

Stop follow-up on booking

Remove booked contacts from appointment-seeking follow-up.

THE FINISHED RESULT

A qualifying booking stops the relevant sequence, and cancellation behavior follows the documented policy.

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: [Personal booking calendar](#)

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

Define which calendar and appointment status count as a successful booking. Do not treat an abandoned booking-page visit as booked.

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

02 / Step 2

Create an appointment-specific condition or trigger that targets the appointment-seeking workflow.

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

03 / Step 3

Book an approved demo slot while the contact is waiting in follow-up. Inspect workflow membership and later scheduled actions.

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

04 / Step 4

Cancel the test booking and document whether follow-up should remain stopped or restart through a separately approved rule.

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

Test, troubleshoot, repeat.

If something goes wrong

If the workflow continues, confirm the appointment belongs to the same contact and the filter uses the intended calendar and status.

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

A qualifying booking stops the relevant sequence, and cancellation behavior follows the documented policy.

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](#)