

GOHIGHLEVEL BUILD · AUTOMATION & WORKFLOW SETUP

A complete lead capture and appointment automation system

Pipeline, calendar and four automated workflows built end to end in GoHighLevel for a single location dental practice: from first enquiry to booked, reminded, shown and rebooked.

PLATFORM

GoHighLevel

CLIENT

Northgate Dental Studio

BUILD

Pipeline, calendar, 4 workflows

OFFER

Free new patient consultation

Every stage of the patient journey, automated

A single location dental practice needed the full appointment lifecycle handled inside GoHighLevel: a lead books, gets confirmed, gets reminded, either shows up or doesn't, and either way the practice keeps working the contact until they're seen. Nothing manual, nothing dropped.

Booking confirmation

The moment someone books, they need a tagged CRM record, a pipeline entry and immediate written confirmation, not silence until the appointment day.

Appointment reminders

No shows are the single biggest revenue leak in a practice calendar. A layered reminder sequence closes that gap without staff having to track it manually.

No show recovery

A missed appointment should not be a dead lead. It should trigger its own automated rebooking sequence and, failing that, a staff task.

Unbooked lead follow up

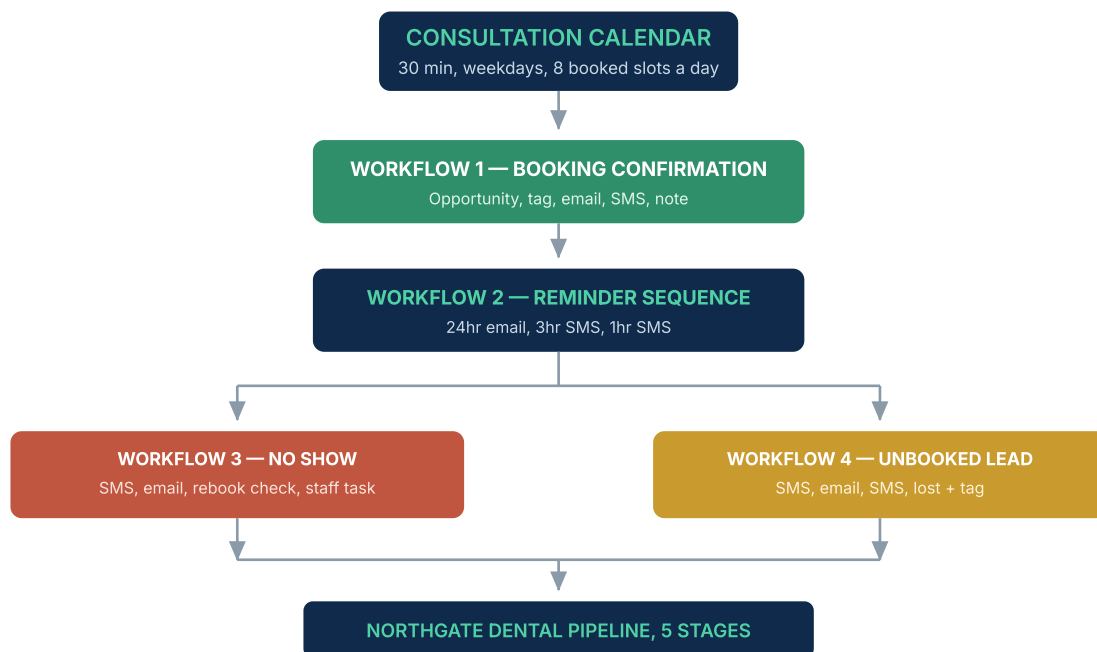
Someone who starts the booking form and abandons it is still a warm lead. Left alone, that interest evaporates within hours.

What I built

One pipeline with five stages tracking every booking from enquiry to outcome, a calendar configured for real practice constraints, and four workflows covering confirmation, reminders, no show recovery and unbooked lead recovery, each using real GoHighLevel triggers, wait steps and merge fielded messaging.

One pipeline, four workflows, every outcome covered

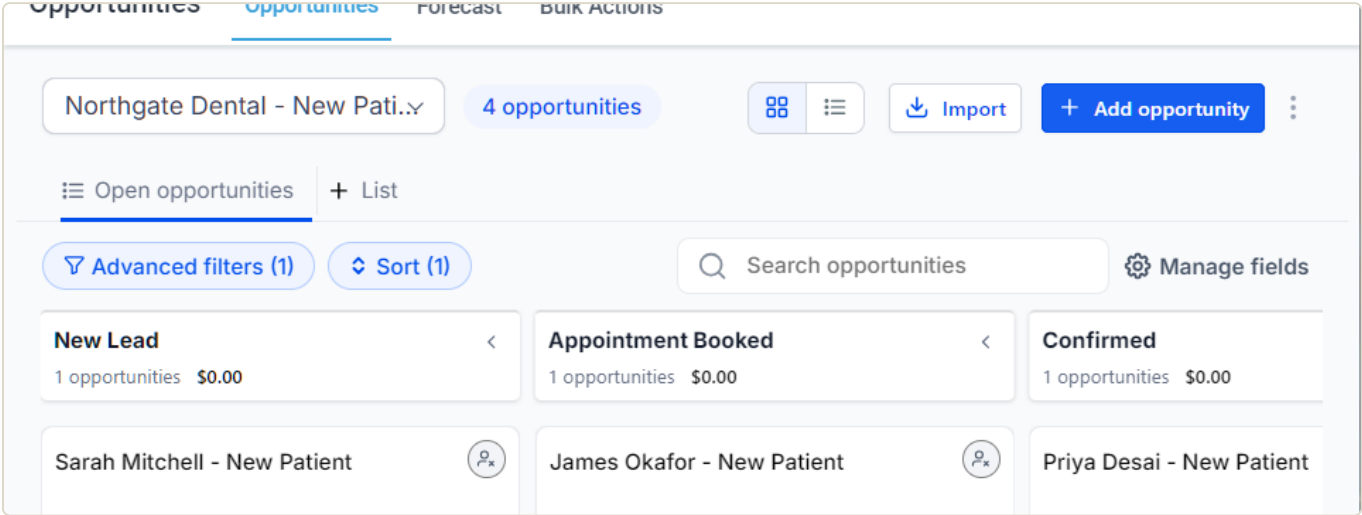
Every appointment enters the same pipeline and is carried by whichever workflow matches what actually happens to it: confirmed and reminded, no show and recovered, or never booked and re-engaged.



System architecture: one calendar feeding one pipeline, worked by four purpose built workflows.

Every booking tracked from enquiry to outcome

A five stage pipeline gives the practice a live view of where every patient sits in the booking lifecycle, and gives every workflow a stage to move the opportunity into as the automation fires.



Northgate Dental - New Patient Bookings pipeline, live with opportunities moving through New Lead, Appointment Booked and Confirmed

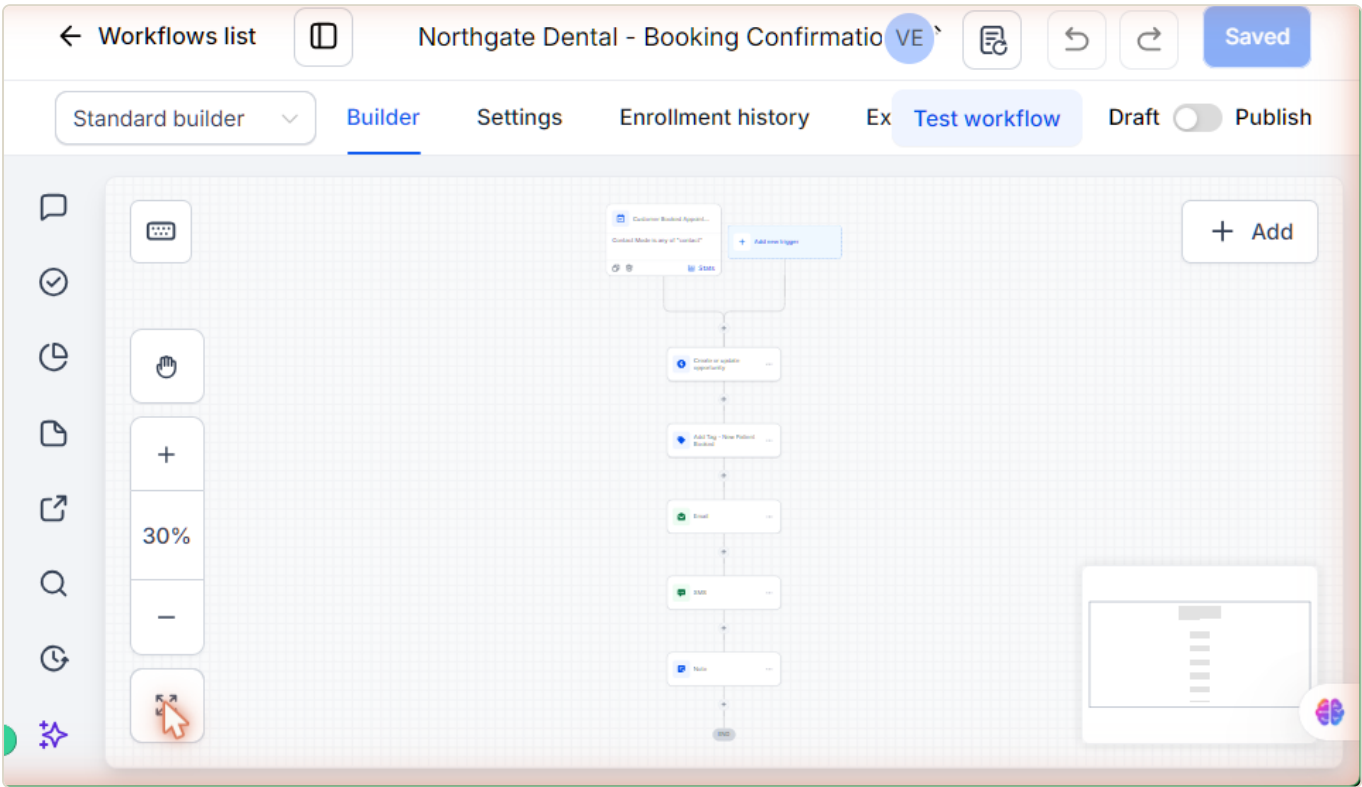
Stage	Entered when
New Lead	Enquiry captured, appointment not yet booked
Appointment Booked	Calendar booking confirmed, Workflow 1 fires
Confirmed	Patient confirms attendance, Workflow 2 reminder sequence begins
Showed	Patient attended the consultation
No Show	Missed appointment, Workflow 3 recovery sequence begins

Why stage movement is automated, not manual

Every workflow in this build updates the opportunity's pipeline stage as one of its own actions. Staff never have to remember to drag a card, and the pipeline stays an accurate live picture of the practice's booking book at all times.

Workflow 1 — Booking Confirmation

Trigger: Customer Booked Appointment. Fires the instant a slot is taken, with no delay between the patient's action and the practice's response.



Full workflow canvas: opportunity update, tag, email, SMS, note, in sequence

Action	Configuration
Create/update opportunity	Moves the opportunity into the pipeline at the Appointment Booked stage, named from the contact's full name
Add contact tag	new patient booked applied on entry, building a permanent, filterable segment
Send email	Branded confirmation with appointment time, assigned provider and a reschedule link, all as live merge fields
Send SMS	Short confirmation with the reschedule link and compliance opt out language
Add note	Records the booking source directly on the contact record for staff visibility

Trigger and action configuration in detail

The two building blocks the job calls for directly: precise action configuration, and merge field personalisation that pulls real appointment and contact data into every message.

Workflow configuration for 'Opportunity action':

- ACTION NAME:** Create or update opportunity
- IN PIPELINE:** Northgate Dental - New Patient Bookings
- IN PIPELINE STAGE:** Appointment Booked
- OPPORTUNITY NAME:** contact.full name - New Patient

Opportunity action: pipeline, stage and dynamic name field configured

Workflow configuration for 'Tag action':

- ACTION NAME:** Add Tag - New Patient Booked
- TAGS:** new patient booked

Tag action: applies the segmentation tag on entry

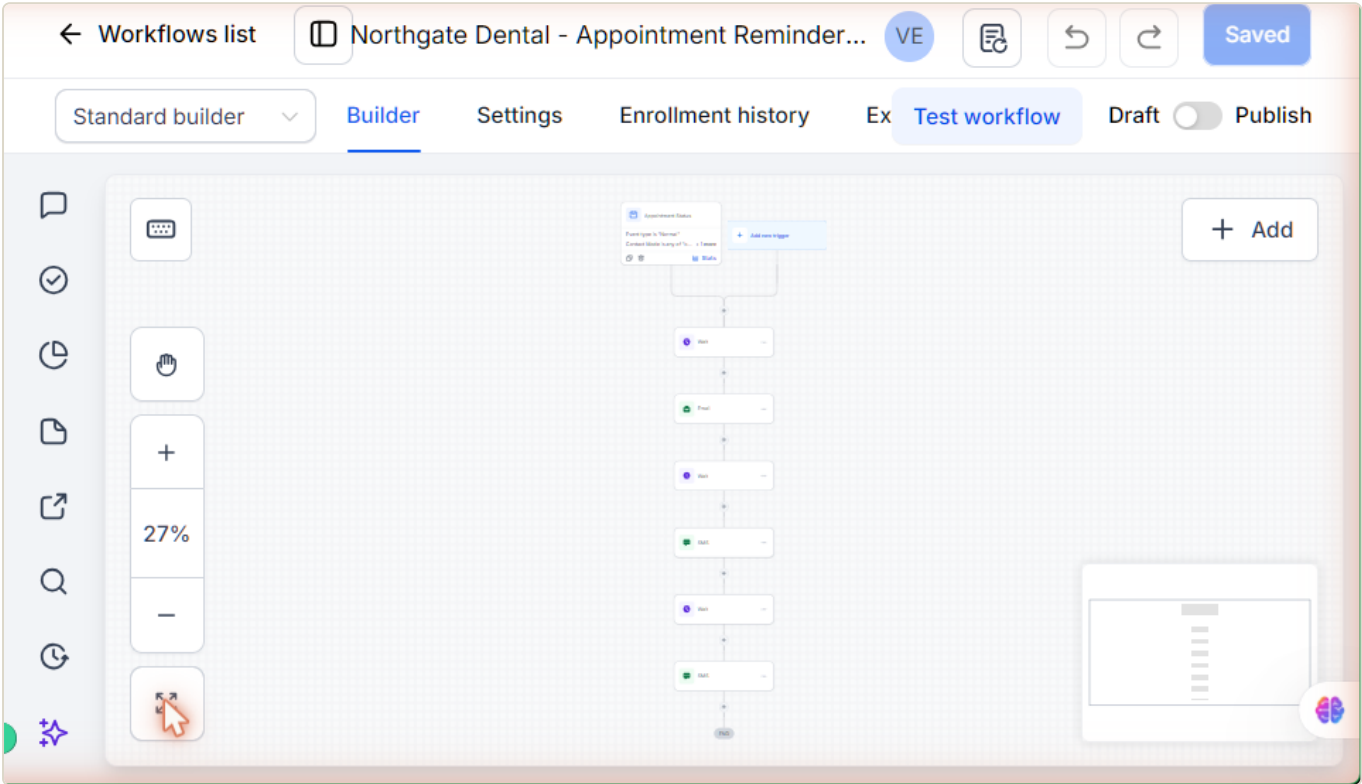
Workflow configuration for 'Email action':

- Subject ***: Your consultation is booked for {{appointment.start_time}}
- Pre-Header (Preview Text)**: (Optional)
- Create email**:
 - ☒ Quick compose
 - ☐ From smart builder

Email action: subject line built from a live `appointment.start_time` merge field

Workflow 2 — Appointment Reminder Sequence

Trigger: Appointment Status is Confirmed. A layered reminder sequence timed against the actual appointment slot, not a fixed calendar date, so it holds regardless of when the booking was made.



Full reminder sequence: wait 24 hours before, email, wait to 3 hours before, SMS, wait to 1 hour before, SMS

Step	Configuration
Wait, 24 hours before	Dynamic wait tied to the appointment / calendar event from the trigger, not a static date
Email reminder	Confirms the time and gives a one line prep note plus a reschedule link
Wait, 3 hours before	Second dynamic wait against the same appointment event
SMS reminder	Same day nudge with the reschedule link, opt out language included
Wait, 1 hour before	Final dynamic wait, closest to the appointment time
SMS final nudge	Short, low friction, arrival reminder

Appointment relative wait steps

Each wait step in the reminder sequence is configured against the live appointment / calendar event carried in from the trigger, counting backward by a set number of hours rather than targeting a fixed date. The same workflow works correctly whether an appointment is booked a day out or three weeks out.

The screenshot shows the 'Builder' tab in the GoHighLevel Workflow Builder. The workflow is titled 'Northgate Dental - Appointment Reminder...'. The 'Test workflow' button is highlighted. The 'Wait' step is configured with the following settings:

- When should the contact proceed?**
 - ☐ At the scheduled time
 - ☒ Before
- Time units:**
 - months: 0
 - days: 0
 - hours: 23
 - minutes: 59
- Summary:** Contact will proceed 23 hours, 59 minutes before the scheduled time.
- Buttons:** Delete, Cancel, Save action

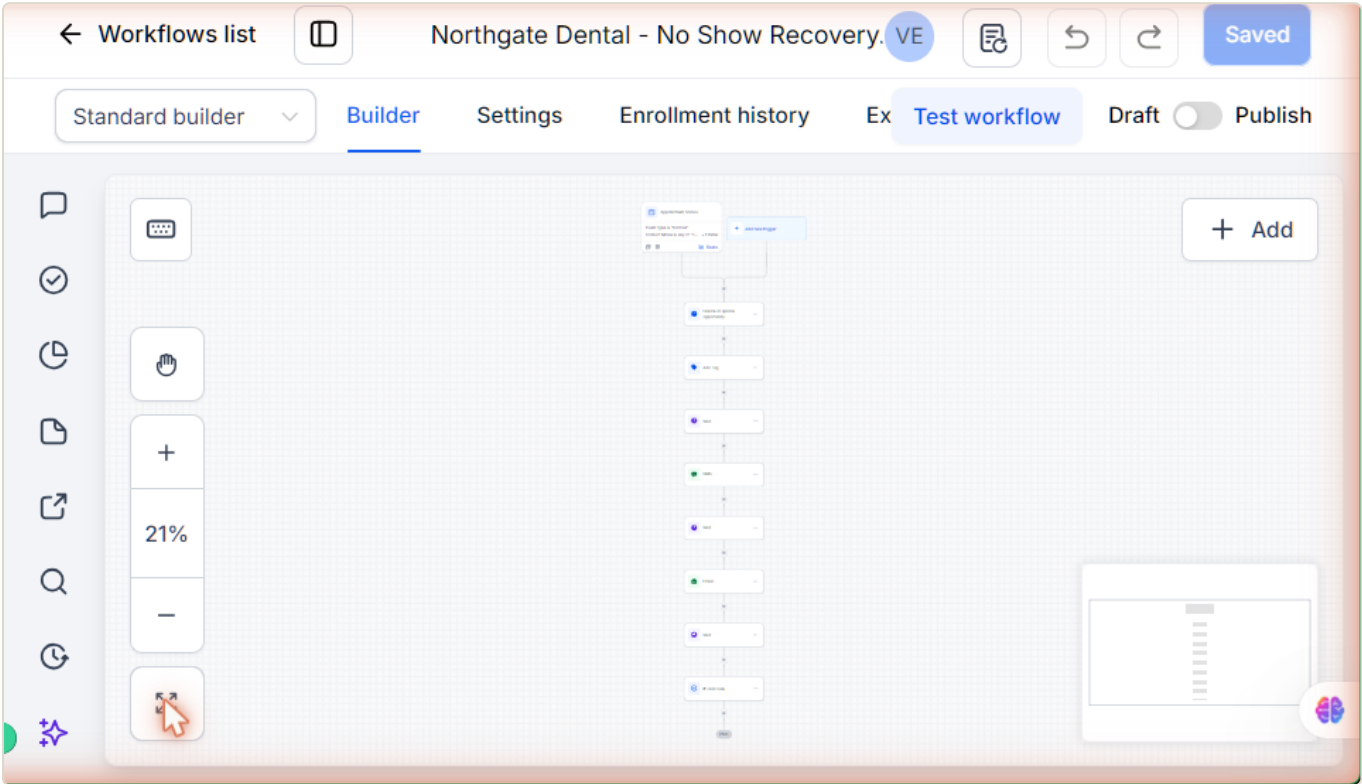
Wait action configured against the appointment event, set to proceed before the scheduled time

Why this matters

A wait step pinned to a calendar date only works for one appointment. Pinning it to the appointment event itself means the exact same workflow correctly reminds every patient at the right relative moment, regardless of when they booked.

Workflow 3 — No Show Recovery

Trigger: Appointment Status is No Show. A missed appointment is treated as a recoverable lead, not a lost one, with an escalating sequence that ends in a direct staff task if automation alone doesn't close the loop.

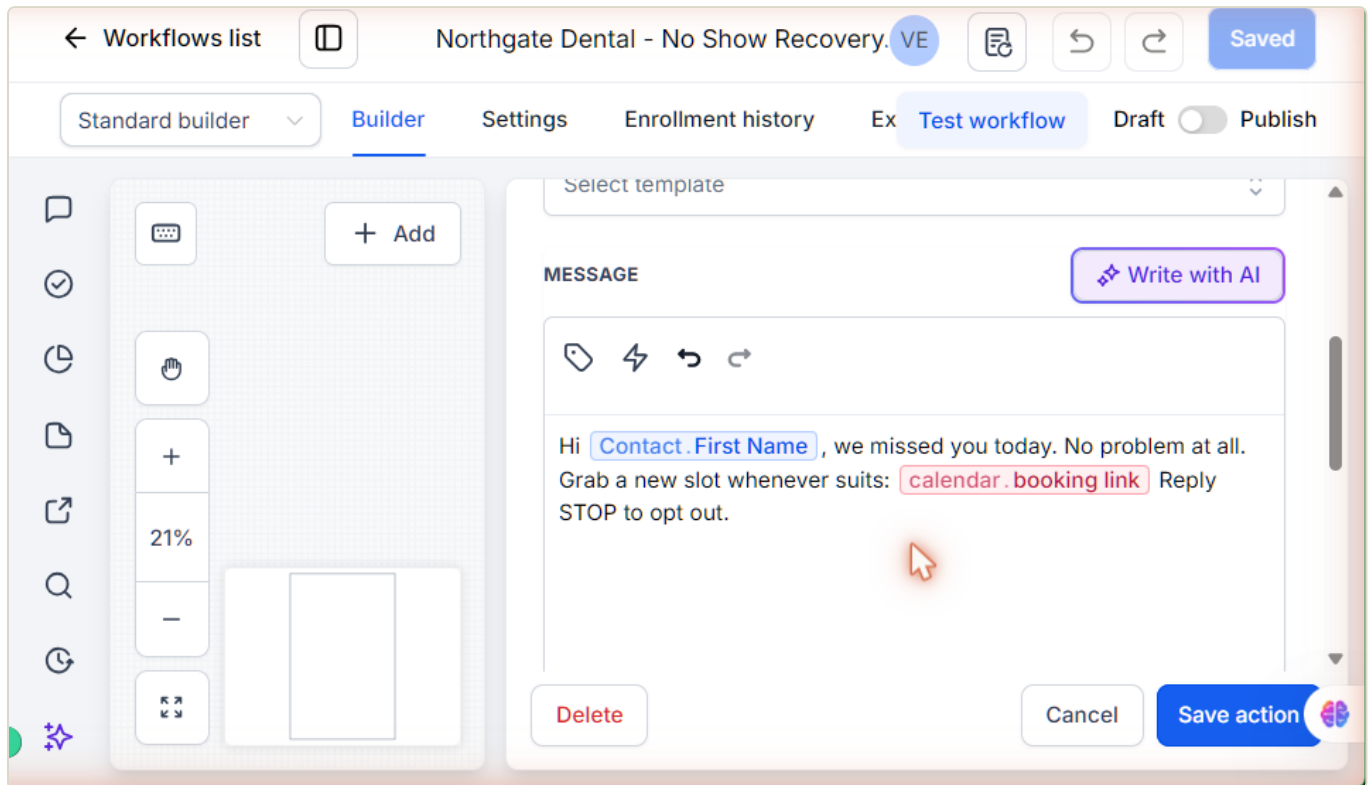


Full recovery sequence: opportunity update, tag, SMS, email, rebook check, staff task

Step	Configuration
Update opportunity	Moves the pipeline card to the No Show stage for accurate reporting
Add contact tag	no show for segmentation and reporting
SMS, 1 hour later	Light touch, low pressure rebook offer with the booking link
Email, 1 day later	Warmer reassurance message, reiterating the offer still stands
Staff task, 3 days later	Creates a direct call task for the team, the automated safety net beneath the automated messaging

Customer communication configuration

Every SMS and email in this build carries merge fields for first name and a live booking link, so recovery messaging reads as personal outreach rather than a mass blast.



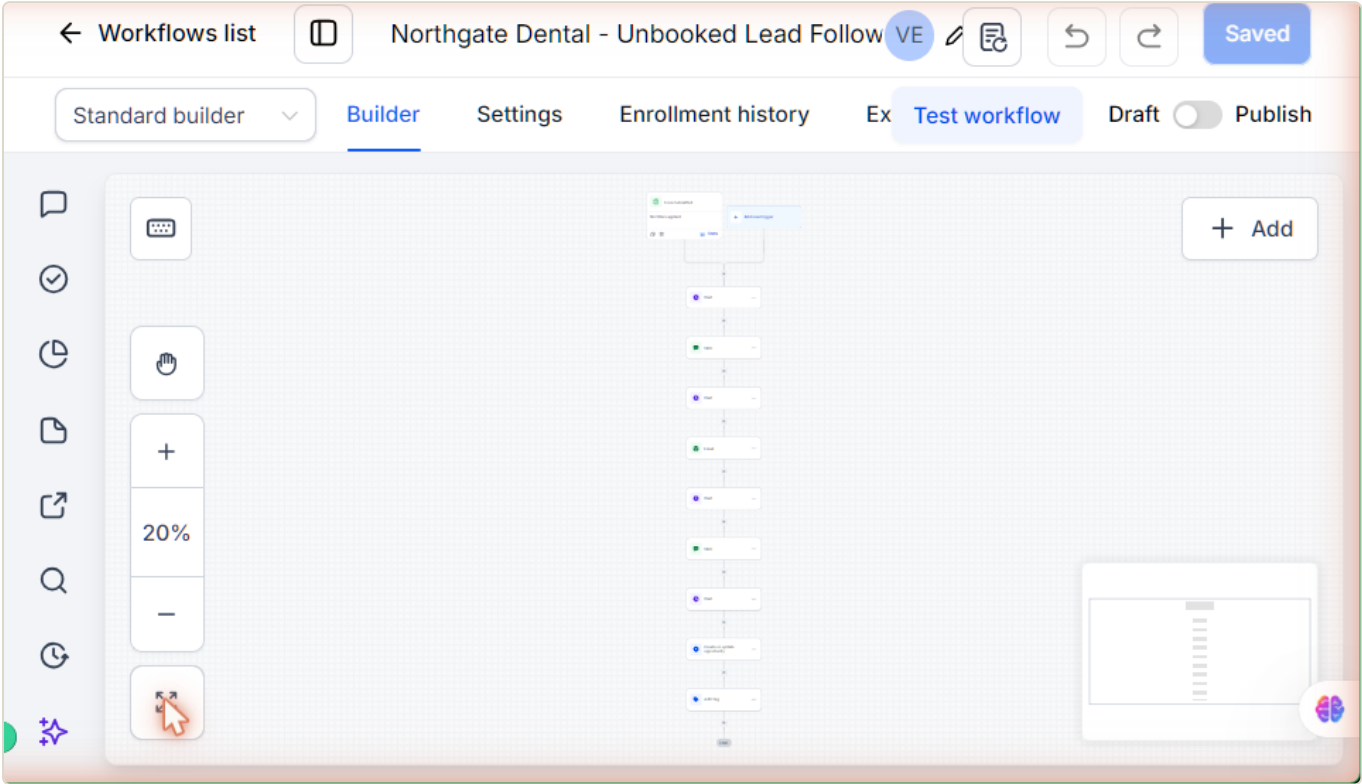
SMS action: message body built from `contact.first_name` and `calendar.booking_link` merge fields, with compliance opt out language included by default

Compliance by default

Every SMS action across all four workflows includes a Reply STOP to opt out line, built in at template level rather than left to chance.

Workflow 4 — Unbooked Lead Follow Up

Trigger: Form Submitted. Recovers the leads that never finish booking, the ones every other system simply forgets about.



Full sequence: SMS at 15 minutes, email at 1 day, SMS at 3 days, opportunity marked lost with tag at 7 days, each step gated by an exit check

Step	Configuration
Wait 15 minutes, SMS	Fast follow up while intent is still warm, direct link back to the booking calendar
Exit check	If the appointment is booked, the contact exits the sequence immediately, so a converted lead never receives a redundant nudge
Wait 1 day, email	Longer form message with social proof and the booking link
Wait 3 days, SMS	Final short touch before the lead is stood down
Wait 7 days	Opportunity moved to a closed state and tagged unconverted lead for later re-engagement campaigns

Four workflows, one account, fully organised

Named, scoped and visible as a set inside the account, each workflow doing one clearly defined job in the patient journey.

What's newAutomation updates

VE

AutomationWorkflows

☐	Name	Status	Total enrolled	Active enrolled	Last updated
☐	Northgate Dental - Appointment Reminder Sequence	Draft	0	0	Aug 24 2020 AM
☐	Northgate Dental - Booking Confirmation	Draft	0	0	Aug 24 2020 AM
☐	Northgate Dental - No Show Recovery.	Draft	0	0	Aug 24 2020 AM
☐	Northgate Dental - Unbooked Lead Follow Up	Draft	0	0	Aug 24 2020 AM

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Workflows list: all four Northgate Dental automations, named and organised together

5

PIPELINE STAGES

4

WORKFLOWS BUILT

22

AUTOMATED ACTIONS

3

CONTACT TAGS FOR SEGMENTATION

Segmentation model

Tag	What it unlocks
new patient booked	Confirms every successful booking as a tracked, filterable segment from day one
no show	Isolates the recovery segment for reporting and for any future targeted win back campaign

unconverted lead

Preserves abandoned bookings as a re-engageable list instead of letting them disappear

Mapped directly to the brief

Automated lead follow up

Form submission triggers Multi step nurture sequences Exit condition logic Lost opportunity handling

Customer communication

Branded email templates SMS with compliance language Merge field personalisation
Sender identity configuration

Appointment reminders

Calendar event triggers Appointment relative wait steps Layered reminder cadence

Pipeline management

Multi stage pipeline design Automated stage movement Opportunity naming conventions

Trigger and action configuration

Appointment status triggers Wait / until logic Create and update opportunity actions Task creation
Contact notes

CRM organisation

Contact tagging strategy Segmentation for re-marketing Named, organised workflow libraries

In one line

Built a complete GoHighLevel appointment automation system from a single trigger point, a booked calendar slot, out to every branch of what can happen next: confirmed and reminded, missed and recovered, or abandoned and re-engaged, with the pipeline staying an accurate live picture throughout.