Create Account

- Click “Add Account” button
- Enter/Find client (or add manually if you can’t find them)
- Select “Industry Template - Hair Salon” snapshot from Snapshots dropdown
- Fill out client info
- Save

Configure General Settings Tab:

- Switch into new client account (Switch To An Account Dropdown at top)
- Settings > Company tab
- Add Company Logo
- Set company email
- Confirm time zone is correct

Setup Twilio Phone Number:

- Settings > Phone Number Tab > Add Number
- Create New Number
- Be sure to enter/save the “call forwarding number” (the main office number)
- Turn on call recording and call recording notification message

Build A Funnel

- Watch [Onboarding Video 3: Building Funnels]
- Set up the URL path for each funnel and page
- In the 30% Off or Free Hair Cut Funnel > be sure to set the form button used in the Pop Up to direct to either the Booking Page or Thank You Page

Update Custom Values

- Settings > Custom Values > Twilio Number > Pencil Icon > Enter new Twilio Number
- Settings > Custom values > Claim TY Page > Pencil Icon > Enter Claim Thank You Page url
- Settings > Custom values > From Email > Pencil Icon > Enter the email address that should be shown as the “from” address (usually contact@yourclient.com)
- Settings > Custom values > Notifications Email For Client > Pencil Icon > Enter the email address of your client that notifications should go to
- Settings > Custom values > Twilio Number In link Form > Pencil Icon > Replace the 5s in the following example with the Twilio number (tel:+15555555555)
- Settings > Custom values > Logo Link > Pencil Icon > Enter the url for your client’s logo
- Settings > Custom values > Your App URL > Pencil Icon > enter the url where clients log into your HighLevel app
- Settings > Custom values > DR Offer > Pencil Icon > enter your database reactivation offer (like 1 free private yoga lesson)

Setup Mailgun

- Agency Account > Settings > Mailgun
- Copy main API key at top and paste in client field (be sure to hit return then click save button that appears)
- Select the subdomain you set up from the dropdown in the domains column for this account

Review Pipeline Stages

- Settings > Pipeline > Edit the name of your Pipeline

Setup campaigns: A-1 OR A-2 depending on campaigns you're running

- Client account > Marketing > Campaigns > select A-1 OR 2) > Configuration dropdown > set From email address > enter Client Business Name in from name field and review other settings
- Update Email Titles
- Review the timing of each item
- Update placeholders in voicemail script, record & upload file
- Be sure that the campaign is published (not draft mode)!
- Repeat steps above for additional A campaigns if necessary

Example Voicemail Script: Hi this is [client name/salon owner] from [salon name] calling to thank you for signing up for claiming your [offer]. The next step is to schedule a time to come in for your hair appointment. Please give us a call back at [Twilio Number] at your convenience to book a day and time that works best for you. We look forward to seeing you!

Optional → Connect Your Facebook Lead Ad And Map Fields

- In your agency account, go to Settings > Integrations
- Follow steps in our Direct Facebook Lead Ad Integration tutorial video
- Be sure to add the Claim Thank You Page (Survey Page) url from the funnel as the redirect link in your Facebook Lead Ads form
- IMPORTANT → If you're using Facebook Lead Forms instead of the landing pages and High Level forms you will need to update all your #1 Triggers to Facebook > Facebook Lead Form Submitted > In form > Correct form you're using on Facebook

Activate Trigger #1-A, 1-B, OR 1-C depending on campaigns you've turned on (Offer - Add to Free Week Claim Nurture - Create Opportunity in New Lead stage - Notify Client):

- Review & Activate

Activate Trigger #2-A or 2-B depending on campaigns you've turned on (Offer Reply - Move opportunity to Hot Lead stage - Notify Client):

- Review & Activate

Setup the Review Request Outreach Email:

- Settings > Email Tab
- Set Positive Answer: Leave A Review
- Set review link: https://search.google.com/local/writereview?placeid=PASTEHERE (replace PASTEHERE with client's ID). ID Finder: https://developers.google.com/places/place-id
- Copy link
- Save!

Setup the Review Request Outreach Text Message:

Settings > SMS Tab
Paste review link from the previous step
Save!

Setup the Review Request Outreach Timing:

Settings > Customize Communications tab. Set Email to 'immediately' and SMS to 'After 1 Hour'

Configure campaign B) No Show Nurture:

- Client account > Marketing > Campaigns > select B) Now Show Nurture campaign > Configuration dropdown > set From email address > enter Client Business Name in from name field > Save!
- Review each item in the sequence and their timing
- Activate Campaign

Edit Booking Request Calendar Settings:

- Settings > Calendars > Booking Request > Pencil Icon
- Set notification Email
- If a client has a Google Calendar > Create a user for them, have client login and go to Settings > Integrations > Connect their Google account then go to Settings > Calendar Tab > Open Free Consults calendar and configure
- Set the BOOKING Thank You Page URL in "Thank You Redirect URL" field
- Save!

Activate Trigger #3 (Appointment Status is No Show - Add to No Show Nurture Campaign):

- Review & Activate

Activate Trigger #4 (No Show Nurture reply - Move to Hot Leads in YOUR PROMOTION Pipeline - Notify Client):

- **Review & Activate**

Activate Trigger #5 (No booking & no reply in A campaigns - Tag - Add to Campaign Not Yet Ready):

- Review & Activate

Activate campaign C) Not Yet Ready:

- Client account > Marketing > Campaigns > select C) Not Yet Ready campaign > Configuration dropdown > set From email address > enter Client Business Name in from name field > Save!
- Make sure it's Active!
- Marketing > Campaigns > A) Core campaign > Config dropdown > Next Campaign dropdown > Select Not Yet Ready > Save

Activate campaign D) Booking Requested Reply

- Marketing > Campaigns > select D) Booking Requested Reply campaign > Configuration dropdown > set From email address > enter Client Business Name in from name field > Save
- Review & Activate

Activate Trigger #6 (New Booking Request - Move to Booking Requested pipeline stage - Notify Client)

- Review & Activate

Activate campaign E) Appointment Reminders

- Marketing > Campaigns > select E) Appointment Reminders campaign > Configuration dropdown > set From email address > enter Client Business Name in from name field > Save
- Turn off "Stop On Reply"
- Review all items
- Activate

Activate Trigger #7 (Appointment Status Confirmed - Add to Appointment Reminders campaign)

- Review & Activate