

Handle communication opt-outs

Ensure opt-out state prevents further contact on the relevant channel.

THE FINISHED RESULT

The opted-out contact cannot reach the relevant sending action and its preference remains stored.

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](#)

HighLevel: [Workflow settings](#)

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

Identify the account's opt-out or do-not-contact fields for each enabled channel. Keep channel-specific preferences distinct.

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

02 / Step 2

Check preference state before outbound steps and route opted-out contacts to a no-send outcome.

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

03 / Step 3

Use the provider's supported test method to set an opt-out on a demo contact. Inspect queued work and the resulting workflow path.

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

04 / Step 4

Verify an opted-in demo contact still follows the intended route. Do not override an opt-out merely to make a test pass.

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

Test, troubleshoot, repeat.

If something goes wrong

If one channel stops while another continues, check whether separate channel preferences and conditions are required.

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 opted-out contact cannot reach the relevant sending action and its preference remains stored.

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](#)