

The 12-Point GoHighLevel Account Audit

About 20 minutes. Run the checks in order: the first four decide whether anything sends at all. Tick what passes, fix what fails in the order the setup guide prescribes.

Day-one checks · do these first (the silent failures)

☐ **1. A2P brand and campaign approved**

Settings → Phone System → Trust Center

Pass: both show approved, and the campaign use case matches what you actually text.

☐ **2. Wallet auto-recharge on**

Agency → Billing → Wallet

Pass: auto-recharge enabled on a card without 3-D Secure prompts, with a sane threshold. An empty wallet halts SMS with no error.

☐ **3. Domain verified**

Settings → Domains

Pass: DNS verified and email authentication green.

☐ **4. LC Phone and LC Email active**

Settings → Phone / Email

Pass: the defaults are in use, or there is a written reason they are not.

Build-order checks · the ones that cost weeks

☐ **5. Contacts tagged by source**

Contacts → Smart Lists

Pass: no untagged blob; every import carries a source tag.

☐ **6. Pipeline matches reality**

Opportunities

Pass: three to six stages, all actually used.

☐ **7. Calendars test-booked**

Calendars

Pass: a booking made by you exists; time zone and buffers are correct.

☐ **8. No unreviewed snapshot loads**

Sub-account history

Pass: loads went into fresh sub-accounts, or every override-or-skip conflict was reviewed. There is no snapshot revert.

Agency checks · margin and client safety

☐ **9. Rebilling configured**

Agency → SaaS / Rebilling

Pass: multiplier set; client wallets auto-recharge on the client's card, not yours.

☐ **10. Client roles restricted**

Settings → Team

Pass: client users cannot reach agency-level settings or Launchpad.

☐ **11. Opt-in language on every form that feeds SMS**

Every form feeding an SMS workflow

Pass: consent text matches the registered A2P campaign; the checkbox is unchecked by default.

☐ **12. Training materials dated**

Your SOP docs

Pass: walkthroughs carry a date and link the official changelog, so nobody trains on last year's screens.

If checks 1 to 4 fail, stop and fix them before touching anything else. Workflows, funnels and imports built on top of a silent SMS failure only make the failure harder to see. The full write-up of each check, with sources, is at weblystudio.com/blog/gohighlevel-setup-mistakes/.

© Webly Studio · weblystudio.com · Free to use and share.

Want it audited and fixed for you? [GoHighLevel setup and automation](#) · [book a Discovery Call](#).