

# CTTK

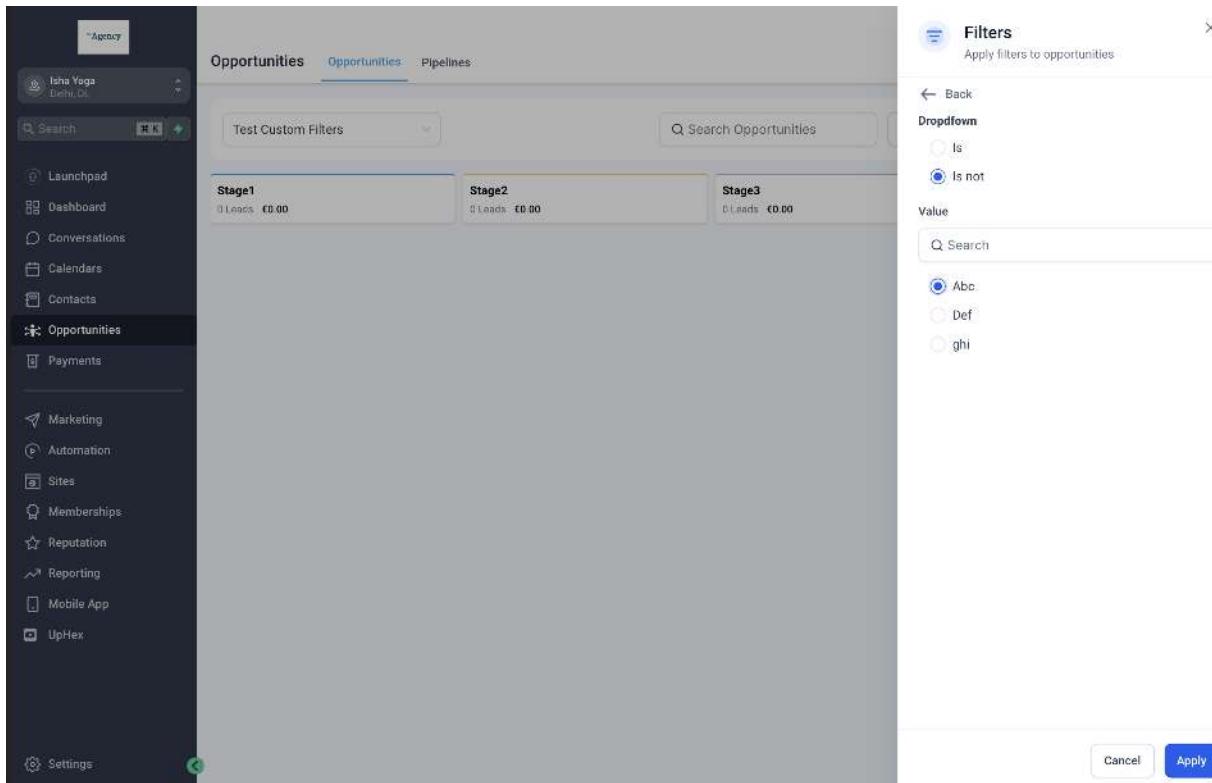
Automating Opportunities



# Automating Opportunities

Automating opportunities in GoHighLevel is a straightforward process that can be accomplished using the platform's powerful workflow builder. Follow these steps to automate your sales processes and streamline your workflow:

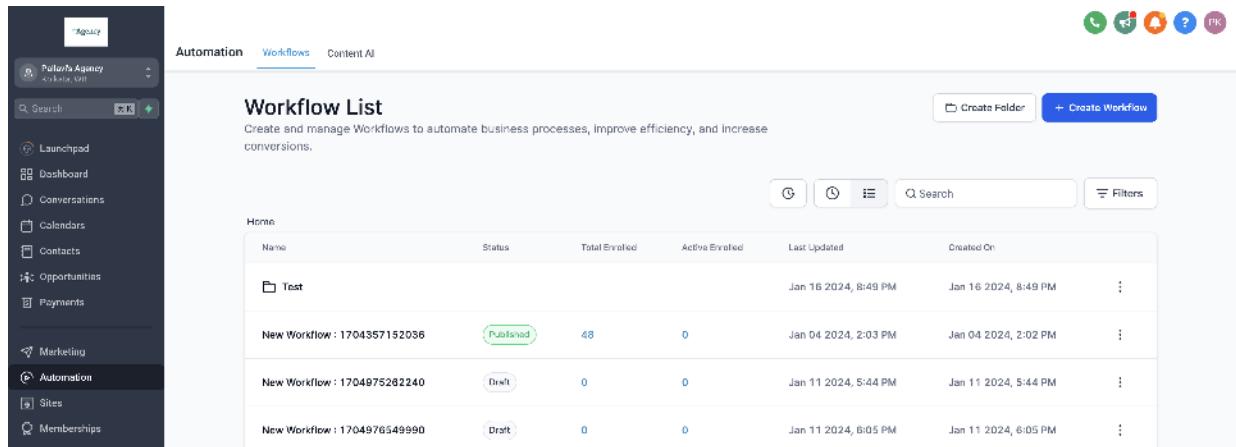
## Step 1: Identify Repetitive Tasks



Start by identifying tasks or processes within your sales workflow that are repetitive and time-consuming. These could include tasks such as sending follow-up emails, assigning leads to team members, scheduling appointments, or updating opportunity statuses.

## Step 2: Design Automated Workflows

# Automating Opportunities



Name	Status	Total Enrolled	Active Enrolled	Last Updated	Created On
Test	Published	48	0	Jan 16 2024, 8:49 PM	Jan 16 2024, 8:49 PM
New Workflow : 1704357152036	Draft	0	0	Jan 04 2024, 2:03 PM	Jan 04 2024, 2:02 PM
New Workflow : 1704975262240	Draft	0	0	Jan 11 2024, 5:44 PM	Jan 11 2024, 5:44 PM
New Workflow : 1704976549990	Draft	0	0	Jan 11 2024, 6:05 PM	Jan 11 2024, 6:05 PM

- Navigate to the "Automations" section in your GoHighLevel dashboard.
- Click on "Workflows" to access the workflow builder.
- Click on "Create New Workflow" to start building your automated workflow.
- **Give your workflow a descriptive name that reflects its purpose.**

## Step 3: Choose a trigger event.

This could be an action taken by a lead, such as filling out a form, clicking on a link, or reaching a certain stage in the sales pipeline.

### Opportunity triggers

# Automating Opportunities

**Workflow Trigger** X

Adds a workflow trigger, and on execution, the contact gets added to the workflow

**CHOOSE A WORKFLOW TRIGGER**

Opportunity status changed ▼

**WORKFLOW TRIGGER NAME**

Opportunity Status Changed

**FILTERS**

Select ▼ Delete

Search

Standard Fields

Assigned to

Has Tag

In pipeline

Lead value

Lost Reason

Moved from status

dd0db8#

Cancel Save Trigger

**1. Opportunity status changed :** Trigger a workflow on the basis of updating an opportunity's status. Opportunities can be filtered on the basis of any of the standard or custom fields linked to that opportunity.

**2. Opportunity Created:** Triggering workflows on the basis of creation of an opportunity. This trigger can be filtered on the basis of any standard or custom field linked to the opportunity being created.

# Automating Opportunities

## Workflow Trigger



Adds a workflow trigger, and on execution, the contact gets added to the workflow

### CHOOSE A WORKFLOW TRIGGER

Opportunity created



### WORKFLOW TRIGGER NAME

Opportunity Created

### FILTERS

Select



Search

#### Standard Fields

Assigned to

Has Tag

In pipeline

Lead value

Lost Reason

Status

Delete

Cancel

Save Trigger

**3. Opportunity Status Changed:** Filters opportunities where there has been a change in status

## Automating Opportunities

**Workflow Trigger** X

Adds a workflow trigger, and on execution, the contact gets added to the workflow

**CHOOSE A WORKFLOW TRIGGER**

Opportunity status changed

**WORKFLOW TRIGGER NAME**

Opportunity Status Changed

**FILTERS**

Lost Reason Select Delete

**Standard Fields**

Assigned to  
Has Tag  
In pipeline  
Lead value  
Lost Reason  
Moved from status

Delete Cancel Save Trigger

dd0db8#

**4. Stale Opportunities:** Filter opportunities where there has been no change for  $<X>$  days and these opportunities can also be filtered basis different standard and custom fields.

## Automating Opportunities

**Workflow Trigger** X

Adds a workflow trigger, and on execution, the contact gets added to the workflow

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**CHOOSE A WORKFLOW TRIGGER** i

Stale Opportunities ▼

**WORKFLOW TRIGGER NAME**

Stale Opportunities

**FILTERS**

Select ▼ Delete

Search

Standard Fields

- Assigned to
- Doesn't Have Tag
- Duration in days
- Has Tag
- In pipeline
- Lead value

---

Delete Cancel Save Trigger

d0db8#

**5. Pipeline Stage Changed:** Workflows can be triggered when a pipeline stage is changed and these can also be filtered based on multiple opportunity standard and custom fields.

# Automating Opportunities

**Workflow Trigger** X

Adds a workflow trigger, and on execution, the contact gets added to the workflow

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**CHOOSE A WORKFLOW TRIGGER**

Pipeline stage changed ▼

**WORKFLOW TRIGGER NAME**

Pipeline Stage Changed

**FILTERS**

Select ✖

Search ✖

Standard Fields

- Assigned to
- Has Tag
- In pipeline
- Lead value
- Lost Reason
- Status

---

Delete dd0db8# Cancel Save Trigger

## Step 4: Add Workflow Actions

Add actions to the workflow that will be performed automatically when the trigger event and conditions are met. These actions could include sending emails, assigning tasks, updating opportunity statuses, or scheduling appointments.

Currently there are two opportunity actions:

# Automating Opportunities

**ACTION NAME**

Create Or Update Opportunity

**IN PIPELINE**

Select Pipeline

**IN PIPELINE STAGE**

Select Pipeline Stage

**OPPORTUNITY NAME****OPPORTUNITY SOURCE****LEAD VALUE****STATUS**

lost

**LOST REASON**

Select Lost Reason



new reason

testing a reason

⊕ Add field

Cancel

Save Action

## Automating Opportunities

**1. Create or Update Opportunity:** Allows you to create or update opportunities fields to a new value for the opportunity that gets triggered.

You can update multiple fields like: Pipeline, Pipeline Stage, Opportunity Name, Opportunity Source, and also Opportunity Status along with Lost reason, and many more.

**2. Remove Opportunities:** Allows you to remove the filtered out opportunity from a certain pipeline.

Test Workflow

Draft  Publish

## Remove Opportunity



Removes an opportunity associated with the contact

### ACTION NAME

Remove Opportunity

### PIPELINE

Test Pipeline



## Automating Opportunities

**Condition**

Fork the contact's journey through this workflow based on conditions

**ACTION NAME**

Condition

**BRANCHES**

Branch 6

Select Select Operator

Opportunity Name  
Opportunity Status  
Pipeline  
Pipeline Stage  
Lead Value  
Lost Reason  
Custom Fields

Reorder Branches

Cancel Save Action

**3. IF/ELSE:** You can also fork the workflow basis a certain condition. Please note you can only use opportunity fields in the filter if you have an opportunity-based trigger in the workflow. All standard and custom fields can be used to filter the branch in this stage.

## Step 5: Test and Refine

## Automating Opportunities

- Once you've created your automated workflow, test it to ensure that it functions as intended.
- Trigger the workflow using test leads or dummy data, and verify that each action is performed correctly.
- Monitor the workflow's performance and gather feedback from team members to identify any areas for improvement.
- Make any necessary adjustments or refinements to the workflow based on testing and feedback.

### Step 6: Activate the Workflow

1. Once you're satisfied with the performance of your automated workflow, activate it to start automating your sales processes.
2. GoHighLevel will automatically trigger the workflow whenever the specified conditions are met, ensuring that repetitive tasks are handled efficiently and consistently.

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