

Add business information

Keep assistant answers aligned with one approved business profile.

THE FINISHED RESULT

Equivalent questions produce consistent facts and no conflicting source remains attached.

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

Prepare a factual record containing business name, time zone, contact route, service area and opening hours.

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

02 / Step 2

Compare the business-profile settings with the knowledge-base answers and remove contradictions.

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

03 / Step 3

For temporary changes, record an expiry or next-review date and identify the person responsible for updating the source.

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

04 / Step 4

Ask the same factual question in two different ways and compare the answer to the approved record.

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

Test, troubleshoot, repeat.

If something goes wrong

If hours differ between answers, inspect all connected content sources, not only the last prompt you edited.

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

Equivalent questions produce consistent facts and no conflicting source remains attached.

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](#)