Standard Operating Procedure (SOP): Using Highlevel as an Online Customer Service Representative (CSR)

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Approved By: Operations Manager

1. OBJECTIVE & SCOPE

This SOP is the step by step for how we handle customer conversations, track lead status, and enter customer data in Highlevel.

Using it consistently is what makes everything else work: every message gets answered, contacts get tagged correctly so marketing can target them, and opportunities actually move through the pipeline.

2. ROLES & RESPONSIBILITIES

This SOP applies to all **Online CSRs** (e.g., Alejandro, Sasha, Rosanna).

- **CSR Duties:** Answer unread messages, assign conversations, apply tags, update custom fields based on customer intent, and manually move lead cards through the Sales Pipeline.

3. PREREQUISITES & TOOLS REQUIRED

- **Highlevel Account Login** (CSR level access).
- **Active Customer Channels** (WhatsApp, TikTok, Facebook Messenger, Instagram DM integrated within Highlevel).
- **Conversation Stamps Guide / Form** (The rulebook for tagging and custom fields).

4. STEP-BY-STEP PROCEDURES

4.1. Navigating and Monitoring Conversations

1. Log into Highlevel.
2. Navigate to the **Conversations** tab on the left-side menu.
3. Manage messages using the three filters at the top:
    - **Unread Tab:** Your primary workspace. Every message in this tab must be opened, read, and answered.
    - **All Tab:** View all messages, including historical and read conversations.
    - **Starred Tab:** Check for flagged messages requiring special attention.
4. **Channel Switching:** Highlevel consolidates chats from multiple channels (e.g., TikTok, WhatsApp, Facebook, Instagram). If a contact has multiple channels available (like WhatsApp and TikTok), you can toggle between them in the upper right of the chat window to continue the conversation in their preferred app.

4.2. Assigning Ownership and Initial Tagging

1. When you begin responding to a new customer chat, immediately go to the right-hand panel of the conversation window.
2. **Assign the Conversation to Yourself** (set yourself as the Contact Owner). Add “other followers” if another team member needs to monitor the conversation.

3. Apply tags to the user as appropriate:
    - *If the customer needs follow-up later (e.g., they state they will pay at the end of the month):* Search for and apply the `needs followup` tag.
    - *If they have successfully completed a purchase on the website:* Apply the `purchase` tag.
    - *To remove an incorrect tag:* Click the "X" on the tag bubble to delete it immediately.

4.3. Completing "Conversation Stamps" & Custom Fields

CSRs must update specific custom fields under the contact's record. This is what keeps the database accurate for reporting and for email marketing campaigns.

1. While in the conversation, look at the **Conversation Stamps Guide** (or follow the rules below once memorized).
2. Open the **Contact Profile** on the right, scroll to **Additional Information**, and update the custom fields according to the customer's response:

Scenario A: Customer was just browsing/checking prices and did not buy

- **Followup Required:** Set to `No`.
- **Followup Completed:** Set to `No`.
- **Conversation Closed:** Select `Today`.
- *Note:* Ensure the `purchase` tag is **not** on the profile.

Scenario B: Customer is interested but wants to think about it / come back later

- **Tag:** Add the `needs followup` tag.
- **Followup Required:** Set to `Yes`.
- **Followup Completed:** Set to `No`.
- **Conversation Closed:** Leave blank or set to tentative follow-up date.

Scenario C: Customer paid and confirmed the sale

- **Tag:** Add the `purchase` tag.
- **Followup Required:** Set to `No`.
- **Followup Completed:** Leave blank or `No`.
- **Conversation Closed:** Select `Today`.
- **Sale Channel:** Select `Chats`.

3. Always click **Save** at the bottom of the contact details panel to commit these changes.

4.4. Filtering Contacts for Target Campaigns

1. Navigate to the **Contacts** tab.
2. Use search and filtering options to identify specific customer groups:
    - *Filter by Phone:* Click the **Phone** column to see all users with valid phone numbers for WhatsApp/SMS outreach.
    - *Filter by Event Tags:* Add a filter for specific tags, such as `tick event` (e.g., to find leads gathered during a physical event).
    - *Filter by Brand Interest:* Filter by tags like `uptrend` or `do brasil` to send brand-specific promotions.
    - *Filter by Purchases:* Filter by the `purchase` tag to list active buyers.

4.5. Managing the Sales Pipeline (Opportunities)

1. Navigate to the **Opportunities** tab to view the active Sales Pipeline.

2. **Understand the bot integration:** The automated bot ingests new inquiries and creates lead cards up to the first stage of the pipeline. From there it is manual.
3. **Manual Pipeline Management:** As the conversation progresses, it is the CSR's responsibility to click and drag the lead card through the following stages:
    - **Contacted:** Move here once you have initiated or replied to a conversation.
    - **Engaged:** Move here when the customer is actively chatting, asking questions, and showing interest.
    - **Ready to purchase:** Move here when they ask for bank details, checkout links, or express immediate intent to buy.
    - **Purchase:** Move here once payment is confirmed.
    - *Pro-tip:* Moving a card to the "Purchase" stage will automatically trigger the `purchase` tag and subsequent automated marketing flows.

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5. KEY WORKFLOWS & FREQUENCIES

- **Hourly:** Monitor and clear the **Unread Tab** under Conversations.
- **During Every Chat:** Assign yourself as the owner, and update tags and custom fields under "Additional Information" before closing the chat window.
- **Daily:** Check and update the **Opportunities Pipeline**, dragging cards to match their current stage.

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6. EXPECTED OUTCOMES & DELIVERABLES

- **Zero Backlog:** Unread message inbox cleared systematically throughout the shift.
- **Data Integrity:** 100% of closed conversations have correct tag structures, "Conversation Stamp" fields, and assigned owners.
- **Accurate Pipeline:** Visual representation of active leads in the Sales Pipeline, matching actual conversation progress.

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7. ROADBLOCKS & TROUBLESHOOTING

Issue / Roadblock	Potential Cause	Action Plan / Solution
Applied the `purchase` tag but customer backed out before paying	Human error or premature tagging.	Go to the contact's profile, click the "X" next to the `purchase` tag to remove it, and delete the opportunity card from the "Purchase" stage of the pipeline.
A chat came in but I don't see how to switch to WhatsApp	The contact does not have a verified WhatsApp phone number associated with their record.	Ask the customer for their WhatsApp number in the current chat (e.g. TikTok/Instagram), add the phone number to their contact profile, save it, and then toggle the channel to WhatsApp.
New leads are not appearing in the Sales Pipeline	The incoming lead bot is experiencing a downtime or connection issue.	Create the opportunity card manually by clicking "Add Opportunity" in the pipeline view, and notify the tech/marketing team to check the automations.
Unsure of how to tag a weird customer scenario	Scenario is not covered by the standard "Conversation Stamps Guide".	Tag the customer as `needs followup`, put notes in their profile, and escalate the question to the Customer Service Lead. Do

not guess, and do not leave it untagged.

> **Note to CSR Team:** “Don’t be afraid to break anything. You’re not going to break anything! Just start using the platform and follow the tagging rules truthfully to help us make better business decisions.”