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.

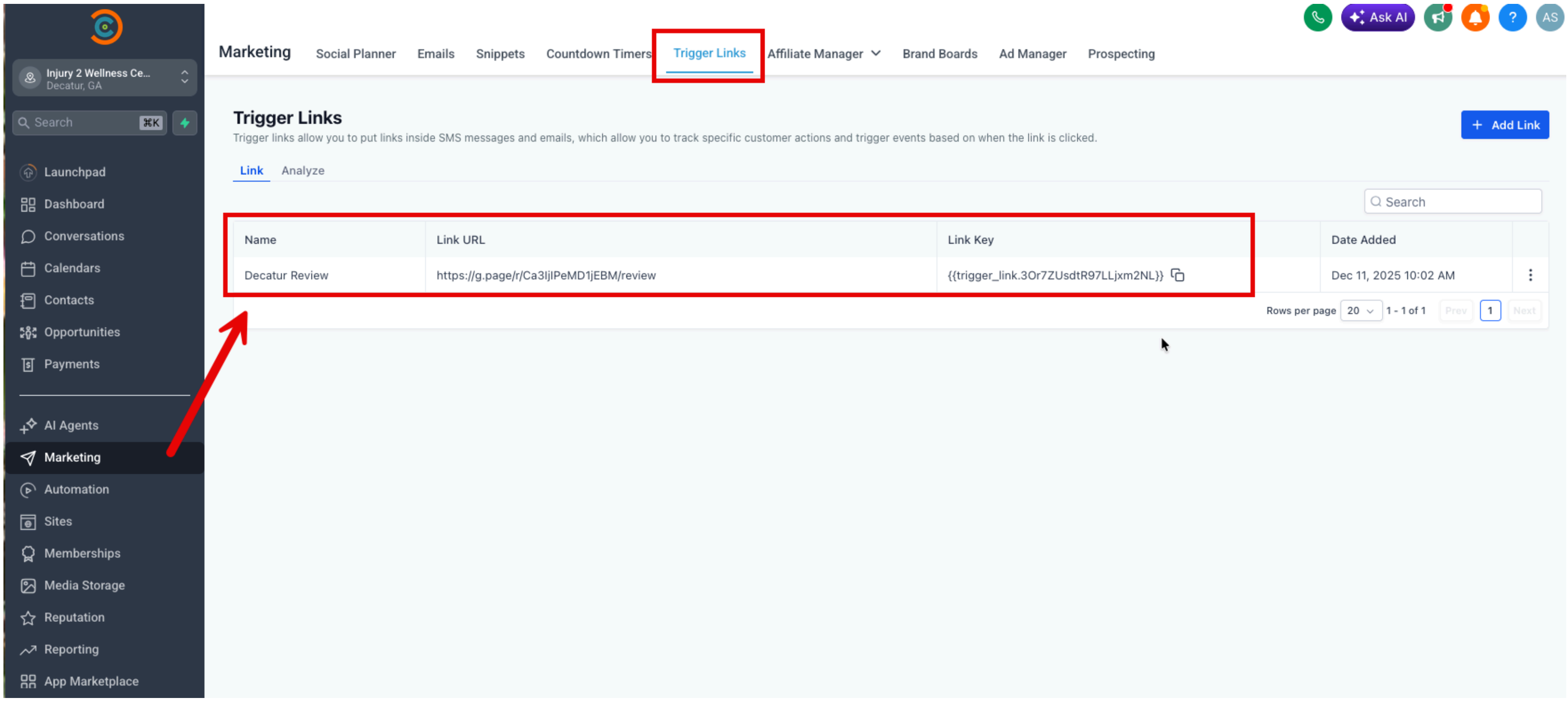
Action Items

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



Step 2: Create the Review Form From Template

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

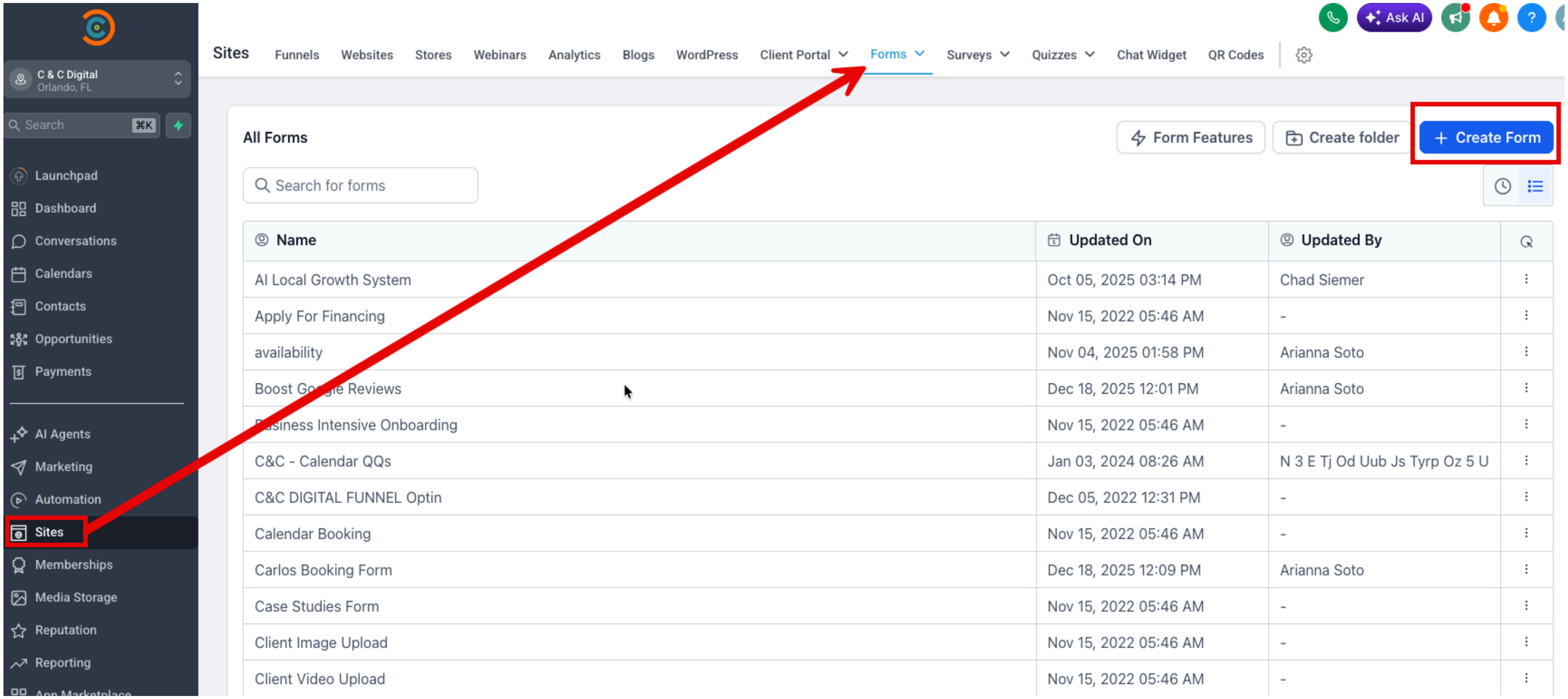
Action Items

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.

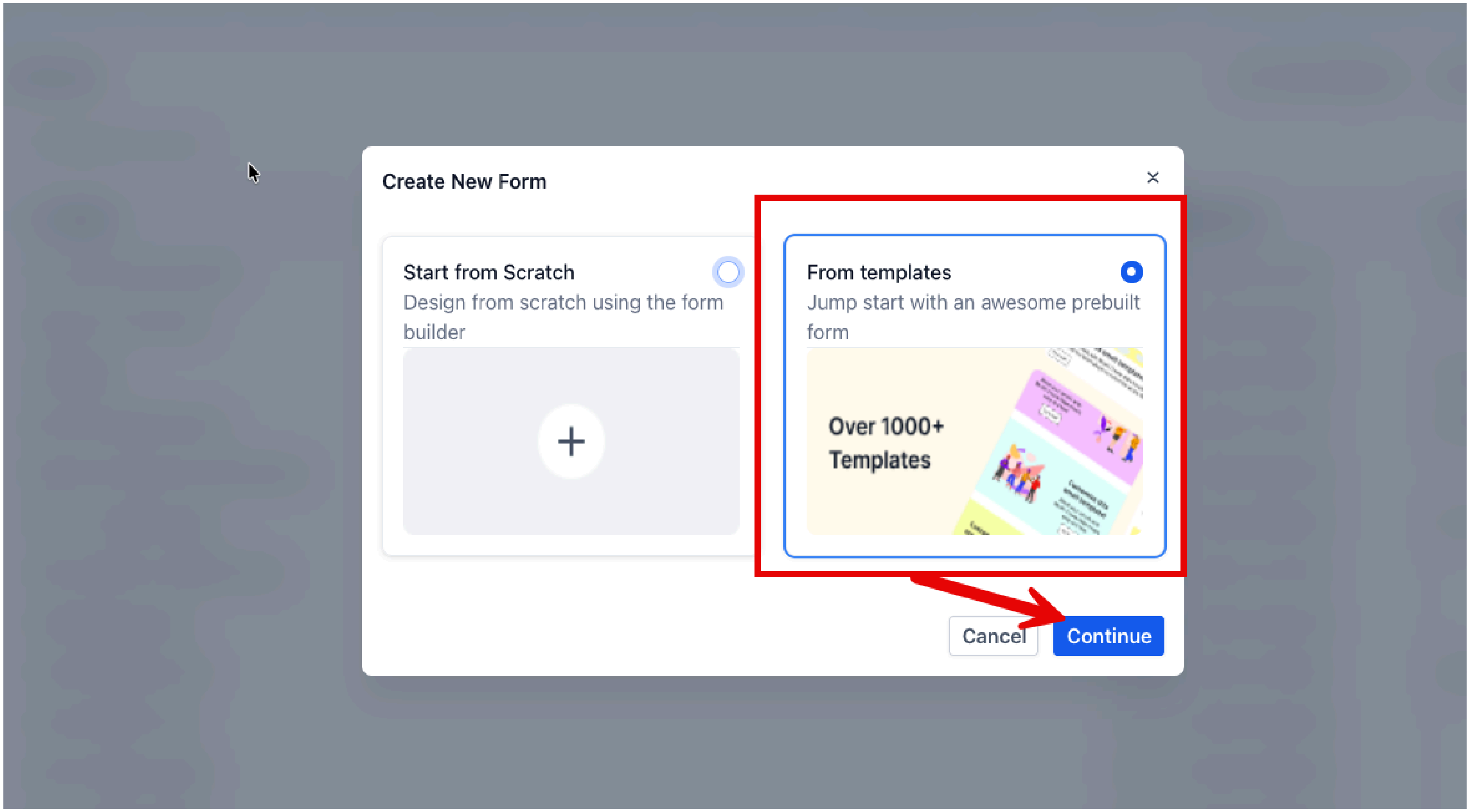
Important Note

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

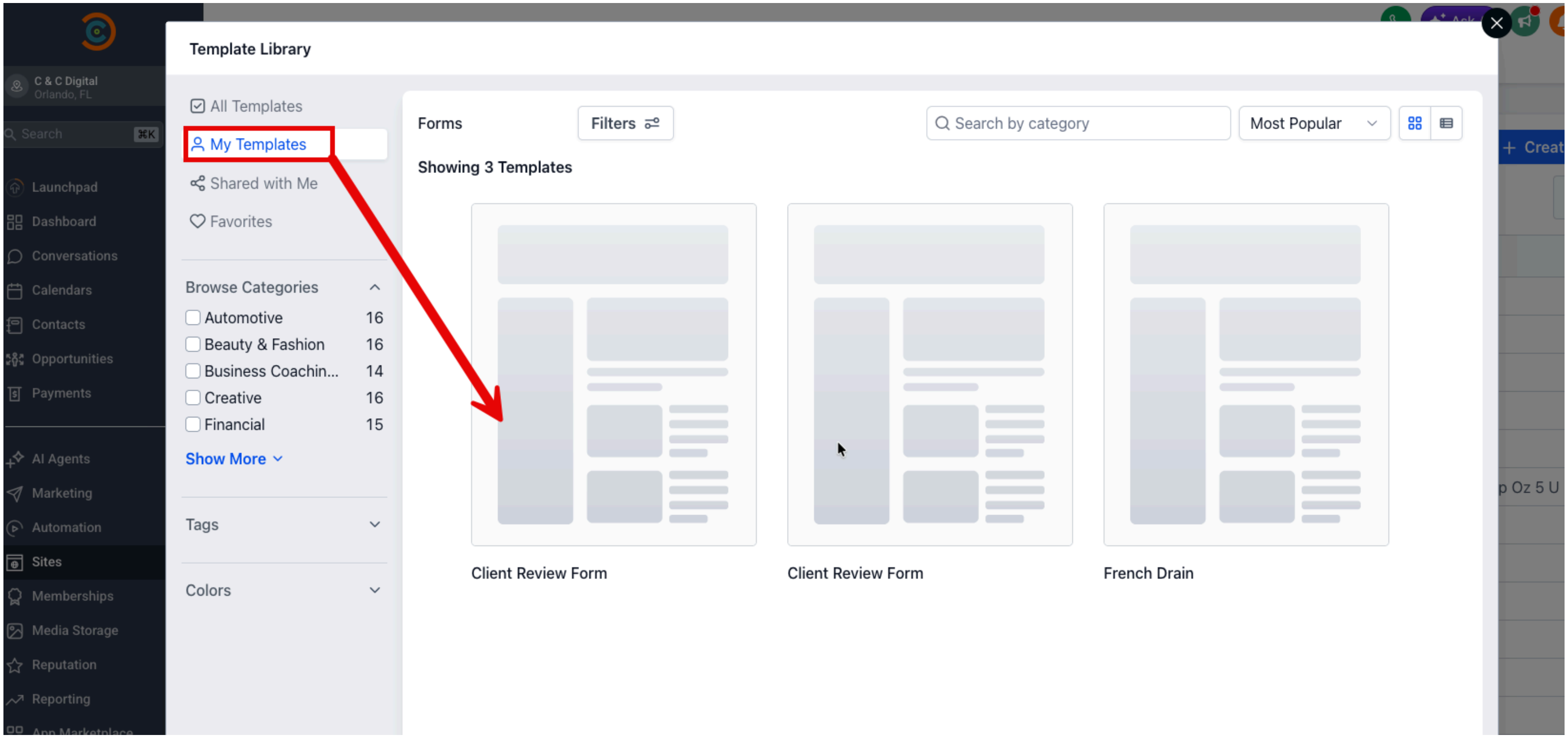
Reference #3a - Forms area and Create Form button



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.

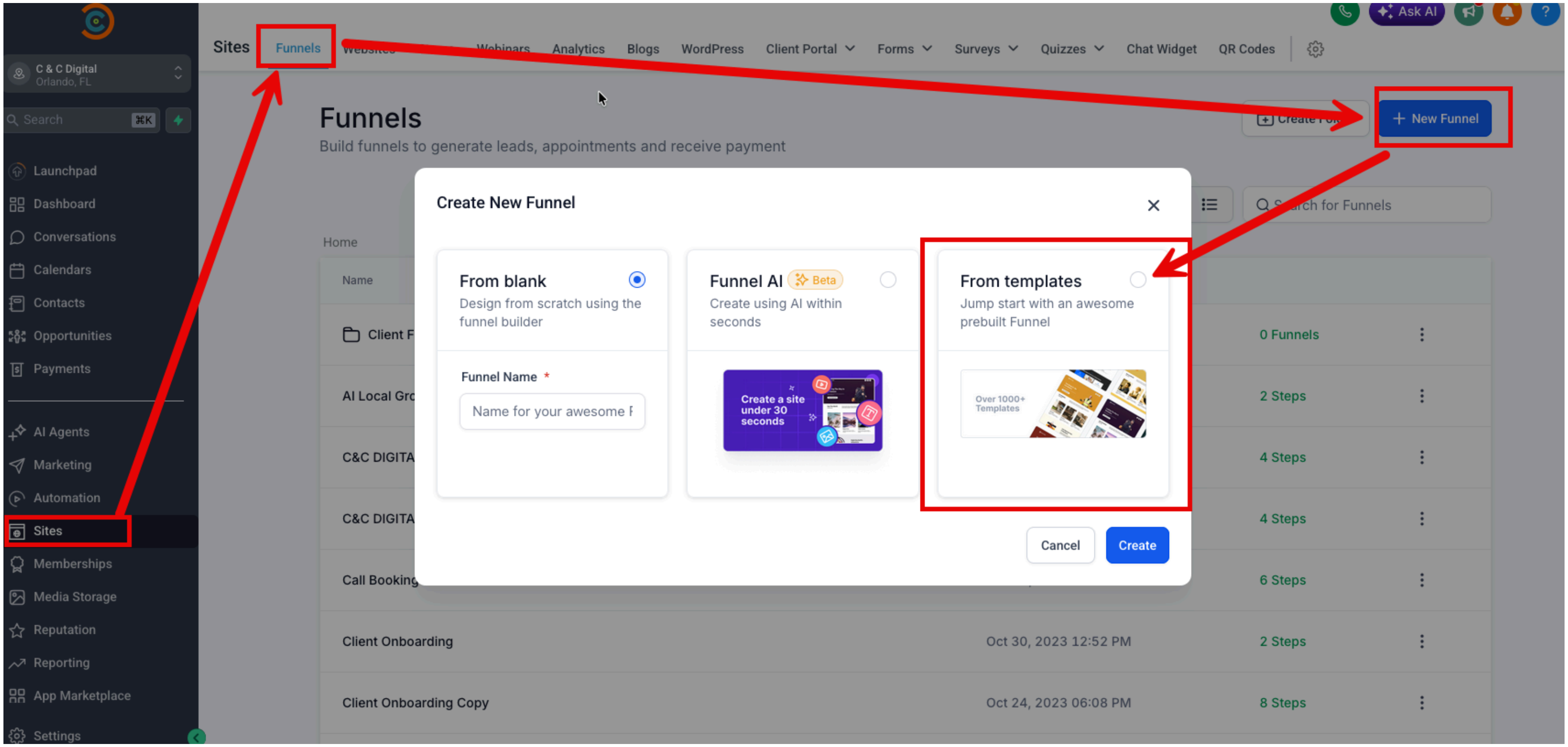
Action Items

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.

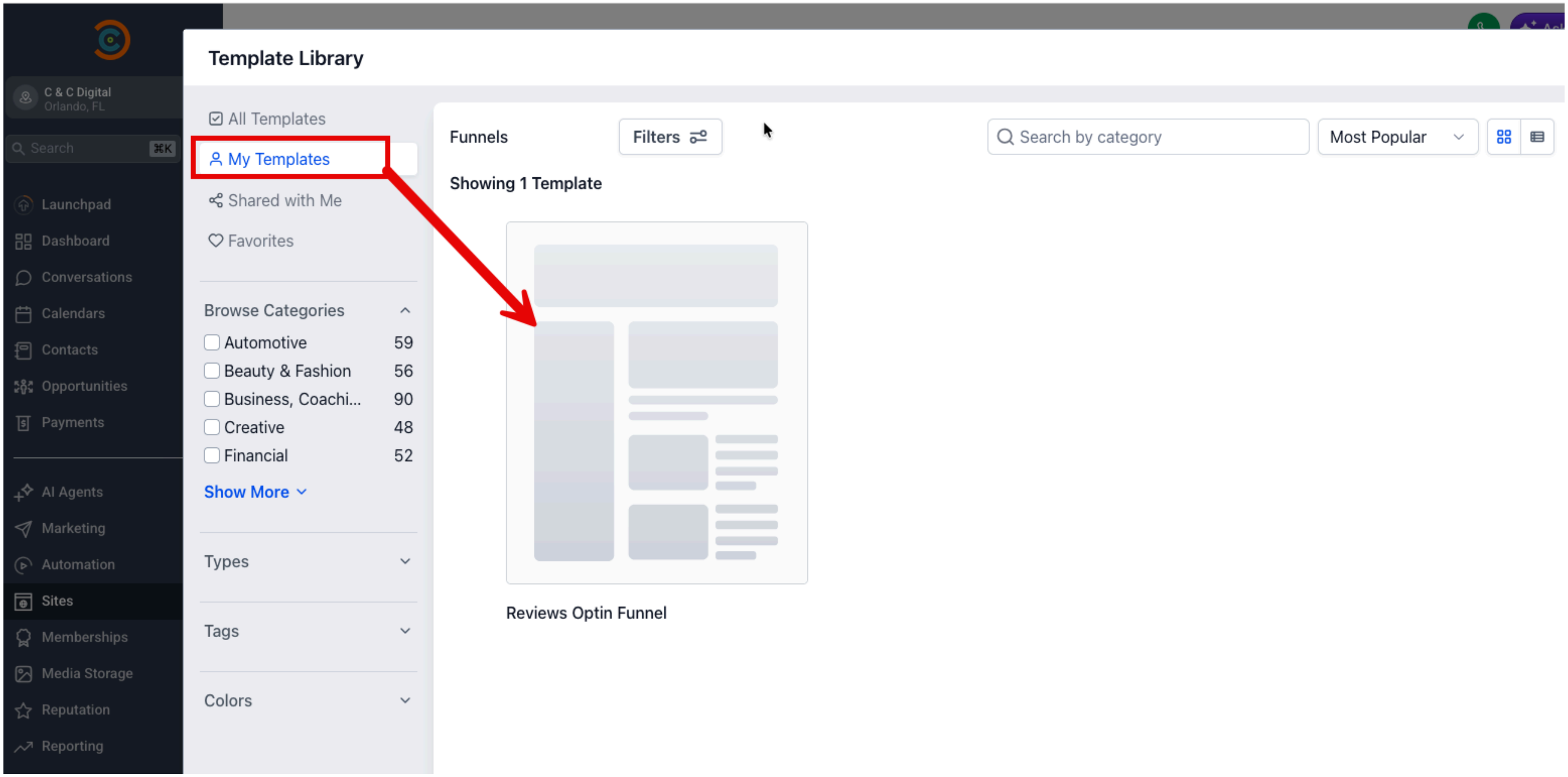
Important Note

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



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



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.

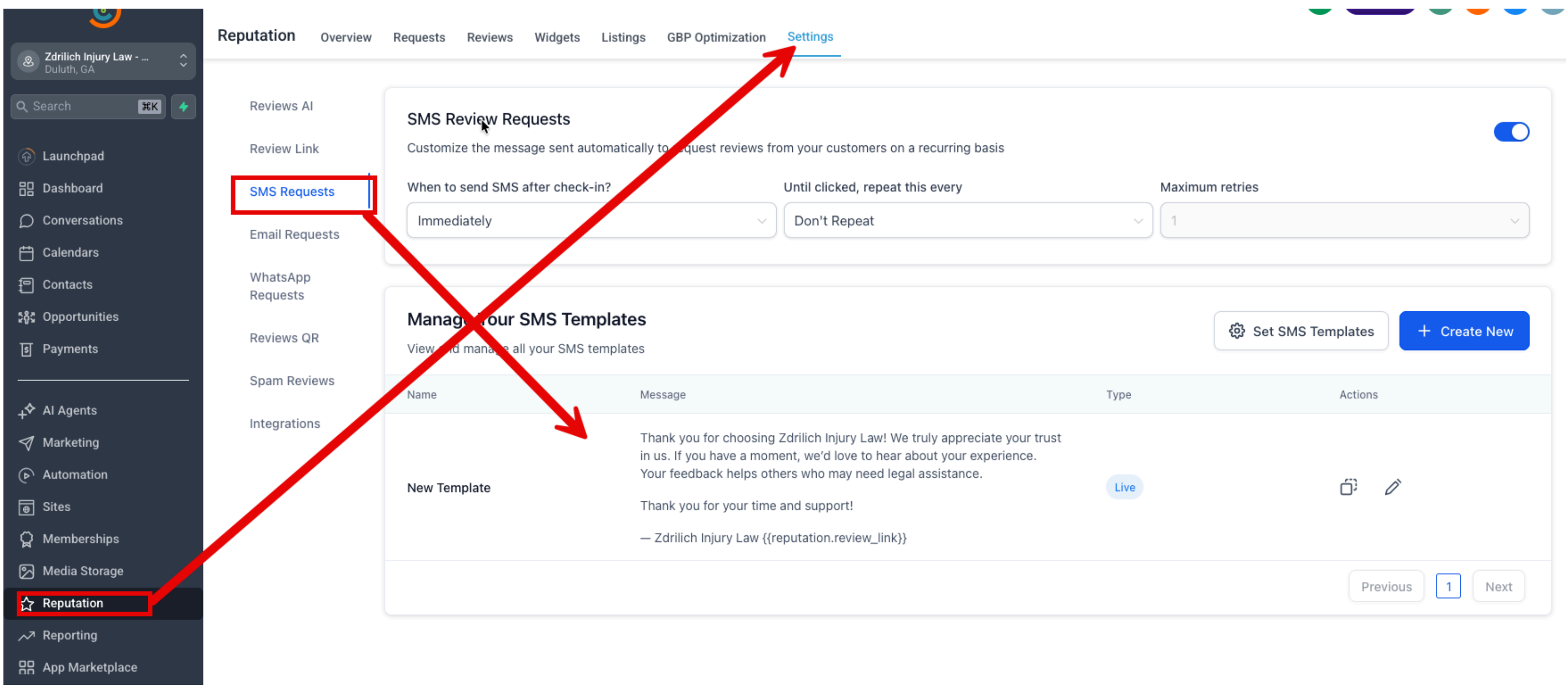
Action Items

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.

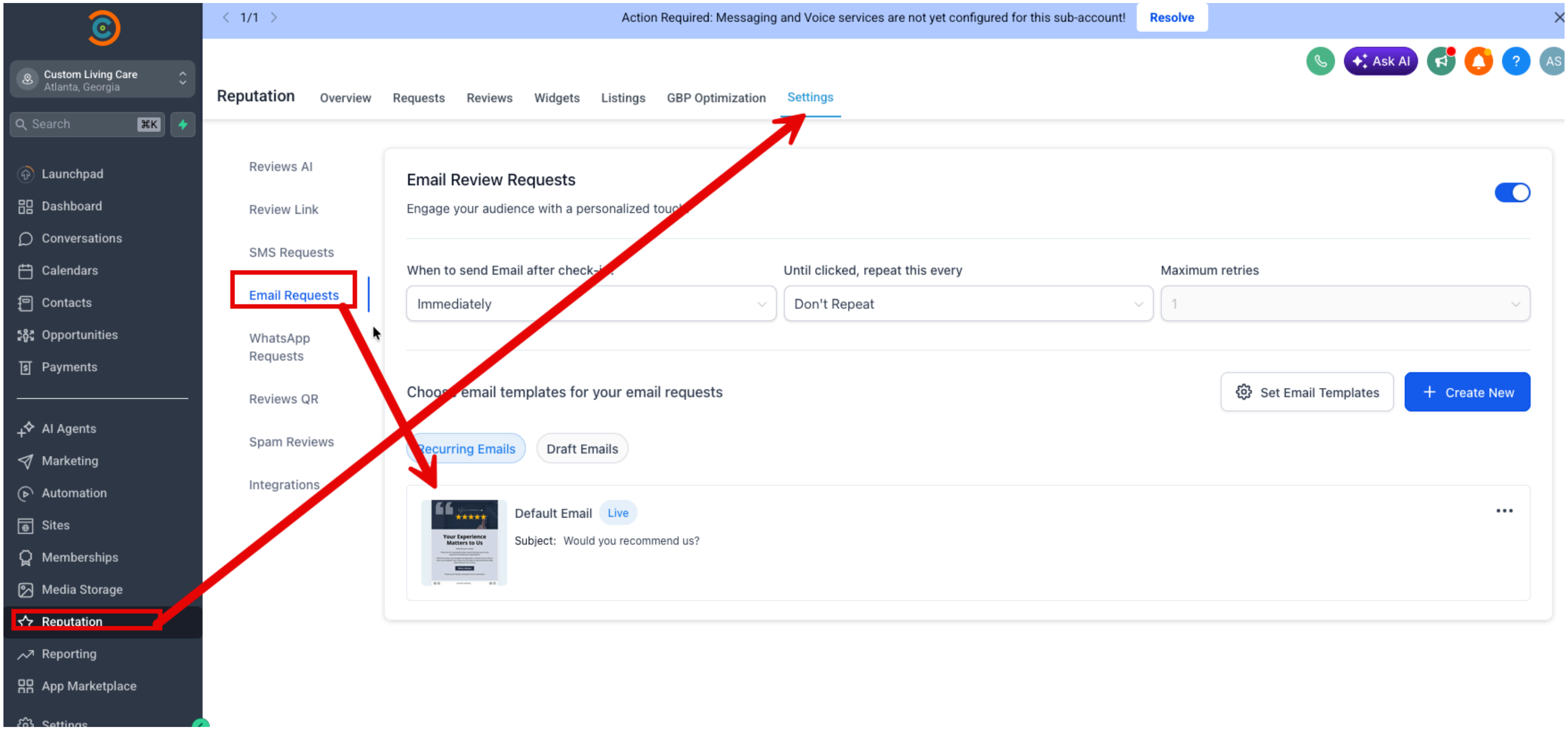
Important Note

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



Reference #5b - SMS Requests template settings



Step 6: Copy Over the Review Request Automation

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

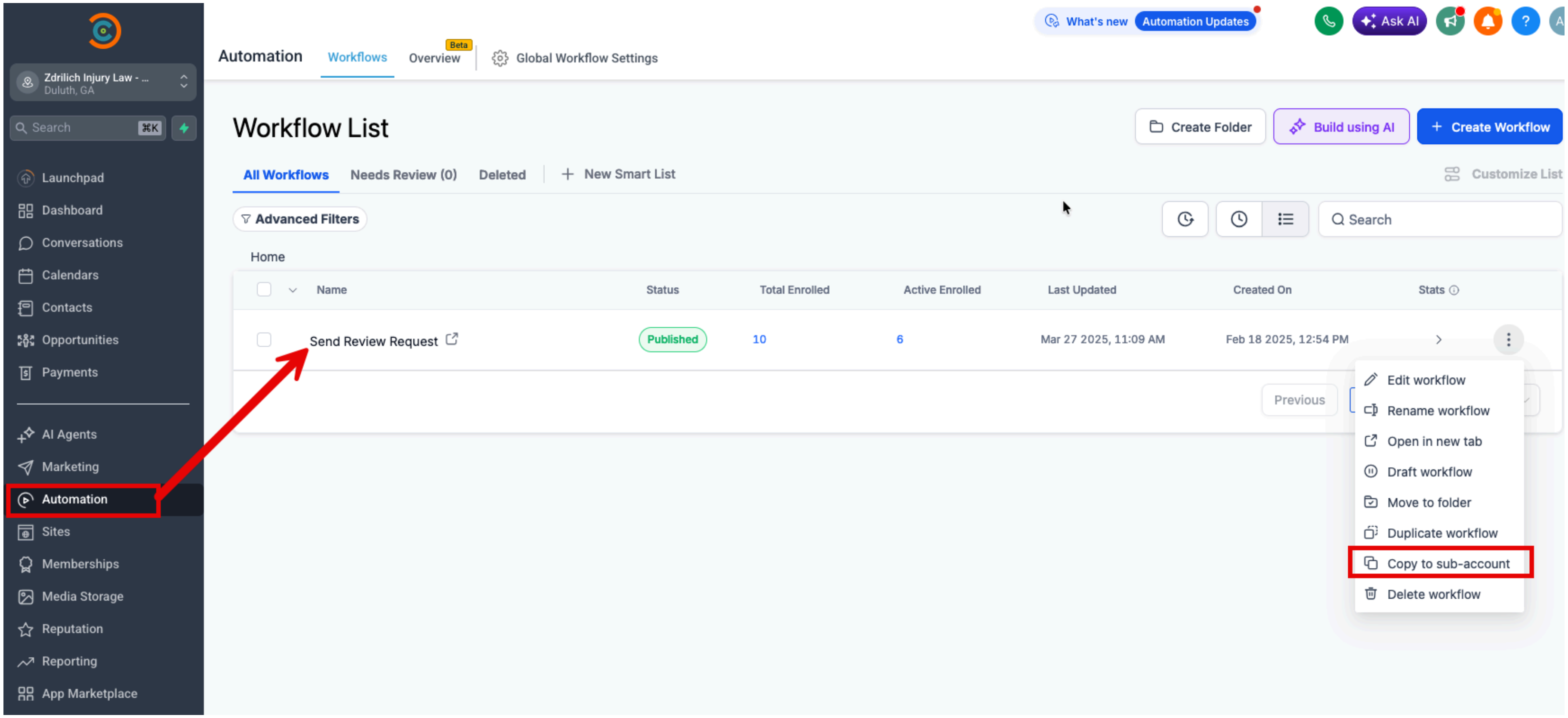
Action Items

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



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.