

Create an approved knowledge base

Give the assistant a small set of verified business facts.

THE FINISHED RESULT

Known questions use approved facts and an unknown question does not produce an invented policy or price.

Before you start

Environment: HighLevel Conversation AI and supported knowledge-base tools

Access and plan: Demo account with the relevant AI feature enabled and an approved test budget. Voice AI and chat may have different configuration and usage requirements.

Practice project: Harbor enquiry helper

Use a separate demo project and fictional information. Record the exact project and version you use. Keep passwords, verification codes and private customer information out of screenshots and notes.

Official walkthroughs

HighLevel: [Create and attach knowledge bases](#)

Open the credited publisher walkthrough for current interface instructions and available screenshots, then return to the SETLY exercise. External courses remain with their publishers; this PDF does not reproduce their complete tutorial.

Your practice task

Finish one action at a time. Inspect the resulting screen or record before moving on. If a control differs, check the matching official instructions instead of guessing.

01 / Step 1

Write ten factual question-and-answer pairs for Harbor: services, hours, coverage, booking route and how to reach a person.

Check: record what changed and confirm you are still working in the intended demo project.

02 / Step 2

Identify an owner and review date for each answer. Omit prices, availability and policies that have not been approved.

Check: record what changed and confirm you are still working in the intended demo project.

03 / Step 3

Create or select a knowledge base using the supported HighLevel flow, then attach it to the intended demo assistant.

Check: record what changed and confirm you are still working in the intended demo project.

04 / Step 4

Ask one question answered by the source and one absent from it. Record the answers and whether the correct source was used.

Check: record what changed and confirm you are still working in the intended demo project.

Test, troubleshoot, repeat.

If something goes wrong

If an old answer persists, inspect the attached source, indexing state and duplicate knowledge bases before rewriting the prompt.

If your screen is different

Compare the product, editor, user permissions and selected account with the guide. Open the official reference for your version. Do not perform a live change whose effect you cannot verify.

Final verification

Known questions use approved facts and an unknown question does not produce an invented policy or price.

Repeat the task with one small variation. Record the test date, project/version, expected result, observed result and a non-sensitive evidence reference. Mark skipped checks as untested.

Your evidence record

Test date: _____ Project/version: _____

Observed result: _____

Evidence reference: _____

Remaining issue and next action: _____

Sources and guide status

Original exercise by Ray / SETLY. Credited technical references are linked on page one. Prepared 1 October 2026. SETLY screen recording and independent learner reproduction are not yet complete. No platform affiliation is implied.

[Open the online practice guide and editable checklist](#)