

Build an enquiry form

Collect the minimum information needed for a service enquiry.

THE FINISHED RESULT

A valid submission maps each value correctly and missing required information produces a visible error.

Before you start

Environment: HighLevel sub-account; feature availability varies by account

Access and plan: Authorized demo sub-account and relevant user permissions. Calendar, messaging and AI features may require additional plan access or usage charges. No purchase is part of these guides.

Practice project: Harbor Demo

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: Forms and surveys in the site builder](#)

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

In Sites, open the form builder and create Harbor enquiry. Add name, email, service and message fields with clear labels.

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

02 / Step 2

Choose which fields are required and review the field mapping. Avoid asking for sensitive information that is unnecessary for this task.

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

03 / Step 3

Write a confirmation message explaining the next step without promising a response time the demo cannot fulfill.

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

04 / Step 4

Use the form preview to test empty and valid values. For a permitted submission, inspect the resulting contact and submitted fields.

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

Test, troubleshoot, repeat.

If something goes wrong

If a value is absent from the contact, compare the form field with its mapped contact or custom field.

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 valid submission maps each value correctly and missing required information produces a visible error.

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](#)