

Prepare an acknowledgement

Write and test a factual acknowledgement without sending to customers.

THE FINISHED RESULT

Both previews contain readable text with no raw placeholder tokens, and the delivery status is honestly recorded.

Before you start

Environment: HighLevel workflows and contact records

Access and plan: Demo sub-account, test contacts and a known enquiry source. Real messages and calls require separate approval; use internal tasks or previews for dry runs.

Practice project: Harbor enquiry recovery

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

Draft: Thanks for your enquiry about [service]. Our team will review your request and contact you using the details you supplied.

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

02 / Step 2

Map each placeholder to an existing field and provide sensible fallback wording for missing service or name values.

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

03 / Step 3

Preview against two demo contacts: one complete and one missing optional data. Review links and any stated response commitment.

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

04 / Step 4

Keep the message disabled or in preview until a specific test recipient and sending action are approved. Record whether rendering or actual delivery was tested.

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

Test, troubleshoot, repeat.

If something goes wrong

If a field is blank, inspect its source and fallback. A rendered preview is not evidence that email or SMS was delivered.

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

Both previews contain readable text with no raw placeholder tokens, and the delivery status is honestly recorded.

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](#)