

Configure the assistant's role

Define what the demo assistant can answer and when it should stop.

THE FINISHED RESULT

Responses stay within the intended role and distinguish suggested actions from confirmed completed actions.

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](#)

HighLevel: [Conversation AI agent logs](#)

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

Name the assistant Harbor enquiry helper and specify its tasks: explain approved services, collect a simple enquiry and direct booking requests.

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

02 / Step 2

Set a calm, concise style and instructions to use only approved business information for factual claims.

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

03 / Step 3

Define actions it must not claim to have completed without tool confirmation, including booking, payment or a human callback.

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

04 / Step 4

Run five short scenarios and inspect the actual responses. Adjust one instruction at a time and retain the scenario set.

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

Test, troubleshoot, repeat.

If something goes wrong

If it promises a booking without a calendar result, remove that promise and require confirmation from the booking action.

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

Responses stay within the intended role and distinguish suggested actions from confirmed completed actions.

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](#)