GoHighLevel Client Onboarding Checklist

The order I work through when a new client sub-account goes live, with the Help Center article behind every step. Tick items as you go; progress stays in this browser. Print it or download the PDF. No email needed.

By Hamid Mazumder ✓ Checked against HighLevel docs on 30 Oct 2026 29 sources

1 Create the sub-account (with a snapshot if you have one)

- [ ] Create the sub-account from Agency View. To start from a snapshot, open Account Snapshots and click Create New Account (+) next to it.
  Only Agency Admins can create a sub-account from a snapshot, and only one snapshot can be picked at creation.
  Source: Create New Sub-Account Using a Snapshot
- [ ] Loading into an existing sub-account instead? Use Manage Client, Actions, Load Snapshot, pick only the assets you need and review every conflict (Override or Skip).
  Source: Load a Snapshot Into an Existing Sub-Account
- [ ] List what the snapshot did not bring over and add it to this checklist: contacts, conversations, Stripe, integrations and other third-party connections.
  Source: Snapshots Overview
- [ ] Remember funnels and websites from a snapshot arrive as drafts. They stay offline until a domain is connected and they are published.
  Source: Create New Sub-Account Using a Snapshot

Want a written record of what the snapshot loaded? Snapshot Atlas, my own Chrome extension, documents a sub-account's workflows, funnels, pipelines, forms and AI agents.

From my CSM days: A snapshot cannot be unloaded once applied, so I load it into a fresh sub-account first and click through it before the client ever logs in. It is far easier to fix a template once than in every client account.

2 Business profile

- [ ] Fill in General Information in Settings, Business Profile: logo, business name, email, phone, website, niche and default currency.
  Source: Business Profile Settings
- [ ] Enter the physical address exactly as it appears on the EIN listing, and set the business time zone and platform language.
  The time zone drives booking times and the platform language carries through to checkout pages.
  Source: Business Physical Address & Time Zone
- [ ] Complete Business Information: business type, industry, registration ID type and number, and regions of operation. Click Update Information.
  Accurate details here reduce delays in A2P review.
  Source: Business Information: Type & Registration
- [ ] Add the Authorized Representative: the person who can verify the business in compliance reviews and carrier approvals.
  Source: Business Profile Settings

- [ ] Review the General toggles and Contact Deduplication Preferences before any contacts come in.
  Source: Business Profile Settings

From my CSM days: Get the client to send their EIN letter (CP-575 or 147C) on day one. The business profile, A2P and Stripe all want the same legal details, and copying them once from the letter avoids three different spellings.

3 Users and permissions

- [ ] Set the sub-account Feature Permissions first, so the client only sees what they are paying for.
  A user can never have more access than the sub-account itself.
  Source: Manage Feature Permissions for Subaccounts
- [ ] Add each client user in Settings, Users and choose Admin or User.
  Source: Manage Sub-Account User Roles & Permissions
- [ ] Set module and granular permissions per user, and turn on Only Assigned Data for anyone who should see just their own contacts and opportunities.
  Copy Permissions copies one user's setup to another.
  Source: Manage Sub-Account User Roles & Permissions

From my CSM days: Give the owner Admin and everyone else User until they ask for more. Taking access away later is a harder conversation than adding it.

4 Phone number and A2P

- [ ] Buy the number inside the client sub-account: Settings, Phone System, Phone Numbers, + Add Number.
  Filter by country, area code and SMS capability before you pick one.
  Source: How to Purchase and Set Up a Phone Number
- [ ] Complete Persona identity verification if HighLevel asks for it on a US, Canada or Puerto Rico number. It is a one-time step per sub-account.
  Persona does not replace A2P registration or toll-free verification.
  Source: Identity Verification for Phone Number Purchases (US/CA/PR)
- [ ] Register the A2P brand and campaign before the client sends any texts from a US local number, then link the number to the approved campaign.
  Source: What is A2P 10DLC: Brand and Campaign Registration

See also: A2P registration checklist

From my CSM days: Start A2P as early as you can. It depends on a review you cannot speed up, and nothing that sends texts should go live before it is approved.

5 Email sending domain (LC Email)

- [ ] Add a dedicated sending domain in Settings, Email Services, Dedicated Domain and IP. Use a subdomain that is not used for anything else, such as mg.clientdomain.com.
  If the client's root domain already runs Google Workspace or another mailbox, use a subdomain.
  Source: How to Set Up a Dedicated Sending Domain (LC Email)

- [ ] Add the DNS records HighLevel shows (or let it auto-configure them), then verify. Propagation can take up to 24 hours.
  Source: How to Set Up a Dedicated Sending Domain (LC Email)
- [ ] Turn on first-send email validation and warm up a new domain before emailing a large list.
  Source: Email Sending Guide: Email Best Practices & Email Warm Up

From my CSM days: Ask who controls the client's DNS in the kickoff call. If an IT contact or an old web designer holds the login, email and domains wait on them, so find out early.

6 Calendars

- [ ] Create the booking calendar in Calendars, Calendar Settings, + New Calendar, with the right type, host, duration and custom URL.
  Source: How to Set Up a Booking Calendar
- [ ] Set weekly working hours and any date-specific hours for holidays or closures.
  Source: Calendar Availability: Weekly Working Hours & Date-Specific Hours
- [ ] Connect the host's personal calendar and video conferencing tool in the Connections and Video Conferencing tabs to avoid double booking.
  Source: How to Set Up a Booking Calendar
- [ ] Set up confirmations and reminders, for example with the Appointment Confirmation + Reminder workflow recipe, and publish it.
  Source: How to Set Up a Booking Calendar

From my CSM days: Book a test appointment from a phone in a private window, then cancel and reschedule it. You see what the client's customers see, reminders included.

7 Pipelines

- [ ] Create the pipeline in Opportunities, Pipelines, Create new pipeline, with stages that match how the client actually sells.
  Source: How to Create Pipelines
- [ ] Do not add Won and Lost stages. HighLevel creates those statuses automatically.
  Source: How to Create Pipelines
- [ ] Decide which stages show in the funnel and pie chart reports.
  Source: How to Create Pipelines

From my CSM days: Sketch the stages with the client before you build them. If the person who will use the pipeline cannot say what moves a deal to the next stage, the stage is not ready.

8 Forms

- [ ] Build the contact form with the standard and custom fields the client needs, and nothing more.
  Source: How to Create a Contact Form

- [ ] Set submission notifications for the team and, if wanted, an auto responder to the person who filled it in.
  Source: How to Create a Contact Form
- [ ] Share the direct link or embed the form, and use the Form Submitted trigger to start follow-up.
  Source: How to Create a Contact Form
- [ ] If the form collects phone numbers for texting, add separate, unticked SMS consent checkboxes with the wording your A2P campaign describes.
  Source: HighLevel A2P Opt-In Compliance

9 Conversation AI basics

- [ ] Create a bot in AI Agents, Conversation AI, + Create Bot. Guided Form Based Setup is the simplest start.
  Source: Guided Form Based Setup for Conversation AI
- [ ] Test the bot from the setup panel before it goes near a customer. New bots may be set to Off by default.
  Source: How to Create and Set Up a Conversation AI Bot
- [ ] Start in Suggestive mode, where your team reviews each reply, and move to Auto-Pilot only when the answers are right.
  Source: How to Create and Set Up a Conversation AI Bot

See also: HighLevel AI plan calculator

From my CSM days: Agree with the client which questions the bot must never answer on its own, such as pricing exceptions or anything medical or legal, and write those into its instructions.

10 Integrations: Google Business Profile and Facebook

- [ ] Connect Google Business Profile in Settings, Integrations, signed in with a Google account that has Owner or Manager access to the location.
  Source: Integrate Google Business Profile with HighLevel
- [ ] Connect Facebook in Settings, Integrations with a profile that is Admin of both the Page and its Business Manager, and choose All Leads or New Leads Only.
  Source: Step-by-Step Guide to Facebook Integration
- [ ] Check each integration shows as connected, and reconnect if HighLevel shows a missing-permissions warning.
  Source: Integrate Google Business Profile with HighLevel

From my CSM days: Do integrations on a screen share with the client. They own the Google and Facebook logins, and being added as a manager on their side is cleaner than borrowing their password.

11 Payments and Stripe

- [ ] Connect Stripe in Payments, Integrations. Each sub-account connects to one Stripe account at a time.
  Source: Connect Stripe to HighLevel

- [ ] Review payment methods and Test or Live mode before sending the first invoice or payment link.
  Source: Connect Stripe to HighLevel
- [ ] Tell the client payments made in Stripe before the connection are not imported into HighLevel.
  Source: Connect Stripe to HighLevel

From my CSM days: The Stripe account should belong to the client, not the agency. Their customers' money should land in their account.

12 Domains

- [ ] Connect the funnel or website domain in Settings, Domains & URL Redirects, using automatic setup or the DNS records HighLevel gives you.
  Source: How to Set Up Root Domain/Subdomain for Funnels/Websites
- [ ] On Cloudflare, set the HighLevel record to DNS only, not Proxied, and never point one hostname at two platforms.
  Source: How to Set Up Root Domain/Subdomain for Funnels/Websites
- [ ] Set the default page and the 404 page, publish, and test the live URL.
  DNS changes can take up to 24 hours.
  Source: How to Set Up Root Domain/Subdomain for Funnels/Websites

13 Workflows

- [ ] Build or review the core workflows: new lead follow-up, appointment reminders and anything the snapshot brought in.
  Source: Getting Started with Workflows
- [ ] Set up missed call text back, either the built-in setting under Phone System, Voice or a Call Details workflow.
  Source: Missed Call Text Back: Overview & Setup
- [ ] Publish each workflow and test it with a new contact. Draft workflows do not run.
  Source: Getting Started with Workflows

See also: Missed call text back calculator

From my CSM days: Test every workflow with a contact that uses your own phone and email. If you would not want to receive the message, the client's customers will not want it either.

14 Reporting

- [ ] Set up the sub-account dashboard in Edit mode with the widgets the client will check: leads, appointments, opportunities and conversations.
  Source: Subaccount Dashboard Page: View or Edit
- [ ] Show the client View mode: change the date range and filters to see activity, without editing the layout.
  Source: Subaccount Dashboard Page: View or Edit

15 Client handover and training

- [ ] Send each client user their login and confirm they can get in with the permissions you set.
  Source: Manage Sub-Account User Roles & Permissions
- [ ] Show them the mobile app you promote to sub-accounts, so replies and bookings reach their phone.
  Source: How to Promote and Customize Your Whitelabel Mobile App
- [ ] Point them to LaunchPad, if it shows in their account, for the guided setup videos.
  Availability depends on the agency's plan and rollout group.
  Source: SubAccount Launchpad

From my CSM days: Hand over a one-page summary of what you set up and who owns each login. When something breaks months later, that page saves time on every support call. Then run a recorded walkthrough of Conversations, Calendars and Opportunities for anyone who joins later.

Why this order

- **Identity first.** The business profile, A2P, Persona verification and Stripe all ask for the same legal details. Entering them once, correctly, avoids mismatches later.
- **Slow steps early.** A2P review and DNS changes for email and domains depend on other people and systems, so start them before the build work.
- **Build, then automate.** Calendars, pipelines and forms are what workflows trigger on, so they come before workflows.
- **Hand over last.** The client logs in to a finished account, with permissions set and a dashboard that answers their questions.

Tools that help along the way: the A2P registration checklist, the usage cost calculator for the client's SMS, call and email costs, the missed call text back calculator, the AI plan calculator and the profit calculator. If you document client accounts, Snapshot Atlas (my own product) exports a sub-account's setup to Excel, JSON and HTML.

Estimates, not guarantees. This is the order I recommend, not an official HighLevel process. Menus and features change, and some depend on your plan,

so check the linked Help Center article if a screen looks different.

FAQ

▼ What order should I set up a new GoHighLevel client in?

Create the sub-account (from a snapshot if you have one), then the business profile, users and permissions, phone number and A2P, the email sending domain, calendars, pipelines, forms, Conversation AI, Google Business Profile and Facebook, Stripe, domains, workflows, reporting, and finally the client handover. Identity and compliance details go first because A2P, email and payments all depend on them.

▼ Does a snapshot set up everything for a new client?

No. HighLevel says snapshots copy configuration such as workflows, funnels, calendars, forms, pipelines and custom fields, but not contacts, conversations, Stripe connections or integrations and other third-party connections. Funnels and websites arrive as drafts until a domain is connected and they are published.

▼ Do I need A2P registration before onboarding is finished?

If the client will text US contacts from a local number, yes. Register the A2P brand and campaign in the Trust Center and link the number to the approved campaign before any SMS workflow goes live. The A2P registration checklist on this site covers each step.

▼ Should the client connect their own Stripe account?

Yes, in most cases the Stripe account should belong to the client, because the money from their customers lands there. Each sub-account connects to one Stripe account at a time, under Payments, Integrations, and payments made in Stripe before the connection are not imported.

▼ What permissions should client users get?

Set the sub-account Feature Permissions first, because a user can never have more access than the sub-account. Then add each person in Settings, Users as Admin or User, set module permissions, and use Only Assigned Data for anyone who should only see their own contacts and opportunities.

▼ Does this checklist save my progress?

Yes, in this browser only, using local storage. Nothing is sent to GHL Weekly. Use a separate browser profile per client, or print or download the PDF for each one, if you onboard several clients at once.

Sources

Checked against HighLevel docs on 30 Oct 2026. Every link below was opened that day. How I check facts is on the editorial standards page.

1. HighLevel Help Center: Create New Sub-Account Using a Snapshot help.gohighlevel.com
2. HighLevel Help Center: Load a Snapshot Into an Existing Sub-Account help.gohighlevel.com
3. HighLevel Help Center: Snapshots Overview help.gohighlevel.com
4. HighLevel Help Center: Business Profile Settings help.gohighlevel.com
5. HighLevel Help Center: Business Physical Address & Time Zone help.gohighlevel.com
6. HighLevel Help Center: Business Information: Type & Registration help.gohighlevel.com

7. HighLevel Help Center: Manage Feature Permissions for Subaccounts
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8. HighLevel Help Center: Manage Sub-Account User Roles & Permissions
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9. HighLevel Help Center: How to Purchase and Set Up a Phone Number
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12. HighLevel Help Center: How to Set Up a Dedicated Sending Domain (LC Email)
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27. HighLevel Help Center: Subaccount Dashboard Page: View or Edit help.gohighlevel.com
28. HighLevel Help Center: How to Promote and Customize Your Whitelabel Mobile App help.gohighlevel.com
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