

Create a sales pipeline

Track enquiries through New, Contacted and Booked stages.

THE FINISHED RESULT

One opportunity follows the intended stages and stays attached to the correct contact and owner.

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: [Creating pipelines](#)

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

Open Opportunities and the pipeline configuration for the demo location. Create a pipeline called Harbor Demo.

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

02 / Step 2

Add New enquiry, Contacted and Booked in that order. Define the observable event that moves a request between stages.

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

03 / Step 3

Create one test opportunity connected to your demo contact. Assign a responsible user and place it in New enquiry.

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

04 / Step 4

Move it to Contacted, then Booked, inspecting the contact relationship and any triggered automations after each move.

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

Test, troubleshoot, repeat.

If something goes wrong

If moving a card triggers unexpected messages, pause the relevant demo workflow and inspect its stage-change trigger before continuing.

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

One opportunity follows the intended stages and stays attached to the correct contact and owner.

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](#)