

Idol Air & Electrical

Regression QA Test Report

GoHighLevel Lead-to-Job Automation | 17 September 2026

Objective: validate the production demo flow from lead capture through appointment handling, quote outcomes, and job completion, including cancellation and no-show exception paths.

Executive Result

Scenario	Test Contact	Result	Key Outcome
1. Happy Path	Sophie Mitchell	PASS	Lead → booking → quote → accepted → won → completed
2. Appointment Cancelled	Lucas Parker / Amelia Grant	PASS	Cancellation workflow, tag, staff alert, acknowledgement + reschedule link
3. Appointment No-Show	Ethan Collins	PASS	Booked stage fix verified; no-show recovery completed
4. Quote Declined	Olivia Bennett	PASS	Decline trigger stopped follow-up and notified staff

Overall: PASS. All four regression branches completed successfully after one defect was found and corrected in WF02.

System Under Test

- External AI Studio/Vibe funnel with embedded GHL Free Quote Form.
- GHL calendar: Idol Air | Quote Visit.
- Pipeline: Idol Air & Electrical.
- Pipeline stages: New Lead → Contacted → Quote Visit Booked → Quote Completed → Quote Sent → Job Won → Job Completed.
- Primary workflows covered: WF01A Lead Intake, WF01B Lead No-Response Follow-Up, WF02 Appointment Booking & Confirmation, WF03A Cancelled Handling, WF03B No-Show Handling, WF04 quote outcome workflows, WF05 Job Won / Job Completed.

Scenario 1 — Happy Path

Test contact: Sophie Mitchell

Step	Expected / Observed	Result
Free Quote Form submitted	Lead/contact and opportunity created in New Lead.	PASS
Quote Visit booked	Appointment communications initiated.	PASS
Quote process completed and estimate accepted	Accepted quote path executed.	PASS
Opportunity marked Won	WF05A Job Won actions executed.	PASS
Job moved to Job Completed	WF05B completion / review-request path executed.	PASS

Note: an earlier Sticky Contact issue caused contact identity contamination in historical testing. Sticky Contact was turned OFF for clean regression records. The happy-path business logic itself was completed successfully.

Scenario 2 — Appointment Cancelled

Clean cancellation evidence was validated using Lucas Parker and Amelia Grant.

Check	Evidence	Result
Free Quote Form	Fresh lead/opportunity created.	PASS
Quote Visit booked	Booking workflow triggered.	PASS
Appointment manually changed to Cancelled	Valid QA trigger for WF03A.	PASS
WF03A stopped WF02 appointment communications	Executed.	PASS
Tag Appointment Cancelled	Executed automatically.	PASS
Notify Assigned User — Appointment Cancelled	Executed.	PASS
Send Cancellation Acknowledgement	Configured with Appointment.Reschedule Link.	PASS

Design decision retained: cancellation uses self-service recovery through the reschedule link. No additional staff follow-up task was added.

Defect Found During Regression — WF02 Opportunity Progression

Observed defect: after a customer booked a Quote Visit, the existing opportunity remained in New Lead. For Chloe Anderson, WF02 execution logs showed Update Opportunity = SKIPPED.

Root cause: WF02 is triggered by Customer Booked Appointment, so Update Opportunity did not have an opportunity record in context.

Correction applied in WF02:

- Added Find Opportunity immediately before Update Opportunity.
- Find: Most recently created opportunity.
- Filters: Pipeline = Idol Air & Electrical; Status = Open.
- Existing Update Opportunity retained and configured to move the matched opportunity to Quote Visit Booked.

Verification: Ethan Collins was submitted through the Free Quote Form and then booked a Quote Visit. Without manual pipeline movement, his opportunity automatically moved to Quote Visit Booked. Fix verified.

Scenario 3 — Appointment No-Show

Test contact: Ethan Collins

Check	Observed	Result
Free Quote Form submitted	Opportunity created.	PASS
Quote Visit booked	WF02 Find Opportunity + Update Opportunity moved record automatically to Quote Visit Booked.	PASS
Appointment manually changed to No Show	WF03B triggered.	PASS
Tag Appointment No-Show	Executed.	PASS
Notify Assigned User — Appointment No-Show	Executed.	PASS
Wait Before No-Show Outreach	10-minute wait completed.	PASS
Send No-Show Rebooking SMS	Executed.	PASS
#1 Follow up — No-show service appointment	Follow-up task executed.	PASS
Workflow end	Finished.	PASS

Scenario 4 — Quote Declined

Test contact: Olivia Bennett

Check	Observed	Result
Lead and appointment flow	Olivia progressed through the quote-visit process.	PASS
Opportunity at Quote Completed	Confirmed before decline branch test.	PASS
Estimate changed to Declined	WF04C — Quote Declined triggered.	PASS
Stop Quote Follow-Up	Executed.	PASS
Quote Declined internal notification	Executed.	PASS
Workflow end	Finished.	PASS

Observation: after decline, Olivia remained at Quote Completed because WF04C currently stops follow-up and notifies staff but does not update the opportunity stage/status. This matches the current workflow design and was not treated as a regression failure.

Final Regression Status

- **Happy Path — PASS**
- **Appointment Cancelled — PASS**
- **Appointment No-Show — PASS**
- **Quote Declined — PASS**
- **WF02 booking-stage defect — FIXED AND RETESTED**

Conclusion: the Idol Air & Electrical demo has completed the planned end-to-end regression coverage. The booking-stage opportunity progression defect discovered during testing was corrected and verified with a fresh contact. No additional workflow redesign is required for the tested scenarios.

Re-test addendum (6-7 October 2026)

Items added after the 17 September regression.

Check	Observed	Result
Owner View dashboard	Saved with contacts by source/medium, appointments (confirmed, no-show, cancelled, showed), won/lost opportunities and Leads by UTM Source	DONE
UTM capture	Test lead with UTM parameters shows qa_test in Leads by UTM Source and on the contact	PASS
Snapshot v3	Saved 7 Oct with all 110 assets	DONE

All re-tests used fictional test contacts and email only. The sub-account has no purchased phone number, so SMS steps can be shown executing in the logs but no text message was delivered.