

AI CHATBOT INSTALLATION PLAYBOOK

AI Setup Pros — Service Delivery Guide

SERVICE 1 OF 3

AISetupPros Internal Use Only · Version 1.0

SERVICE OVERVIEW

Custom AI chatbot deployed on client website, trained on their business data, connected to GoHighLevel CRM for lead capture. Works on website, SMS, and Facebook Messenger.

Time to Deploy	2-3 days
Service Tier	Starter / Professional
Stack	GoHighLevel + custom GPT / GHL AI Studio
Who Installs	Builder (with GHL access)

PHASE 1 — CLIENT DISCOVERY & SETUP

Step 1: Gather Client Information

Collect the following before starting any build work:

- **Website URL** — Where the chatbot will be installed
- **CRM Access** — GoHighLevel sub-account created for this client
- **Business Info Document** — Services, pricing, FAQs, contact details
- **Lead Capture Fields** — What info to collect (name, email, phone, message)
- **Platform Requirements** — Website only? Also SMS? Facebook Messenger?

⚠ **NOTE:** If client doesn't have a GHL account, create a new sub-account under your agency first. You cannot install a chatbot for a client without GHL access.

Step 2: Create GHL Sub-Account for Client

1. Log into your GHL agency dashboard
2. Navigate to **Settings → Locations → Add Location**
3. Create new location for the client
4. Copy the new **Location ID** (You'll need this for API calls)
5. Set the client's branding: logo, brand colors, business info

Step 3: Train the Chatbot

1. In GHL, go to **AI Studio → Create Bot**
2. Upload or paste the client's business info document
3. Add training data: services, pricing, common FAQs
4. Set the bot's personality and greeting message
5. Define trigger phrases — what prompts the bot to start
6. Add after-hours message if needed

PHASE 2 — DEPLOYMENT

Step 4: Install on Website

Option A — WordPress Website:

1. Install the **GoHighLevel plugin** on the client's WordPress site
2. Navigate to **Settings** → **Connect** in the GHL plugin
3. Authorize the connection using API key or OAuth
4. Go to **AI Studio** → **Deploy** and copy the widget embed code
5. Add to WordPress: **Appearance** → **Theme Editor** → **footer.php** — paste before `</body>`

Option B — Non-WordPress Website:

1. In GHL, go to **AI Studio** → **Deploy** → **Custom Website**
2. Copy the generated JavaScript widget code
3. Send to the client's developer to embed before `</body>` tag

Step 5: Connect to GHL Pipeline

1. In GHL, go to **Pipelines** → **Create or select existing pipeline**
2. Set up trigger: **New Conversation** → **Add to Pipeline**
3. Tag lead source: **chatbot**
4. Set up follow-up sequence: **New Lead** → **Auto-Emails** → **Task Created**

Step 6: Configure Multi-Platform (if needed)

Facebook Messenger:

1. In GHL, go to **Integrations** → **Facebook**
2. Connect the client's Facebook Page
3. Enable Messenger bot on the page
4. Map the chatbot to respond to page messages

SMS:

1. In GHL, set up SMS number (buy or port existing number)
2. Connect SMS to AI chatbot in GHL
3. Set trigger keywords (e.g., "SMS" to opt-in)

PHASE 3 — TESTING

Chatbot Testing Checklist

- Chatbot loads on desktop browser
- Chatbot loads on mobile browser
- Bot responds to "Hello" / greeting
- Bot answers 3 service-related questions correctly
- Bot collects name and email when prompted
- Lead appears in GHL after conversation
- GHL pipeline stage updated correctly
- After-hours message shows outside business hours
- Facebook Messenger works (if enabled)
- SMS works (if enabled)

COMMON ISSUES & FIXES

Symptom	Fix
Chatbot not responding on page	Verify widget code is live — check browser console for errors
Leads not saving to GHL	Verify webhook URL is correct; check Location ID matches
Bot gives wrong answers	Retrain with more Q&A examples in AI Studio
Widget shows "Powered by" branding	Upgrade plan or configure in GHL settings
Facebook Messenger not connecting	Check Facebook Page permissions — Page must be admin-accessible
SMS not sending	

Verify GHL SMS credits are loaded; check phone number is SMS-enabled

PREREQUISITES CHECKLIST

Item	Status
Client GHL sub-account created	<input type="checkbox"/>
Location ID obtained	<input type="checkbox"/>
Business info document received from client	<input type="checkbox"/>
Website URL confirmed	<input type="checkbox"/>
Lead capture fields defined	<input type="checkbox"/>
Multi-platform requirements confirmed	<input type="checkbox"/>
WordPress login (if applicable)	<input type="checkbox"/>

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