

Configure a demo sub-account

Prepare an isolated location for learning and controlled tests.

THE FINISHED RESULT

The correct demo location, time zone and user access are documented and no live campaign was triggered.

Before you start

Environment: HighLevel sub-account; feature availability varies by account

Access and plan: Authorized demo sub-account and relevant user permissions. Calendar, messaging and AI features may require additional plan access or usage charges. No purchase is part of these guides.

Practice project: Harbor Demo

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: [Getting started with workflows](#)

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

Create or select a demo sub-account with the account owner's authorization. Confirm the location name before entering settings.

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

02 / Step 2

Enter fictional business details and the intended time zone. Keep live customer lists and sending numbers out of this environment.

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

03 / Step 3

Identify the user role, available features and connected channels. Record any paid feature that is unavailable rather than purchasing it.

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

04 / Step 4

Create one clearly labelled demo contact using an approved test address. Verify that opening it does not trigger a live workflow.

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

Test, troubleshoot, repeat.

If something goes wrong

If an expected menu is absent, check role and account feature access before following instructions for a different account.

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 demo location, time zone and user access are documented and no live campaign was triggered.

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](#)