

Measure recovered enquiries

Report observed follow-up outcomes without inventing revenue.

THE FINISHED RESULT

Every reported recovered enquiry has supporting evidence and the report clearly states its definition and exclusions.

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: [Personal booking calendar](#)

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

Define recovered for this report, such as an unanswered enquiry that later produced a verified booking after follow-up.

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

02 / Step 2

Create a small demo table with enquiry id, first response time, follow-up activity, booking state and evidence link.

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

03 / Step 3

Exclude tests, duplicates and unresolved records from customer outcome totals. Keep counts and revenue separate unless actual transaction data supports revenue.

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

04 / Step 4

Calculate the result for a fixed date range and manually reconcile a few records to the underlying appointments.

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

Test, troubleshoot, repeat.

If something goes wrong

If totals do not match the calendar, compare date fields and time zones; avoid counting both an enquiry and its duplicate opportunity.

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 reported recovered enquiry has supporting evidence and the report clearly states its definition and exclusions.

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](#)