

Install chat on a test page

Make the assistant available on an approved demo page.

THE FINISHED RESULT

The correct widget appears and a test conversation is routed to the intended assistant or team.

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](#)

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

Choose the supported chat widget and associate it with the intended demo assistant or inbox.

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

02 / Step 2

Add its installation snippet to an approved test page using the website platform's supported embed route. Keep secrets out of the public snippet.

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

03 / Step 3

Open the page signed out and inspect the widget on desktop and mobile. Verify its contact and privacy information.

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

04 / Step 4

Send a labelled test question and locate the resulting conversation in the account; then test closing and reopening the widget.

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

Test, troubleshoot, repeat.

If something goes wrong

If the widget loads but no conversation appears, inspect its account/location association and routing before reinstalling it repeatedly.

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 correct widget appears and a test conversation is routed to the intended assistant or team.

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](#)