

GoHighLevel Setup Checklist

Build a usable sub-account, verify each handoff and launch with clear owners and recovery steps.

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I set up the account around the business process first. This checklist uses general terminology rather than menu paths. Feature access, sender requirements and integrations vary by account and region; verify them in the account before designing a dependency.

Business / sub-account owner / builder / planned launch date

01 / Agree the operating brief

- ☐ Write the offer, lead sources, sales owners, service area and handoff process.
- ☐ Choose the business timezone, working hours, response coverage and escalation contact.
- ☐ List existing systems and decide which system owns each record.

02 / Complete the business profile

- ☐ Verify business name, address, website and public contact details with the owner.
- ☐ Confirm timezone, currency where applicable and the details used in outgoing messages.
- ☐ Record billing and integration owners without storing passwords in this worksheet.

03 / Assign access by responsibility

Access plan - use the permissions supported by the account

Role	Needed responsibility	Named owner
Administrator	Account, billing, integrations and access approval.	
Builder	Approved configuration and workflow changes.	
Sales / service user	Assigned leads, conversations, tasks and calendars.	
Reporting viewer	Approved reporting access with limited editing.	

Configuration approver / backup owner / access review date

Use individual accounts and strong authentication where available. Test actual permissions using a non-admin user before launch. Keep real customer data out of test records.

Establish a trusted sending path

04 / Map the domain roles

List the website or funnel domain, email sending domain, reply mailbox and any tracking domain. Keep ownership and renewal responsibility explicit. A DNS change should have an approver and a record of the previous value.

Domain register

Domain / purpose	DNS owner / access confirmed	Verification / next action

05 / Configure email sending

- ☐ Choose the sending service supported by the account and confirm eligibility.
- ☐ Use the exact DNS records supplied by the provider; verify ownership and authentication.
- ☐ Review SPF, DKIM and DMARC with the domain owner. Do not replace existing email records blindly.
- ☐ Set a recognizable sender name, address and a monitored reply path.
- ☐ Define unsubscribe and suppression handling for the message types you will send.
- ☐ Use contacts with an appropriate permission basis; avoid importing unverified lists into a launch send.

06 / Test the complete email path

- ☐ Send test messages to controlled inboxes and inspect authentication results.
- ☐ Check sender identity, reply delivery, links, mobile readability and personalization fallbacks.
- ☐ Test unsubscribe handling and confirm suppressed contacts stay out of later sends.
- ☐ Confirm failures and bounces are visible to an owner.
- ☐ Record the test date and outcome; a successful test is not a guarantee of future inbox placement.

Reply mailbox owner / failure alert owner / test evidence

Open sending issue / owner / due date

Verify identity, routing and preferences

07 / Connect numbers deliberately

- ☐ Choose numbers and calling or messaging services supported for the business and region.
- ☐ Complete the identity, business or sender registrations required by the selected provider.
- ☐ Assign each number a purpose and an owner; verify inbound call and message routing.
- ☐ Define business-hours behavior, after-hours handling and a fallback for unavailable staff.

Phone number register

Number / purpose	Routing / coverage owner	Registration or test status

08 / Build preference and suppression rules

- ☐ Record permission source, timestamp, scope and preferred channel where applicable.
- ☐ Agree how opt-outs and do-not-contact requests are recognized and stored.
- ☐ Make every workflow check suppression before sending.
- ☐ Verify sending windows, message requirements and eligibility with the connected service owner.
- ☐ Review call recording, disclosure and retention choices with the business owner before enabling them.

09 / Prove the communication path

- ☐ Test an inbound call, missed call, voicemail, inbound text and outbound reply.
- ☐ Confirm caller identity, routing, conversation ownership and callback tasks.
- ☐ Test an opt-out and any supported re-subscription path without assuming permission was restored.
- ☐ Check failed-delivery handling and confirm the team can see the exception.

Permission field / suppression rule / person responsible

Test number / date / evidence / unresolved issue

Define the pipeline before automation

10 / Create stages with evidence

Use buyer progress, not staff activity, as the stage meaning. A call attempted is an activity; a discovery meeting agreed is evidence. Define a separate process when two services have different buying journeys.

Pipeline setup worksheet

Stage	Entry / exit evidence	Owner / next-action SLA

11 / Choose fields and storage

- ☐ Define contact, company and opportunity facts without duplicating the same meaning.
- ☐ Capture source, service interest, owner, next action, due date and preference status.
- ☐ Use controlled choices for stages, lost reasons and reporting categories.
- ☐ Choose a field type, allowed values and source of truth for every important field.
- ☐ Decide how duplicates, multiple opportunities and re-opened deals are handled.

Field dictionary starter

Field / type	Record level / allowed values	Required when / enforcement

12 / Set reusable custom values

Use custom values for stable shared content such as business name, support details or a standard booking destination. Use record fields for a person's or deal's facts. Do not place secrets in message templates.

Shared values / owner / where each value is used

Test required-field enforcement. Depending on account capabilities, a rule may need a form, workflow or human review rather than a stage setting.

Make entry points match the process

13 / Configure calendars

- ☐ Assign the booking owner or team and connect the intended availability source.
- ☐ Set timezone, working hours, duration, buffers and booking notice rules.
- ☐ Check conflict handling and the route for unavailable or unassigned staff.
- ☐ Write confirmation, reminder, reschedule and cancellation messages with preference checks.
- ☐ Confirm the meeting location or call method and who receives booking notifications.

14 / Build forms and surveys

- ☐ Ask only for fields needed to respond or qualify; label required fields clearly.
- ☐ Map every answer to the correct record field and use sensible validation.
- ☐ Record lead source and campaign context where available.
- ☐ Make channel permissions and preferences explicit; avoid ambiguous combined choices.
- ☐ Define completion, error and confirmation states and a useful next step.
- ☐ Choose whether a long qualification survey belongs before or after the first conversation.

Intake asset register

Form / survey / calendar	Field or event mapping	Owner / expected next step

15 / Test from a new record

- ☐ Submit on mobile and desktop with complete, incomplete and duplicate data.
- ☐ Confirm the right contact, opportunity, source, owner and next action are created.
- ☐ Book, reschedule, cancel and test a timezone different from the business timezone.
- ☐ Check notifications, calendar conflicts and messages without relying on admin-only access.

Intake test / expected result / actual result / fix owner

Build speed-to-lead and nurture safely

16 / Design the speed-to-lead path

Set the response target from actual staffing coverage. The automated acknowledgment and the first human response are different events; measure both.

Recommended build order - adapt to your process

Step	Rule to configure and prove
Trigger and eligibility	Use an explicit inquiry or stage event. Filter tests, duplicates and suppressed contacts.
Record and assign	Create or update once, set the right owner and record a next action.
Acknowledge	Send an appropriate confirmation only through an eligible channel.
Notify and task	Alert the owner and create a dated task with useful context.
Wait and escalate	Check for reply, booking or completion before escalating overdue work.
Exit	Stop on reply, booking, disqualification, opt-out or another defined terminal event.

17 / Build nurture around intent

Segment by service, buying stage and permission. Every step should answer a likely question or invite a useful action. Define a maximum sequence and an exit; repeated sends are not a nurture strategy.

Nurture workflow template

Trigger / audience / permission	Message purpose / timing	Exit / owner / evidence

18 / Test exceptions before publishing

- ☐ Test new lead, duplicate submission, reassignment, no response and after-hours arrival.
- ☐ Reply, book and opt out during a wait step; confirm later messages stop.
- ☐ Confirm repeated triggers do not create duplicate tasks or parallel sequences.
- ☐ Route failed actions and unowned records to a visible exception queue.

Human response target / covered hours / escalation owner

Set limits before enabling AI

Conversation AI and voice AI should serve a defined job. Confirm feature and channel availability in the account, then decide what the assistant may answer, collect, book or change. Keep a human route available.

19 / Define scope and approved knowledge

- ☐ Write the use case: answer approved questions, collect intake details or help with booking.
- ☐ Supply verified service descriptions, hours, locations, exclusions and escalation contacts.
- ☐ Forbid unsupported prices, guarantees, availability claims or commitments.
- ☐ Specify which information may be collected and where it is stored.
- ☐ Keep sensitive or unnecessary details out of the knowledge and test records.

20 / Design the human handoff

- ☐ Define handoff on explicit request, low confidence, complaint or an out-of-scope question.
- ☐ Assign a queue owner, response target and after-hours fallback.
- ☐ Pass the conversation summary, collected facts and unresolved question to the human.
- ☐ Prevent conflicting AI and human replies when ownership changes.

21 / Test text and voice separately

AI test set - record actual behavior

Scenario	Expected behavior	Pass / issue / owner
Unknown answer or price	Admit the limit; route to a human.	
Booking conflict / cancellation	Use the approved booking path; confirm the outcome.	
Opt-out or human request	Stop the relevant automation; hand off as defined.	
Voice interruption / unclear speech	Clarify or transfer without inventing facts.	
Unavailable human / tool failure	Explain the next step and create a visible follow-up.	

For voice, agree identity disclosure, permission, recording and retention choices before a pilot. Review real pilot conversations with appropriate access controls before widening scope.

AI approver / pilot boundary / disable and handoff owner

Close delivery and measure the work

22 / Configure reputation follow-up

- ☐ Choose the verified business review destination and a clear request owner.
- ☐ Trigger requests after a real service milestone, with suitable contact preferences.
- ☐ Use a neutral request for honest feedback; do not filter invitations by expected sentiment.
- ☐ Separate service issue handling from public replies and avoid exposing customer details.
- ☐ Stop duplicate requests and record how complaints reach a human.

Reputation request plan

Completion event	Request channel / timing	Reply or issue owner

23 / Define reporting before choosing charts

Reporting specification

Question	Metric / definition	Source / owner
Are inquiries handled?	Unassigned leads, first human response time and overdue tasks.	
Does the pipeline move?	New opportunities, stage aging and conversion by cohort.	
Do bookings happen?	Booked, attended, cancelled and no-show events using clear definitions.	
Does business close?	Won and lost counts; booked revenue separate from collected cash.	
Do automations work?	Failures, suppression events and exceptions awaiting a person.	

24 / Check the numbers

- ☐ Use a consistent timezone, date field, cohort and reporting window.
- ☐ Exclude test records; define how duplicate and reopened opportunities are counted.
- ☐ Reconcile a small sample from intake through opportunity to outcome.
- ☐ Separate platform attribution from CRM outcomes; document missing source data.
- ☐ Check that sales users see the records and reports they need, with appropriate limits.

Dashboard owner / review cadence / known data gap

Release with evidence and a recovery path

25 / Complete end-to-end QA

- ☐ A new inquiry creates one correct record and a visible owned next action.
- ☐ Returning and duplicate inquiries follow the agreed merge or update rules.
- ☐ Email replies, calls and SMS reach the assigned person.
- ☐ Booking, rescheduling, cancellation and no-show handling behave as designed.
- ☐ Reply, opt-out, won and lost events stop the intended sequences.
- ☐ After-hours leads, absent users and failed actions reach the fallback owner.
- ☐ AI boundaries and human handoff pass the agreed test set.
- ☐ A non-admin user can do the job and cannot change restricted configuration.
- ☐ Reports reconcile to test records and test data is marked or excluded.

Launch evidence and open issues

Test / record reference	Expected / actual result	Evidence / owner / resolved

26 / Agree release and recovery

Record the approved configuration and previous settings. Launch with a limited, observed flow first. If routing or messaging fails, pause the affected workflows, preserve inbound capture and move work to a named manual queue. Record who can restore the previous configuration.

Go-live approver / release window / rollback owner

27 / Hand over the operating system

Leave a field dictionary, stage rules, workflow map, sender register, access owners and support contacts. Schedule the first review and assign every unresolved issue before calling the setup complete.

First review date / operating owner / remaining issue

Want help implementing this?

Bring your completed worksheets. I can help turn your next decision into a working growth system.

shoebloodhi.com/contact