

Connect booking to the assistant

Book only real available slots through the selected demo calendar.

THE FINISHED RESULT

Confirmed appointments exist in the correct calendar with matching times, and unavailable slots are not falsely confirmed.

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: [Personal booking calendar](#)

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

Select the demo calendar, service duration and allowed booking route. Confirm availability rules before enabling the assistant action.

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

02 / Step 2

Require the assistant to obtain the relevant date, time zone and contact details using the supported flow.

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

03 / Step 3

Test an available slot and an unavailable slot. Only a successful calendar action may produce a confirmed-booking response.

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

04 / Step 4

Inspect the appointment record and compare it with the conversation. Cancel the labelled test after recording the result.

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

Test, troubleshoot, repeat.

If something goes wrong

If the conversation and calendar disagree, inspect tool inputs, time-zone conversion and the returned action result.

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

Confirmed appointments exist in the correct calendar with matching times, and unavailable slots are not falsely confirmed.

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](#)