HighLevel 团队使用手册

HighLevel Team Guide — Angie Zhang Team

我们团队的客户管理系统：标签怎么打、联系人怎么录、账号里已经搭好的功能怎么用。 How our team uses the CRM: tags, contact entry rules, and the setups already built for you.

账号 Account: `Angie Zhang Personal Real Estate Corporation` · 更新日期 Updated: 2026-10-05（v2：已删除 18 个零使用标签 / v2: removed 18 zero-use tags）

> **Angie 的话 / A word from Angie:** 每一个联系人进系统，都按这本手册的标准录入——标签打对、来源写清、信息写全。系统里的数据越干净，我们的跟进、群发、成交就越准。 Every contact enters the system to this standard: correct tags, clear source, complete info. Clean data = better follow-up, better campaigns, more closings.

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第一部分：标签全解 Tag Dictionary（47 tags total · 2026-10-05 已清理 18 个零使用标签 / cleaned up 18 zero-use tags）

标签是系统的语言。打标签只有一套标准写法，下面表格就是全部。任何人不得自创标签写法。 Tags are the system's language. Use exactly the spellings below — never invent your own.

1A. 身份标签 Role — 必填其一 REQUIRED

每个联系人必须有一个身份标签，代表他/她是买家、卖家、投资人、房东、租客还是不合格线索。 Every contact gets exactly one role tag.

标签 Tag	中文解释	什么时候用 When to use	现有数量
`t-buyer`	买家	想买房的人（自住或投资性购房都先算 buyer，纯投资客另加 `t-investor`）。/ People looking to buy a home (owner-occupiers and investors alike start as buyer; pure investors also get `t-investor`).	83
`t-seller`	卖家	想卖房的人。/ People looking to sell a home.	21
`t-investor`	投资人	买楼花、买投资房、找高回报项目的人（可与 `t-buyer` 并存）。/ People buying presales, investment properties, or seeking high-return projects (can coexist with `t-buyer`).	19
`t-landlord`	房东	有房出租、需要找租客或管理服务的人。/ People with rentals who need tenants or management services.	3
`t-tenant`	租客	正在找房、已申请、或已入住的租客。/ Tenants who are searching, have applied, or have moved in.	28
`t-unqualified`	不合格	明确不是客户的人（已明确拒绝、无需求、无效线索）——打了这个就不再打扰。/ People who are clearly not prospects (declined, no need, invalid lead) — do not contact again once tagged.	237

合作经纪怎么记？经纪标签已删除。合作经纪不录入为客户联系人——如需留记录，在备注里写"合作经纪"即可，永不进培育流程。 How to record cooperating realtors? Realtor tags have been deleted. Never enter a cooperating realtor as a client contact — if you need a record, write "合作经纪" (cooperating realtor) in the notes. They never enter any nurture flow.

1B. 热度标签 Heat — 必填其一 REQUIRED

标签 Tag	中文解释	什么时候用 When to use	现有数量
`h-hot`	热 — 30 天内可成交	有明确需求、预算、时间线，正在行动的客户。/ Clients with clear needs, budget, and timeline who are taking action now.	34
`h-warm`	温 — 1–6 个月	有兴趣但还没准备好，需要持续跟进。/ Interested but not ready yet — needs ongoing follow-up.	29
`h-cold`	冷 — 6 个月以上 / 未知	刚认识、需求不明，先放长期培育。/ New acquaintances with unclear needs — long-term nurture.	30

1C. 来源标签 Source — 必填其一 REQUIRED

这个人从哪里来？来源标签决定我们知道哪个渠道有效。 Where did this person come from? Source tells us which channel works.

标签 Tag	中文解释	现有数量
`src-realtorca`	REALTOR.ca 咨询 / REALTOR.ca inquiry	2
`src-bchomehub-foreclosures`	bchomehub 法拍页面 / bchomehub foreclosures page	—
`src-facebook`	Facebook（广告 / 帖子 / 私信）/ Facebook (ads / posts / DM)	—
`src-messenger`	Messenger 私信 / Messenger DM	—
`src-whatsapp`	WhatsApp	8
`src-wechat`	微信 / WeChat	176
`src-referral`	朋友 / 客户转介绍（备注里写谁介绍的）/ Friend / client referral (note who referred them)	—
`src-webinar`	线上讲座 / 说明会 / Webinar / info session	—
`eventbrite`	Eventbrite 活动报名 / Eventbrite event registration	—

来源标签不够用了怎么办？手动录入、官网、小红书等来源标签已删除。手动加的联系人，按实际认识渠道打最接近的标签（微信认识的打 `src-wechat`，以此类推），并在备注里写清来源。 What if no source tag fits? The manual-entry, website, and Xiaohongshu source tags have been deleted. For manually added contacts, use the closest tag for how you actually met them (met on WeChat → `src-wechat`, and so on), and write the source clearly in the notes.

1D. 跟进状态 Follow-up — 推荐 RECOMMENDED

标签 Tag	中文解释	什么时候用 When to use
`f-followup`	需要跟进	答应了回电、等文件、等决定——打上就不会忘。/ Promised a callback, waiting on documents or a decision — tag it and you won't forget.
`f-nurture`	长期培育	现在不买，以后可能买——进长期内容培育。/ Not buying now, might buy later — long-term content nurture.

1E. 买家资质 Buyer qualification — 推荐 RECOMMENDED

标签 Tag	中文解释	什么时候用 When to use
`c-no-mortgage`	全款 / 无需贷款	现金买家（备注里写预批 / 租购情况）。/ Cash buyers (note pre-approval / rent-to-own status in notes).

1F. 客户生命周期 Client lifecycle

标签 Tag	中文解释	什么时候用 When to use
`cl-active`	现有客户	正在合作中的客户。/ Clients currently working with us.
`cl-past`	过去客户	已成交 / 已结束合作——转介绍和复购的金矿。/ Closed / past clients — a goldmine for referrals and repeat business.

1G. 房源提醒 Property alerts

打了这些标签的买家，系统会自动匹配新房源并提醒。 Contacts with these tags get automatic new-listing alerts.

标签 Tag	中文解释
`property-alert-bc-buyers`	BC 买家房源提醒 / BC buyer property alerts

注意：Alberta / 商业 / 投资人提醒标签已删除（零使用）。需要时重建，命名规则不变：`property-alert-*`。 Note: the Alberta / commercial / investor alert tags were deleted (zero use). Rebuild when needed — naming convention stays the same: `property-alert-*`.

1H. 活动 Event

标签 Tag	中文解释	什么时候用 When to use
`ai-saturday-oct3-2026`	10/3 周六 AI 活动报名 / Oct 3 Saturday AI event registration	每场活动用"活动名 + 日期"的格式打标签。/ Tag each event as "event name + date".
`ai meeting`	AI 讲座 / 会议参与者 / AI seminar / meeting attendee	—
`open house lead`	Open House 现场线索 / Open house on-site lead	现场登记的人。/ People who registered on site.

注意 / Note: 活动报名的人只打活动标签，没有房产需求证据的不打热度标签、不进房产培育流程。这是 Angie 的硬性规定。 Event registrants get event tags only — no heat tags, no real-estate nurture — unless they show real-estate intent. This is Angie's hard rule.

1I. 特殊 Special

标签 Tag	中文解释	什么时候用 When to use
`rental applicant`	租房申请人 / Rental applicant	提交了租房申请的人。/ People who submitted a rental application.
`rental application received`	已收到租房申请 / Rental application received	申请表已进系统。/ Application is in the system.
`property manager`	物业经理 / Property manager	合作的物业管理方。/ Partner property-management contacts.
`renovation`	装修需求 / Renovation needs	有装修 / 翻新需求的联系人。/ Contacts with renovation needs.
`richmond condo`	Richmond 公寓意向 / Richmond condo interest	特定项目意向。/ Interest in a specific project.
`commercial-sell-by-owner`	商业房东直售 / Commercial FSBO	FSBO 商业线索。/ Commercial for-sale-by-owner leads.
`preferred language - chinese`	偏好中文 / Prefers Chinese	用对方偏好的语言沟通。/ Communicate in their preferred language.
`preferred language - english`	偏好英文 / Prefers English	—
`stop bot`	停机器人 / Stop bot	要求人工接手、不再自动回复。/ Requested human handoff — no more auto-replies.
`abandon`	放弃 / Abandoned	长期无响应的线索归档。/ Archive long-unresponsive leads.

1J. 旧标签 Legacy — 不要再用 DO NOT USE

以下标签是历史遗留的，已经合并或作废。新联系人一律不许用。 Legacy tags — merged or retired. Never use on new contacts.

- `buyer`、`seller` → 已合并为 `t-buyer`、`t-seller` / merged into `t-buyer`, `t-seller`
- `hot`、`warm`、`cold` → 已合并为 `h-hot`、`h-warm`、`h-cold` / merged into `h-hot`, `h-warm`, `h-cold`

- `chinese`（有 4 个重复的同名标签）、`买家`、`卖家`、`捡漏系统` → 重复 / 中文旧标签，停用 / duplicate / legacy Chinese tags, retired
- `src - ai lead` → 写法不规范（含空格），停用 / invalid spelling (contains spaces), retired

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第二部分：录入联系人 10 条硬性要求 Contact Entry Rules — 10 hard requirements

1. 先查重，再新建 — Duplicate check first

按姓名、电话、邮箱各搜一遍。搜到已存在的联系人 → 在原记录上补充信息，绝不建重复。 Search by name, phone, and email before creating. Found it? Update the existing record — never create a duplicate.

2. 必须有电话或邮箱 — Phone OR email required

两个都没有 → 不许建联系人（Angie 2026-10-04 硬性规定）。 No phone and no email = no contact. Hard rule (Angie, 2026-10-04).

3. 三个标签缺一不可 — Three tags minimum

`t-*` 身份 + `src-*` 来源 + `h-*` 热度，一个都不能少。 One role tag + one source tag + one heat tag. All three, every time.

4. 写备注 — Note: who, where from, what they want

至少一句话：怎么认识的、聊了什么、需求是什么。没有备注的联系人等于没有录入。 At least one line: how you met, what was discussed, what they need. A contact with no notes is a contact never entered.

5. 指定负责人 — Assign an owner

每个联系人都要有负责人（Assigned User），跟进责任到人。 Every contact must have an owner (`Assigned User`) — follow-up responsibility belongs to a person.

6. 新客户先签 DORT + PRIV — Compliance first

和新客户实质谈房产之前，必须先签 DORT（代理关系披露）和 PRIV（隐私同意）。没签之前只做基本介绍，不谈具体房源、不做分析。 No substantive real-estate discussion until DORT (representation disclosure) + PRIV (privacy consent) are signed. Before that: basic intro only — no specific listings, no analysis. This is a managing-broker compliance rule.

7. 语言标签 — Preferred language

第一次沟通就确认对方偏好中文还是英文，打上 `preferred language - chinese` / `preferred language - english`。 Confirm their preferred language (Chinese or English) at first contact and tag `preferred language - chinese` / `preferred language - english`.

8. 活动报名 ≠ 房产线索 — Event registrants are not leads

AI 讲座、Eventbrite 报名的人，没有房产需求证据的，只打活动标签，不打热度标签，不进房产培育流程。 AI seminar and Eventbrite registrants with no real-estate intent evidence get event tags only — no heat tags, no real-estate nurture.

9. 经纪人不是 lead — Realtors are never leads

合作经纪不录入为客户联系人（经纪标签已删除）。如需留记录，在备注里写"合作经纪"，永不进任何客户培育流程。 Never enter a cooperating realtor as a client contact (realtor tags deleted). If you need a record, write "合作经纪" (cooperating realtor) in the notes. They never enter any client nurture flow.

10. 租客排除在营销之外 — Tenants excluded from marketing

群发、营销活动永远排除租客（`t-tenant`）和团队成员。营销邮件必须带可用的退订链接。 Tenants (`t-tenant`) and team members are always excluded from marketing sends. Every marketing email must carry a working unsubscribe link (CASL).

第三部分：账号已搭好的设置 Step-by-Step Setups

3.1 销售管道 Pipelines（7 条 / 7 pipelines）

每个联系人 / 交易在管道里是一张卡片，按阶段往右拖。阶段到了就挪卡片，系统会自动触发对应的跟进。 Each deal is a card. Move it right as it progresses.

管道 Pipeline	阶段 Stages（从左到右 / left to right）	配哪个标签 / Tag
`BUYER` 买家管道	`New Lead` → `Contacted` → `Qualified` → `Viewing` → `Offer` → `Under Contract` → `Closed / Lost`	`t-buyer`
`SELLER` 卖家管道	`New Lead` → `Contacted` → `Listing Appointment` → `Listed` → `Showing / Marketing` → `Offer Received` → `Sold / Lost`	`t-seller`

管道 Pipeline	阶段 Stages（从左到右 / left to right）	配哪个标签 / Tag
`Landlord Pipeline` 房东管道	`New Lead` → `Contacted` → `Qualified` → `Property Review` → `Proposal / Consultation` → `Onboarding` → `Listing Preparation` → `Active Marketing` → `Occupied / Managed` → `Maintenance / Support` → `Closed / Lost`	`t-landlord`
`Tenant Pipeline` 租客管道	`New Lead` → `Contacted` → `Qualified` → `Searching / Matching` → `Viewing Scheduled` → `Application Submitted` → `Screening / Review` → `Approved` → `Lease / Booking Preparation` → `Move-In / Check-In` → `Ongoing Support` → `Closed / Lost`	`t-tenant`
`Rental Application` 租房申请	`Application Received` → `Under Review` → `Reference & Credit Check` → `Approved / Declined` → `Lease Signed`	`rental application received`
`RTO - DEALS` 租购管道	`New Lead` → `Qualified` → `Buyer Ready` → `Seller Ready` → `Matching` → `Structuring Deal` → `Agreement Signed` → `Closed / Lost`	`t-buyer`（备注租购意向 / note rent-to-own intent）
`GENERAL CONSULTATION` 综合咨询	`New Inquiry` → `Need Review` → `Contacted` → `Consultation Scheduled` → `Follow Up Later` → `Converted / Closed Lost`	通用 / General

团队动作 / Team action: 每次和客户推进到下一步，30 秒内把卡片拖到对应阶段。卡片不动 = 系统不知道 = 跟进不会发生。 Every time you move a client forward, drag the card to the right stage within 30 seconds. Card doesn't move = system doesn't know = no follow-up happens.

3.2 日历 Calendars（9 个 / 9 calendars）

日历 Calendar	用途 Purpose
`Team 1:1 with Angie`	⭐客户约 Angie 一对一（60 分钟，周一 / 周四 9am–6pm）。把这个预约链接发给客户：`api.gohighlevel.com/widget/bookings/team-11-with-angie` / ⭐Clients book a 1:1 with Angie (60 min, Mon/Thu 9am–6pm). Send clients this booking link: `api.gohighlevel.com/widget/bookings/team-11-with-angie`
`angie meeting with leads`	Angie 的线索会议 / Angie's lead meetings
`Angie one on one meeting`	Angie 一对一会议 / Angie 1:1 meetings

日历 Calendar	用途 Purpose
`Marco Liu Real Estate` / `Cindy Zhang's Personal Calendar` / `Shirley Wang's Personal Calendar` / `Wenjie Sun's Personal Calendar`	团队成员个人日历——约自己的客户用自己的 / Team members' personal calendars — use your own for your own clients
`Sarah Calendar`（event ×2）	活动日历 / Event calendars

3.3 表单 Forms（10 个 / 10 forms）— 每个用在哪 / When to use each

表单 Form	什么时候发给客户 When to send it
`Buyer Inquiry Form` 买家咨询表	新买家线索：收集预算、区域、房型。/ New buyer leads: collect budget, areas, property type.
`Seller Lead Form` 卖家线索表	想卖房的人：收集地址、卖房时间线。/ Would-be sellers: collect address, selling timeline.
`Off-Market Buyer Form` off-market 买家表	找捡漏 / 私盘的买家。/ Buyers hunting off-market / private deals.
`Buyer Alert Criteria` 房源提醒条件表	买家填好 → 打 `property-alert-*` 标签 → 自动收到匹配房源。/ Buyer completes it → tag `property-alert-*` → automatic matching listings.
`Open House Registration` 看房登记表	Open House 现场扫码登记（原自动标签 `src-openhouse` 已删除——表单里的自动打标签动作需要更新，见 Angie）。/ On-site QR registration at open houses (the old auto-tag `src-openhouse` was deleted — the form's auto-tag action needs updating, see Angie).
`For Landlord form` 房东表	房东：收集出租物业信息。/ Landlords: collect rental property info.
`Webinar Registration Form` 讲座报名表	线上讲座报名。/ Webinar registration.
`Chinese-generic-form` 中文通用表	中文客户通用咨询。/ General inquiry form for Chinese-speaking clients.
`Registration From Wix`	Wix 网站（investorsuccesshub.com）注册同步。/ Registration sync from the Wix site (investorsuccesshub.com).
`Form 11`	旧表单，待整理——暂时不用。/ Old form, pending cleanup — don't use for now.

团队动作 / Team action: 和客户聊完需求，顺手把对应的表单链接发过去。表单提交会自动进系统、打标签、触发跟进流程——你手动录的信息越少越好。 After discussing needs with a client, send them the matching form link. Form submissions enter the system, get tagged, and trigger follow-up automatically — the less you enter manually, the better.

3.4 自动化 Workflows（已发布的 14 个 / 14 published — 这些在自动跑 / these are running）

自动化 Workflow	它是干嘛的 What it does	团队要配合什么 What the team must do
`Buyer Form Submitted Automation`	买家表单提交 → 自动打标签、建任务、进 `BUYER` 管道。/ Buyer form submitted → auto-tag, create tasks, enter `BUYER` pipeline.	收到任务提醒就去联系。/ Contact them when you get the task reminder.
`Seller Form Submitted Automation`	卖家表单提交 → 自动进 `SELLER` 管道。/ Seller form submitted → enter `SELLER` pipeline automatically.	收到任务提醒就去联系。/ Contact them when you get the task reminder.
`Chinese / English Rental Application Workflow`	租房申请（中 / 英）→ 自动进 `Rental Application` 管道。/ Rental application (CN/EN) → enter `Rental Application` pipeline automatically.	按阶段审核申请。/ Review applications by stage.
`Wix rental application to GHL Automation`	Wix 网站的租房申请同步进 GHL。/ Sync Wix-site rental applications into GHL.	—
`FACEBOOK LEAD ROUTING`	Facebook 广告线索 → 自动分配负责人。/ Facebook ad leads → auto-assign an owner.	分到你的线索，15 分钟内联系。/ Contact your assigned leads within 15 minutes.
`Universal Registration Automation`	通用注册 → 自动打标签归档。/ General registration → auto-tag and archive.	—
`Tag AI Meeting on Form`	AI 会议表单 → 自动打 `ai meeting` 。/ AI meeting form → auto-tag `ai meeting` .	—
`Commercial Seller Lead - Tag Only (No Auto Contact)`	商业卖家线索 → 只打标签，不自动联系。/ Commercial seller leads → tag only, no auto-contact.	人工判断后再联系。/ Use judgment before contacting.
	房源提交 → 进审核队列。/ Property submission → review queue.	—

自动化 Workflow	它是干嘛的 What it does	团队要配合什么 What the team must do
`Rental Property Submission → n8n Review Queue`		
`Weekly Investor Email Campaign`	每周投资人邮件。/ Weekly investor email.	有好的 deal 告诉 Angie，入选就群发。/ Tell Angie about good deals — selected ones get blasted.
`Affiliate automation`	分销 / 推荐自动化。/ Affiliate / referral automation.	—
`ghl trading connect to Postgres / Supabase`	数据同步（系统用）。/ Data sync (system use).	不用管。/ Ignore.

注意：还有 16 个 workflow 是草稿状态（draft），没有在跑，包括 `Buyer/Seller Pipeline Automation`、普通话培育序列等。不要以为它们在工作——看到任务没触发，先来问。 Note: 16 more workflows are still drafts — not running — including `Buyer/Seller Pipeline Automation` and the Mandarin nurture sequence. Don't assume they're working — if a task doesn't trigger, ask first.

3.5 统一收件箱 Conversations

所有渠道（短信、邮件、WhatsApp、Facebook、Instagram）的消息都汇总在一个收件箱。不用来回切 App。记住：租客的消息未经 Angie 批准不回复；新客户先走 DORT/PRIV 流程。 Messages from every channel (SMS, email, WhatsApp, Facebook, Instagram) land in one inbox — no app-switching. Remember: never reply to tenant messages without Angie's approval; new clients go through DORT/PRIV first.

3.6 自定义字段 Custom Fields（139 个 / 139 fields）

系统里有 139 个自定义字段（预算、区域、房型、预批状态、租客背景调查等），表单会自动填充。手动录入时，至少填：预算 `Monthly Budget` / `budget_min` / `budget_max`、意向区域 `Interested City` / `Which area(s)`、房型 `Interested Property Type`、时间线 `Timeline` / `When are you planning to make a move?`、贷款预批 `Pre-approval status`。 The system has 139 custom fields (budget, areas, property type, pre-approval status, tenant screening, etc.) — forms fill them automatically. When entering manually, at minimum fill: budget `Monthly Budget` / `budget_min` / `budget_max`, target areas `Interested City` / `Which area(s)`, property type `Interested Property Type`, timeline `Timeline` / `When are you planning to make a move?`, pre-approval `Pre-approval status`.

3.7 群发前的必做：先建人群 Smart Lists

血的教训：群发前必须先建好 Saved Segment（人群包），把排除项（团队成员、租客、已退订）做进去，再对人群包发送。绝不在发送界面临时一个个剔除——那样会清空已选人群导致误发。 Hard lesson: before any blast, build the audience as a `Saved Segment` with exclusions (team members, tenants, unsubscribed) baked in, then send to that segment. Never deselect one-by-one at send time — that wipes the selection and causes mis-sends.

第四部分：套餐功能最大化 Get the Most from the Plan

你的套餐（2026-10-05 已验证 / Verified in your account):

- Agency 套餐：`Starter Account` — $970/年 / $970 per year，下次账单 2027-09-25 / next billing 2027-09-25
- 付费插件：无（`Premium Support` $500/月、`HIPAA` $297/月都没订，不需要）/ Paid add-ons: none (`Premium Support` $500/mo and `HIPAA` $297/mo not subscribed — not needed)
- 邮件发送：`LC-Email`，已绑定专用域名 `info.bchomehub.com`（默认）；另接了 Gmail SMTP（`angiezhangprec@gmail.com`，非默认）/ Email sending: `LC-Email` with dedicated domain `info.bchomehub.com` (default); also connected Gmail SMTP (`angiezhangprec@gmail.com`, non-default)
- 电话 / 短信：`LC-Phone`，2 个本地号码：+1 778-800-6258（默认 / default）、+1 862-225-6769 / Phone/SMS: `LC-Phone` with 2 local numbers: +1 778-800-6258 (default), +1 862-225-6769
- 公司资料：`Angie Zhang Personal Real Estate Corporation` · 邮箱 `angiezhangprec@gmail.com` · 电话 +1 778-926-5822 · 网站 bchomehub.com / Company profile: `Angie Zhang Personal Real Estate Corporation` · email `angiezhangprec@gmail.com` · phone +1 778-926-5822 · website bchomehub.com

4.1 套餐内含、要拼命用的功能 INCLUDED — USE MORE

这些都不额外花钱，用得越多越值。 These cost nothing extra — the more you use them, the more they're worth.

功能 Feature	现状 Status	团队动作 Team action
无限联系人、管道、自动化、日历、表单 / Unlimited contacts, pipelines, automations, calendars, forms	7 管道、10 表单、9 日历已建好 / 7 pipelines, 10 forms, 9 calendars built	每个新客户必建管道卡片；每个需求必发对应表单。/ Every new client gets a pipeline card; every need gets its form.
`Workflows` 自动化 / Automations		把 `Buyer/Seller Pipeline Automation`、普通话培育序列等有用的发布——草稿 = 没干活。/ Publish the useful ones like `Buyer/Seller`

功能 Feature	现状 Status	团队动作 Team action
	14 个在跑，16 个还是草稿 / 14 running, 16 still drafts	`Pipeline Automation` and the Mandarin nurture sequence — a draft = not working.
统一收件箱 `Conversations` / Unified inbox	已接多渠道 / Multiple channels connected	所有客户消息只在这里回，不用来回切 App。/ Reply to all client messages here only — no app-switching.
邮件群发 `Email campaigns`	`LC-Email` + 专用域名已就绪 / `LC-Email` + dedicated domain ready	群发前先建人群包（含排除项），发完看打开率。/ Build the audience segment (with exclusions) before blasting; check open rates after.
`Reputation` 口碑管理 / Reputation management	—	每次成交 / 服务完就发 review 请求——Google 38 个 5.0 星就是这么攒的。/ Send a review request after every closing/service — that's how the 38 five-star Google reviews were earned.
`Social Planner` 社交排期 / Social scheduling	—	每周的房源帖、市场帖提前排好，不用每天现想。/ Schedule the week's listing and market posts ahead — no daily improvising.
`Opportunities` + `Tasks`	—	任务到期必须清零；机会阶段必须和管道卡片同步。/ Tasks must hit zero by due date; opportunity stages must stay in sync with pipeline cards.

4.2 按量计费、要精打细算的功能 USAGE-BASED — SPEND WISELY

功能 Feature	计费方式 Billing	怎么用最省 How to spend wisely
短信 SMS（`LC-Phone`）	按条计费，钱包扣费 / Per-message, wallet-billed	只给 `h-hot` 发短信；群发、培育一律用邮件。签名只留必要信息。/ SMS only to `h-hot`; blasts and nurture by email always. Keep signatures minimal.
电话 Calls（`LC-Phone`）	按分钟计费 / Per-minute	重要客户才用系统电话；日常用自己手机。/ System calls for important clients only; use your own phone day-to-day.
邮件 Email（`LC-Email`）	按量计费，钱包扣费 / Volume-based, wallet-billed	群发前先建人群包、去重、排除退订；别给全库乱发。/ Build the segment, dedupe, and exclude unsubscribed before blasting; never spray the whole database.

功能 Feature	计费方式 Billing	怎么用最省 How to spend wisely
`Conversation AI` / `AI Employee`	付费插件（账号显示未购买 resell，但配过 Facebook AI bot）/ Paid add-on (account shows resell not purchased, but a Facebook AI bot was configured)	先确认账单再决定开不开；开了就只用在高价值场景（Facebook 私信首答）。/ Confirm billing before enabling; if enabled, use only for high-value scenarios (first reply to Facebook DMs).
`Ad Manager`	显示 1 个 $0/月 / Shows 1 at $0/mo	保持现状即可。/ Leave as is.

钱包余额查不到：`Billing` → `Wallet & Transactions` 页面在查账时打不开。Angie 需要亲自看一眼钱包余额（`LC-Phone` / `LC-Email` 都是先充值后扣费，余额不足群发会失败）。 Wallet balance couldn't be viewed — the `Billing` → `Wallet & Transactions` page wouldn't open during the audit. Angie needs to check the wallet balance herself (`LC-Phone` / `LC-Email` are prepaid; insufficient balance = failed blasts).

4.3 给团队的一句话总结 One-line summary for the team

套餐里不花钱的功能（管道、自动化、表单、日历、群发、口碑）往死里用；花钱的功能（短信、电话、AI）只用在刀刃上——热客户和成交环节。 Max out everything included (pipelines, automations, forms, calendars, blasts, reputation); spend usage-based credits only where it counts — hot leads and closing moments.

附录：快速自查卡 Quick Reference Card

新建联系人时，逐项打勾： Check off each item when creating a contact:

- ☐ 查重：姓名 / 电话 / 邮箱都搜过，没有重复 / Duplicate check: searched by name, phone, and email — no duplicates
- ☐ 有电话或邮箱（两者都没有 → 不建）/ Has phone or email (neither → don't create)
- ☐ 身份标签 `t-*`（1 个 / one）
- ☐ 来源标签 `src-*`（1 个 / one）
- ☐ 热度标签 `h-*`（1 个 / one）
- ☐ 语言标签（中文 / 英文）/ Language tag (Chinese / English)
- ☐ 备注：谁、哪认识的、要什么 / Notes: who, how you met, what they need
- ☐ 指定了负责人 Owner / Owner assigned
- ☐ 新客户：DORT + PRIV 已安排签署 / New client: DORT + PRIV signing arranged
- ☐ 推进到下一步 → 管道卡片已移动 / Moved to next step → pipeline card moved

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Angie Zhang Team · HighLevel 团队使用手册 HighLevel Team Guide · 账号 Account: `Angie Zhang Personal Real Estate Corporation` · 2026-10-05 Questions? Ask Angie or Kai（Angie Zhang Team

AI). Tag spellings in this guide are the single source of truth. / 有问题问 Angie 或 Kai（Angie Zhang Team AI）。标签写法以本手册为准。