New User Invite Flow Documentation

Core Design Principles

Why route all signups through a landing page?

Routing signups through a landing page keeps us compliant (users actively enter their number instead of having it pre-filled), works consistently across all devices (SMS deep links are flaky), and lets us track the full journey from someone discovering Aside to actually signing up.

Tracking invite conversions:

We could generate unique invite codes for each link so we can track when someone signs up using an existing user's invite - that way we'd know who's bringing in new users.

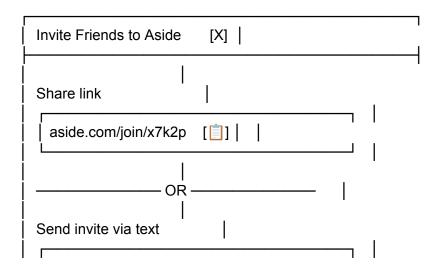
Flow 1: Web App Invite Flow

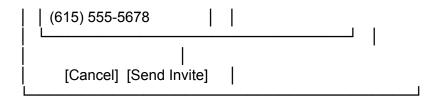
How It Works:

Existing user initiates invite from the web dashboard, provides friend's contact info, and Aside handles the invitation.

Step-by-Step:

1. Alex clicks "Invite Friends" in web dashboard





2. Option A: Alex copies the share link and sends it to Sarah manually

- Alex copies aside.com/join/x7k2p
- Alex sends it to Sarah via text, email, Slack, etc.

2. Option B: Alex enters Sarah's phone number and clicks "Send Invite"

Aside automatically sends SMS to Sarah:

From: Aside (615) 555-1234

Your friend uses Aside to save links, ideas, and anything by texting.

Try it: aside.com/join/x7k2p

Reply STOP to opt out

3. Sarah clicks the link

- Lands on aside.com/join/x7k2p
- Sees landing page explaining Aside

4. Sarah enters her phone number on landing page

- Submits her number
- Sees confirmation: "Check your phone! We just sent a text to (615) 555-5678. Reply YES to opt-in and start using Aside."

5. Sarah receives SMS from Aside

From: Aside (615) 555-1234

Welcome to Aside! Reply YES to confirm and start saving links and ideas by text.

Reply STOP to opt out

6. Sarah replies YES

- Sarah is now entered into standard onboarding flow
- Receives welcome message and instructions

Pros:

- Clean web interface for inviting
- Option to automate or manually share
- Trackable with unique codes
- Professional user experience

Cons:

- X Requires web access to initiate
- X Multiple steps for invitee

Flow 2: SMS QR Code Flow

How It Works:

Existing user texts "invite" to Aside, receives a QR code, and shares it in person with friend who scans it.

Step-by-Step:

1. Alex texts "invite" to Aside

Alex: invite

Aside: I'll send you a QR code you can share with friends!

2. Aside sends QR code image via MMS

From: Aside (615) 555-1234

[QR CODE IMAGE]

Have your friend scan this code to try Aside!

This QR code links to: aside.com/join/x7k2p

3. Alex shows QR code to Sarah in person

- At coffee, at work, at an event, etc.
- Sarah pulls out her phone and scans the QR code

4. Sarah's phone opens the link

- QR code contains: aside.com/join/x7k2p
- Opens in Sarah's browser automatically

5. Sarah lands on signup page

- Sees explanation of what Aside is
- Enters her phone number
- Sees confirmation: "Check your phone! We just sent a text to (615) 555-5678. Reply YES to opt-in and start using Aside."

6. Sarah receives SMS opt-in

From: Aside (615) 555-1234

Welcome to Aside! Reply YES to confirm and start saving links and ideas by text.

Reply STOP to opt out

7. Sarah replies YES

- Sarah is now entered into standard onboarding flow
- Receives welcome message and instructions

Pros:

- Perfect for in-person sharing
- No need to type or copy URLs
- Visual and modern
- Fast and frictionless scanning
- Trackable via unique code in QR

Cons:

- X Only works in person
- X Requires camera access

X Some older phones may struggle with QR scanning

Flow 3: SMS Link Flow

How It Works:

Existing user texts "invite" to Aside, receives a shareable link, and shares it via text message.

Step-by-Step:

1. Alex texts "invite" to Aside

Alex: invite

Aside: I'll send you the invite message in a separate text. You can copy and paste it to share with your friend!

2. Aside sends shareable invite message

From: Aside (615) 555-1234

Hey! I've been using Aside to save links and ideas by texting. Super simple - no app needed.

Try it: aside.com/join/x7k2p

3. Alex copies and pastes the message to Sarah

- Opens conversation with Sarah
- Copies the message from Aside and pastes it into the conversation
- Sarah receives the invite message

4. Sarah taps the link

- Opens aside.com/join/x7k2p in browser
- Lands on signup page explaining Aside
- Enters her phone number
- Sees confirmation: "Check your phone! We just sent a text to (615) 555-5678. Reply YES to opt-in and start using Aside."

5. Sarah receives SMS opt-in

From: Aside (615) 555-1234

Welcome to Aside! Reply YES to confirm and start saving links and ideas by text.

Reply STOP to opt out

6. Sarah replies YES

- Sarah is now entered into standard onboarding flow
- Receives welcome message and instructions

Pros:

- SMS-first stays in messaging
- No web interface required to initiate
- Simple copy/paste behavior
- Trackable via unique code

Cons:

- X Manual copy/paste step
- Message could be edited before sharing
 Depends on Alex actually sharing it

Standardized Landing Page Experience

Regardless of which flow is used, once the invitee lands on the signup page, the experience is identical:

- 1. Landing page displays: Explanation of Aside and phone number input field
- User submits phone number: Sees confirmation message
- 3. SMS opt-in sent: User receives "Reply YES to confirm" message
- 4. User replies YES: Enters standard onboarding flow with welcome message and instructions

This ensures a consistent, predictable experience for all new users.

Technical Implementation

Invite Code Generation

```
// Generate unique random code
const inviteCode = Math.random().toString(36).substring(2, 7);
// Example: "x7k2p"

// Store in database
await db.invites.create({
   code: inviteCode,
   invitedBy: user.id,
   createdAt: timestamp,
   type: "web" | "qr" | "sms_link"
});
```

URL Structure

- All invites use: aside.com/join/{inviteCode}
- Landing page detects invite code for tracking
- Tracks conversion back to inviter

QR Code Generation

```
// Use QR code library to generate image
const qrCode = await QRCode.toDataURL(`https://aside.com/join/${inviteCode}`);

// Send via Twilio MMS
await twilioClient.messages.create({
    to: user.phone,
    from: ASIDE_NUMBER,
    body: "Have your friend scan this code to try Aside!\n\nThis QR code links to: aside.com/join/"
+ inviteCode,
    mediaUrl: [qrCode]
});
```

Tracking Events

Pendo/Analytics:

- Invite Initiated User starts invite flow
 - Properties: invite_method ("web" | "qr" | "sms_link"), user_id, invite_code
- Invite Link Generated Unique code created
 - Properties: invite_code, invited_by, invite_method

- Join Page Viewed Someone lands on signup page
 - Properties: invite_code, referrer
- Phone Number Submitted New user enters number
 - Properties: invite_code, phone_number_hash
- SMS Opt-in Sent Confirmation SMS sent to new user
 - o Properties: invite_code, twilio_message_sid
- Invite Conversion New user replies YES and completes signup
 - Properties: invite_code, invited_by, new_user_id
- Standard Onboarding Started New user enters onboarding flow
 - Properties: user_id, signup_source ("invite" | "direct")

Twilio Events:

- SMS/MMS sent to inviter (QR or link)
- SMS sent to invitee (opt-in request)
- Invitee opt-in response (YES)
- Standard onboarding messages

Database Schema

```
// Invites table
 id: "inv_123",
 code: "x7k2p",
 invitedBy: "user_123", // Inviter's user ID
 createdAt: "2025-10-12T10:00:00Z",
 type: "web" | "qr" | "sms_link",
 conversions: 3 // Number of signups via this code
}
// Users table - add referral tracking
 id: "user_456",
 phone: "+16155555678",
 firstName: null, // Optional
 lastName: null, // Optional
 referredBy: "inv_123", // Links back to invite code
 signupMethod: "invite link" | "direct",
 createdAt: "2025-10-12T10:15:00Z"
}
```

Recommended Implementation Order

Phase 1 (MVP):

- 1. SMS Link Flow Easiest to implement, most SMS-native
- 2. Basic landing page with phone number capture
- 3. Simple conversion tracking with invite codes

Phase 2:

- 1. Web App Invite Flow For users who prefer dashboard
- 2. Enhanced landing page with better copy/design
- 3. Automated SMS sending option (Option B)

Phase 3:

- 1. SMS QR Code Flow For in-person sharing
- 2. QR code generation and MMS delivery
- 3. Advanced analytics dashboard showing invite metrics

Compliance & Privacy

TCPA Requirements:

- All SMS must include: "Reply STOP to opt out"
- Landing page must have clear consent mechanism (button click = consent)
- Store opt-in timestamps for all users
- Honor STOP requests immediately and automatically

Privacy Considerations:

- Hash phone numbers in analytics dashboards
- Use anonymized user IDs for reporting
- Implement user data export and deletion capabilities
- Separate PII from behavioral analytics data
- Don't require or store first/last names unless user provides them
- Clear privacy policy explaining data collection and usage

Data Retention:

• Define retention periods for invite codes (suggest: no expiration)

- Automatic purging of old analytics data (suggest: 2 years)
- User control over data retention preferences

Success Metrics

Key Performance Indicators:

- Invite Send Rate: % of active users who send invites
- Invite Conversion Rate: % of invited users who complete signup
- Time to Conversion: Average time from invite sent to signup completed
- Invite Method Distribution: Which flow is most popular (web vs QR vs SMS)
- Viral Coefficient: Average number of successful invites per user

Tracking Dashboard Should Show:

- Total invites sent (by method)
- Total conversions from invites
- · Conversion rate by invite method
- Top inviters (anonymized or by user ID)
- Invite funnel drop-off points

Open Questions for Team Discussion

- 1. Should invite codes expire after a certain time period? (Recommendation: No expiration)
- 2. How many invites should we allow per user per day to prevent spam? (Recommendation: 10 per day)
- 3. Should we show invite metrics to users in their dashboard? (e.g., "You've sent 5 invites!")
- 4. Do we want to build a referral reward system in the future? (Track now to enable later)
- 5. Should the shareable message template be customizable by users?
- 6. Should we A/B test different landing page copy/designs?
- Do we want to allow users to see which friends signed up via their invite? (Privacy consideration)

SMS Message Templates

For Web App Automated Invite (Option B):

Your friend uses Aside to save links, ideas, and anything by texting.

Try it: aside.com/join/{inviteCode}

Reply STOP to opt out

For SMS Link Flow (User copies/pastes):

Hey! I've been using Aside to save links and ideas by texting. Super simple - no app needed.

Try it: aside.com/join/{inviteCode}

For QR Code MMS:

[QR CODE IMAGE]

Have your friend scan this code to try Aside!

This QR code links to: aside.com/join/{inviteCode}

Landing Page Confirmation:

Check your phone!

We just sent a text to (615) 555-5678

Reply YES to opt-in and start using Aside.

SMS Opt-in Message:

Welcome to Aside! Reply YES to confirm and start saving links and ideas by text.

Reply STOP to opt out

Last Updated: October 12, 2025

Version: 1.0

Status: Ready for Implementation