

Build a follow-up workflow

Create a testable internal follow-up sequence.

THE FINISHED RESULT

A new enquiry produces one owned task after the intended delay and a handled enquiry avoids unnecessary follow-up.

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: [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

Start a draft workflow from the specific demo enquiry form. Name its purpose and expected final state in the description.

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

02 / Step 2

Add assignment, a wait period and a task for the assigned user. Use a short wait only in the isolated demo; document the intended live delay separately.

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

03 / Step 3

Add a condition that checks whether the enquiry has already been handled before creating further work.

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

04 / Step 4

Run a controlled test and inspect each execution step and timestamp. Keep real outbound messages disabled until their content and recipients are approved.

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

Test, troubleshoot, repeat.

If something goes wrong

If the task appears immediately, inspect the wait configuration and time zone. Avoid assuming a test button reproduces every live trigger condition.

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 new enquiry produces one owned task after the intended delay and a handled enquiry avoids unnecessary follow-up.

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](#)