Yestoryd Customer Journey Audit

Complete Flow Testing Checklist

Date: January 1, 2026
Purpose: Test all customer journeys end-to-end, identify broken flows

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JOURNEY 1: ASSESSMENT FLOW (Lead Generation)

Test Steps

Step	Action	Expected Result	Status
1.1	Go to yestoryd.com	Homepage loads	🟪
1.2	Click "Free Assessment" CTA	/assessment page loads	🟪
1.3	Fill parent details (name, email, phone)	Form accepts input	🟪
1.4	Fill child details (name, age)	Form accepts input	🟪
1.5	Start assessment	Passage appears based on age	🟪
1.6	Record audio reading	Recording works	🟪
1.7	Submit assessment	Loading indicator, AI analysis	🟪
1.8	View results page	Scores + feedback displayed	🟪
1.9	Check (children) table	New record created	🟪
1.10	Check email inbox	Certificate received (SendGrid)	🟪
1.11	Check WhatsApp	Assessment results message (AiSensy)	🟪

Database Check

```sql
sql

-- Check latest assessment
SELECT id, child_name, parent_email, created_at, assessment_score
FROM children
ORDER BY created_at DESC
LIMIT 5;
```

JOURNEY 2: DISCOVERY CALL BOOKING

Test Steps

Step	Action	Expected Result	Status
2.1	From results page, click "Talk to Coach"	/enroll page opens	🟪
2.2	Check URL params	childName, childAge, parentEmail pre-filled	🟪
2.3	Click "Book Free Session"	Cal.com popup opens	🟪
2.4	Select date/time	Calendar shows availability	🟪
2.5	Complete booking	Confirmation shown	🟪
2.6	Check discovery_calls table	New record with status='scheduled'	🟪
2.7	Check email	Booking confirmation (Cal.com)	🟪
2.8	Check WhatsApp	discovery_booked message	🟪
2.9	Check Admin CRM Discovery tab	New call appears	🟪

Database Check

```sql
sql

-- Check discovery calls
SELECT id, parent_name, parent_email, status, scheduled_at, assigned_coach_id
FROM discovery_calls
ORDER BY created_at DESC
LIMIT 5;
```

Webhook Check

```sql
sql

-- Check if Cal.com webhook is creating records
SELECT * FROM discovery_calls WHERE created_at > NOW() - INTERVAL '1 hour';
```

JOURNEY 3: ADMIN CRM & COACH ASSIGNMENT

Test Steps

Step	Action	Expected Result	Status
3.1	Go to /admin/login	Login page loads	🟪
3.2	Login with admin credentials	Dashboard loads	🟪
3.3	Go to /admin/crm	CRM page with 2 tabs	🟪
3.4	Check Leads tab	Shows children from assessments	🟪
3.5	Check Discovery tab	Shows Cal.com bookings	🟪
3.6	Click on a discovery call	Detail view opens	🟪
3.7	Assign coach from dropdown	Coach assigned, saved	🟪
3.8	Check `discovery_calls` table	assigned_coach_id updated	🟪

Database Check

```sql
-- Verify coach assignment
SELECT dc.id, dc.parent_name, dc.assigned_coach_id, c.name as coach_name
FROM discovery_calls dc
LEFT JOIN coaches c ON dc.assigned_coach_id = c.id
ORDER BY dc.created_at DESC
LIMIT 5;
```

JOURNEY 4: COACH DISCOVERY CALL FLOW

Test Steps

Step	Action	Expected Result	Status
4.1	Go to /coach/login	Login page loads	🟪
4.2	Login as coach	Dashboard loads	🟪
4.3	Go to /coach/discovery-calls	List of assigned calls	🟪
4.4	Click on a call	Detail page with AI questions	🟪

Step	Action	Expected Result	Status
4.5	See AI-generated questions tab	Questions based on assessment	🔲
4.6	Fill questionnaire tab	Form saves	🔲
4.7	Click "Send Payment Link"	WhatsApp message sent to parent	🔲
4.8	Check discovery_calls status	Updated to 'payment_sent'	🔲

Database Check

```sql
sql

-- Check questionnaire saved
SELECT id, status, questionnaire_data, likelihood_to_enroll
FROM discovery_calls
WHERE questionnaire_data IS NOT NULL
ORDER BY updated_at DESC
LIMIT 5;
```

JOURNEY 5: PAYMENT FLOW

Test Steps

Step	Action	Expected Result	Status
5.1	Click payment link (from WhatsApp)	Razorpay checkout opens	🔲
5.2	Complete test payment	Payment success page	🔲
5.3	Check payments table	New payment record	🔲
5.4	Check enrollments table	New enrollment created	🔲
5.5	Check scheduled_sessions table	9 sessions created	🔲
5.6	Check email	Payment receipt + welcome email	🔲
5.7	Check WhatsApp	payment_received message	🔲
5.8	Check Google Calendar	Sessions with Meet links	🔲

Database Check

```sql
sql

-- Check payment and enrollment
SELECT
  p.id as payment_id,
  p.amount,
  p.status as payment_status,
  e.id as enrollment_id,
  e.status as enrollment_status,
  (SELECT COUNT(*) FROM scheduled_sessions WHERE enrollment_id = e.id) as sessions_count
FROM payments p
JOIN enrollments e ON e.payment_id = p.id
ORDER BY p.created_at DESC
LIMIT 5;
```

JOURNEY 6: PARENT DASHBOARD

Test Steps

Step	Action	Expected Result	Status
6.1	Go to /parent/login	Login page loads	🟪
6.2	Login with parent email	OTP sent	🟪
6.3	Enter OTP	Dashboard loads	🟪
6.4	See child's profile	Name, age, coach info	🟪
6.5	See upcoming sessions	Calendar with sessions	🟪
6.6	See progress tab	Assessment scores, session notes	🟪
6.7	Access e-learning	Videos/modules if enrolled	🟪
6.8	Submit support ticket	Ticket created	🟪

JOURNEY 7: COACH DASHBOARD

Test Steps

Step	Action	Expected Result	Status
7.1	Go to /coach/dashboard	Dashboard loads	▪
7.2	See My Students tab	List of assigned children	▪
7.3	See Upcoming Sessions tab	Today/week sessions	▪
7.4	Click on a student	Student detail page	▪
7.5	See assessment history	Past assessments + scores	▪
7.6	See session notes	Previous session summaries	▪
7.7	Complete a session	Session form works	▪
7.8	Check Earnings tab	Revenue split displayed	▪
7.9	Check My Referrals tab	Referral tracking works	▪

JOURNEY 8: COACH APPLICATION FLOW

Test Steps

Step	Action	Expected Result	Status
8.1	Go to /yestoryd-academy	Academy page loads	▪
8.2	Click "Apply Now"	Application form	▪
8.3	Fill application	Form submits	▪
8.4	AI Interview (Vedant)	Chat interface works	▪
8.5	Check `coach_applications` table	New record	▪
8.6	Admin approves in /admin/coach-applications	Status updated	▪
8.7	Coach receives approval email	Email sent	▪
8.8	Coach completes onboarding	/coach/onboarding works	▪

Step	Action	Expected Result	Status
8.9	Coach signs agreement	Digital signature works	🟪

JOURNEY 9: GROUP CLASSES

Test Steps

Step	Action	Expected Result	Status
9.1	Go to /classes	Classes page loads	🟪
9.2	See available sessions	List of group classes	🟪
9.3	Click "Register" on a class	Registration form	🟪
9.4	Complete registration	Confirmation page	🟪
9.5	Check group_session_participants	New record	🟪
9.6	Receive confirmation	Email + WhatsApp	🟪

JOURNEY 10: E-LEARNING (For Enrolled Children)

Test Steps

Step	Action	Expected Result	Status
10.1	Parent logs into dashboard	E-learning section visible	🟪
10.2	Click on E-learning	/parent/elearning loads	🟪
10.3	See recommended modules	rAI recommendations	🟪
10.4	Watch a video	Video plays	🟪
10.5	Complete quiz after video	Quiz loads	🟪
10.6	Submit quiz	XP awarded, progress saved	🟪
10.7	Check gamification	Badges, streaks, leaderboard	🟪

CRITICAL API ENDPOINTS TO TEST

Quick Health Checks

```bash
bash

# Test each endpoint (run from browser console or Postman)

# 1. Assessment Analysis
POST /api/assessment/analyze

# 2. Cal.com Webhook
POST /api/webhooks/cal

# 3. Payment Create
POST /api/payment/create

# 4. Payment Verify
POST /api/payment/verify

# 5. Discovery Call APIs
GET /api/discovery-call/pending
POST /api/discovery-call/assign

# 6. Communication
POST /api/communication/send
```

KNOWN ISSUES TO CHECK

Based on project history, verify these specific items:

Issue	Check	Status
Cal.com webhook not creating discovery_calls	Test booking, check table	🟪
Coach dropdown empty in CRM	Check /api/discovery-call/pending returns coaches	🟪
Payment link not sending via WhatsApp	Test send-payment-link API	🟪
Google Calendar sessions not created	Check after payment	🟪
SendGrid emails not delivered	Check sender verification	🟪
E-learning videos not loading	Check learning_videos table	🟪

TESTING ORDER (Priority)

1. **Assessment Flow** (1.1-1.11) - Lead generation
2. **Discovery Booking** (2.1-2.9) - Conversion funnel
3. **Payment Flow** (5.1-5.8) - Revenue critical
4. **Coach Assignment** (3.1-3.8) - Operations
5. **Coach Discovery** (4.1-4.8) - Sales enablement
6. **Parent Dashboard** (6.1-6.8) - Customer experience
7. **Coach Dashboard** (7.1-7.9) - Coach experience
8. **E-Learning** (10.1-10.7) - Product value

HOW TO PROCEED

1. Start with Journey 1 (Assessment)
2. Report status for each step as ✅ or ❌
3. For ❌ items, share:
   - Error message (console/network tab)
   - Database state (run the SQL)
   - Screenshot if UI issue

I'll fix broken flows one by one as you test.