

Your Lead Kit

# Internal Technical Support Guide

WHAT THE TEAM NEEDS TO BE ABLE  
TO DO TO SUPPORT CLIENTS

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*The smarter way to market your business.*

Team reference · pairs with the customer Setup Guide

# Internal Technical Support Guide

*This guide defines the technical capabilities the team needs to support Your Lead Kit clients – whether troubleshooting a self-setup member or delivering a paid YLK Set-Up end to end. It mirrors the customer Setup Guide step for step, but goes to the technical depth the client never sees.*

*Use it two ways: as a competency checklist for anyone doing YLK setup or support, and as the escalation reference when a self-setup client gets stuck. Each section lists what to be able to do and the traps that most often generate support tickets.*

**Principle:** Most YLK support tickets are deliverability and DNS. If the team is strong on domains, authentication and warm-up, the majority of client problems disappear before they start.

## 1. Account provisioning & white-label

### Be able to:

- ✓ Create and configure a client sub-account in the white-labelled GHL environment (yourleadkit.co.uk).
- ✓ Apply the correct tier entitlements and confirm no GoHighLevel branding is visible to the client anywhere.
- ✓ Set timezone, GBP currency, business hours and user roles; enforce 2FA on admin/owner accounts.
- ✓ Map an FPG bundle to the correct YLK tier (Visibility→Starter, Growth→All in One, Elite AI→AI All in One).

**Watch for:** White-label leaks – a stray GHL logo, login URL or system email undermines the whole brand. Audit every client-facing touchpoint before handover.

## 2. Domains & DNS (the core competency)

### Be able to:

- ✓ Identify where any domain's DNS is hosted and navigate the major registrars (GoDaddy, 123 Reg, Cloudflare, IONOS, Namecheap).
- ✓ Add and verify A, CNAME and TXT records, and explain propagation to a client without jargon.
- ✓ Configure SPF, DKIM and DMARC correctly, and read the results of a mail-tester report.
- ✓ Set up a dedicated sending subdomain and a branded tracking (link) domain.
- ✓ Point funnel/landing-page domains at the platform.

### Records the team must be fluent in:

| Record             | Must be able to explain & configure                                                                  |
|--------------------|------------------------------------------------------------------------------------------------------|
| SPF (TXT)          | Single record only. Merge multiple senders into one. Diagnose and fix duplicate-SPF failures.        |
| DKIM (TXT/CNAME)   | Enable, publish and verify the signature from the sending settings.                                  |
| DMARC (TXT)        | Publish at p=none to monitor; interpret aggregate reports; advise when to move to quarantine/reject. |
| Sending subdomain  | Configure so the root domain reputation is insulated from marketing sends.                           |
| Tracking CNAME     | Brand the link domain; confirm links don't trip spam filters.                                        |
| Page/funnel record | Resolve pages on the client domain, not a platform default.                                          |

**Most common ticket:** Two SPF records. If a client already has email (e.g. Microsoft 365), never add a second SPF – merge into the existing one. This single mistake accounts for a large share of 'my mail goes to spam' cases.

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## 3. Email deliverability & warm-up

### Be able to:

- ✓ Run and interpret a deliverability test (SPF/DKIM/DMARC pass, spam-score, blacklist check) before any real send.
- ✓ Design a warm-up schedule: low initial volume to engaged contacts, ramped over 2–4 weeks.
- ✓ Configure a compliant footer (physical address + one-click unsubscribe) for UK GDPR/PECR.
- ✓ Seed-test inbox placement across Gmail, Outlook and a UK ISP — not just confirm delivery.
- ✓ Diagnose rising bounce or complaint rates and know when to pause a send.

**Reputation is fragile:** A rushed warm-up or a dirty list can damage a domain's reputation for months. Prevention is far cheaper than recovery — coach clients to ramp slowly and never import cold lists.

## 4. Contact data & compliance

### Be able to:

- ✓ Clean and validate an import: dedupe, fix formatting, standardise phone to E.164 (+44...).
- ✓ Map import fields correctly and preserve opt-in/consent evidence.
- ✓ Configure suppression lists so previously-unsubscribed contacts are never re-mailed.
- ✓ Recognise and refuse cold/purchased lists, and explain to the client why they're harmful.

## 5. Automations, pipelines & workflows

### Be able to:

- ✓ Build pipelines that reflect a client's real sales process.
- ✓ Configure the new-lead follow-up workflow and missed-call/enquiry auto-responses.
- ✓ Confirm the DFY-Purchase tag triggers the correct add-on fulfilment workflow.
- ✓ Test every automation end to end with a dummy contact before go-live.
- ✓ Debug a workflow that isn't firing: check trigger conditions, tags, and enrolment history.

## 6. Forms, booking & calendars

### Be able to:

- ✓ Build forms and embed them via widget/iframe on client sites and YLK pages.
- ✓ Configure calendars with correct availability, buffers, durations and notifications.
- ✓ Connect Google/Outlook calendars to prevent double-booking.
- ✓ Test the full booking cycle: submission → confirmation → reminder → calendar entry.

## 7. Phone & SMS (A2P registration)

### Be able to:

- ✓ Provision numbers and complete brand/campaign (A2P) registration — and build the lead time into go-live plans.
- ✓ Configure call forwarding, voicemail and missed-call-text-back.
- ✓ Test SMS delivery and call routing before handover.

**Plan ahead:** A2P registration isn't instant. Start it early or it becomes the thing holding up an otherwise finished account.

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## 8. Payments, checkout & add-ons

### Be able to:

- ✓ Confirm the Stripe connection and that the correct VAT tax rate ID is applied.
- ✓ Verify payment links resolve and the add-on checkout (Vercel serverless) completes end to end.
- ✓ Confirm the current campaign code applies correctly at checkout.

**Verify, never assume:** Payment link IDs, campaign codes and pricing change. Always check the live account before publishing anything transactional — never reuse an old ID from memory or a previous doc.

## 9. Landing pages & technical build

### Be able to:

- ✓ Build standalone GHSL Custom HTML section landing pages with scoped CSS prefixes (e.g. ylk01--ylk08-).
- ✓ Use transparent wrappers, rgba card surfaces, IntersectionObserver scroll-reveal and self-contained font imports.
- ✓ Control vertical spacing via GHSL section padding rather than fighting it with margins on block wrappers.
- ✓ Apply YLK brand correctly — dark navy dominant, orange sparing, Onest (never FPG colours or Gotham).

## 10. Supporting a stuck self-setup client

When a self-setup member escalates, work the funnel in this order — it resolves the majority of cases fastest:

- Confirm DNS first — are SPF/DKIM/DMARC actually verified? This is the top cause of email problems.
- Check for duplicate SPF and free-mailbox 'from' addresses.
- Confirm they warmed up rather than blasting the full list on day one.
- Check list quality and suppression — complaints and bounces point to list issues.
- Only then look at content, automation logic and integrations.

**The upgrade path:** If a client is out of their depth, the YLK Set-Up service exists precisely for this. Position it as removing the technical burden — not as a rescue — and hand back a correctly configured account they can run with confidence.