

Configure human handoff

Transfer an unresolved conversation with useful context.

THE FINISHED RESULT

The conversation reaches the intended human queue and the assistant avoids continuing contradictory automated replies.

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: [Human handover action](#)

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

Choose the conditions for handoff: an explicit request for a person, repeated misunderstanding or an unsupported question.

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

02 / Step 2

In the assistant's supported handover settings, select the responsible team or user and define the customer-facing message.

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

03 / Step 3

Include a concise conversation summary and the unresolved question where the platform supports it. Set expectations for staffed and unstaffed hours.

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

04 / Step 4

Test a direct human request and an after-hours request, then inspect the team queue and assistant behavior after transfer.

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

Test, troubleshoot, repeat.

If something goes wrong

If the customer sees a handoff message but no owner receives the case, inspect routing and notification settings separately.

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

The conversation reaches the intended human queue and the assistant avoids continuing contradictory automated replies.

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](#)