

Test duplicate submissions

Prevent repeated enquiries from creating duplicate work.

THE FINISHED RESULT

A repeated identical event does not duplicate follow-up, while a genuinely new enquiry remains visible.

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

Submit the same demo enquiry twice with the same approved test email. Record the contact and opportunity ids produced.

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

02 / Step 2

Inspect matching rules, workflow re-entry and existing-task checks. Decide whether repeat submissions update the same request or create a new legitimate enquiry.

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

03 / Step 3

Apply the rule consistently to tasks and acknowledgements, not only to the contact record.

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

04 / Step 4

Repeat with a different service and then a different email to ensure deduplication does not erase legitimate separate enquiries.

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

Test, troubleshoot, repeat.

If something goes wrong

If all same-email enquiries disappear, narrow the duplicate rule to the relevant event or time window rather than blocking the customer permanently.

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 repeated identical event does not duplicate follow-up, while a genuinely new enquiry remains visible.

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](#)