

# 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.

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## 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

Invite Friends to Aside	[X]
Share link	
aside.com/join/x7k2p [📋]	
OR	
Send invite via text	

(615) 555-5678	
<div>[Cancel] [Send Invite]</div>	

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

- Alex copies [aside.com/join/x7k2p](https://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](https://aside.com/join/x7k2p)

Reply STOP to opt out

## 3. Sarah clicks the link

- Lands on [aside.com/join/x7k2p](https://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:

-  Requires web access to initiate
  -  Multiple steps for invitee
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## 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](https://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](https://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:

-  Only works in person
-  Requires camera access

-  Some older phones may struggle with QR scanning
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## 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](https://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](https://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:

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

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## 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
2. **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.

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## 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
  - 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"
}
```

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# 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
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# 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
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## 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
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## 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?
  7. Do we want to allow users to see which friends signed up via their invite? (Privacy consideration)
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## 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}](https://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}](https://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}](https://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

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