FollowFunnel - Test Plan for Zoom App Review

Test Account Credentials

Email: [claire.andrews@getgreyreach.com]
Password: rifvuw-qufwiv-2mytXi

Pre-populated test data:

- Test account has Gmail connected
- Test account has Zoom connected
- At least one past Zoom meeting with attendee data available

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Scope Testing Instructions

Scopes Requested:

- `meeting:read:admin` - Read meeting details
- `webinar:read:admin` - Read webinar details (if applicable)
- `report:read:admin` - Access meeting participant reports

Step-by-Step Testing Process

1. Create Account & Authorization

Goal: Test user signup and OAuth flows

1. Navigate to https://www.followfunnel.app/signup
2. Click "Sign Up" or use provided test credentials to log in
3. You will be redirected to the onboarding page
4. Click **"Connect"** next to Zoom
   - Authorize the requested permissions in the Zoom OAuth screen
   - Confirm successful connection (checkmark or "Connected" status)
5. Click **"Connect"** next to Gmail
   - Authorize the requested permissions in the Google OAuth screen
   - Confirm successful connection (checkmark or "Connected" status)
6. Click **"Go to Dashboard"**

Expected Result: Both Zoom and Gmail show as connected; user is redirected to dashboard

Scopes Tested: Initial OAuth authorization

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2. Select Meeting & Load Data

Goal: Test `meeting:read:admin` and `report:read:admin` scopes

1. On the dashboard, locate the **meeting selector dropdown**
2. Click the dropdown to view available meetings
3. Select any past meeting from the list
4. Observe the meeting data loading

Expected Result:

- Meeting list populates with past meetings from connected Zoom account
- Meeting title, date, and participant count displayed
- System fetches attendee list via Zoom API

Scopes Tested:

- `meeting:read:admin` - Retrieves meeting details
- `report:read:admin` - Retrieves attendee/participant data

3. Configure Attendees Template

Goal: Test template configuration and merge field functionality

1. Click the **"Attendees"** tab
2. Enter a template name: "Test Thank You Email"
3. In the **Subject** field, enter: `Thank you for attending {{Meeting Title}}`
4. In the **Body** editor, compose a test message:

```
Hi {{First Name}},

Thank you for attending {{Meeting Title}}.

You can access the recording here: {{Recording Link}}

Best regards,
FollowFunnel Team
```

5. Set delay: **15 minutes** after meeting ends
6. Review the template preview (if available)

Expected Result: Template is saved with merge fields intact

Scopes Tested: Data from `report:read:admin` will be used to populate merge fields

4. Configure No-Shows Template

Goal: Test no-show segmentation and template configuration

1. Click the **"No Shows"** tab
2. Enter a template name: "Test Missed Meeting Email"
3. In the **Subject** field, enter: `You missed {{Meeting Title}}`
4. In the **Body** editor, compose a test message:

```
Hi {{First Name}},

We noticed you couldn't make it to {{Meeting Title}}.

No worries! Here's the recording: {{Recording Link}}

Best regards,
FollowFunnel Team
```

5. Set delay: **30 minutes** after meeting ends

Expected Result: Separate template configured for no-shows

Scopes Tested: `report:read:admin` - Distinguishes attendees from registrants who didn't attend

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5. Create Sending Package

Goal: Test complete follow-up sequence activation

1. Review both configured templates (Attendees and No Shows)
2. Click **"Create Sending Package"** button
3. Observe confirmation message or success state

Expected Result:

- System confirms sending package is created
- Success message displayed (e.g., "Follow-ups scheduled successfully")
- Templates are queued for sending after next meeting ends

Scopes Tested: All scopes work together to:

- Fetch meeting details (`meeting:read:admin`)
- Segment attendees vs. no-shows (`report:read:admin`)
- Prepare personalized emails with merge fields

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6. Verify Email Sending (Post-Meeting)

Goal: Confirm emails are sent with correctly populated merge fields

Note: This requires a live meeting to end, which may not be feasible during review. Alternative testing:

1. Check dashboard for "Sent" status indicator
2. Verify test emails were generated (if applicable)
3. Confirm merge fields like `{{First Name}}` , `{{Recording Link}}` , etc. are replaced with actual data

Expected Result:

- Emails sent from user's connected Gmail account
- Merge fields populated with real attendee data
- Attendees and no-shows receive different templates

Scopes Tested:

- `report:read:admin` - Provides attendee data for merge fields
- `meeting:read:admin` - Provides recording link and meeting details

Scope Justifications

Scope	Purpose	API Endpoints Used
`meeting:read:admin`	Retrieve meeting details (title, date, recording link)	`GET /meetings/{meetingId}`
`report:read:admin`	Access participant reports to segment attendees vs. no-shows	`GET /report/meetings/{meetingId}/participants`

webinar:read:admin	(If applicable) Support for webinar follow-ups	GET /webinars/{webinarId}

Additional Notes for Reviewers

Data Flow

1. User connects Zoom and Gmail via OAuth
2. FollowFunnel fetches meeting list using `meeting:read:admin`
3. When user selects a meeting, system fetches attendee data using `report:read:admin`
4. System segments attendees (who joined) vs. no-shows (registered but didn't join)
5. After meeting ends + delay, personalized emails sent via Gmail API
6. Merge fields replaced with actual attendee data from Zoom reports

Security & Privacy

- All OAuth tokens stored securely
- User credentials never stored in plaintext
- Emails sent from user's own Gmail account (not FollowFunnel's servers)
- Users can disconnect Zoom and Gmail at any time

Common Issues & Troubleshooting

- If OAuth fails: Ensure pop-ups are enabled
- If meeting list is empty: Account must have past meetings with participants
- If templates don't save: Check for required fields (name, subject, body)

Contact During Review

If you encounter any issues during testing:

Email: support@followfunnel.app
Support Portal: https://follow-funnel-for-zoom.nolt.io

We typically respond within 24 hours.

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