

# Portal Creation

*This page walks you through the exact steps to create a new client's portal in GoHighLevel — a task that must be completed immediately upon payment and sets the foundation for their entire experience with us.*

## Portal Creation — Step-by-Step Guide

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This guide walks Onboarding Specialists and other members of Customer Service through the complete process of creating a new client's portal in GoHighLevel (GHL). This must be completed within at least 30 minutes of a client's payment being received if it is during business hours.

### **Time Requirement**

Portal creation should take approximately 10-15 minutes per client. Complete this task immediately when you receive a new client notification.

## Before You Begin

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Confirm you have the following information from the client's purchase record:

- Client's full name
- Client's email address
- Client's phone number
- Plan purchased (Essentials/Accelerated/Momentum)
- Mark the invoice as paid if it is a web purchase or the payment was made through CashApp or Zelle
- Add any special instructions the Dispute Team must know in Additional Information on DisputeFox

## Step-by-Step: Creating the Client Portal

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### Step 1 — Verify Payment in GoHighLevel (GHL)

Once you receive a portal creation request from the closer:

1. Copy the client's full name
2. Open **GHL (GoHighLevel)**
3. Paste the client's name into the search bar
4. Verify that the payment has been successfully processed
5. Confirm the membership type purchased:
  - Accelerated
  - Essential Membership
  - Momentum (6-Month Bundle)

**After verification:**

- Mark the client with a ★ (star) on GHL

## Step 2 — Open Client in DisputeFox (DF)

1. Open **DisputeFox (DF)**
2. Navigate to the **Client Tab**
3. Locate the client under **Active Clients**
4. Click on the client's name

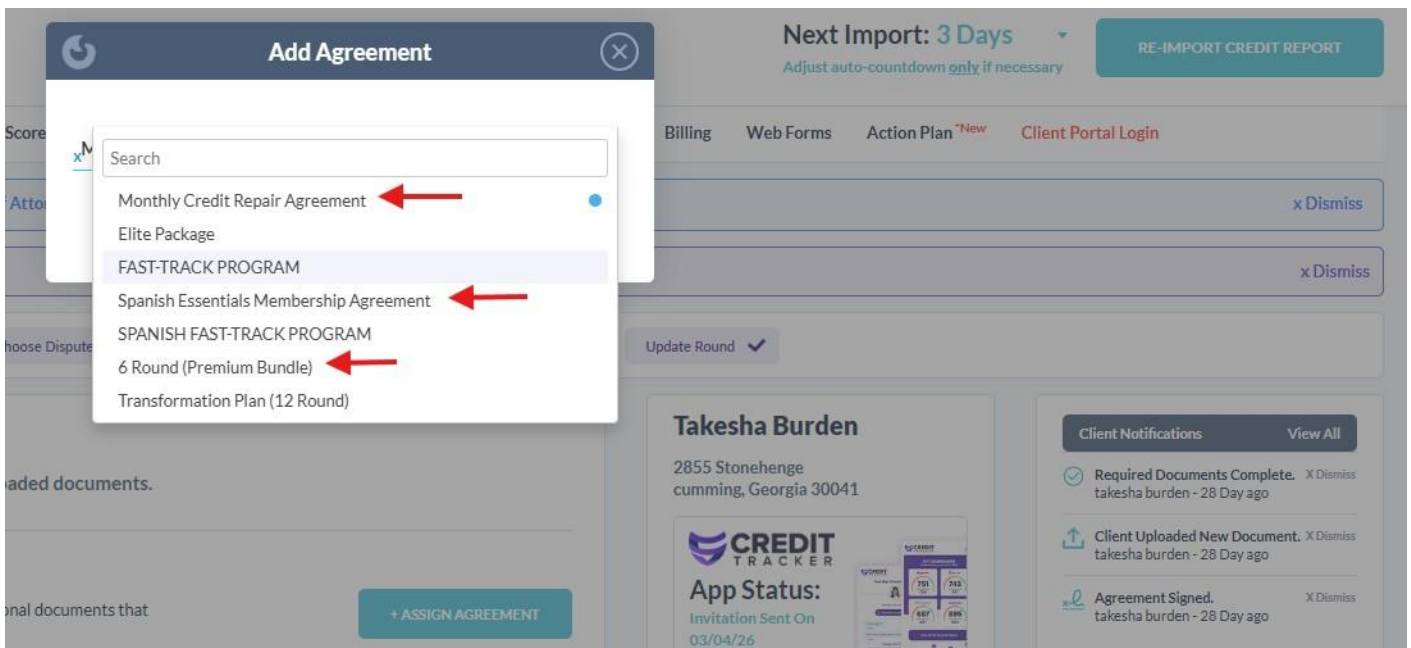
## Step 3 — Verify Client Details

1. Go to the **Account Tab**
2. Copy the client's **First Name** (this will be used for the password)
3. Navigate to **Client Settings**
4. Confirm the membership status:
  - For English-speaking clients: Essentials (Slow Delete); For **Spanish-speaking clients:** Essentials (Spanish Slow Delete)
  - All clients: Accelerated (Accelerated)
  - All clients: Momentum (6-Month Bundle)

⚠ **Important** — Ensure this matches the membership purchased in GHL

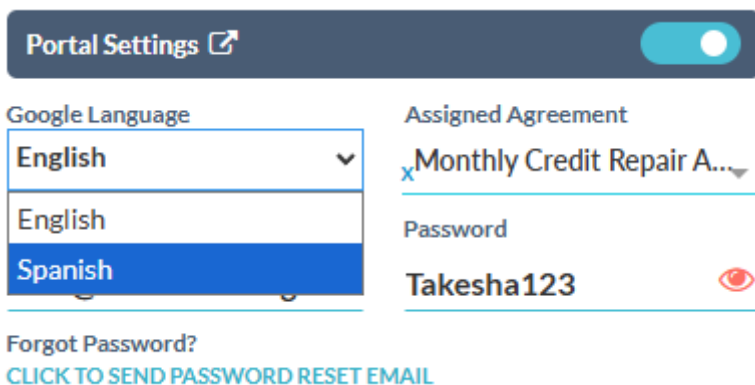
**If Spanish-Speaking client:**

Assign the correct agreement based on the client's plan:



- **Essential (Slow Delete)** → *Spanish Essential Membership*
- **Accelerated** → *Monthly Credit Repair Agreement*
- **Momentum** → *Six Month Premium Bundle*

## Portal Settings




1. Go to **Portal Settings**
2. Locate **Google Language**
3. Change language to **Spanish**

## Step 4 — Update SMS Settings

1. Locate **SMS References**
2. Click **Opt-Out**

## Step 5 — Update Portal Password

1. Go to **Portal Settings**
2. Click the  (eye icon) to view the current password

3. Update the password using the following format: FirstName123

### Rules

- No spaces
- Use only the client's first name
- Add "123" immediately after
- E.g. Maria →

## Step 6 — Assign Agent

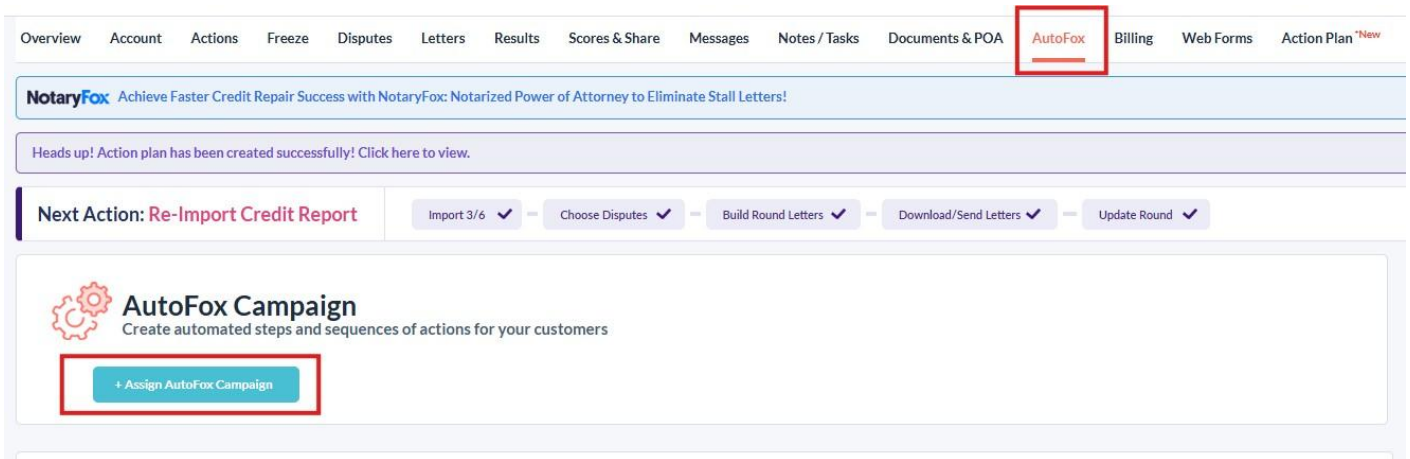
1. Under **Assigned Agent**:
  - If the client is English-speaking → select **MARJORIE MERCADERO**
  - If the client is Spanish-speaking → select **GIO MENDEZ**
2. Click **Save Changes**

## Step 7 — Send Credit Tracker Invitation

The screenshot shows the NotaryFox dashboard. The top navigation bar includes 'Overview', 'Account', 'Actions', 'Freeze', 'Disputes', 'Letters', 'Results', 'Scores & Share', 'Messages', 'Notes / Tasks', 'Documents & POA', 'AutoFox', 'Billing', 'Web Forms', and 'Action Plan <sup>New</sup>'. Below the navigation bar is a banner for 'NotaryFox' with the text 'Achieve Faster Credit Repair Success with NotaryFox: Notarized Power of Attorney to Eliminate Stall Letters!'. A notification bar states 'Heads up! Action plan has been created successfully! Click here to view.' Below this is a 'Next Action: Re-Import Credit Report' section with several dropdown menus: 'Import 3/6', 'Choose Disputes', 'Build Round Letters', 'Download/Send Letters', and 'Update Round'. The main content area features the 'AutoFox Campaign' section, which includes a gear icon and the text 'AutoFox Campaign' and 'Create automated steps and sequences of actions for your customers'. A red box highlights a button labeled '+ Assign AutoFox Campaign'.

1. Scroll to **Credit Tracker App Status**
2. Click **Send Invitation**
3. In the pop-up window:
  - Click **Send** or **Save & Send**

## Step 8 — AutoFox Assignment

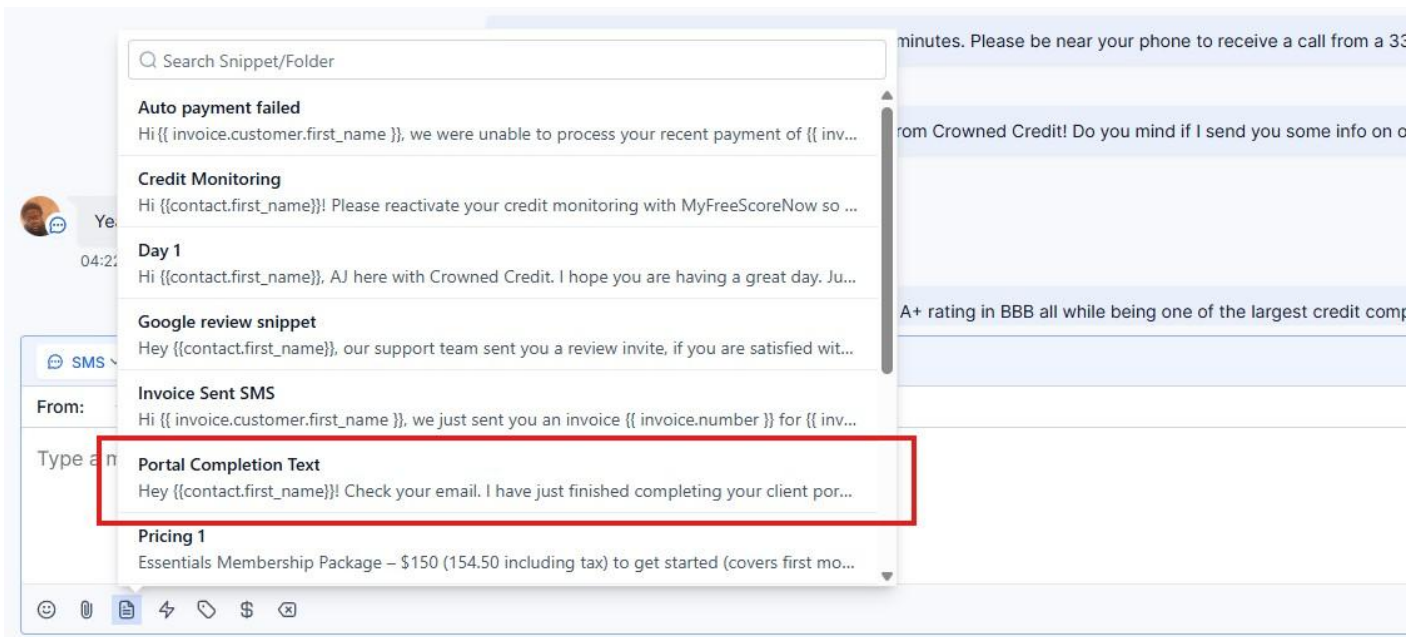


1. Click on **AutoFox**
2. Click **Send** or **Assign**

This will generate and send the client's login credentials.

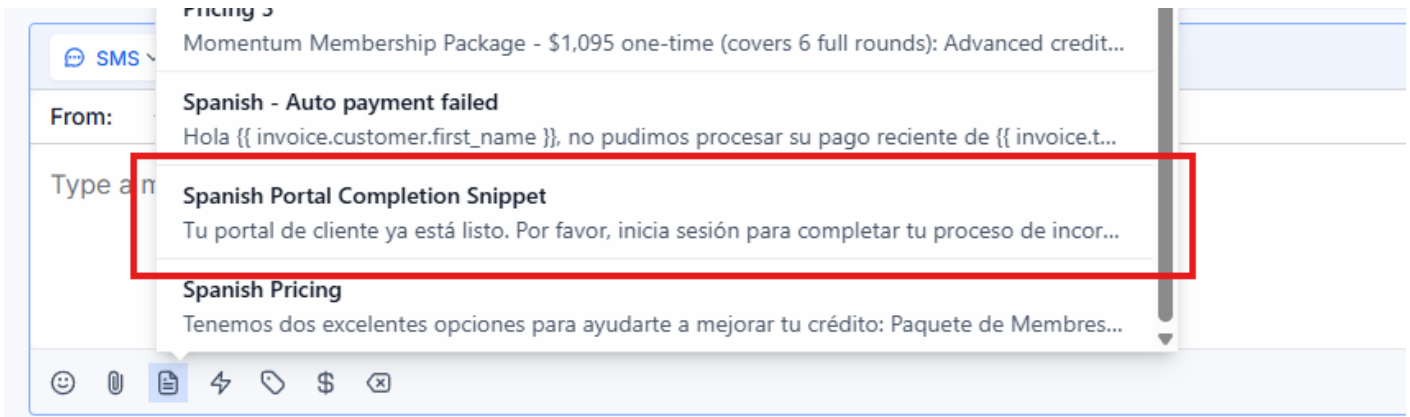
⚠ **Important** — Double check if the onboarding email is reflected by viewing the conversation with the client on GHL

## Step 9 — Send Portal Creation Message (GHL)



1. Return to **GHL**
2. Send the prepared **portal creation snippet** to the client

**If Spanish-Speaking client:**



1. Return to **GHL**
2. Send the prepared **Spanish portal creation snippet** to the client

## Step 10 — Update Closer (Discord)

1. Open **Discord**
2. Reply to the closer's request
3. Send: Done

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