



CLIENT & AGENCY RESPONSIBILITIES

What is required before setup, launch and ongoing operation

PURPOSE

This guide outlines the information, approvals, access and ongoing duties required from the client and Blue Collar Digital before a missed call text-back system is implemented.

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BUSINESS INFORMATION

Information the client provides before implementation begins

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| <ul style="list-style-type: none">• Legal business name• Public-facing business name• Business structure: corporation, partnership or sole proprietorship• Business registration or tax identification information when required• Complete physical business address• Website address | <ul style="list-style-type: none">• Business email address• Main business telephone number• Name, email and mobile number of the authorized owner• Business hours, holidays and after-hours procedures• Services offered and normal service area• Privacy-policy and terms pages, if available |
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CLIENT RESPONSIBILITY

The client is responsible for providing complete and accurate business information and for confirming that the authorized owner may approve the setup.



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CURRENT TELEPHONE SETUP

How calls work today and how unanswered calls should be handled

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| <ul style="list-style-type: none">• Which number customers currently call• Whether it is a mobile, landline, VoIP or toll-free number• Who currently owns that number• Which carrier provides it• Whether call forwarding is available• Whether the number is already capable of texting | <ul style="list-style-type: none">• Whether the client wants to keep that number permanently• Whether calls should ring one person, several people or an office line• How long calls should ring before being treated as unanswered• Whether voicemail should answer missed calls• Whether calls are recorded• Whether different rules are needed after hours |
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3

STAFF AND ACCESS INFORMATION

Details required for every employee who will use HighLevel

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| <ul style="list-style-type: none">• Full name• Work email• Mobile number• Job role | <ul style="list-style-type: none">• Permission level• Whether the employee receives forwarded calls• Whether the employee replies to text conversations• Work schedule or availability |
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ACCESS BEST PRACTICE

The business owner should retain administrator access. Employees should receive only the permissions needed for their jobs.

4

MESSAGE REQUIREMENTS

Decisions that shape the automatic text and the reply process

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| <ul style="list-style-type: none">• Desired tone: friendly, professional, rugged or urgent• Which business name appears in the text• Whether customers should reply by text• Whether the message includes a booking link• Whether emergency or after-hours instructions are needed | <ul style="list-style-type: none">• Whether English, French or another language is required• Who is responsible for answering replies• Expected response time• What happens when a customer writes "STOP," asks not to be contacted or complains |
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CHOOSING THE TELEPHONE-NUMBER ARRANGEMENT

The most important implementation decision

Choose the approach that best balances customer familiarity, setup effort and implementation risk. Responsibilities differ depending on the selected option.

OPTION A Use a new HighLevel number

NEW PUBLIC NUMBER

THE CLIENT

- Approves the area code and number
- Changes the number on its website, Google Business Profile, advertisements and printed materials
- Accepts that existing customers may continue calling the old number

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- Purchases a local or toll-free number inside the client's sub-account
- Enables voice and SMS
- Routes calls to the client's existing phone
- Configures caller ID, voicemail and the text-back automation

OPTION B Forward the existing number to HighLevel

RECOMMENDED

THE CLIENT

- Keeps the existing public number
- Requests conditional or unconditional forwarding from its carrier
- Pays any forwarding charges
- Provides access or works with the carrier to configure it

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- Supplies the HighLevel destination number
- Configures routing and text-back
- Tests whether HighLevel receives the correct caller information



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OPTION C

Port the existing number into HighLevel

SAME NUMBER FOR CALLS AND TEXTS**THE CLIENT**

- Confirms it owns the number
- Provides a recent carrier bill, account number and service address
- Signs the required authorization
- Keeps the old account active until the port completes
- Approves the timing and possible service interruption

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- Checks whether the number is portable
- Submits and monitors the port request
- Configures the number after transfer
- Tests incoming calls, outbound calls and SMS

IMPORTANT

Porting gives the cleanest customer experience because calling and texting use the same established number. It carries more implementation risk, so there should be a rollback and downtime plan.

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CLIENT RESPONSIBILITIES AFTER LAUNCH

Ongoing account, operations, compliance and optimization tasks

ACCOUNT & BILLING

- Keep the HighLevel/phone wallet funded
- Pay number, call, SMS and registration charges
- Keep business and registration information current

DAILY OPERATIONS

- Maintain its website and privacy-policy pages
- Respond to customer texts during agreed hours
- Train replacement employees
- Notify Blue Collar Digital about staff or routing changes
- Report delivery problems promptly

CONSENT & COMPLIANCE

- Avoid sending prohibited or unapproved content
- Honour STOP and other opt-out requests
- Obtain appropriate consent before adding callers to marketing campaigns

REVIEW & IMPROVEMENT

- Review conversations for missed opportunities
- Approve future workflow or message changes