THE LEAD CAPTURE FUNNEL

FOLLOWS UP ON ITS OWN



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HIGHLEVEL GUIDES · VOLUME 06 · PILLAR 05

LAUNCH A LEAD CAPTURE FUNNEL **THAT FOLLOWS UP ON ITS OWN.**

A lead capture funnel is one page, one form and one workflow. The page brings the visitor in, the form takes their details, and the workflow follows up the moment they submit. By the end you will have a published funnel on your own domain, a Meta pixel firing on it, and an automation that runs on every new lead.

5	38	60 min
PARTS	STEPS	TO BUILD

Michael Reimer, Founder of CRM Pros · HighLevel Commander and Certified Admin

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WHAT YOU ARE BUILDING

WHAT YOU ARE BUILDING **AND WHY IT MATTERS.**

The finished system is a single funnel page on your custom domain with a form built into it. When someone submits the form, HighLevel creates the contact, a Form Submitted workflow sends the follow up, and the funnel event pixel reports the conversion to Meta through the Conversions API. No lead sits untouched and every lead is counted.

- ✓ A funnel page live on your own root domain or subdomain with SSL
- ✓ A form with Full Name, Email and Phone that saves every submission as a contact
- ✓ A Meta pixel installed on the funnel without duplicate events
- ✓ A workflow that fires on Form Submitted and sends the first follow up
- ✓ A Conversions API action that records each lead as a funnel event in Meta

BEFORE YOU START

BEFORE YOU START **HAVE THESE READY.**

Gather these first so you build straight through without stopping.

- Access to a HighLevel subaccount
- A root domain or subdomain you own, with access to its DNS provider
- A decision on whether visitors will use the root domain or a subdomain
- A clear goal for the funnel and the one offer the page will make
- Access to Facebook Business Manager with the correct Ad Account and Page permissions
- The first follow up message you want every lead to receive

i Build the funnel first, then connect the domain, because HighLevel asks you to **link the domain to a funnel** during domain setup. Add the pixel and the workflow last, once the page and form exist to point them at.

PART 01 OF 05

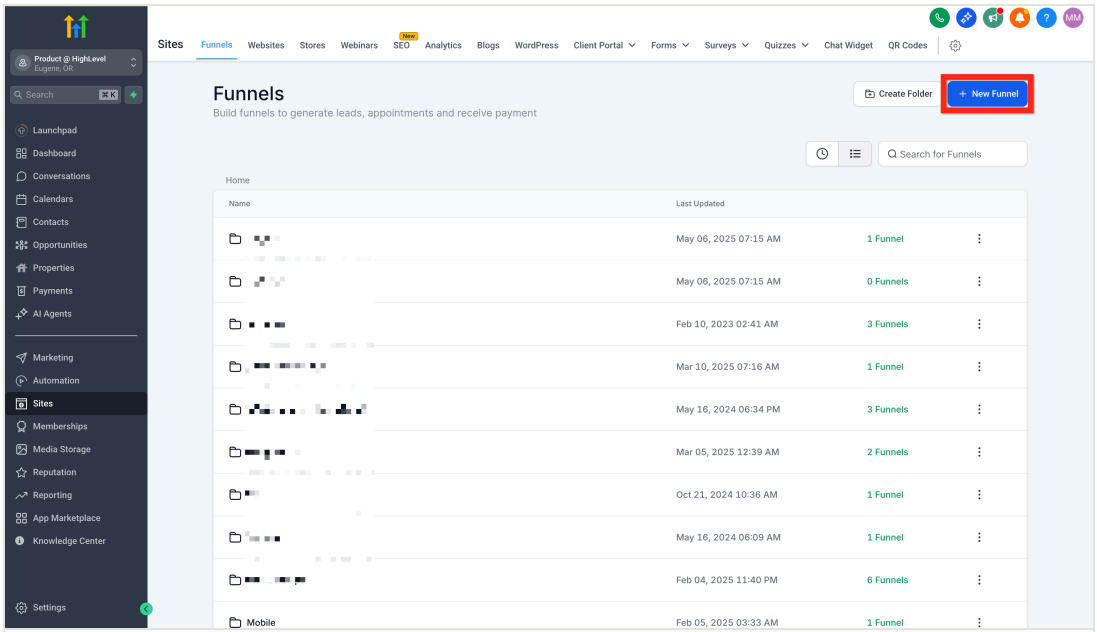
01 CREATE THE FUNNEL **FROM A TEMPLATE.**

The funnel is the container for your page. A template gets you a finished design in minutes, so you spend your time on the offer and the form instead of the layout.

01 Go to **Sites** , then **Funnels** .

02 Click **New Funnel** .

03 Select **From Template** and click **Continue** .



Start at Sites, then Funnels, then New Funnel.

04 Open the **Template Library** and search, filter and sort to find a lead capture design.

05 Preview your chosen template and click **Continue** .

06 Customize the headline, offer and images in the **Funnel Editor** .

07 Click **Save** .

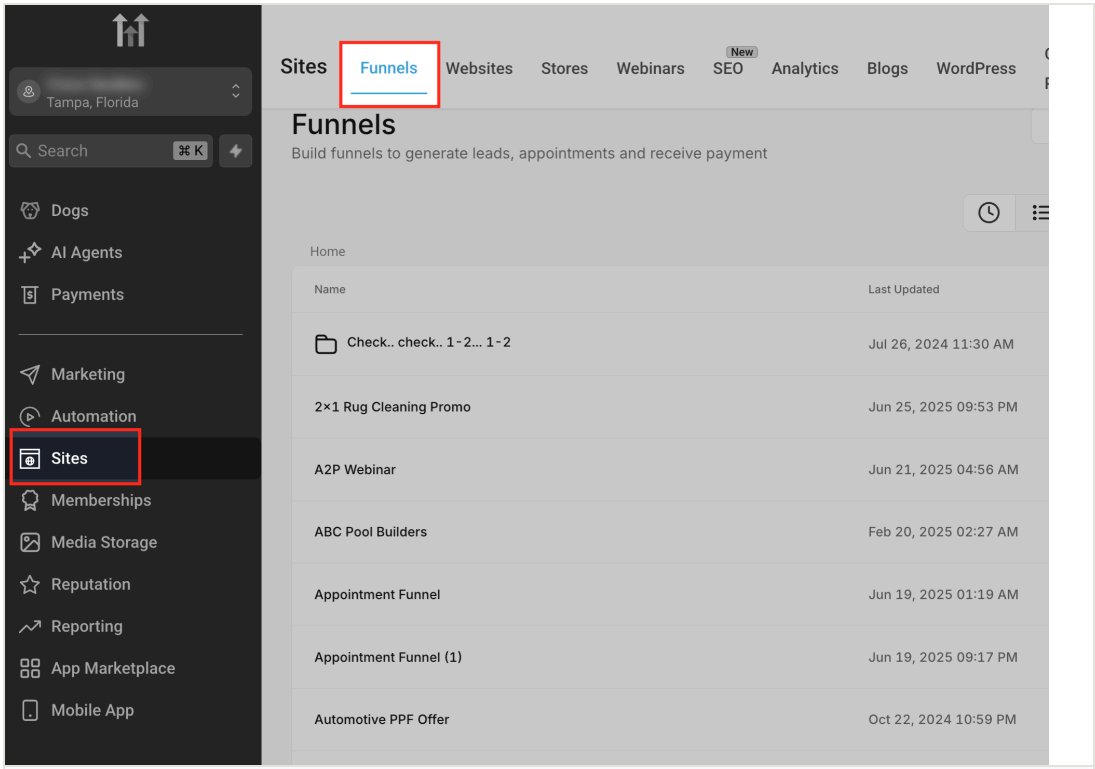
i You can also pick **From Blank** or **Funnel AI** at the New Funnel screen. For a first lead capture page, a template is the fastest path to something you can publish today.

PART 02 OF 05

02 ADD THE FORM **AND SET ITS FIELDS.**

The form is where the lead happens. You add it inside the funnel step and edit it in a pop up, so you never leave the page you are designing.

01 In **Sites** , then **Funnels** , open your funnel and select the **Steps** tab.



The form editor opens as a pop up over the funnel step.

02 Choose the step and click the **Edit** button below the step preview.

03 Click the **+** icon in the top toolbar, choose **Elements** , scroll to **Form** , and drag the **Form** element onto the page.

04 When the **Form Picker** appears, click the **Click Here** link to create a new form.

05 In the right side panel, click **Edit form** to open the pop up.

06 Use the **Quick Add** panel to drag **Full Name** , **Email** and **Phone** onto the form.

07 Choose a layout of **Single Column** , **Two Column** or **Single Line** , and adjust any field with **Field Width in Percentage** .

08 Click **Save** in the top right corner of the pop up, then click **Save** on the funnel step.

i Closing the pop up without saving discards every change. Save the form first, then save the page. A Single Line form holds up to 5 fields.

PART 03 OF 05

03 CONNECT YOUR DOMAIN **AND LINK THE FUNNEL.**

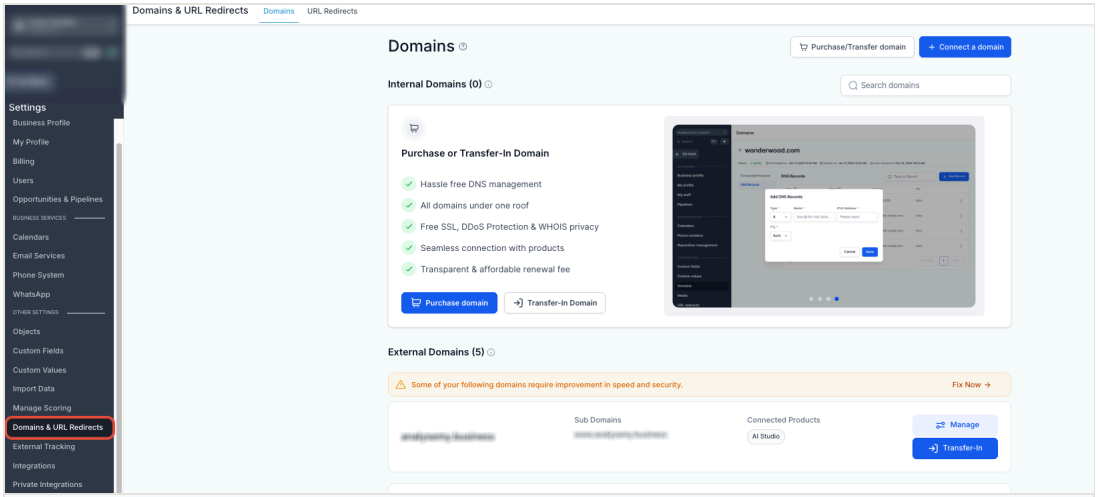
A custom domain puts the funnel on your brand instead of a HighLevel address. HighLevel verifies the DNS record, links the funnel, and provisions SSL for you.

01 From the subaccount view, click **Settings**, then **Domains & URL Redirects**.

02 Click **+ Connect a domain**.

03 Locate **Funnel/Website/Store/Blog/Webinar** and click **Connect**.

04 Enter the root domain or subdomain in the **Domain URL** field.



Enter the domain, then pick Domain Connect or manual DNS.

05 Choose **Continue** for automatic Domain Connect and authorize your provider, or choose **Add record manually** and add the record at your DNS provider: an A record at @ pointing to 162.159.140.166 for a root domain, or a CNAME pointing to sites.ludicrous.cloud for a subdomain.

06 Wait for HighLevel to verify the DNS record.

07 Select your funnel and choose the lead capture step as the default landing page.

08 Click **Link Domain** and allow a few minutes for SSL to provision.

i If Cloudflare manages your DNS, set the HighLevel record to **DNS only**, not Proxied. Never create both an A record and a CNAME for the same hostname. DNS changes can take up to 24 hours to propagate.

PART 04 OF 05

04 INSTALL THE FUNNEL PIXEL **ON EVERY PAGE.**

The pixel tells Meta who visited and who converted. You create it in Events Manager, then paste the code into the funnel so it runs on every step without duplicates.

01 In Facebook Business Manager, go to **Events Manager** and click **Connect Data Sources** in the left sidebar.

02 Choose **Web**, click **Next**, then create a new pixel or select an existing one and click **Continue**.

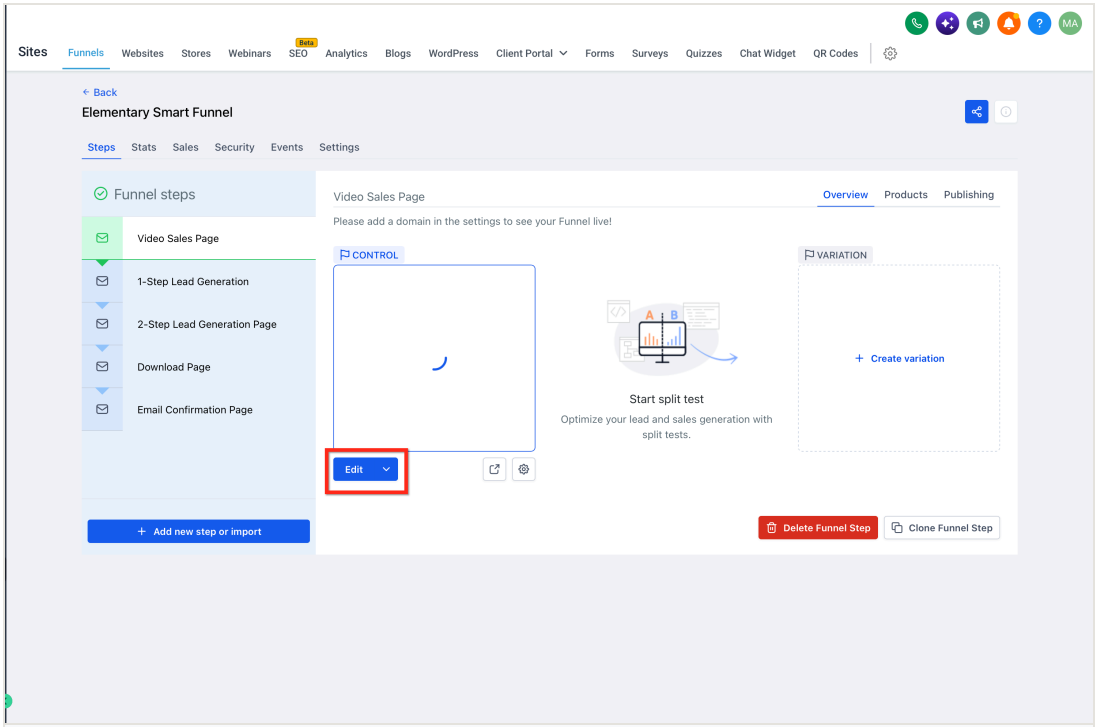
03 Enter the funnel domain, click **Check**, and wait for the green checkmark.

04 Click **Next**, choose **Meta Pixel and Conversions API**, then click **See Instructions**, continue through the industry, event and parameter selections, and click **Finish**.

05 Copy the pixel code from the Facebook popup.

06 In HighLevel, go to **Sites**, then **Funnels**, open your funnel and click the **Settings** tab.

07 Paste the code into the **Head tracking code** field and click **Save**.



Site wide scripts go in Head tracking code under the funnel Settings tab.

i Put the pixel in the funnel Settings, not on each page. Adding the same script at page level and site wide fires events twice and inflates your reports.

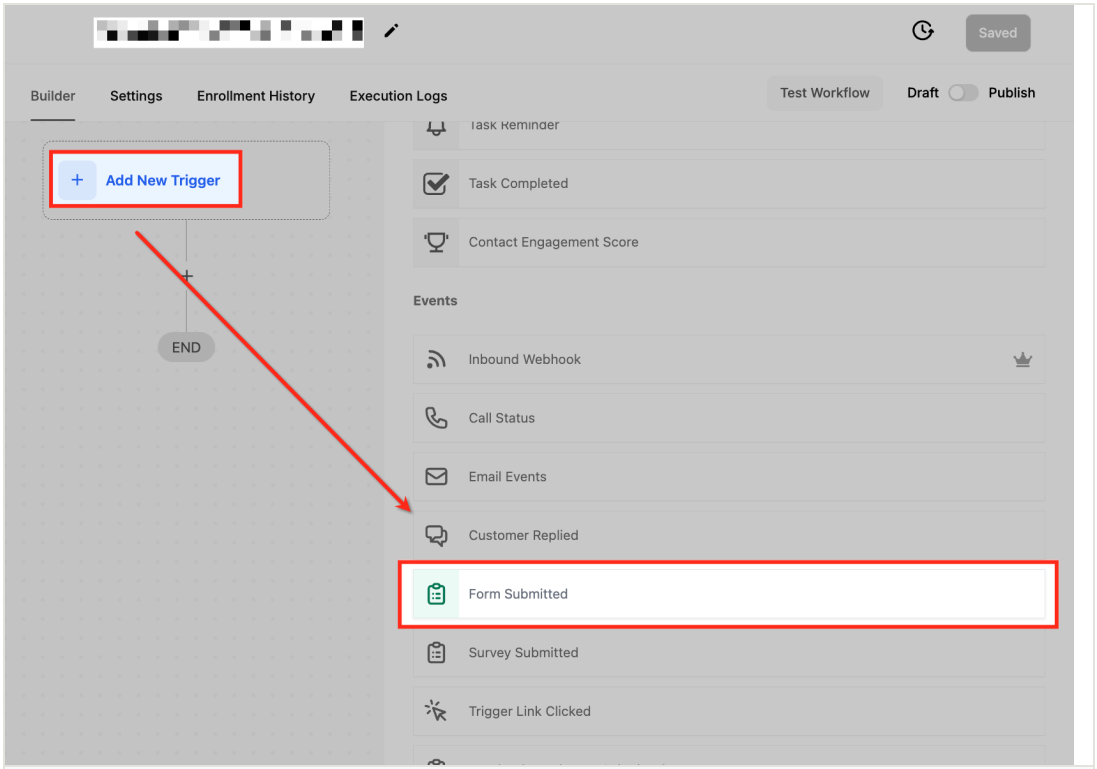
PART 05 OF 05

05 BUILD THE WORKFLOW **THAT FIRES ON SUBMIT.**

This is the part that turns a form entry into a conversation. The Form Submitted trigger starts the workflow, the follow up goes out, and the Conversions API action reports the lead to Meta.

01 Go to **Automation**, then **Workflows**, and click **Create Workflow**.

02 Click **Add New Trigger** and choose **Form Submitted** from the dropdown.



Point the Form Is filter at the exact form on your funnel.

03 Name the trigger with a descriptive label.

04 Under filters, set **Form Is** to the form you built in Part 2, then click **Save the Trigger**.

05 Add your first follow up action, such as an email or SMS, and use merge tags like {{contact.name}} to pull in the submitted data.

06 Click **Add Action**, select **Facebook Conversion API**, name the action, and set **Event Type** to **Funnel Event**.

07 Paste your **Access Token** and **Pixel ID** (Dataset ID) into the respective fields and save the action.

08 Click **Save**, then turn on the **Publish** toggle.

i The **Form Is** filter is the setting that matters most. Without it the workflow runs on every form in the subaccount, not just this one.

TEST IT

TEST IT
BEFORE YOU SEND TRAFFIC.

Run one real submission through the whole chain and watch every piece respond.

01 Open your custom domain in a browser. The funnel step loads with a padlock and no SSL warning.

02 Run a public DNS lookup on the domain. The expected HighLevel record (A 162.159.140.166 or CNAME sites.ludicrous.cloud) is publicly visible.

03 Submit the form with a test name, email and phone. The page accepts the entry.

04 Open **Contacts** in HighLevel. The test contact exists with the submitted details.

05 Open the workflow and check its history. The test contact entered through the Form Submitted trigger and the follow up went out.

06 Check the pixel with Meta's testing tool. One page view and one funnel event appear, not two of each.

WHEN A STEP FAILS

WHEN IT FAILS **HERE IS THE FIX.**

Most problems trace back to DNS, a duplicate script or a missing filter.

The funnel does not load on the domain

Verify the custom domain, check DNS propagation, and confirm the funnel is linked to the domain with a default page set.

HighLevel cannot find the CNAME or A record

Confirm which provider hosts the active DNS, remove any other A or CNAME on that hostname, enter only the hostname portion such as www in the Host field, save, wait for propagation and retry verification.

The domain shows an SSL or privacy error

Remove conflicting A, CNAME or AAAA records, make sure a Cloudflare record is set to DNS only, then allow time for propagation and SSL provisioning.

The form is not collecting leads

Confirm the form is on the page, submit a test entry, and check the workflow attached to the form.

Pixel events fire twice

Check whether the same script sits at both the page level and in the funnel Settings and remove the duplicate.

Tracking stopped after cloning a page

Page level tracking does not copy when a page is duplicated. Add the script back to the cloned page, or keep it site wide in Settings.

FROM THE FIELD

MICHAEL'S **TAKE.**



Michael Reimer

FOUNDER OF CRM PROS · HIGHLEVEL COMMANDER

I start with the domain, even before I touch the design. Connect it in Settings, verify the record, and let SSL provision while you build. DNS is the one piece you cannot rush, so get it moving first and the rest of the build never waits on it.

Where people go wrong is the form. They add eight fields because they can. Full Name, Email and Phone is enough for a lead capture page. The second mistake is the pixel. Someone pastes it on the page and again in Settings, and a week later the reports show double the conversions that actually happened. Pick one place and keep it there.

This build pays off the first time a lead comes in at 11pm and gets a reply before you wake up. One page, one form, one workflow. Once it runs clean, you clone it for the next offer and you have a repeatable way to turn traffic into conversations.

GO DEEPER

THE FEATURES **BEHIND THIS BUILD.**

Every feature this guide touches has its own page in the library, with the settings, limits and Michael's notes.

SITES

How to launch a HighLevel funnel and start capturing leads

SITES

Customizing Forms Inside Funnels using the Form Builder

SITES

Enhanced form builder features for flexible layouts in HighLevel

SITES

Setting up root domains and subdomains in HighLevel

INTEGRATIONS

Setting up the funnel event pixel in HighLevel

WORKFLOWS

Workflow Trigger: Form Submitted: Automates workflow actions

SITES

Add tracking code to funnels and websites in HighLevel