

Configure a review-request workflow

Prepare a request after a verified service completion.

THE FINISHED RESULT

Only eligible, contactable demo records reach the intended request step and no satisfaction gate exists.

Before you start

Environment: Google Business Profile; HighLevel only for workflow exercises

Access and plan: Authorized Business Profile access for link and QR tasks. A real customer experience is required to post a review; these exercises do not publish test reviews.

Practice project: One verified business location

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

[Google Business Profile: Reviews](#)

[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 the completion event and the eligible contact population without filtering by expected sentiment.

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

02 / Step 2

Create a draft workflow from the completion event and add checks for contact preference and an existing recent request.

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

03 / Step 3

Insert the approved neutral message and location-specific link. Use an internal task in place of sending during the dry run.

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

04 / Step 4

Test eligible, opted-out and recently-requested demo records. Actual email or SMS sending requires an approved recipient and sending action.

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

Test, troubleshoot, repeat.

If something goes wrong

If a low satisfaction score blocks public requests, remove that rule; eligibility should not select only positive experiences.

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

Only eligible, contactable demo records reach the intended request step and no satisfaction gate exists.

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](#)