

Capture a test enquiry

Store a service enquiry with its source and receipt time.

THE FINISHED RESULT

Both enquiries are recoverable with the right source and timestamp and no real customer was contacted.

Before you start

Environment: HighLevel workflows and contact records

Access and plan: Demo sub-account, test contacts and a known enquiry source. Real messages and calls require separate approval; use internal tasks or previews for dry runs.

Practice project: Harbor enquiry recovery

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

Use the demo enquiry form and a unique test name. Include the requested service and a short message that clearly identifies this as a test.

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

02 / Step 2

Submit through the approved test path. Inspect the contact and opportunity rather than assuming the confirmation screen proves persistence.

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

03 / Step 3

Record the receipt timestamp, source form and channel. Keep the original source distinct from later campaign activity.

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

04 / Step 4

Submit a second, different enquiry and verify the first record has not been overwritten.

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

Test, troubleshoot, repeat.

If something goes wrong

If attribution is missing, inspect the source fields and trigger mapping before creating reports from the data.

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

Both enquiries are recoverable with the right source and timestamp and no real customer was contacted.

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](#)