

Estate Realty Group — GHL Dashboard Setup Guide

Location: Estate Realty Group | ID: 4EZ2dmBbZp6NB8vElkeW

Date: 2026-06-20 | Contact: (770) 692-1923 | Site: dexterwilliams.net

■ What's Already Working (No Action Needed)

- Site is live at <https://dexterwilliams.net> — all forms show a working custom fallback
- Concierge API processes leads for ALL types: buyer, seller, contact, market-report, investor, cash-offer, contractor
- SMS sequences auto-send on all form submissions (via GHL conversations API)
- A2P SMS approved — all queued SMS will deliver
- Messaging Service SID: MG6066530a02b2a3d0486020e2f86422bd

The GHL REST API does **not** support form creation via Private Integration Tokens (forms:write is IAM-restricted). The items below must be completed manually in the GHL UI at <https://app.gohighlevel.com>.

STEP 1 — Create 5 Forms

Navigate to: **Sites** → **Forms** → **Builder**

Form Name: Contact Form - Estate Realty Group

Fields:

- First Name (required)
- Last Name
- Phone (required)
- Email
- Message (textarea)

Note: Style: #0B2545 background, #C9A84C accent. Copy Form ID from embed URL after saving.

Form Name: Home Value Request - Estate Realty Group
Fields:
• First Name (required)
• Last Name
• Phone (required)
• Email
• Property Address (required)
• City
• Timeline (dropdown): ASAP / 1-3 months / 3-6 months / Just exploring

Form Name: Market Report Request - Estate Realty Group
Fields:
• First Name (required)
• Last Name
• Phone (required)
• Email (required)
• City / Area of Interest

Form Name: Contractor Partnership - Estate Realty Group
Fields:
• First Name (required)
• Last Name
• Phone (required)
• Email
• Company Name
• Trade / Service Type

Form Name: Buyer Inquiry - Estate Realty Group
Fields:
• First Name (required)
• Last Name
• Phone (required)
• Email
• Pre-approved? (dropdown): Yes / No / Not yet
• Timeline (dropdown): ASAP / 1-3 months / 3-6 months / Just browsing
• Budget Range (text or dropdown)

STEP 2 — Retrieve Form IDs

For each form, go to **Embed** → **iframe** and copy the Form ID from the URL:

```
https://api.leadconnectorhq.com/widget/form/{FORM_ID_HERE}
```

STEP 3 — Update .env with Form IDs

Edit: `/home/coder/workspace/docker/dexterwilliams-realestate/.env`

```
GHL_FORM_CONTACT=<paste Contact Form ID> GHL_FORM_VALUATION=<paste Home Value Form ID>
GHL_FORM_MARKET=<paste Market Report Form ID> GHL_FORM_CONTRACTOR=<paste Contractor
Form ID> GHL_FORM_BUYER=<paste Buyer Form ID>
```

STEP 4 — Rebuild the Site

Run this command from the VPS (takes ~3-4 minutes):

```
bash /home/coder/workspace/dexterwilliams-realestate/rebuild-with-forms.sh
```

This script reads the .env, builds the Docker image with form IDs baked in (required for static Next.js), and restarts the container.

STEP 5 — Create 2 CRM Pipelines

Navigate to: **CRM** → **Pipelines** → **Add Pipeline**

Buyer Pipeline

Stage 1: New Buyer Lead

Stage 2: Consultation Scheduled

Stage 3: Pre-Approved

Stage 4: Active Search

Stage 5: Under Contract

Stage 6: Closed Won

Stage 7: Closed Lost

Seller Pipeline

Stage 1: New Seller Lead

Stage 2: Valuation Requested

Stage 3: Listing Presentation

Stage 4: Active Listing

Stage 5: Under Contract

Stage 6: Closed Won

Stage 7: Closed Lost

STEP 6 — Create 3 SMS Workflows (Optional)

The Concierge API already sends SMS sequences automatically for all lead types. These GHL-native workflows are optional but give you visual automation tracking in GHL.

Navigate to: **Automation** → **Workflows** → **Create Workflow**

Workflow 1: Buyer Lead Welcome

Trigger: Contact Tag Added → buyer-lead

Timing: Immediately

SMS Message:

Hi {{contact.firstName}}! This is Dexter Williams with Estate Realty Group. Thanks for reaching out! I'll call you shortly to discuss your home search. Reply STOP to opt out.

Workflow 2: Seller Lead Welcome
Trigger: Contact Tag Added → seller-lead
Timing: Immediately
SMS Message:
Hi {{contact.firstName}}! Dexter Williams here – I received your home value request. I'll prepare a custom analysis and reach out shortly. Reply STOP to opt out.

Workflow 3: Market Report Welcome
Trigger: Contact Tag Added → market-report-request
Timing: Immediately
SMS Message:
Hi {{contact.firstName}}! Dexter Williams from Estate Realty Group. Your Atlanta market report is on its way! I'll follow up with insights specific to your area. Reply STOP to opt out.

Current SMS Sequences — Already Active via Concierge API

All sequences fire automatically when a form is submitted. No GHL workflow setup required for these.

Lead Type	Day 0	Day 1	Day 3	Day 7	Day 14	Day 30
buyer	■ + IDX	■	■	■	■	■
seller	■ + CMA	■	■	■	■	■
contact	■	■	Day 5	—	■	—
market-report	■ + IDX	—	■	—	Day 10	Day 21
investor	■ + IDX	—	Day 2	■	■	■
cash-offer	■	■	■	■	—	—
contractor	■	■	—	Day 5	■	—

Reference Notes

- A2P Campaign approved: Messaging Service SID MG6066530a02b2a3d0486020e2f86422bd
- GHL Location ID: 4EZ2dmBbZp6NB8vElkeW
- Concierge API: <https://concierge.srv1617495.hstgr.cloud/api/leads>
- All leads automatically get tagged with website-funnel + type-specific tag
- Phone: (770) 692-1923 — reply STOP opt-out is already in all SMS templates

