

Test a booking journey

Prove that the page, calendar and contact record agree.

THE FINISHED RESULT

The visitor selection corresponds to the correct appointment and cancellation or rescheduling produces the intended state.

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: [Personal booking calendar](#)

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

Use an approved test contact and open the booking page as a visitor. Record the displayed time zone before selecting a slot.

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

02 / Step 2

Choose an available appointment and enter the approved demo details. Only submit when the test's notification settings are understood.

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

03 / Step 3

Find the appointment in the demo account and compare service, owner, contact, start time and time zone.

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

04 / Step 4

Cancel or reschedule the test, then verify the updated record and relevant workflow behavior. Remove the test only after retaining non-sensitive evidence.

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

Test, troubleshoot, repeat.

If something goes wrong

If the times seem different, compare time zones before declaring the appointment wrong. Check calendar and contact records 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 visitor selection corresponds to the correct appointment and cancellation or rescheduling produces the intended state.

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](#)