HighLevel & Aircall

<u>Standard Operation Procedures (SOP)</u>

Created for Family Confident Limited

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Reassigning Leads from One User to Another

Objective : To reassign leads (contacts) from one user to another within the sales pipeline, while maintaining the current pipeline stage.

Procedure :

- Identify Leads for Reassignment

  Navigate to the Contacts section.
  Apply filters:
  - **Assigned**: Select the current owner of the leads.
  - **Pipeline Stage**: Choose **Sales Team Pipeline** and **Stage as Priority 1 / 2 / 3**.
  - Check leads for multiple advisors to decide which advisor's leads can be transferred.
- Select Contacts
  - Manually select the leads you intend to reassign.
- Initiate Workflow Assignment
  - Click the **"Add to Workflow"** button.
- Choose the Appropriate Workflow
  - Search for the workflow titled:
    Firstname Lastname Assign
    (Replace with the name of the user you are assigning to)
- Confirm Reassignment
  - Add the selected contacts to the workflow and confirm the action.

Important Notes

- This process **only reassigns the user**; it does **not alter the pipeline stage**.
- For example, a contact in **P1** will remain in **P1**, but ownership will transfer to the new user.

Opening Calendar Dates & Weekly Scheduling

Objective : To manage and open calendar availability on a daily basis using a step-by-step method and predefined schedule.

Part 1: Opening Calendar Dates (One Day at a Time)

Procedure:

- Access Calendar
  Navigate to the Calendar section via the left-hand menu.
- Open Calendar Settings
  - Click on Calendar Settings at the top of the page.
- Edit the Main Calendar
  - In the list of calendars, locate the one named "calendar" with ID: AvUIqPWlaQTfO78eNsLO
  - Click the pencil icon to edit.
- Set Availability
  a. Click on the Availability tab.
  b. Select Add Date-Specific Hours.
  c. Choose and enter the required date and time slots.
  d. Click Submit & Save.

Part 2: Weekly Opening Schedule

Use this guide to determine which dates to open and when.

Monday	No dates to open
Tuesday	Morning: open Thursday
Wednesday	Morning: open Friday
Thursday	No dates to open
Friday	9:00 AM: Open **Monday** 4:00 PM: Open **Tuesday**
Saturday	4:00 PM: Open **Wednesday**

Sunday	No dates to open

	Monday	Tuesday	Wednesday	Thursday	Friday
Monday	Open	Open	Open		
Tuesday		Open	Open	Open	
Wednesday			Open	Open	Open
Thursday				Open	Open
Friday	Open	Open			Open
Saturday	Open	Open	Open		
Sunday	Open	Open	Open		

Part 3: Office Opening Hours

Monday	8:00 AM – 10:00 AM, 10:30 AM – 7:30 PM
Tuesday	8:00 AM – 10:00 AM, 10:30 AM – 7:30 PM
Wednesday	8:00 AM – 10:00 AM, 10:30 AM – 8:30 PM
Thursday	8:00 AM – 10:00 AM, 10:30 AM – 7:30 PM
Friday	9:30 AM – 5:30 PM

Note

Some staff members may set availability **outside of regular office hours**. These are managed and updated by the staff themselves.

Adding a User to the Calendar

Objective : To assign a user to the main calendar and ensure they are fully integrated to receive appointments within company hours.

Procedure :

- Access the Calendar : Navigate to the Calendar section via the left-hand menu.
- Open Calendar Settings : At the top of the calendar view, click on Calendar Settings.
- Edit the Main Calendar :
    - Locate the calendar named "calendar" with ID: AvUIqPWlaQTfO78eNsLO.
    - Click the pencil icon to edit.
- Assign the User
    - Scroll down to "Select Team Members & Assign Meeting Location".
    - From the list, add the desired user.
    - Click Save to apply changes.

Post-Assignment Checklist

- Set User Availability
    - Ensure the user's availability matches company hours (see previous SOP section for reference).
    - This ensures the user can receive appointment bookings during operating hours.
- Verify Gmail/Google Integration
    - Navigate to the user's CRM account.
    - Go to Settings > Integrations.
    - Check the Google integration status:
        - ✅ If green, it's properly connected.
        - ❌ If not connected, click to reconnect it.
- Confirm Calendar Sync
    - Still under Settings, go to My Profile > Calendar.
    - Ensure the correct calendar is selected and integration is active.

Re-Assigning Appointments

Objective :To manually reassign an existing appointment from one user to another while ensuring availability and calendar integrity.

Procedure:

- Access the Calendar
  - Navigate to the Calendar section from the left-hand menu.
- Select Appointment Slot
  - Click on the specific appointment slot you wish to reassign.
- Change Assigned User
  - In the appointment details, change the Assigned User to the desired team member.
  - Save the changes.

Alternative Method: Drag & Drop

- You can drag and drop appointments to another user's calendar view.
- ⚠️ Important: Only do this if the receiving user has availability open during that time.
  - If they do not have availability set, the system may:
    - Fail to assign the appointment, or
    - Automatically reassign it to another available user.

Important Notes

- Advisor Calendar Blocks:
  - Advisors may place personal or manual blocks on their calendars that prevent appointments from being booked.
  - Always verify the advisor's availability before reassigning.
- Google Calendar Sync:
  - Advisors should keep their Google Calendar clear during main working hours to avoid conflicts.
  - Ensuring accurate calendar sync helps prevent booking issues and ensures smooth reassignment.

Adding a User to Receive New Leads (P1s & P2s)

Objective : To enable a user to begin receiving newly generated leads by adding them to the appropriate lead distribution workflows.

Part 1: Adding a User to P1 Lead Assignment

Workflows Involved:

- New Lead
- Recoversions

Steps:

1. Navigate to the Automations section in your CRM.
2. Locate the workflows titled:
    - New Lead
    - Recoversions
3. In each workflow, find the “Assign User” step.
4. Add the new user to the user assignment list.
5. Save and publish any changes.

To Remove a User:
Simply unselect them from the Assign User step in the respective workflows.

Part 2: Adding a User to P2 Lead Assignment

Workflow Involved:

- Main Lead Rotation

Steps:

1. Navigate to the Main Lead Rotation automation.
2. Locate the “Assign User” step.
3. Add the new user to the assignment list.
4. Save and publish the changes.

Important Notes : Assignment changes take effect immediately upon saving the workflow.

Adding a New User to GoHighLevel

Objective : To correctly set up a new staff member in GoHighLevel with the appropriate permissions, availability, and email signature.

Procedure :

- Access Staff Settings
  - Navigate to Settings in the left-hand menu.
  - Select My Staff.
- Add the New User
  - Click "Add User".
  - Fill in all required fields (Name, Email, Role, etc.).
  - Email template: *first_name.last_name@privatesickpay.co.uk*
- Set User Password
  - Click the "Advanced" tab.
  - Manually set and confirm the user's password.
- Copy Permissions
  - Use the "Copy Permissions" button to ensure role consistency.
  - Select a template user—typically the last advisor added from the current onboarding batch.
  - Set User Role : *User* and Data Visibility Scope : *Only Assigned Data*
- Set Availability
  - In the Availability section, set the user's hours to match Company Operating Hours (see SOP on office hours for reference).
- Save
  - Click Save to finalize the setup.

Post-Creation Tasks

- Email Signature Setup
  - Ensure the new user has a professional email signature.
  - Add the signature to:
    - Their GoHighLevel Profile, and

        - Their Gmail account (within Gmail settings).

Create Lead Assignment Workflow

- Create a new workflow titled:
  FirstName LastName Assign
  (replace with the user's actual name)
- This workflow will be used to assign leads directly to the user.
- You can duplicate an existing user assignment workflow and update the name and target user accordingly.

Creating a New Number in Aircall

Objective : To set up a new Aircall number for an advisor, configure essential settings, and ensure proper integration and routing.

Procedure :

1. Create a New Number

- Go to the Numbers section in Aircall.
- Click “Create or Port Number”.
  Select “Create Number”.
- Set the following options:
  - Country: United Kingdom
  - Number Type: Mobile
  - Region: Mobile
- Name the number using this format:
  V2 AdvisorName Number #
  (e.g., V2 John Smith Number 1)

2. Configure Call Distribution

Once the number is created, the number panel should open automatically:

- Under Call Distribution, click Template - Direct Line.
- In the “Ring To” field:
  - Select the Advisor/User (not the number).
  - Set the duration to 25 seconds.
- Click Publish to assign the number.

3. Adjust Number Settings

After publishing, you’ll be redirected to the Number Page:

- Click Settings.
- Enable the following:
  - ✅ Mandatory Call Tagging
  - ✅ Inbound Call Recording
  - ✅ Outbound Call Recording

- ✅ Call Transcription (including for voicemails)

4. Configure Integrations

- Go to the Integrations tab.
- Enable:
  - ✅ HubSpot
  - ✅ 8th May (Integrately)

5. Assign Number to User

- Navigate to the Teams & Users tab.
- Confirm the advisor/user is selected.
- Click the three dots (⋮) next to their name.
- Select “Go to User Page”.
- Go to the Numbers tab.
- Set the new number as default for the user.

Important Final Step

- Before setting up the new number, ensure the old number is deleted.
  - ⚠️ Only delete the old number after verifying:
    - Call recordings are active.
    - All necessary recordings have been reviewed or archived.

Troubleshooting Common Aircall Issues

Objective : To systematically troubleshoot and resolve common technical issues in Aircall such as tagging failures, user status glitches, and application performance.

Common Issues Covered

- ✅ Call tagging not transferring to the CRM
- ✅ User stuck in “On Call” status
- ✅ Aircall app not loading or disconnecting
- ✅ Any other general technical issues

Step-by-Step Troubleshooting Guide

1. Verify Integration

- Go to the Aircall number settings.
- Confirm that the “8th May (Integrately)” integration is enabled.

2. Troubleshoot on Advisor’s Laptop

On the advisor’s computer:

- Open Task Manager:
  - Locate Aircall under running processes.
  - Click End Task to force close the app.
- Log Out and Log Back In:
  - Sign out of the Aircall desktop app, then log in again.
  - Sign out of the Aircall Chrome extension, then log back in.
- Check if the Issue Persists:
  - Test the issue after restarting both the app and extension.

3. Check Aircall System Status

Visit: https://status.aircall.io/

- See if there are any ongoing outages or incidents reported.

4. Reference Aircall’s Official Support Guide: If the issue continues after all steps above, visit the official troubleshooting guide: https://support.aircall.io/hc/en-gb/p/ai-support/articles/10375397243293