

Configure missed-call follow-up

Design a controlled missed-call path with duplicate protection.

THE FINISHED RESULT

Only the qualifying missed-call scenario enters the intended path, and repeats are suppressed as designed.

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

Identify the exact call event that should qualify, such as an inbound call that was not answered. Exclude answered calls and irrelevant directions.

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

02 / Step 2

Add a short deduplication window or a recorded handled state so repeat calls do not produce repeated acknowledgements.

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

03 / Step 3

Build the internal assignment and task actions first. Keep any SMS action disabled until the recipient, sender and copy are approved.

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

04 / Step 4

Test missed, answered and repeated-call scenarios through the account's supported test method and inspect execution history.

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

Test, troubleshoot, repeat.

If something goes wrong

If every call qualifies, inspect direction and outcome filters. A manually added tag does not prove the real call trigger works.

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

Only the qualifying missed-call scenario enters the intended path, and repeats are suppressed as designed.

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](#)