

AI Booking Agent — Appointment Reassignment & Missing Closer Records

Our AI booking agent automatically assigns inbound leads to closers on the Consultation calendar (round-robin). Sometimes the appointment record in GHL shows a different closer than the one whose name appears on the automated confirmation messages. This page explains what is happening, how to verify it, and what to do.

The Symptom

- Automated GHL confirmation / reminder messages were sent out under **Closer A's** name (e.g. "Hi, this is Abby from Crowned Credit...")
- But the actual appointment in GHL → Calendar → Appointments is now assigned to **Closer B** (e.g. Ehman)
- There is **no visible record of Closer A** on the contact card — no appointment history, no reassignment log, nothing in the audit trail
- GHL does not allow appointments to be deleted, so a missing appointment feels wrong

📄 **Real Example (April 23, 2026):** Client *Telisha Sostre* received automated booking messages from *Abby Rafael* on Apr 22. By Apr 23 the only appointment on her contact was with *Ehman*, with no record of Abby. Reported by Paul Adrian (@lxr6831) in [#improvement-requests](#).

Why It Happens (Known Causes)

1. **AI agent re-routed the lead.** If the lead messaged back after the first booking, or missed the original slot, the AI can re-book them into a new slot with a different closer (round-robin rotation). The old appointment can be auto-removed by the rebooking flow.
2. **Active client rule.** If the contact is already an active client, a new inbound appointment is **automatically routed to the CSR team**, not a closer. The original closer's confirmation messages already went out before the system recognized them as active. (Sam Oludayo, Ops, Apr 23 2026.)

3. **Manual calendar move by Ops/Admin.** Sam or an admin moves the appointment to the correct owner when a misassignment is spotted. This can happen silently without a visible audit entry.
4. **GHL bug / limitation.** Appointment transfers between users do not always leave a trail on the contact timeline. Still under investigation.

How to Verify What Happened

1. Open the contact in GHL → **Conversations** tab. Look at the *sender name* on the automated confirmation/reminder messages — that is who the AI originally booked.
2. Check **Contact** → **Appointments**. Note the current assignee and the appointment time.
3. Check the contact's **Tags** for `active-client`, `ort-done`, or CSR pipeline tags. If present, the active-client rule (above) likely re-routed them.
4. Check **Activity Log** on the contact for any "Appointment updated" / "Appointment deleted" entries (not always present).

What to Do (Team Members)

1. **Do not re-book the lead again.** Multiple appointments on the same contact confuses closers and the client.
2. **Respect the current assignee.** Whichever closer is on the appointment right now owns the call, even if a different name appears in the old automated messages.
3. **Flag it in** `#improvement-requests` if it looks wrong, with:
 - Client name
 - Who the automated messages came from
 - Who the appointment is assigned to now
 - Tag @Sam (Ops)
4. **Do not delete the appointment.** Ops will adjust if needed.

For Admins / Ops

- Confirm whether the contact is an active client — that explains most reassignments to CSR.
- If the appointment was moved manually, leave a **contact note** explaining who moved it, when, and why, so the next person does not think it is a bug.
- If this pattern repeats with *non-active* leads, escalate to Peter — the AI booking flow may need prompt/logic adjustment in GHL.
- Ongoing: investigate why GHL does not log appointment reassignments visibly on the contact timeline.

Related Pages

- [AI Chatbot Troubleshooting — Facebook & Instagram Bot Issues](#)
- [GHL Timezone & DST Troubleshooting](#)
- [GoHighLevel Complete Guide](#)
- [ORT-Done Tagging Protocol](#)

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Source: Paul Adrian + Sam Oludayo exchange.

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