

Respect review-request opt-outs

Prevent requests through channels the customer has declined.

THE FINISHED RESULT

An opted-out demo record cannot reach the relevant request-send action.

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 A real customer experience is required to post a review; these exercises do not publish test reviews.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

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 how the selected sending channel stores opt-outs and how those preferences reach the workflow.

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

02 / Step 2

Check preference state before any request step and exclude the relevant channel when consent or permission is absent.

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

03 / Step 3

Use a demo contact to verify that changing the preference blocks queued or future activity according to the system's behavior.

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

04 / Step 4

Keep the preference intact during retries and imports; document a separate process for a legitimate preference update.

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

Test, troubleshoot, repeat.

If something goes wrong

If an import resets preferences, fix field mapping and precedence before importing additional records.

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

An opted-out demo record cannot reach the relevant request-send action.

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](#)