GoHighLevel Account Audit Checklist

Thirteen checks you can run in your own account today, in this order. Tick each box as you go. Menu names are as of Nov 5, 2026, and your agency's setup may show some of them differently.

Start With Your Front Door

- [ ] **1. Go through your own front door.** Submit your main website form with your real phone and email, then book on your main calendar. This one test finds more than any report. Confirm all four appear:
  - [ ] The text
  - [ ] The email
  - [ ] The contact record
  - [ ] The deal in Opportunities
- [ ] **2. Read what just ran.** In Automation > Workflows, open the automation that fired and check its Execution Logs and Enrollment History. Execution Logs shows each action, its status and any error. Enrollment History shows why the contact left.

Check Your Automations

- [ ] **3. Walk the handoffs.** On every published automation you rely on, open each step that names another automation, a pipeline, a stage or a tag. Confirm that thing still exists.
- [ ] **4. Open Needs review.** Go to Automation > Workflows, the Needs review tab. It lists workflows with errors in the past 30 days which are not resolved. **Mark as read** fixes nothing. HighLevel documents a fuller view called Workflow Maps, limited at launch to agency users and agency admins. We did not see it in our own account on Nov 5, 2026, so ask your agency if you want it.
- [ ] **5. Question every published automation.** For each one, ask what starts it and when it last ran. If you cannot answer, write it down for the last check.
- [ ] **6. Test the emails in your main sequence.** Send each one to yourself, or open it in Marketing > Emails > Templates. Confirm that the template exists, the links go to the right place and the unsubscribe link works.

Check What Your Account Depends On

- [ ] **7. Check your texting registration.** Go to Settings > Phone System > Trust Center, open Brands & Campaigns, then the Campaigns tab. You want Approved. On a rejected campaign, click View required fixes.
- [ ] **8. Check your email domain.** In Settings > Email Services > Dedicated Domain and IP, confirm that your sending domain is verified.
- [ ] **9. Check every calendar on your site.** In Calendars, confirm each one has a team member assigned. No team member means no slots, so a visitor has nothing to book.
- [ ] **10. Check your payment connection.** In Payments > Integrations, confirm your processor still shows as connected.
- [ ] **11. Open your privacy and terms pages in a browser.** We have found these returning a 404 after a funnel was removed, with consent boxes still linking to them. Carriers review those pages when they check your texting registration.

Check Who Has Access

- [ ] **12. Read your user list.** In Settings > Users, remove anyone who no longer works with you. We have found placeholder users sitting in accounts with full admin access, carried in by a snapshot.

Only Now, List The Clutter

- [ ] **13. List it without deleting it.** Go through the Tags page, Settings > Custom Fields, Settings > Custom Values, Sites > Forms and Opportunities > Pipelines. Look hard at any custom value that is blank. Mark each item:
  - [ ] Keep
  - [ ] Merge
  - [ ] Switch off
  - [ ] Remove

Before You Delete Anything

> **Work in this order:** fix what is running, prove it with a test, switch off what you doubt, and delete last.
>
> **Unused is a measurement, not permission.** A custom field no automation reads can still hold data a form collected or an outside system wrote. A tag on nobody today may be the trigger for something that fires next month. HighLevel's own guidance on tags says to review workflows, Smart Lists, filters and integrations before you rename or delete an established tag. HighLevel documents a Workflow Maps check for where an asset is used, which we did not see in our own account on Nov 5, 2026, and says it covers workflow dependencies only.
>
> **Deleted automations are hard to bring back.** HighLevel keeps them in a Deleted tab for 90 days, but a restored workflow returns as a Draft, and the contacts who were inside it do not come back with it.

Repair Or Rebuild?

Repair when your front door test mostly works and the faults fit on one page. **Rebuild** when you cannot say what most of your automations do, when several builders have layered over each other, or when each fix breaks something else. That is our judgment from reading these accounts, not a formula.

What I Found, And What I Will Fix First

> **Want a second set of eyes on what you found?** Book a call with us and bring your notes. We build and manage GoHighLevel accounts every month. The full write up behind this list is at createassistants.ai/post/gohighlevel-account-audit.