

Automated & Personalised Onboarding Guide

For the Replit Development Agent

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1. Objective

This document provides a detailed technical guide for the Replit Agent to build a new, automated, and personalised user onboarding flow. This wizard will replace the previous initial onboarding process. Its goal is to create a welcoming experience, reduce manual data entry by scraping the user's website, and understand the user's primary motivation from the outset.

2. Part 1: Backend & Database Enhancements

2.1. Database Schema Modifications

- users Table:
| Column Name | Data Type | Constraints | Description |
| :--- | :--- | :--- | :--- |
| ... (existing columns) | | | |
| first_name | VARCHAR(255) | NULLABLE | Stores the user's first name for personalisation. |
- companies Table:
| Column Name | Data Type | Constraints | Description |
| :--- | :--- | :--- | :--- |
| ... (existing columns) | | | |
| website_url | VARCHAR(255) | NULLABLE | The company's primary website. |
| address | TEXT | NULLABLE | The company's primary address, scraped from the website. |
| contact_details | TEXT | NULLABLE | Contact info scraped from the website. |
- products Table:
| Column Name | Data Type | Constraints | Description |
| :--- | :--- | :--- | :--- |
| ... (existing columns) | | | |
| image_url | VARCHAR(255) | NULLABLE | URL to the product's image, scraped from the website. |
| is_primary | BOOLEAN | DEFAULT false | Flag to indicate a primary product. |

2.2. New Backend Service & API

- **New Service: WebsiteScrapingService**
 - **Technology:** Use Python with requests and BeautifulSoup4.
 - **Functionality:** This service will contain a function `scrape_company_info(url)` that crawls a website to find and extract: Company Name, Address, Contact Details, and a list of products (name, category, image URL). It should look for common pages like "Contact Us," "About Us," and "Products/Shop."
- **New API Endpoint: POST /api/onboarding/scrape**
 - **Request Body:** { "url": "..."} }
 - **Response Body:** A JSON object containing all the structured data scraped from the website.

3. Part 2: Frontend Implementation (New Onboarding Wizard)

This new wizard will be a full-screen modal that appears on the user's very first login.

- **Step 1: Personal Welcome**
 - **UI:** A friendly, full-screen welcome message.
 - **Text:** "Welcome to the Sustainability Tool! We're going to help you measure and manage your brand's impact. First, what should we call you?"
 - **Field:** A single text input for the user's first_name.
 - **Button:** "Next"
- **Step 2: Company Name**
 - **UI:** A clean screen with a single prompt.
 - **Text:** "Great to meet you, [User's First Name]! What is the name of your company? This will be used as your account name."
 - **Field:** A single text input for company_name.
 - **Button:** "Next"
- **Step 3: Website Scraping**
 - **UI:** A screen explaining the automated step.
 - **Text:** "To save you time, let's try to automatically import your company and product details. Please enter your company's primary website address below."
 - **Field:** A text input for the website_url.
 - **Button:** "Import My Data"
 - **Logic:** When clicked, the button becomes a loading spinner. The frontend calls the POST /api/onboarding/scrape endpoint.
- **Step 4: Review & Confirm Scraped Data**
 - **UI:** A review screen displaying the data returned from the scraping service.
 - **Text:** "Here's what we found. Please check the details and make any corrections."

- **Fields:** The form will be pre-populated with the scraped data, but all fields (Address, Contact Details, etc.) will be editable.
- **Product List:** A section will display the products that were found, showing their name and image. The user can uncheck any products they don't want to import.
- **Button:** "Looks Good, Next!"
- **Step 5: User Motivation**
 - **UI:** A multiple-choice question.
 - **Text:** "Perfect! To help us personalise your journey, what is the main goal you want to achieve with this tool?"
 - **Options (Multiple Choice):**
 - "Measure my company & product carbon footprint (LCA)"
 - "Produce a professional annual sustainability report"
 - "Ensure compliance with new regulations (like DMCC)"
 - "Get help with my overall sustainability strategy"
 - "Set and track progress towards Net Zero targets"
 - **Button:** "Go to Dashboard"
- **Final Action:**
 - Upon clicking "Go to Dashboard," all the collected and confirmed data is saved to the database.
 - The user is then redirected to the main application dashboard, where the "What's Next?" module can use their stated motivation to provide tailored suggestions.