Form-to-Workflow Testing Checklist

Verify the front-end feeds the CRM correctly.

Related week: Week 8 | Related SOP: Build a lead capture form | Estimated use time: 20-30 min

Use this worksheet before building inside the CRM. Plan the path first, then build only what the plan supports.

Purpose

Use this checklist to verify that a form, landing page, QR code, or social link creates the right CRM result from front end to contact record.

Path Definition

Item	Decision
Asset name	
Public URL	
Audience	
Source tag/value	
Connected form	
Workflow	
Pipeline/stage	
Thank-you action	
Internal notification owner	

Front-End Test

[ ] Page opens on desktop

[ ] Page opens on mobile

[ ] CTA is visible

[ ] Form fields display correctly

[ ] Consent language appears where needed

[ ] Thank-you action works

CRM Record Test

[ ] Contact is created or updated correctly

[ ] Name, email, and phone map correctly

[ ] Custom fields map correctly

[ ] Source tag/value is applied

[ ] Opportunity is created or updated correctly

[ ] Correct pipeline stage is applied

Workflow Test

Expected event	Did it happen?	Evidence checked	Fix needed

Related Training and SOPs

Related training: Week 8 - Lead Capture Assets

Related SOPs: Build a lead capture form; Build a safe first workflow; Tag naming convention; Design a sales pipeline