

Connect the form to follow-up

Start a controlled demo workflow from the intended form only.

THE FINISHED RESULT

The selected form enters the workflow once and the expected internal action is visible on the test contact.

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](#)

[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

Create a draft workflow named Harbor enquiry intake. Select the form-submission trigger and filter it to Harbor enquiry.

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

02 / Step 2

Add an internal assignment or tag action as the first observable outcome. Keep external SMS and email actions disabled during setup.

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

03 / Step 3

Save the workflow and inspect its entry settings. Use a unique demo contact for the controlled test so previous enrolment does not confuse the result.

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

04 / Step 4

After any required approval to activate the demo test, submit the actual form and inspect the workflow's execution record.

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

Test, troubleshoot, repeat.

If something goes wrong

If nothing happens, compare the submitted form id, trigger filter, activation state and re-entry settings rather than adding unrelated triggers.

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 selected form enters the workflow once and the expected internal action is visible on the test contact.

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](#)