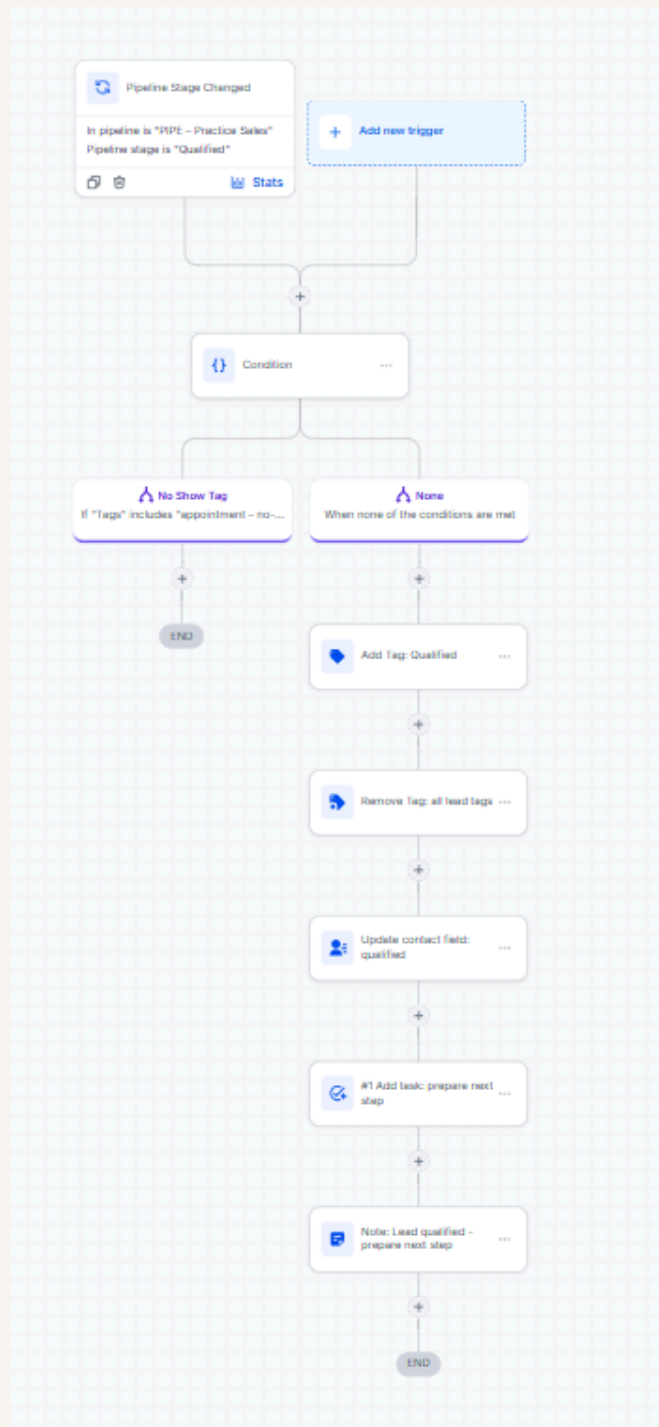


Workflow 06: WF – Pipeline – Qualified Lead Sync

Primary responsibility: Synchronize the contact record when the opportunity reaches Qualified.

Trigger / entry: Pipeline stage changes to Qualified.

Handoff / outcome: CRM and opportunity show the same Qualified state.



Core actions:

- Check for the No-Show tag first.
- On a normal qualification path, add the Qualified tag.
- Remove conflicting lead-state tags.
- Update Qualification Status / Contact Status to Qualified.
- Create Prepare Next Step task.
- Add a qualification note.
- On a No-Show return path, suppress the duplicate standard next-step task.

Implementation notes

The No-Show guard prevents a backward stage move from generating duplicate work.



Workflow 07: WF - Lead - Unqualified Processing

Primary responsibility: Convert an Unqualified qualification decision into the appropriate Lost opportunity state.

Trigger / entry: Qualification Status changes to Unqualified.

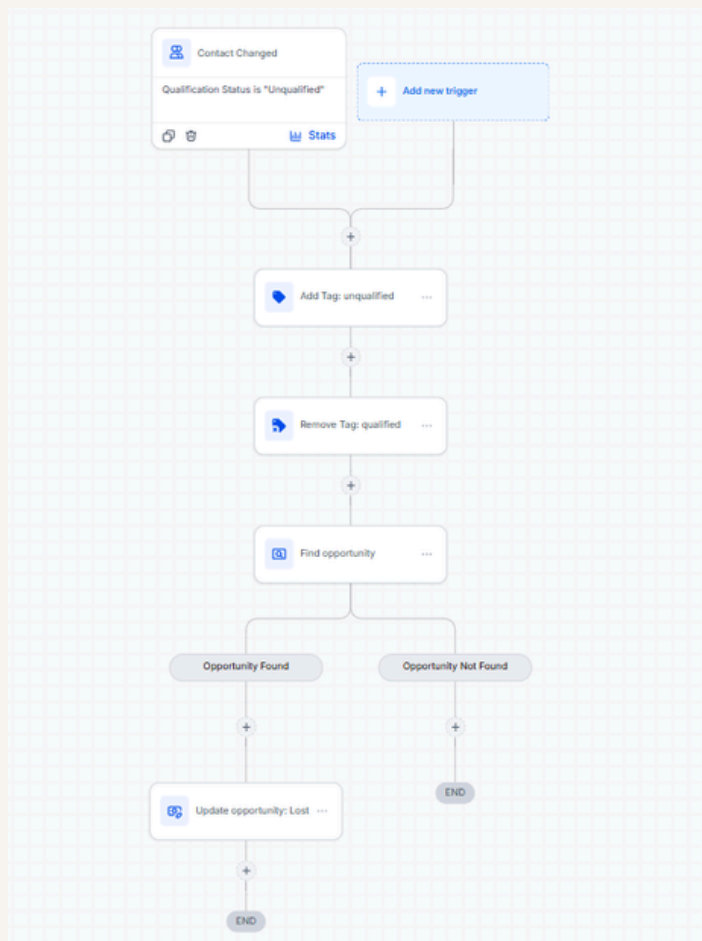
Handoff / outcome: General Lost workflow takes over cleanup and Lost Reason handling.

Core actions:

- Add Unqualified tag.
- Remove Qualified tag / conflicting qualification state.
- Find the active opportunity.
- If found, update the opportunity to Lost.
- Update Lost Reason as defined by the practice logic.
- Create a review task if required.
- End the active qualification path.

Implementation notes

Unqualified is a qualification decision; Lost is an opportunity outcome. Keeping them separate makes the lifecycle easier to reason about.



Workflow 08: WF - Appointment - Booked CRM Update

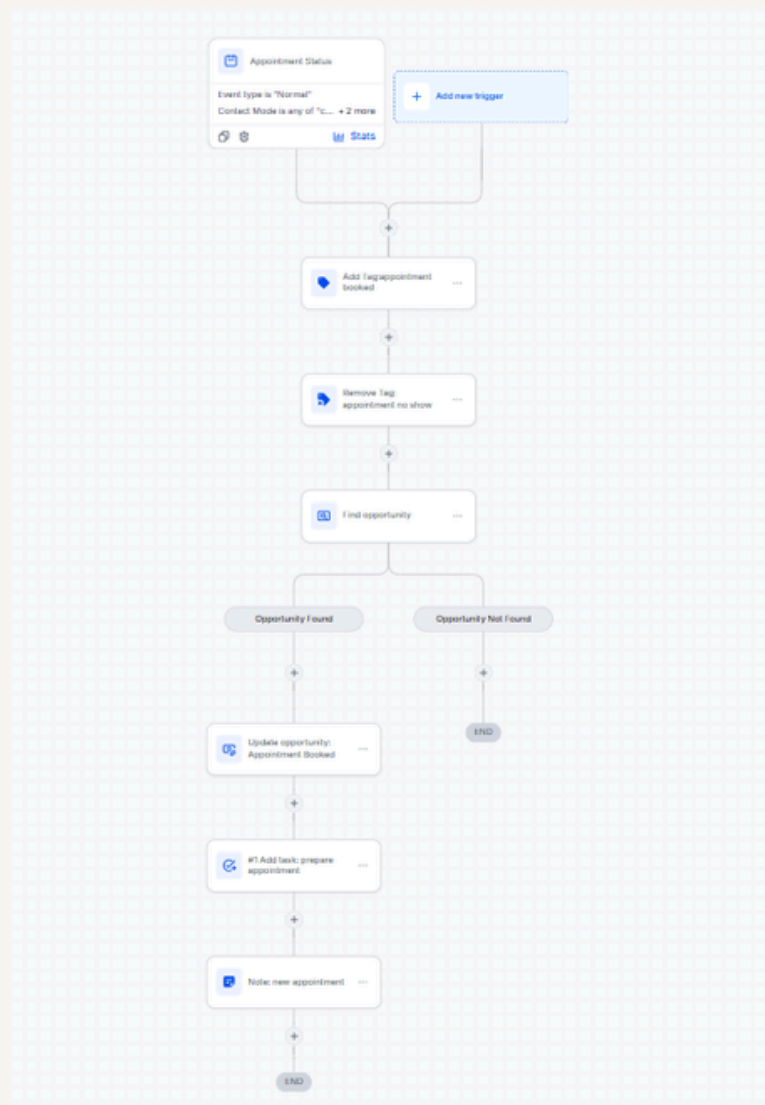
Primary responsibility: Synchronize a booked appointment with contact tags, opportunity stage and preparation work.

Trigger / entry: Appointment status changes to booked / normal appointment event.

Handoff / outcome: Opportunity and CRM reflect the booked appointment; preparation task is visible.

Core actions:

- Add Appointment Booked tag.
- Remove Appointment No-Show tag.
- Find the current opportunity.
- If found, update stage to Appointment Booked.
- Create Prepare Appointment task.
- Add a New Appointment note.

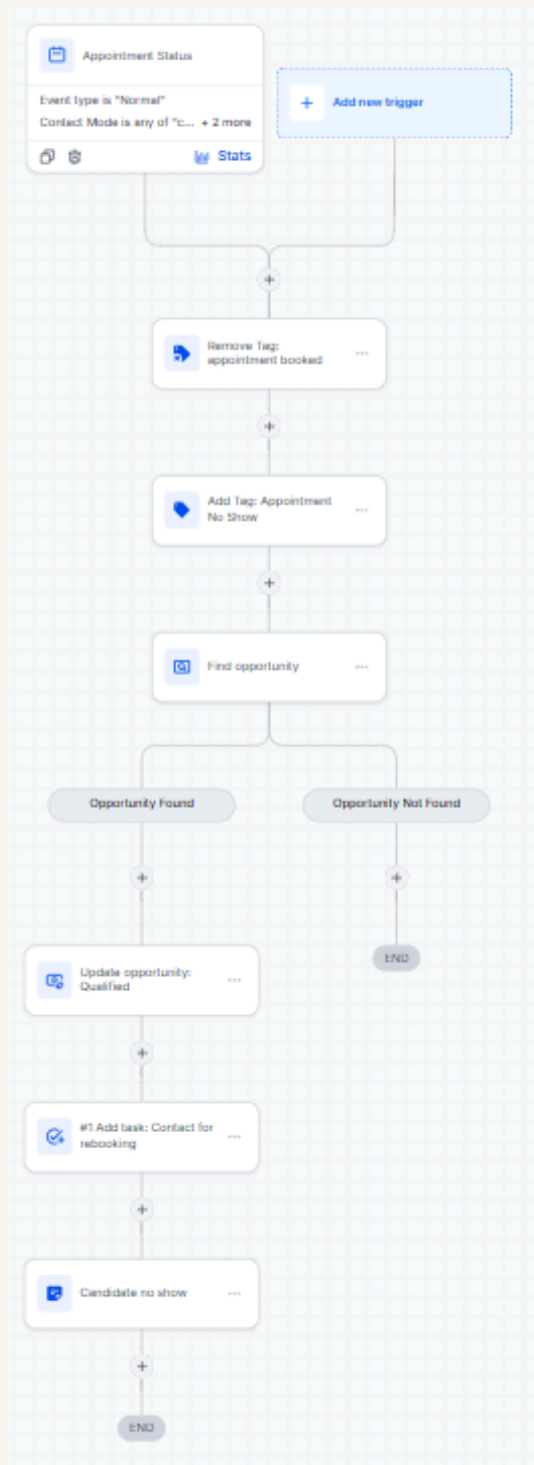


Workflow 09: WF - Appointment - No-Show CRM Update

Primary responsibility: Recover a missed appointment without treating the lead as automatically Lost.

Trigger / entry: Appointment status changes to No-Show.

Handoff / outcome: Lead returns to Qualified for rebooking; Qualified sync recognizes the No-Show marker.



Core actions:

- Remove Appointment Booked tag.
- Add Appointment No-Show tag.
- Find the current opportunity.
- If found, move the opportunity back to Qualified with backward movement allowed.
- Create Contact for Rebooking task.
- Add / maintain the no-show note or state.

Implementation notes:

The backward stage move is intentional because the next action is rebooking, not closing the opportunity.



Workflow 10: WF - Sales - Proposal Sent Actions

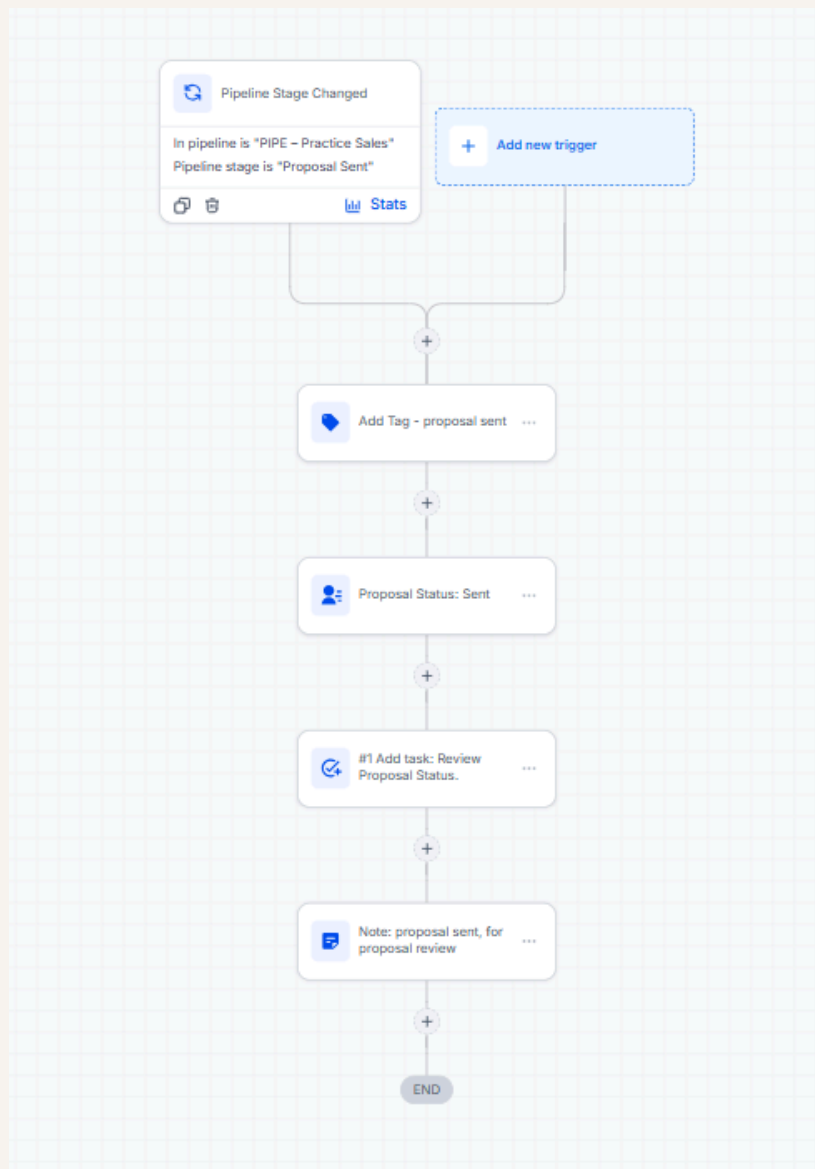
Primary responsibility: Synchronize the Proposal Sent stage with proposal status and a clear review action.

Trigger / entry: Pipeline stage changes to Proposal Sent.

Handoff / outcome: Proposal state is visible in the CRM and a follow-up task exists.

Core actions:

- Add Proposal Sent tag.
- Update Proposal Status to Sent.
- Create Review Proposal Status task.
- Add note that the proposal was sent for review.



Workflow 11: WF - Billing - Payment Pending Actions

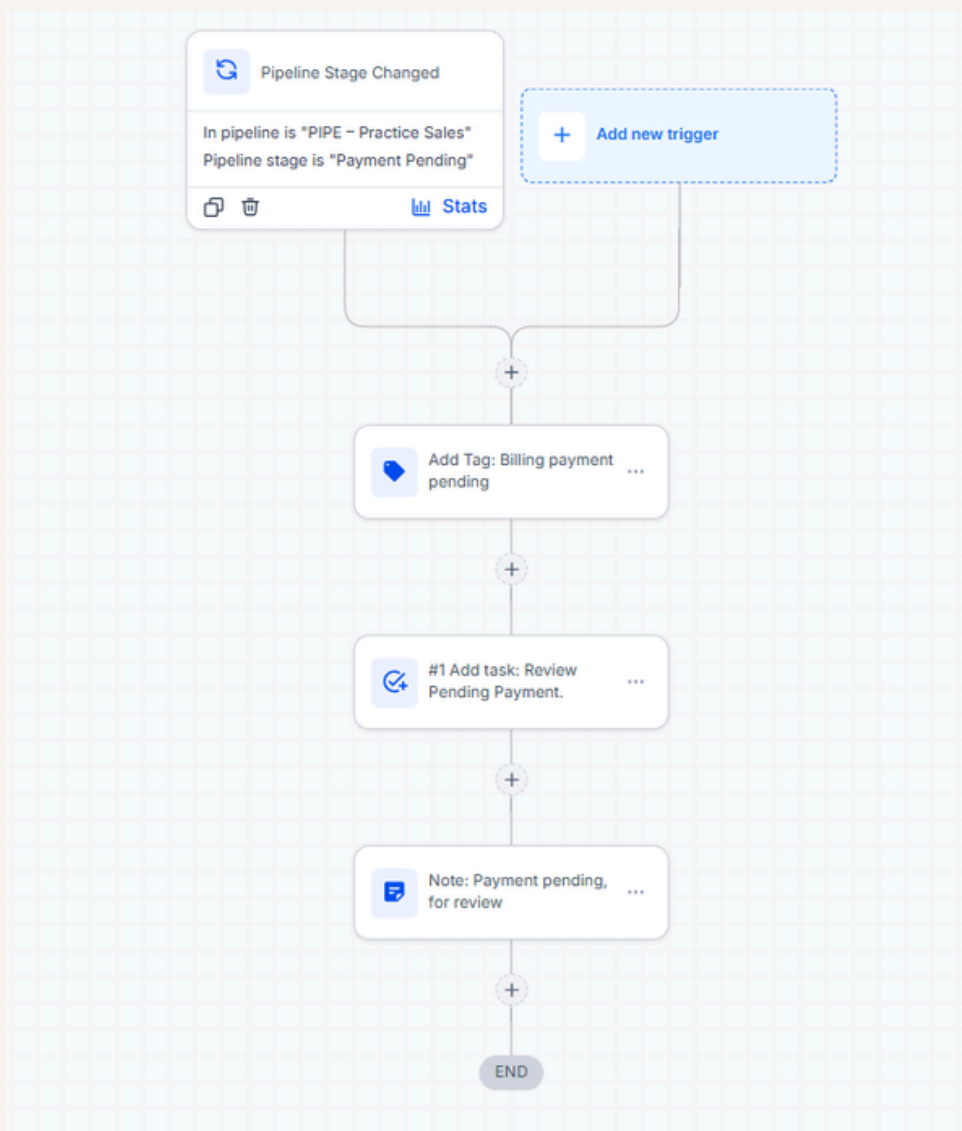
Primary responsibility: Create visibility and ownership when an opportunity reaches Payment Pending.

Trigger / entry: Pipeline stage changes to Payment Pending.

Handoff / outcome: Payment state is visible and a human review action is assigned.

Core actions:

- Add Billing / Payment Pending tag.
- Create Review Pending Payment task.
- Add Payment Pending for Review note.

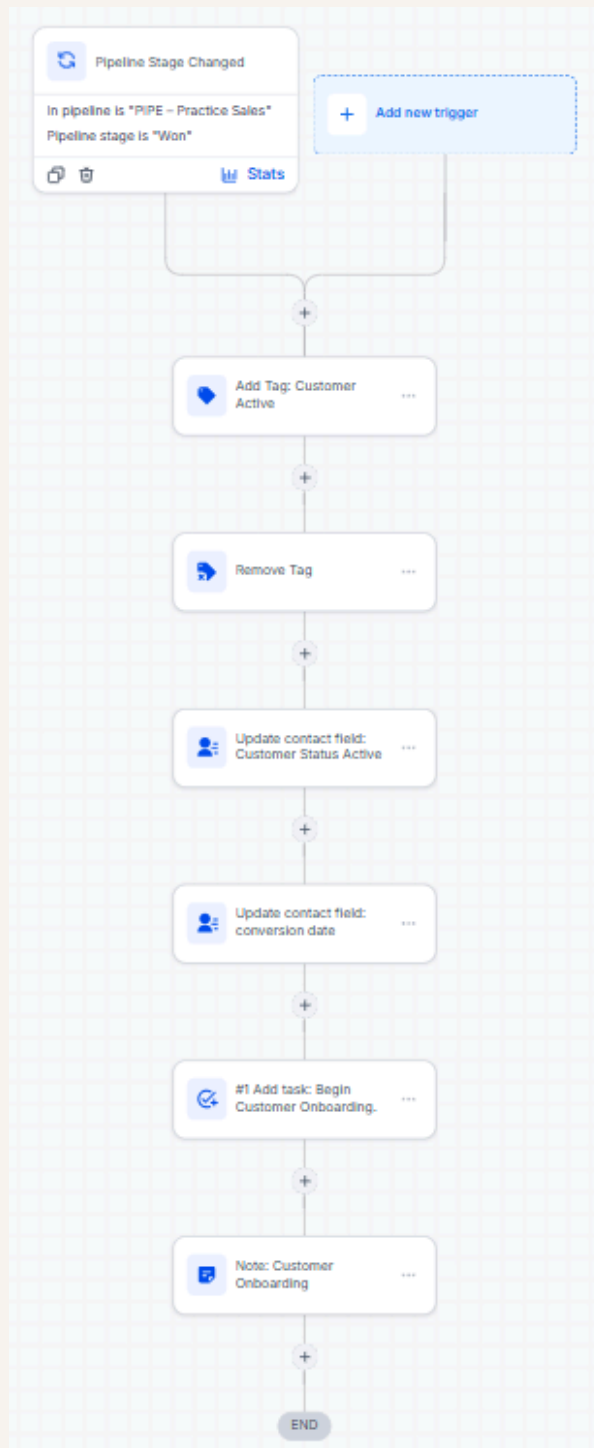


Workflow 12: WF - Customer - Won Opportunity

Primary responsibility: Convert a Won opportunity into customer state and begin the onboarding handoff.

Trigger entry: PPipeline stage changes to Won.

Handoff / outcome: Lead lifecycle closes as Won and the customer onboarding handoff begins.



Core actions:

- Add Customer Active tag.
- Remove stale lead / sales-state tags.
- Update Customer Status to Active.
- Update Conversion Date.
- Create Begin Customer Onboarding task.
- Add Customer Onboarding note.

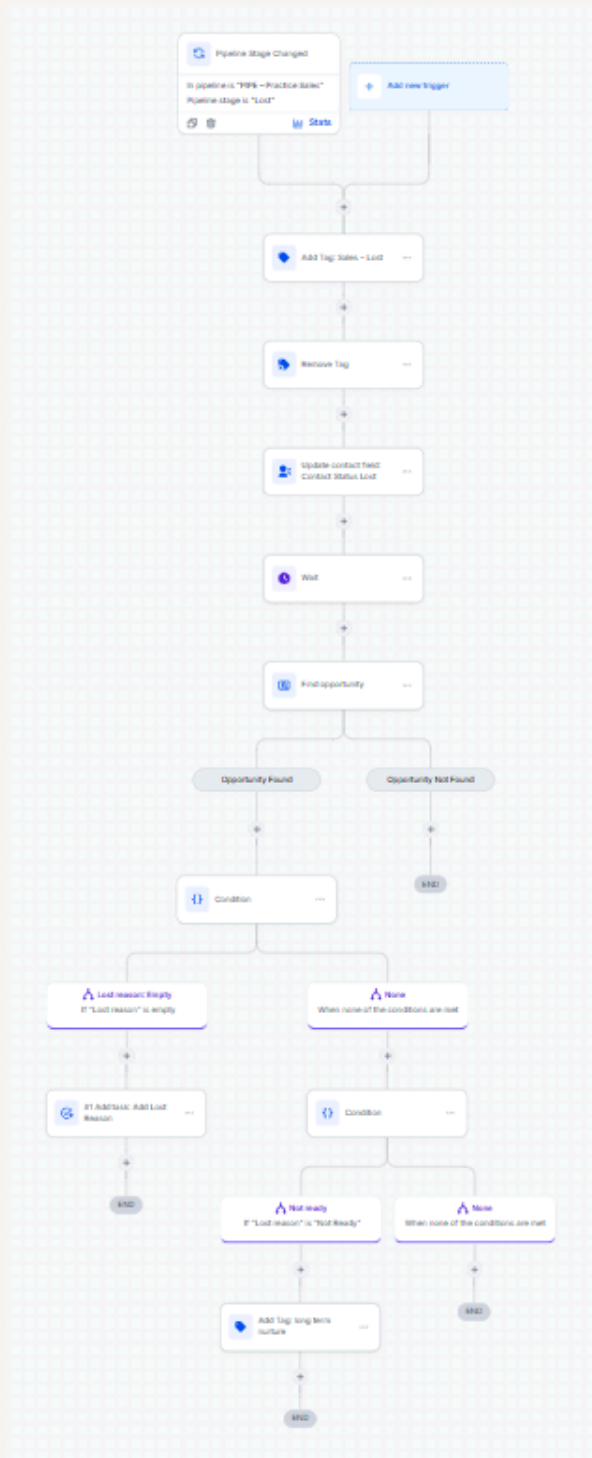


Workflow 13: WF - Sales - Lost Opportunity

Primary responsibility: Normalize Lost state, require a usable Lost Reason and route appropriate leads into nurture.

Trigger entry: Pipeline stage changes to Lost.

Handoff / outcome: Lost record is clean; missing reason is surfaced; Not Ready can continue to nurture.



Core actions:

- Add Sales - Lost tag.
- Remove stale lead-state tags.
- Update Contact Status to Lost.
- Wait to allow opportunity fields to settle.
- Find Opportunity again to refresh context.
- If Lost Reason is empty, create Add Lost Reason task.
- If Lost Reason is Not Ready, add the long-term nurture handoff tag.
- Otherwise end according to the Lost outcome.

Implementation notes

Testing showed the trigger snapshot could contain an older Lost Reason value. Wait + Find Opportunity refreshes the record before evaluation.

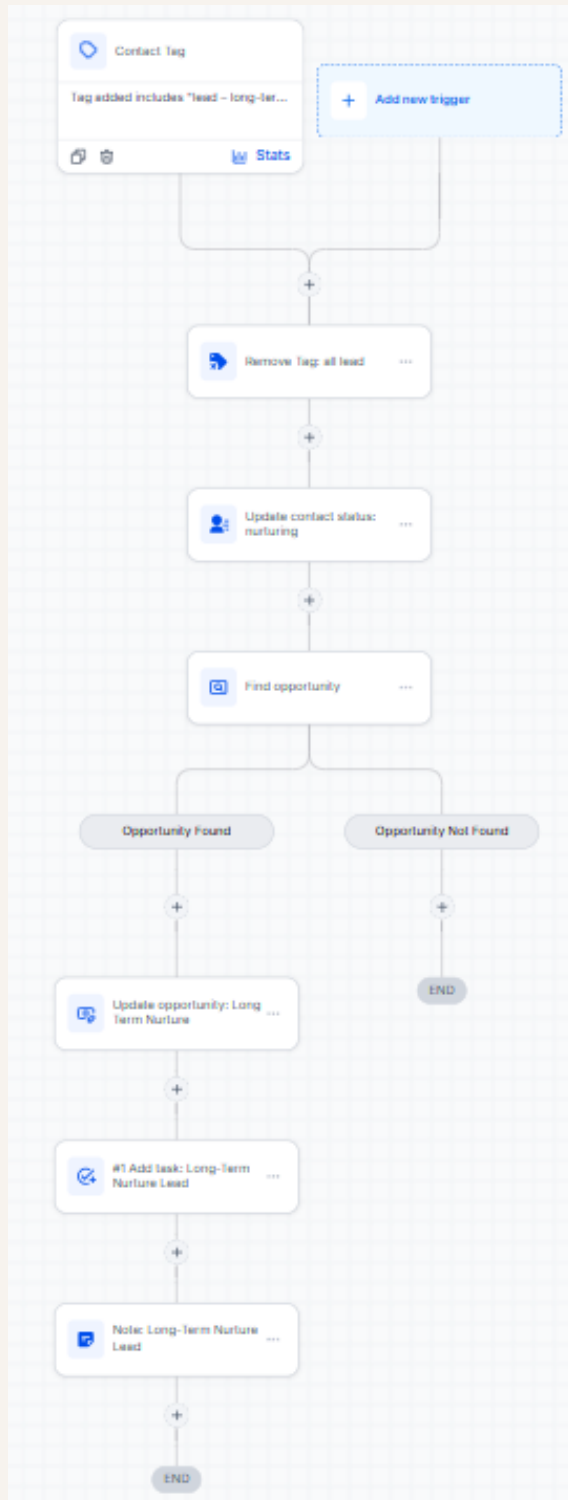


Workflow 14: WF - Lead - Long-Term Nurture Organization

Primary responsibility: Organize leads entering long-term nurture and preserve a visible future follow-up state.

Trigger entry: Long-term nurture handoff tag is added.

Handoff / outcome: Contact and opportunity remain visible in a deliberate nurture state.



Core actions:

- Remove conflicting lead-state tags.
- Update Contact Status to Nurturing.
- Find the current opportunity.
- If found, update opportunity stage to Long-Term Nurture.
- Create Long-Term Nurture Lead task.
- Add Long-Term Nurture Lead note.



Key Design Decisions

Lead - New is added only after intake validation

Prevents incomplete or existing-customer submissions from launching opportunity setup.

Duplicate opportunities are blocked before creation

WF02 searches for an existing Open opportunity first. Existing deals generate a review task and note rather than another opportunity.

Manual Review stays in New Lead

The build uses Qualification Status + Manual Review tag + a human task instead of inventing a misleading Manual Review pipeline stage.

Unqualified and Lost remain separate concepts

Unqualified Processing converts a qualification decision into Lost; the general Lost workflow handles lifecycle cleanup and Lost Reason logic.

No-Show intentionally moves backward

A missed appointment returns from Appointment Booked to Qualified because the next action is rebooking.

Lost Reason uses refreshed opportunity context

Wait + Find Opportunity was added after testing showed the original trigger context could contain an older Lost Reason snapshot.



Testing & Quality Assurance

Each challenge workflow was tested during the build. After individual testing, the connected workflows were published temporarily and seven end-to-end capstone scenarios were run with fresh dummy contacts. All seven scenarios passed before documentation.

Quality audit checklist

- Clear workflow names and exact trigger filters.
- Consistent tag naming and correct field values.
- Correct pipeline stages, task owners and deadlines.
- All If/Else branches end in a defined action or End state.
- Re-entry reviewed for workflows that can legitimately repeat.
- Duplicate opportunities controlled.
- No paid communication or premium actions used.
- Execution history reviewed for unexplained errors.

DD Dammy Dup	Removed by - End Of Workflow	Finished	Sep 19th, 4:43:58 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	No Show Tag	Executed	Sep 19th, 4:43:57 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	Add to workflow	Added To Workflow	Sep 19th, 4:43:57 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	Removed by - End Of Workflow	Finished	Sep 19th, 4:36:22 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	Note	Executed	Sep 19th, 4:36:22 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	#1 Add task: prepare next step	Executed	Sep 19th, 4:36:21 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	Update contact field: qualified	Executed	Sep 19th, 4:36:19 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	Remove Tag	Executed	Sep 19th, 4:36:18 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	Add Tag: Qualified	Executed	Sep 19th, 4:36:18 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	None	Executed	Sep 19th, 4:36:17 am	View details	🔍 ⚙️ 🔄
DD Dammy Dup	Add to workflow	Added To Workflow	Sep 19th, 4:36:17 am	View details	🔍 ⚙️ 🔄

Contact	Action	Status	Executed on (CST +08:00)	Actions
DD Dammy Dup	Removed by - End Of Workflow	Finished	Sep 19th, 4:44:01 am	View details 🔍 ⚙️ 🔄
DD Dammy Dup	Note	Executed	Sep 19th, 4:44:00 am	View details 🔍 ⚙️ 🔄
DD Dammy Dup	#1 Add task: Contact for rebooking	Executed	Sep 19th, 4:44:00 am	View details 🔍 ⚙️ 🔄
DD Dammy Dup	Update opportunity	Executed	Sep 19th, 4:43:57 am	View details 🔍 ⚙️ 🔄
DD Dammy Dup	Find opportunity	Executed	Sep 19th, 4:43:54 am	View details 🔍 ⚙️ 🔄
DD Dammy Dup	Add Tag: Appointment No Show	Executed	Sep 19th, 4:43:52 am	View details 🔍 ⚙️ 🔄
DD Dammy Dup	Remove Tag: appointment booked	Executed	Sep 19th, 4:43:51 am	View details 🔍 ⚙️ 🔄
DD Dammy Dup	Add to workflow	Added To Workflow	Sep 19th, 4:43:51 am	View details 🔍 ⚙️ 🔄

Test	Dummy Contact	Expected	Result
Happy Path	Dammy Capstone	Qualified > Won	Passed
Missing Info	Dammy Missing	Manual Review. No Opportunity	Passed
Existing Customer	Dammy Missing	No new opportunity	Passed
Manual Review > Lost	Dammy Midrange	Lost correctly	Passed
Long Term Nurture	Dammy Nurture	Nurture path	Passed
Duplicate inquiry	Dammy Dup	One open opportunity	Passed
No-Show	Dammy Dup	Rebooking path	Passed



Production Readiness & Limitations

This is a practice capstone. Several settings are intentionally simplified and should not be copied into a live client account without confirming the client operating rules.

Confirm before production

- Final pipeline stages and stage definitions.
- What Qualified, Unqualified, Lost, Not Ready and Nurture mean for the client.
- Ownership rules, task assignees and escalation path.
- Real SLA timing for new-lead review.
- Appointment calendar, statuses, reschedule / cancellation behavior and no-show policy.
- Lost Reason values and which reasons should enter nurture.
- Re-entry rules and duplicate-contact / duplicate-opportunity policy.
- Communication channels, consent requirements and any paid actions.
- Customer onboarding handoff after Won.
- Reporting fields and required audit notes.

Process-first production lesson

The automation should follow the client operating rules. GoHighLevel can route, remind, update and flag; the business still decides what Qualified, Lost, Nurture, ownership and follow-up should mean.



***Process first.
Clarity over complexity.
Human judgment stays human***

**THE PURPLE
PIPELINE**



thepurplepipeline.com



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