

Assign the enquiry owner

Make one person responsible for the next action.

THE FINISHED RESULT

Every new test enquiry has an accountable owner and an accessible next action.

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

Choose an assignment rule for the demo: all home-care enquiries go to the designated demo user.

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

02 / Step 2

Add the assignment action after the intake trigger and before creating a follow-up task. Confirm the chosen user has the needed access.

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

03 / Step 3

Run one test and inspect both the contact owner and the task owner, since they may be separate fields.

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

04 / Step 4

Test the unassigned case deliberately. Define a fallback queue or internal alert when the expected user is unavailable.

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

Test, troubleshoot, repeat.

If something goes wrong

If a task is owned but the contact is not, inspect the two assignment settings independently.

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

Every new test enquiry has an accountable owner and an accessible next 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](#)