

Create follow-up tasks

Give the owner a dated action with enough context to respond.

THE FINISHED RESULT

One correctly owned task appears with a sensible due time and useful context.

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](#)

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

Add a task after assignment with a title identifying the enquiry and a description linking the relevant demo record.

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

02 / Step 2

Set the due interval using the business time zone. Include the requested service and the next action without exposing unnecessary personal details.

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

03 / Step 3

Run the demo sequence and inspect the owner's task list. Confirm the task is attached to the intended contact.

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

04 / Step 4

Mark the task complete and submit a duplicate test event to check that the same work is not recreated unintentionally.

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

Test, troubleshoot, repeat.

If something goes wrong

If tasks multiply, inspect re-entry and whether the task action needs a check for existing open work.

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

One correctly owned task appears with a sensible due time and useful context.

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](#)