

Standard Operating Procedure

Creating Funnels in GHL Review Systems

Purpose: Build a client review request funnel, form, trigger link, templates, and automation inside GoHighLevel.

Department	C&C Digital / Client Fulfillment
Platform	GoHighLevel (GHL)
Applies To	Client review request systems using funnels, forms, SMS/email templates, and automation
Primary Outcome	A functional review opt-in funnel connected to client branding, domain, review link, and follow-up workflow

Overview

This SOP explains how to create and configure a GoHighLevel review system for a client. The process includes creating a trigger link, form, funnel, connected domain, SMS/email review request templates, and automation.

Before You Begin

- Confirm you are inside the correct client sub-account in GoHighLevel before making changes.
- Have the client logo and preferred company name ready for funnel edits.
- Have access to the client's Google Business Profile review request URL.
- Have access to the required templates: Client Review Form, Reviews Optin Funnel, and Send Review Request workflow.
- Confirm domain setup access is available through GoDaddy when prompted by GHL.

Template Reminder

Always start from the approved C&C Digital templates where available. Do not build from scratch unless a manager specifically requests it.

Step 1: Create the Trigger Link Under Marketing

Objective: Create a trackable review link that can be inserted into SMS and email messages.

Action Items

1. In the client sub-account, go to Marketing.
2. Open Trigger Links.
3. Click Add Link.
4. Name the link clearly, such as Client Review, Google Review, or Decatur Review.
5. Paste the client's Google Business Profile Review Request URL into the Link URL field.
6. Save the trigger link.
7. Copy the generated Link Key. You will use this token in the SMS/email request templates and/or automation.

Important Note

The Link URL should be the Review Request URL from the client's Google Business Profile. This allows the system to track clicks while sending users to the correct review destination.

Reference #4 - Trigger Links under the Marketing tab

The screenshot displays the GHL (GoHighLevel) interface. In the top navigation bar, the 'Trigger Links' tab is highlighted with a red box. The left sidebar shows the 'Marketing' tab selected, also indicated by a red arrow. The main content area is titled 'Trigger Links' and includes a description: 'Trigger links allow you to put links inside SMS messages and emails, which allow you to track specific customer actions and trigger events based on when the link is clicked.' Below this, there is a table with the following data:

Name	Link URL	Link Key	Date Added
Decatur Review	https://g.page/r/Ca3ljPeMD1jEBM/review	{{trigger_link.3Or7ZUsdtR97LLxm2NL}}	Dec 11, 2025 10:02 AM

At the bottom right of the table, there is a pagination control showing 'Rows per page' set to 20, '1 - 1 of 1', and buttons for 'Prev', '1', and 'Next'.

Step 2: Create the Review Form From Template

Objective: Create the form that will collect or route review opt-in information for the funnel.

Action Items

8. Go to Sites.
9. Open Forms.
10. Click Create Form.
11. Select From templates.
12. Click Continue.
13. In the Template Library, open My Templates.
14. Select the template named Client Review Form.
15. Create the form and make any client-specific edits needed before saving.

Important Note

Use the saved template named Client Review Form. Avoid changing the core structure unless the client requires a custom review intake flow.

Reference #3a - Forms area and Create Form button

The screenshot shows the GHL interface. On the left, the 'Sites' menu item is highlighted with a red box. A red arrow points from this box to the 'Forms' tab in the top navigation bar, which is also highlighted with a red box. In the top right corner, the '+ Create Form' button is highlighted with a red box. The main content area displays a table of forms.

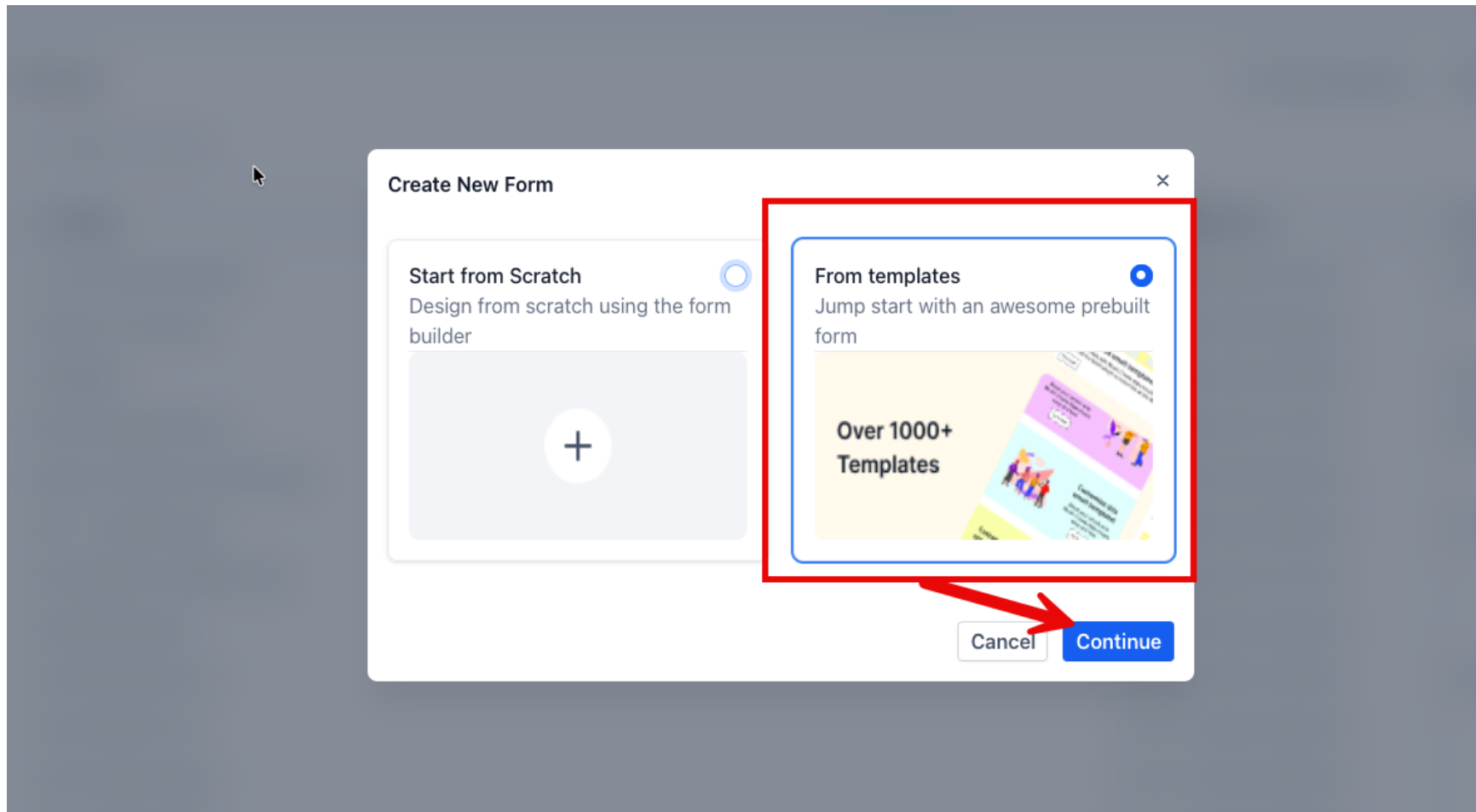
All Forms

Search for forms

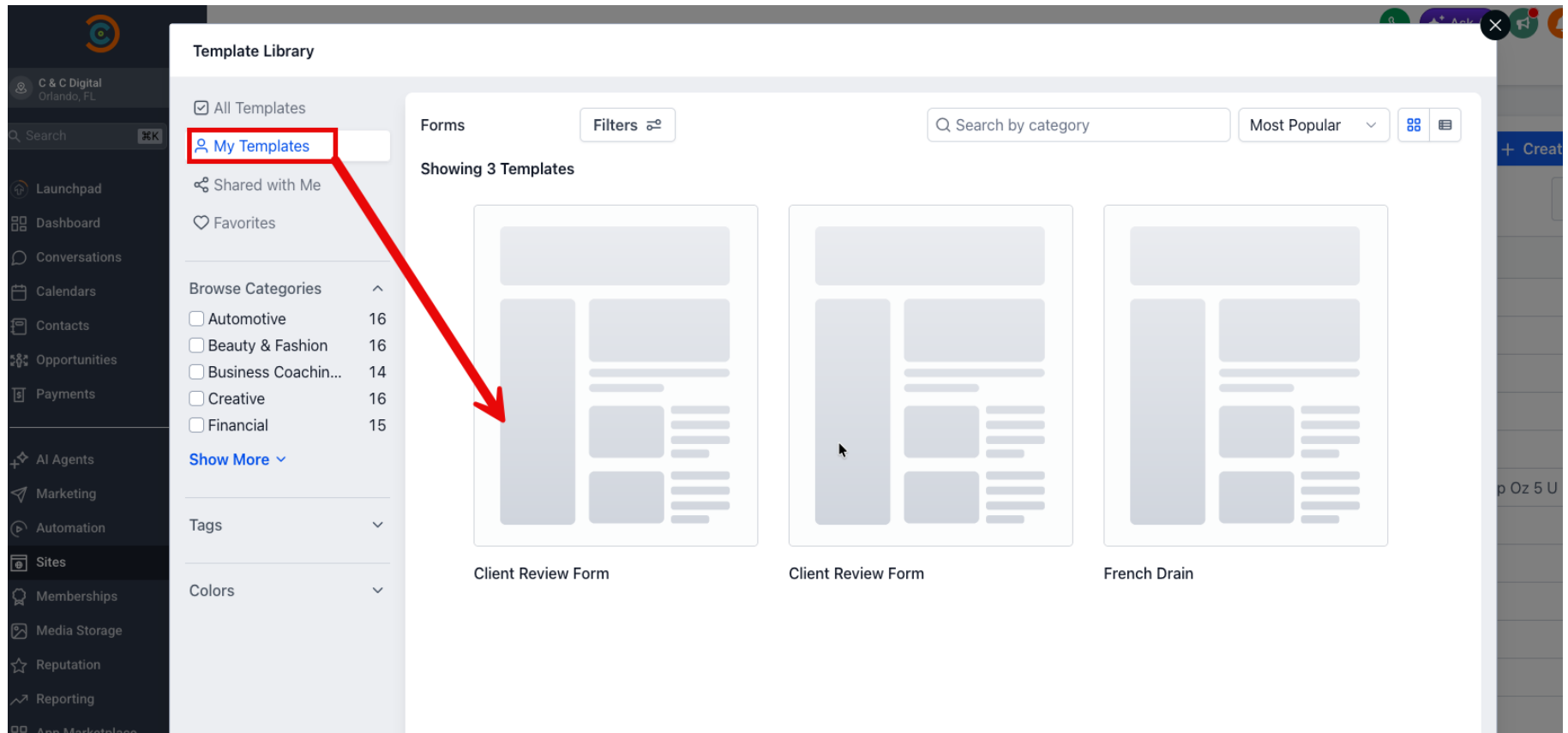
Form Features Create folder + Create Form

Name	Updated On	Updated By	
AI Local Growth System	Oct 05, 2025 03:14 PM	Chad Siemer	:
Apply For Financing	Nov 15, 2022 05:46 AM	-	:
availability	Nov 04, 2025 01:58 PM	Arianna Soto	:
Boost Google Reviews	Dec 18, 2025 12:01 PM	Arianna Soto	:
Business Intensive Onboarding	Nov 15, 2022 05:46 AM	-	:
C&C - Calendar QCs	Jan 03, 2024 08:26 AM	N 3 E Tj Od Uub Js Tyrp Oz 5 U	:
C&C DIGITAL FUNNEL Optin	Dec 05, 2022 12:31 PM	-	:
Calendar Booking	Nov 15, 2022 05:46 AM	-	:
Carlos Booking Form	Dec 18, 2025 12:09 PM	Arianna Soto	:
Case Studies Form	Nov 15, 2022 05:46 AM	-	:
Client Image Upload	Nov 15, 2022 05:46 AM	-	:
Client Video Upload	Nov 15, 2022 05:46 AM	-	:

Reference #3b - Choose From templates and continue



Reference #3c - Select Client Review Form from My Templates



Step 3: Create the Review Opt-In Funnel From Template

Objective: Create the funnel page that will support the review system and customer review flow.

Action Items

16. Go to Sites.
17. Open Funnels.
18. Click New Funnel.
19. Select From templates, then click Create.
20. In the Template Library, open My Templates.
21. Select the funnel template named Reviews Optin Funnel.
22. Open the funnel editor and update client-specific items, including logo image and company name.
23. Save and preview the funnel to confirm the page looks correct.

Important Note

Required edits include replacing the logo image and updating the company name on the funnel page. Check every visible section for old client names or copied branding before publishing.

Reference #2a - Create a funnel from templates

The screenshot displays the GoHighLevel (GHL) interface. In the left sidebar, the 'Sites' menu item is highlighted. The top navigation bar shows the 'Funnels' tab selected. The 'Create New Funnel' modal is open, showing three options: 'From blank', 'Funnel AI', and 'From templates'. The 'From templates' option is selected and highlighted with a red box. A red arrow points from the 'New Funnel' button to the 'From templates' option.

Create New Funnel

- From blank** (Selected)
Design from scratch using the funnel builder
- Funnel AI** (Beta)
Create using AI within seconds
- From templates** (Selected)
Jump start with an awesome prebuilt Funnel

Funnel Name *

Name for your awesome f

Over 1000+ Templates

Cancel Create

Name	Steps
Client F	0 Funnels
AI Local Gro	2 Steps
C&C DIGITA	4 Steps
C&C DIGITA	4 Steps
Call Booking	6 Steps
Client Onboarding	2 Steps
Client Onboarding Copy	8 Steps

Reference #2b - Select Reviews Optin Funnel from My Templates

The screenshot shows the GHL Template Library interface. On the left is a dark sidebar with navigation options: Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments, AI Agents, Marketing, Automation, Sites, Memberships, Media Storage, Reputation, and Reporting. The main area is titled 'Template Library' and includes a filter section on the left with 'All Templates' (checked), 'My Templates' (highlighted with a red box and a red arrow), 'Shared with Me', and 'Favorites'. Below this is a 'Browse Categories' list with checkboxes and counts: Automotive (59), Beauty & Fashion (56), Business, Coachi... (90), Creative (48), and Financial (52), followed by a 'Show More' link. There are also dropdown menus for 'Types', 'Tags', and 'Colors'. The main content area shows 'Showing 1 Template' and a preview of the 'Reviews Optin Funnel' template, which is a funnel layout with a header, a large left sidebar, and several content blocks on the right. The text 'Reviews Optin Funnel' is centered below the preview.

Step 4: Connect the Domain to the Funnel

Objective: Connect a branded review-system domain to the client funnel.

Action Items

24. Open the funnel settings or domain connection area in GHL.
25. Enter the domain using this format: companyname.getmorereviewsforus.com.
26. Follow the GHL prompts to verify the domain.
27. When prompted, connect through GoDaddy and complete the verification steps.
28. After verification, confirm the domain is assigned to the correct funnel and funnel step.
29. Open the live URL in a browser to confirm the funnel loads correctly.

Important Note

Use the client's business name in the subdomain. Keep it simple, lowercase, and easy to read. Example: acmeplumbing.getmorereviewsforus.com.

Step 5: Create SMS and Email Review Request Templates

Objective: Create or update the recurring SMS and email templates that request customer reviews.

Action Items

30. Go to Reputation.
31. Open Settings.
32. For SMS: select SMS Requests and create or edit the SMS review request template.
33. For Email: select Email Requests and create or edit the email review request template.
34. Insert the correct review link token, such as the trigger link key or the GHL reputation review link field, depending on the setup.
35. Update the copy so it reflects the client's company name and tone.
36. Set the template live when approved.
37. Send a test message where possible to confirm the link works correctly.

Important Note

Before setting templates live, proofread for copied client names, wrong locations, broken links, and unsupported claims. Keep the request simple, polite, and compliant.

Reference #5a - Email Requests template settings

The screenshot displays the Reputation settings page in GHL. The left sidebar shows the 'Reputation' menu item highlighted with a red box. The main content area is divided into two sections: 'SMS Review Requests' and 'Manage your SMS Templates'.

SMS Review Requests

Customize the message sent automatically to request reviews from your customers on a recurring basis

When to send SMS after check-in? Until clicked, repeat this every Maximum retries

Manage your SMS Templates

View and manage all your SMS templates

[Set SMS Templates](#) [+ Create New](#)

Name	Message	Type	Actions
New Template	Thank you for choosing Zdrilich Injury Law! We truly appreciate your trust in us. If you have a moment, we'd love to hear about your experience. Your feedback helps others who may need legal assistance.	Live	
	Thank you for your time and support!		
	— Zdrilich Injury Law {{reputation.review_link}}		

Previous Next

Reference #5b - SMS Requests template settings

The screenshot shows the GHL Reputation settings interface. On the left is a dark sidebar with a menu. The 'Reputation' menu item is highlighted with a red box. A red arrow points from this menu item to the 'Email Requests' sub-menu item, which is also highlighted with a red box. Another red arrow points from 'Email Requests' to the 'Settings' tab in the top navigation bar. The main content area is titled 'Email Review Requests' and includes a toggle switch (turned on), a dropdown for 'When to send Email after check-in' (set to 'Immediately'), a dropdown for 'Until clicked, repeat this every' (set to 'Don't Repeat'), and a dropdown for 'Maximum retries' (set to '1'). Below these are buttons for 'Set Email Templates' and '+ Create New'. A section titled 'Choose email templates for your email requests' shows a 'Default Email' template with a 'Live' status and a subject line 'Subject: Would you recommend us?'. The top of the page features a blue banner with the text 'Action Required: Messaging and Voice services are not yet configured for this sub-account!' and a 'Resolve' button.

Custom Living Care
Atlanta, Georgia

Search

Launchpad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Payments

AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings

1/1

Action Required: Messaging and Voice services are not yet configured for this sub-account! [Resolve](#)

Reputation Overview Requests Reviews Widgets Listings GBP Optimization **Settings**

Reviews AI
Review Link
SMS Requests
Email Requests
WhatsApp Requests
Reviews QR
Spam Reviews
Integrations

Email Review Requests
Engage your audience with a personalized touch

When to send Email after check-in: Immediately
Until clicked, repeat this every: Don't Repeat
Maximum retries: 1

Choose email templates for your email requests

Set Email Templates + Create New

Recurring Emails Draft Emails

Default Email **Live**
Subject: Would you recommend us?

Step 6: Copy Over the Review Request Automation

Objective: Copy the existing review request workflow and customize it for the new client.

Action Items

38. Go to Automation.
39. Open Workflows.
40. Locate the Zdrilich - Duluth sub-account workflow named Send Review Request.
41. Use the workflow action menu and select Copy to sub-account.
42. Copy the workflow into the correct client sub-account.
43. Open the copied workflow and review every step.
44. Update any copied client-specific details, including business name, trigger link, email template, SMS template, sender details, tags, and conditions.
45. Publish the workflow only after testing the complete review request flow.

Important Note

Do not publish the copied workflow until it has been fully reviewed and tested. Copied automations often contain client-specific names, links, forms, or templates that must be replaced.

Reference #1 - Copy Send Review Request workflow to sub-account

The screenshot displays the GHL Automation Workflows interface. On the left, a dark sidebar contains a menu with items like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments, AI Agents, Marketing, Automation (highlighted with a red box), Sites, Memberships, Media Storage, Reputation, Reporting, and App Marketplace. A red arrow points from the 'Automation' menu item to the 'Send Review Request' workflow in the main area.

The main area is titled 'Workflow List' and shows a table of workflows. The 'Send Review Request' workflow is listed with a status of 'Published', 10 total enrolled, and 6 active enrolled. A context menu is open for this workflow, showing options such as 'Edit workflow', 'Rename workflow', 'Open in new tab', 'Draft workflow', 'Move to folder', 'Duplicate workflow', 'Copy to sub-account' (highlighted with a red box), and 'Delete workflow'.

Workflow List Table:

Name	Status	Total Enrolled	Active Enrolled	Last Updated	Created On	Stats
Send Review Request	Published	10	6	Mar 27 2025, 11:09 AM	Feb 18 2025, 12:54 PM	>

Final QA Checklist

- [] Trigger link is created and points to the client's correct Google Business Profile review request URL.
- [] Form is created from the Client Review Form template and updated with the client's details where needed.
- [] Funnel is created from the Reviews Optin Funnel template and includes the correct client logo, company name, and branding.
- [] Funnel domain is connected using the format `companyname.getmorereviewsforus.com` and verified through GoDaddy.
- [] SMS request template is live, proofread, and contains the correct review link/token.
- [] Email request template is live, proofread, and contains the correct review link/token.
- [] Automation has been copied from the Zdrilich - Duluth sub-account workflow named Send Review Request.
- [] Automation has been updated for the new client before publishing.
- [] Test contact has been run through the workflow to confirm SMS/email delivery and review link behavior.
- [] All client-specific references from copied templates or automations have been replaced.

Recommended Test Process

46. Create or use a test contact in the client sub-account.
47. Enroll the test contact in the copied Send Review Request workflow.
48. Confirm the SMS sends correctly and uses the proper client-specific copy.
49. Confirm the email sends correctly and uses the proper client-specific copy.
50. Click the review link and confirm it routes to the correct review page or funnel path.
51. Confirm click tracking is visible where expected, especially if using a trigger link.
52. Remove or archive the test contact activity if needed after testing.

Completion Standard

The setup is complete only when the funnel loads on the connected domain, the correct form is active, templates are live, automation is published, and a full test confirms the review request process works end to end.