



WAVES B2B MASTER - PARKING & MOBILITY



# PARKING & MOBILITY

## B2B MASTER - STANDARD RELEASE

### Implementation & Deployment Guide

A practical setup guide for installing, configuring, testing and launching the generic Parking & Mobility B2B MASTER snapshot in HighLevel.

**INSTALL -> CONFIGURE -> CONNECT -> TEST -> LAUNCH**

**STANDARD RELEASE** This guide applies to the generic Marketplace snapshot. It covers the reusable lead-generation, qualification, handoff, nurture and sales-tracking framework. Waves-specific compensation and managed-service billing logic are intentionally excluded.

**Use this document as the deployment checklist for each new partner or customer installation.**



# 1. Deployment Philosophy

**CORE RULE** Do not rebuild the system for each customer. Install the Standard Release snapshot, keep the core logic intact, and customize only the partner-specific operating details.

## What stays standardized

- B2B Sales Pipeline structure and stage logic
- Core workflow framework and lead lifecycle
- Generic tags and opportunity status behavior
- Future Opportunity / Nurture process
- Closed Won / Closed Lost handling
- Unresponsive-lead follow-up and Lost Reason = No Response
- Reusable company-setup custom values and booking-link pattern

## What changes for each deployment

- Branding and business information
- Territory and target geography
- Users, owners, roles and notification routing
- Lead forms and source connections
- Calendar connection and booking link
- Email/SMS sender settings and phone configuration
- Campaign audience, offer and advertising accounts
- Qualification responsibility and handoff ownership

## Recommended deployment sequence

| Phase | Primary task          | Complete before moving on                               |
|-------|-----------------------|---------------------------------------------------------|
| 1     | Install snapshot      | Core assets visible in the new sub-account              |
| 2     | Company setup         | Branding, users, custom values and ownership rules      |
| 3     | Pipeline + calendar   | Stages, booking calendar and conflict calendar verified |
| 4     | Lead sources          | Forms, LinkedIn/Meta connections and field mapping      |
| 5     | Workflow QA           | All generic owner routing and messages verified         |
| 6     | Dashboard + reporting | Widgets, filters and theme checked                      |
| 7     | End-to-end testing    | Every critical lead path tested with test contacts      |
| 8     | Go live               | Real campaigns/forms connected and monitoring begins    |



## 2. What the Standard Release Includes

The Standard Release is designed to provide the reusable operating system for Parking & Mobility B2B lead generation and partner handoff. The current snapshot includes the core pipeline, fields, forms, custom values, dashboards/brand assets and nine operational workflows.

### Core workflows

| Workflow                                  | Purpose                                                                                                  |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------|
| B2B MASTER - New Lead Intake              | Creates an open B2B opportunity, preserves source, tags the lead and alerts the owner.                   |
| B2B MASTER - Lead Form Acknowledgment     | Sends a prompt acknowledgment to form/LinkedIn leads by SMS and email.                                   |
| B2B MASTER - Unresponsive Lead            | Runs timed follow-up, stops on reply, and closes no-response leads as Lost / No Response.                |
| B2B MASTER - Lead Qualification & Handoff | Tags Qualified leads and alerts the opportunity owner with handoff details and booking link.             |
| B2B MASTER - Handoff Meeting Booked       | Finds the active Qualified opportunity and moves it to Handoff Scheduled when the appointment is booked. |
| B2B MASTER - Future Opportunity Nurture   | Creates a task to document deferral details and set a future follow-up date.                             |
| B2B MASTER - Future Opportunity Follow-Up | Creates a follow-up task when the future date is updated.                                                |
| B2B MASTER - Closed Won                   | Tags the win, sets Opportunity Status = Won, and creates owner follow-up.                                |
| B2B MASTER - Closed Lost                  | Tags the loss, sets Opportunity Status = Lost, and creates owner review/notification.                    |

**NOT INCLUDED IN STANDARD RELEASE** The Waves Revenue & Compensation workflow and Waves-specific compensation/payment custom fields belong to the Managed Services edition and are excluded from the Marketplace Standard Release.



## 3. Configure the B2B Sales Pipeline

Verify the pipeline immediately after snapshot installation. The stage names and status behavior below are the baseline used by the workflows.

| Stage                        | Prob. | Status | Use                                                                                         |
|------------------------------|-------|--------|---------------------------------------------------------------------------------------------|
| New Lead                     | 10%   | Open   | New opportunity created from a lead source.                                                 |
| Contacted                    | 20%   | Open   | Initial outreach has begun.                                                                 |
| Consultation Scheduled       | 35%   | Open   | Initial discovery/needs-assessment meeting is booked.                                       |
| Qualified                    | 50%   | Open   | Lead is confirmed as a legitimate opportunity.                                              |
| Handoff Scheduled            | 60%   | Open   | Sales handoff/review meeting is booked.                                                     |
| Proposal Sent                | 70%   | Open   | Formal proposal is with the customer.                                                       |
| Negotiation                  | 85%   | Open   | Scope, price, timing or revisions are under discussion.                                     |
| Future Opportunity / Nurture | 40%   | Open   | Valid opportunity is deferred with a future follow-up plan.                                 |
| Closed Won                   | 100%  | Won    | Workflow must also set the native opportunity Status to Won.                                |
| Closed Lost                  | 0%    | Lost   | Workflow must set Status to Lost; no-response automation records Lost Reason = No Response. |

**OPTIONAL SALES STAGE** Some partners may want a Site Walk / Evaluation stage between Handoff Scheduled and Proposal Sent. Add it only when the partner will actively use it; update any related workflow/report filters if added.

### Marketplace-safe ownership rule

- [ ] Do not hard-code a named user into the MASTER.
- [ ] Tasks should use Contact's Assigned User where available.
- [ ] Internal notifications should use Assigned Owners -> Contact Owner or Opportunity Owner as appropriate.
- [ ] Use a Particular User only for a deployment-specific requirement and document that choice.



## 4. Partner Company Setup & Custom Values

Before publishing any workflow, replace the generic company-setup values with the new partner's information. These values allow the same workflow copy to behave correctly without hard-coded names or links.

### Required setup checklist

- ☐ Company/brand name and website are correct throughout the sub-account.
- ☐ Primary lead qualifier or sales contact is defined.
- ☐ B2B MASTER - Company Setup custom values are reviewed and populated.
- ☐ Booking Link custom value points to the correct HighLevel calendar.
- ☐ Lead Qualifier Name custom value contains the person/role that should sign follow-up messages.
- ☐ Default email sender/domain is configured and verified.
- ☐ Phone/SMS number is configured if SMS workflows will be used.
- ☐ Contact and opportunity owner routing is defined for new leads.

**CUSTOM VALUE RULE** Keep partner-specific names, booking URLs and reusable business details in custom values whenever possible. This is what keeps the MASTER portable.

### Native Lost Reason

Confirm the HighLevel Lost Reason list contains:

No Response

The Unresponsive Lead workflow uses the native Lost Reason field so no-response losses can be separated from competitive, price, timing or other sales losses in reporting.



## 5. Calendar & Booking Configuration

The handoff workflow depends on a valid booking calendar. Configure the calendar before activating the Qualified/Handoff workflow.

- [ ] Connect the partner's primary Google calendar (recommended) or approved calendar source.
- [ ] Use one primary conflict calendar whenever practical to reduce double-booking.
- [ ] Create or verify the HighLevel consultation/handoff booking calendar.
- [ ] Set availability, meeting duration, time zone and conferencing/location details.
- [ ] Confirm the calendar checks conflicts against the intended primary calendar.
- [ ] Remove or deactivate unintended auto-created personal calendars if they create confusion.
- [ ] Copy the live booking URL into the B2B MASTER - Company Setup Booking Link custom value.
- [ ] Use a client-specific calendar color so deployed calendars are easy to identify.

**HANDOFF WORKFLOW DEPENDENCY** When a handoff appointment is booked, the workflow finds the contact's most recently created opportunity where Pipeline = B2B Sales Pipeline, Status = Open and Stage = Qualified. If found, it moves that opportunity to Handoff Scheduled. It does not create a duplicate opportunity if none is found.

### Handoff meeting message standard

The Qualified notification should be generic and owner-based. Recommended wording:

This lead has been qualified and is ready for handoff. Please book a brief handoff meeting to review the opportunity and next steps: [Booking Link]



## 6. Connect Lead Sources & Forms

The MASTER can accept leads from selected HighLevel forms, LinkedIn Lead Gen Forms and additional sources. Every source should feed the same pipeline and preserve Contact Source into Opportunity Source.

### Lead intake mapping

| Data                  | Required behavior                    |
|-----------------------|--------------------------------------|
| Contact name          | Opportunity Name = Contact Full Name |
| Source                | Opportunity Source = Contact Source  |
| Pipeline              | B2B Sales Pipeline                   |
| Stage                 | New Lead                             |
| Status                | Open                                 |
| Duplicate opportunity | Disabled in New Lead Intake          |
| Lead tag              | b2b - lead                           |

### LinkedIn deployment checklist

- ☐ Partner has a LinkedIn Campaign Manager ad account.
- ☐ Correct LinkedIn Page and ad account access is confirmed.
- ☐ Insight Tag / Partner ID is obtained if website tracking will be used.
- ☐ Privacy policy URL and required privacy text are partner-specific.
- ☐ Lead form fields match the CRM fields used by the snapshot.
- ☐ The intended LinkedIn lead form is connected to HighLevel before launch.
- ☐ Campaign audience, territory and offer are customized for the partner.
- ☐ Form/campaign is tested before paid delivery begins.

**LEAD FORM BASELINE** A proven Parking & Mobility lead-form structure uses a concise improvement-focused headline, a short problem/needs introduction, and core fields such as first name, last name, email and company name. Add phone or other fields only when they support the partner's qualification process.

### Meta / other sources

Meta forms and website forms can also be connected. Preserve the same intake behavior: one CRM contact, one open opportunity, source retained, immediate acknowledgment and owner notification.



## 7. Workflow Configuration & QA

The workflows are supplied as a reusable framework. Review their settings after snapshot installation, but do not redesign them unless the partner's operating model requires it.

| Workflow                     | Deployment QA                                                                                                         |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| New Lead Intake              | Triggers: contact created / selected form / LinkedIn form. Create Open opportunity at New Lead. Notify Contact Owner. |
| Lead Form Acknowledgment     | Use generic SMS/email copy. Leave sender fields blank when account defaults should apply.                             |
| Unresponsive Lead            | Reply exits follow-up. Timeout branches end at Closed Lost + Status Lost + Lost Reason No Response.                   |
| Qualification & Handoff      | Trigger = Qualified. Add b2b - qualified. Notify Opportunity Owner. Use Booking Link custom value.                    |
| Handoff Meeting Booked       | Find Pipeline=B2B Sales Pipeline + Status=Open + Stage=Qualified; move to Handoff Scheduled.                          |
| Future Opportunity Nurture   | Task assigned to Contact's Assigned User. Due next day. Skip weekends ON.                                             |
| Future Opportunity Follow-Up | Task assigned to Contact's Assigned User. Skip weekends ON.                                                           |
| Closed Won                   | Add b2b - closed won. Update Status = Won. Task/notification dynamically owner-based.                                 |
| Closed Lost                  | Add b2b - closed lost. Update Status = Lost. Task/notification dynamically owner-based.                               |

**SAFETY DURING TESTING** Before using Test Workflow or manually moving a test opportunity, identify whether that step will send a real SMS/email/internal notification and exactly who will receive it. Use test contacts and test destinations whenever possible.



## 8. Dashboard & Reporting Standard

The snapshot is designed to provide a consistent sales and lead overview. Confirm the widgets are using the correct pipeline and that no deployment-specific filters still point to a prior partner.

### Visual theme standard

| Widget type            | Title   | Background | Metric/Text | Chart   | Link    |
|------------------------|---------|------------|-------------|---------|---------|
| KPI / Number           | #5EDAF2 | #090D24    | #FFFFFF     | #21B8F6 | #2F80FF |
| Chart / Graph / Funnel | #0B1F33 | #B8D7E8    | #0B1F33     | #21B8F6 | #2F80FF |

### Reporting verification

- [ ] Dashboard pipeline filters point to B2B Sales Pipeline.
- [ ] Lead-source reporting is populated from Contact/Opportunity Source.
- [ ] Qualified, Handoff Scheduled, Proposal Sent, Won, Lost and Future stages are visible.
- [ ] Closed Won and Closed Lost native statuses match the pipeline stage.
- [ ] Lost Reason reporting can distinguish No Response.
- [ ] Standard Release contains no Waves compensation/payment widgets or fields.



## 9. End-to-End Test Plan

Run the complete test before connecting paid advertising. Test with controlled contacts so no real customer or partner receives unintended communication.

| #  | Test                                 | Expected result                                                                                             |
|----|--------------------------------------|-------------------------------------------------------------------------------------------------------------|
| 1  | Submit a test website/HighLevel form | Contact created; acknowledgment delivered; opportunity created at New Lead; source retained; owner alerted. |
| 2  | Submit/test LinkedIn lead flow       | Lead appears in CRM with correct source and field mapping.                                                  |
| 3  | Move opportunity to Contacted        | No unexpected automation; manual outreach process remains intact.                                           |
| 4  | Schedule consultation if used        | Calendar event appears on intended connected calendar.                                                      |
| 5  | Move to Qualified                    | b2b - qualified tag added; Opportunity Owner receives handoff notification with correct booking link.       |
| 6  | Book handoff meeting                 | Existing Open/Qualified opportunity moves to Handoff Scheduled; no duplicate created.                       |
| 7  | Move to Future Opportunity / Nurture | Owner task created; follow-up date process works; weekend skip honored.                                     |
| 8  | Set/change Future Follow-Up Date     | Review Future Opportunity task is created for Contact's Assigned User.                                      |
| 9  | Move to Closed Won                   | b2b - closed won tag added; native Status becomes Won; owner follow-up created.                             |
| 10 | Run no-response path                 | Follow-up stops on reply. If timeout completes, opportunity ends Closed Lost / Lost / No Response.          |
| 11 | Move a manual loss to Closed Lost    | Native Status becomes Lost; owner receives the expected review task/notification.                           |



## 10. Go-Live Checklist

- ☐ Snapshot installed into the correct partner sub-account.
- ☐ Partner branding and company settings complete.
- ☐ Users invited and permissions confirmed.
- ☐ Contact/Opportunity ownership rules tested.
- ☐ Primary email sending domain and sender identity verified.
- ☐ Phone/SMS configuration verified if SMS is enabled.
- ☐ B2B Sales Pipeline stage order and probabilities confirmed.
- ☐ No Response Lost Reason exists.
- ☐ Company Setup custom values completed, including booking link and qualifier name.
- ☐ Calendar connected; conflicts and availability tested.
- ☐ HighLevel/LinkedIn/Meta forms mapped to the intended fields.
- ☐ All owner notifications point to dynamic Assigned Owners, not a hard-coded implementation user.
- ☐ Acknowledgment messages reviewed for partner-specific language.
- ☐ Unresponsive workflow tested through reply and timeout branches.
- ☐ Qualified -> Handoff Scheduled sequence tested.
- ☐ Closed Won native Status = Won verified.
- ☐ Closed Lost native Status = Lost verified.
- ☐ Dashboard filters and visual theme verified.
- ☐ Paid advertising remains OFF until lead flow and notifications are confirmed.
- ☐ Go-live owner and first-week monitoring responsibility assigned.

**FIRST WEEK AFTER LAUNCH** Monitor every new lead manually during the first week. Confirm source attribution, acknowledgment delivery, opportunity creation, owner routing, calendar booking and stage movement before relying on the automation unattended.



## 11. Day-to-Day Operating Model

| Stage                        | Primary action                                                             |
|------------------------------|----------------------------------------------------------------------------|
| New Lead                     | Review lead details and make first outreach promptly.                      |
| Contacted                    | Continue discovery and schedule the initial consultation when appropriate. |
| Consultation Scheduled       | Conduct discovery/needs assessment and document relevant notes.            |
| Qualified                    | Confirm fit and trigger the sales handoff process.                         |
| Handoff Scheduled            | Conduct the handoff/review meeting with the receiving sales owner.         |
| Proposal Sent                | Track proposal status, next step and customer questions.                   |
| Negotiation                  | Document scope/pricing changes and decision timing.                        |
| Future Opportunity / Nurture | Set a real follow-up date and retain deferral context.                     |
| Closed Won                   | Confirm status is Won and complete fulfillment/closeout follow-up.         |
| Closed Lost                  | Confirm status is Lost and record the correct lost reason.                 |

### Qualification responsibility

The MASTER supports either a central qualifier model or partner-managed qualification. The deployment team should decide who owns the lead before launch and configure Contact Owner, Opportunity Owner, phone/SMS, calendar and handoff notifications around that model.

**SOURCE OF TRUTH** Keep the generic MASTER stable. When live deployments reveal a proven improvement, validate it first, then apply the improvement to the MASTER and refresh future snapshot releases. Avoid making customer-specific changes directly in the untouched baseline.



## 12. Common Deployment Checks

| Symptom                                     | Check first                                                                                                              |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| Lead entered CRM but no opportunity         | Confirm New Lead Intake trigger fired and Create Opportunity action is enabled.                                          |
| Opportunity created in wrong stage          | Verify Create Opportunity -> Pipeline Stage = New Lead.                                                                  |
| Owner did not receive SMS                   | Confirm Contact Owner/Opportunity Owner exists, Assigned Owners routing is selected, and phone/SMS is configured.        |
| Qualified handoff link is wrong             | Update the Company Setup Booking Link custom value.                                                                      |
| Handoff booking does not move stage         | Confirm appointment trigger/calendar, Find Opportunity filters, and Handoff Scheduled stage.                             |
| Duplicate opportunity created               | Verify New Lead duplicate setting is disabled and Handoff workflow uses Find Opportunity rather than Create Opportunity. |
| Closed Won still appears Open               | Confirm Closed Won workflow includes Update Opportunity -> Status = Won.                                                 |
| Closed Lost still appears Open              | Confirm Closed Lost workflow includes Update Opportunity -> Status = Lost.                                               |
| No-response loss has blank reason           | Confirm native Lost Reason includes No Response and the timeout Update Opportunity action sets it.                       |
| Future task lands on weekend                | Confirm Skip weekends is ON for nurture/follow-up tasks.                                                                 |
| Email shows wrong sender                    | Review account default sender/domain or explicit From Name/Email fields.                                                 |
| Marketplace buyer sees Waves billing fields | Confirm Standard Release excludes Revenue & Compensation workflow and Waves compensation/payment custom fields.          |

**FINAL NOTE** This guide is intended to travel with the Standard Release snapshot. The snapshot provides the reusable framework; successful deployment still requires deliberate partner configuration, testing and ownership decisions before live advertising is connected.