HighLevel setup checklist

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A practical order to set up a HighLevel agency account and first client sub-account, plus a starter template pack. Adapt the steps and templates to fit each business.

1. Agency account

- ☐ Pick your plan (Starter for up to 3 clients; Unlimited for more)
- ☐ Add your agency logo, colours and custom domain for white-label
- ☐ Add team members and set their permissions
- ☐ Connect your payment provider (e.g. Stripe)
- ☐ Set up rebilling for phone and email (Unlimited/Pro)

2. First client sub-account

- ☐ Create the sub-account with business name, address and timezone
- ☐ Load a snapshot or start from a clean template
- ☐ Connect the client's domain and verify email sending
- ☐ Buy or port a phone number; complete any required messaging registration
- ☐ Connect calendars and set availability

3. CRM & pipeline

- ☐ Define pipeline stages

- ☐ Create custom fields and tags you'll actually use
- ☐ Import contacts with consent records
- ☐ Set lead source tracking

4. Automations

- ☐ New-lead workflow: tag, notify team, send first reply
- ☐ Appointment reminders (email + SMS)
- ☐ Missed-call text-back
- ☐ Review-request workflow after a job is done
- ☐ Test every workflow with a test contact before switching it on

5. Before go-live

- ☐ Check usage costs from test SMS/emails
- ☐ Set up reporting dashboard for the client
- ☐ Train the client's team on the mobile app
- ☐ Document the setup so it can become your next snapshot

Starter template pack

Ready-to-use templates you can copy into HighLevel and edit to fit the business. Merge fields like `{{contact.first_name}}` fill in automatically. Check that every field and custom value (e.g. `{{custom_values.booking_link}}`, `{{custom_values.review_link}}`) exists in your sub-account, and check messaging rules for your region before sending.

New-lead instant reply

New-lead instant reply (SMS)

Hi {{contact.first_name}}, thanks for getting in touch with {{location.name}}! We've got your enquiry and will be in touch shortly. Want to book a time now? {{custom_values.booking_link}} Reply STOP to opt out.

New-lead instant reply (Email)

Subject: Thanks for reaching out, {{contact.first_name}}

Hi {{contact.first_name}},

Thanks for contacting {{location.name}}. We've received your enquiry and a member of our team will get back to you soon.

If you'd like to skip the wait, you can book a time here: {{custom_values.booking_link}}

Kind regards,
{{user.first_name}}
{{location.name}}

Appointment reminder – 24 hours

Appointment reminder – 24 hours (SMS)

Hi {{contact.first_name}}, a reminder that your appointment with {{location.name}} is tomorrow, {{appointment.start_date}} at {{appointment.start_time}}. Need to change it? {{appointment.reschedule_link}} Reply STOP to opt out.

Appointment reminder – 24 hours (Email)

Subject: See you tomorrow, {{contact.first_name}}

Hi {{contact.first_name}},

Just a reminder that your appointment with {{location.name}} is tomorrow:

{{appointment.start_date}} at {{appointment.start_time}}

If you need to reschedule, use this link: {{appointment.reschedule_link}}

See you then,
{{location.name}}

Appointment reminder – 1 hour

Appointment reminder – 1 hour (SMS)

Hi {{contact.first_name}}, see you in about an hour at {{appointment.start_time}}! Running late or can't make it? Let us know here: {{appointment.reschedule_link}} Reply STOP to opt out.

Appointment reminder – 1 hour (Email)

Subject: Your appointment starts in 1 hour

Hi {{contact.first_name}},

Your appointment with {{location.name}} starts at {{appointment.start_time}} today.

Can't make it? Reschedule here: {{appointment.reschedule_link}}

{{location.name}}

Missed-call text-back

Missed-call text-back (SMS)

Hi, sorry we missed your call at {{location.name}}! How can we help? Reply here and we'll get back to you as soon as we can. Reply STOP to opt out.

Review request

Review request (SMS)

Hi {{contact.first_name}}, thanks for choosing {{location.name}}! If you have a minute, we'd really appreciate a quick review: {{custom_values.review_link}} Reply STOP to opt out.

Review request (Gentle follow-up (SMS, 3–5 days later))

Hi {{contact.first_name}}, just a gentle nudge in case you missed our last message. If you have a moment to share your experience, here's the link: {{custom_values.review_link}} Thanks either way! Reply STOP to opt out.

No-show rebook

No-show rebook (SMS)

Hi {{contact.first_name}}, we missed you at your appointment today. No worries, these things happen! Would you like to pick a new time? {{custom_values.booking_link}} Reply STOP to opt out.

3-step lead nurture

3-step lead nurture (Step 1 – Email, day 1)

Subject: A quick hello from {{location.name}}

Hi {{contact.first_name}},

Thanks for your interest in {{location.name}}. Here's a quick overview of how we can help: [add 2–3 lines about your service].

Any questions? Just reply to this email.

{{user.first_name}}

3-step lead nurture (Step 2 – SMS, day 3)

Hi {{contact.first_name}}, it's {{user.first_name}} from {{location.name}}. Do you have any questions I can help with? Happy to chat whenever suits. Reply STOP to opt out.

3-step lead nurture (Step 3 – Email, day 7)

Subject: Ready when you are, {{contact.first_name}}

Hi {{contact.first_name}},

I'm checking in one last time. If you'd like to take the next step, you can book a time that suits you here: {{custom_values.booking_link}}

If now isn't the right time, no problem. We're here when you need us.

{{user.first_name}}
{{location.name}}

Suggested pipeline stages

1. New lead
2. Contacted
3. Appointment booked
4. Showed / consultation held
5. Proposal or quote sent
6. Won
7. Lost / not a fit
8. No-show (rebook)

Common setup mistakes to avoid

- Sending SMS to US numbers before A2P 10DLC brand and campaign registration is complete (Settings › Phone System › Trust Center). Sample messages you submit should identify the sender and include opt-out language.
- Sending email from a shared domain instead of setting up and verifying a dedicated sending domain (Settings › Email Services › Dedicated Domain and IP).
- Leaving merge fields or custom values empty, so contacts see blank names or links. Fill in custom values like booking and review links and preview each message.
- Getting Allow Re-entry wrong in workflow settings. Leave it off for one-time sequences like a nurture, and turn it on only where repeat entry is the point.
- Publishing workflows without testing them on a test contact first.
- Texting contacts with no recorded SMS consent, or leaving out opt-out language in marketing messages.
- Building every client account from scratch instead of saving a finished setup as a snapshot.

Based on HighLevel's public help docs: US phone number registration, A2P campaign best practices, email, phone & SMS setup, checked 4 Nov 2026. Menu paths may change.

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How I reviewed this: Prices and plan limits come only from HighLevel's official pricing page (gohighlevel.com/pricing), checked 4 Nov 2026, in USD. Opinions come from my own use of HighLevel for agency client work. Nothing here is a paid placement. See how we rate and how we review.

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