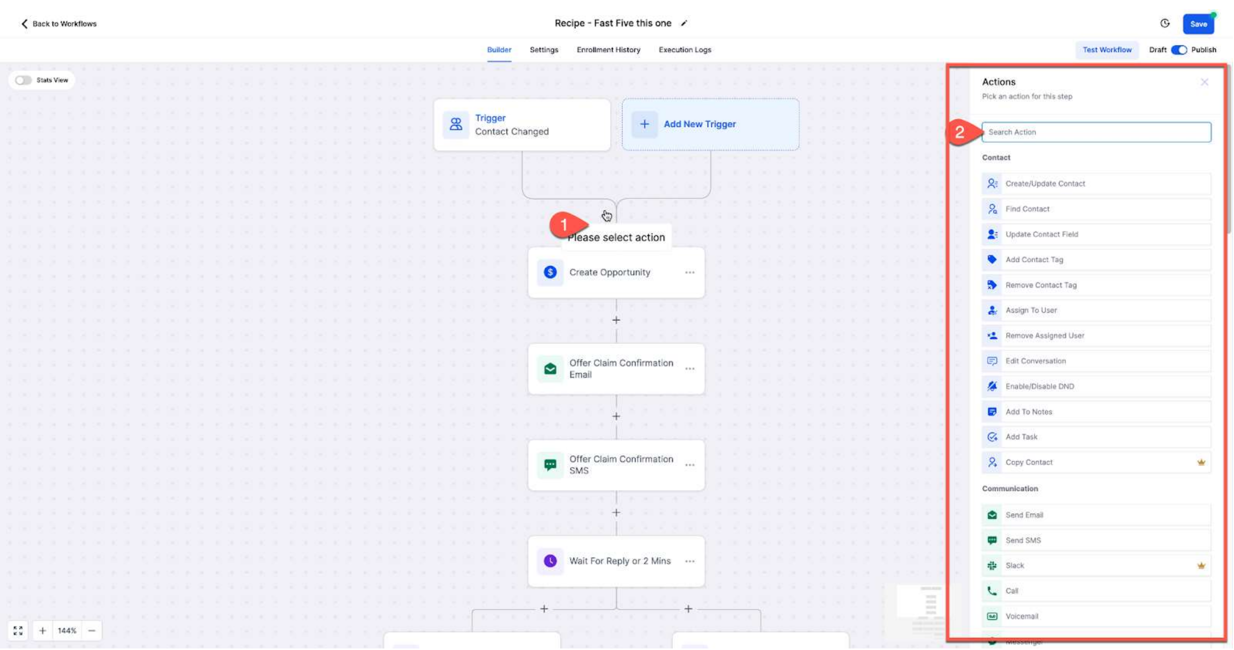
- **Workflow Action:** Follows the trigger and performs tasks as instructed.

## Action Categories

Workflow Actions are organized into categories to make them easier to find and use. The categories are:

- Contact Actions
- Communication Actions
- Send Data
- Internal Tools Actions
- Workflow AI Action
- Eliza Actions
- Appointments Actions
- Opportunities Actions
- Payments Actions
- Marketing Actions
- Affiliate Actions
- Courses Actions
- IVR (Interactive Voice Response) Actions
- Communities Actions

You can access Workflow Actions within the workflow build and then select the add action button.




Below we will break down of each action - notating what it does and what it's "useful for" to get you started!

# Contact Actions

**Create Contact:**

- Removes a contact from the system.
- Useful for: Helps in contact list maintenance.

**Modify Contact Engagement Score:**

- Adjusts a contact's engagement score.
- Useful for: Assists in evaluating contact interaction and responsiveness.

**Add/Remove Contact Followers:**

- Adds or removes followers to/from a contact.
- Useful for: Facilitates shared contact visibility within teams or departments.

## Communication Actions

**Send Email**

- Sends an email to the contact.
- Useful for: Allows personalized communication via email, facilitating follow-ups, updates, and notifications.

**Send SMS**

- Sends an SMS to the contact.
- Useful for: Enables direct and immediate communication via text, suitable for alerts, reminders, and quick interactions.

**Send Slack Message**

- Sends a message via Slack if integrated.
- Useful for: Facilitates team communication and internal notifications within Slack, streamlining collaboration and task management.

**Call**

- Makes a phone call to the contact, if they pick up, it will attempt to ring a user.
- Useful for: Automates lead outreach and management, useful for auto-dialing, and efficiently connecting leads with assigned users.

**Messenger**

- Sends a Facebook message to the contact.
- Useful for: Manages inbound messages via Facebook Messenger, enabling personalized communication and customer engagement.

**Instagram DM**

- Sends an Instagram Direct Message.
- Useful for: Engages with customers via Instagram Direct Messages, enhancing social media interaction and customer support.

**Manual Action**

- Prompts a manual action to be performed by a user for a contact.

## Send Data

**Webhook/Custom Webhook:**

- Sends data from HighLevel to external applications or services.
- Useful for: Facilitates integration with other tools and services.

**Google Sheets:**

- Manages data in Google Sheets, enabling updates or lookups.
- Useful for: Automates data management and reporting.

## Internal Tools Actions

**If Else**

- Creates branches based on conditions.
- Useful for: Allows personalized customer experiences by directing contacts down specific paths based on conditions, useful for segmentation and customization.

**Wait Step**

- Delays the workflow for a specific time.
- Useful for: Useful for scheduling actions or communications at a later time, enhancing workflow efficiency and timing.

**Goal Event**

- Directs contacts to a specific event goal.
- Useful for: Helps contacts skip unnecessary steps in a workflow, useful for optimizing customer journeys and automation.

**Split**

- Conducts a split test within a workflow.
- Useful for: Allows comparison of different paths or actions, useful for optimizing marketing messages and strategies.

**Update Custom Value**

- Updates custom values.
- Useful for: Enables dynamic updating of custom fields based on events or triggers, enhancing data management and personalization.

**Go To**

- Directs contacts to another workflow.
- Useful for: Facilitates moving contacts between workflows, useful for managing complex customer journeys without duplication.

**Remove from Workflow**

- Removes contacts from a workflow.

## Appointments Actions

**Update Appointment Status:**

- Updates appointment status (e.g., rescheduled, no show, completed).
- Useful for: Managing appointment statuses and bookings on your calendars.

**Generate One Time Booking Link:**

- Generates a one-time booking link to send to clients.
- Useful for: Sending a booking link via SMS or email to protect your calendar from multiple bookings.

## Opportunities Actions

Create/Update Opportunity:

- Creates or updates an opportunity in the pipeline.
- Useful for: Managing opportunity pipelines and moving opportunities along the pipeline.

Remove Opportunity:

- Removes the opportunity from specific or multiple pipelines.
- Useful for: Managing opportunities by removing them from pipelines.

## Payments Actions

**Stripe One-Time Charge**:

- Charges a one-time fee via Stripe using the Stripe Customer ID ("cus_id").
- Useful for: Sending one-time charges to customers via integrated Stripe.

**Send Invoice:**

- Sends an invoice created in HighLevel to the customer.
- Useful for: Automating invoice management and sending invoices to customers.

**Send Documents and Contracts:**

- Sends a document or contract from a template to the customer.
- Useful for: Automating the process of sending contracts or documents to customers.

## Marketing Actions

**Add to Google Analytics:**

## IVR (Interactive Voice Response) Actions

**Gather Input on Call:**

- Gathers input from callers to determine their path in the IVR.
- Useful for: Creating IVR branches based on caller input.

**Play Message:**

- Plays a message within the IVR journey.
- Useful for: Providing information or instructions during the IVR experience.

**Connect to Call:**

- Connects the call to a specific user or number.
- Useful for: Forwarding calls to the appropriate user or number.

**End Call:**

- Ends the call.
- Useful for: Ending the call after a specific action or message.

**Record Voicemail:**

- Records a voicemail from the caller.
- Useful for: Allowing callers to leave voicemail messages.

## Communities Actions

Grant Group Access:

- Grants access to a specific community group.
- Useful for: Managing access to community groups.

Revoke Group Access:

- Removes access from a specific community group.
- Useful for: Managing access to community groups.

Workflow actions in HighLevel are a powerful way to manage contacts and automate business processes, streamlining tasks such as appointment scheduling, opportunity management, payments, marketing, affiliate management, course offerings, IVR interactions, and community access.