PreIntake.ai

Complete User Journey

End-to-End Customer Flow Documentation

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Overview

This document outlines the complete user journey for PreIntake.ai customers, from initial discovery through ongoing subscription management. The journey is divided into seven distinct phases.

Key Touchpoints: Homepage → Demo Request → Email → Demo Experience → Account Creation → Stripe Payment → Success Page → Website Implementation → Lead Generation

Phase 1: Discovery & Demo Request

Step	Action	Page / System
1.1	User lands on preintake.ai	index.html
1.2	Browses features, practice areas, pricing ($399 + $129/mo)	index.html
1.3	Scrolls to "Create Your Custom AI Intake Demo"	index.html
1.4	Fills form: Firm Name, Website, Email, Practice Areas	index.html
1.5	Submits form	generateDemoIntake API
1.6	Demo generated & stored in Firebase Storage	Backend
1.7	Email sent with personalized demo link	SMTP (Dreamhost)

Phase 2: Demo Experience

Step	Action	Page / System
2.1	User receives email with demo link	Email inbox
2.2	Clicks link to https://preintake.ai/demo/{firmId}	Firebase Storage
2.3	Sees personalized intake with firm name/branding	demo/{firmId}
2.4	Interacts with AI intake conversation	Claude AI
2.5	Views results screen (qualified/flagged/declined)	demo/{firmId}
2.6	Sees conversion CTAs: "Ready to Go Live?" (sidebar) or "Impressed?" (results)	demo/{firmId}

Phase 3: Account Creation & Payment

Step	Action	Page / System
3.1	Clicks CTA → navigates to create-account page	create-account.html?firm={firmId}
3.2	Page loads firm info from config	getWidgetConfig API
3.3	Sees firm name, practice areas, pricing breakdown	create-account.html
3.4	Enters billing email	create-account.html
3.5	Clicks "Continue to Payment"	createCheckoutSession API
3.6	Redirected to Stripe Checkout	Stripe
3.7	Enters payment info, completes purchase ($528)	Stripe
3.8	Stripe webhook fires	stripeWebhook function
3.9	Firestore updated: status: 'active', subscription info	Backend
3.10	Activation email sent to customer	SMTP
3.11	Notification email sent to admin (Stephen)	SMTP
3.12	User redirected to success page	payment-success.html

Phase 4: Post-Purchase Onboarding

Success Page (payment-success.html)

Step	What User Sees	Details
4.1	Confirmation with confetti animation	Visual celebration
4.2	Account summary	Firm name, plan, status: Active
4.3	Embed code with copy button	Ready to paste
4.4	Placement instructions	"Paste before </body>"
4.5	Position options	bottom-right, bottom-left, top-right, etc.
4.6	Link to view demo	For reference/testing

Activation Email Contents:

- Welcome message with firm name
- Same embed code as success page
- "What's Next" numbered steps
- Link to demo for testing
- Lead delivery email confirmation
- Support contact information

Phase 5: Implementation (Customer's Website)

Step	Action	Details
5.1	Customer copies embed code	From success page or activation email
5.2	Pastes into website HTML	Before </body> tag
5.3	Deploys website changes	Their workflow
5.4	Floating button appears	"Free Case Evaluation"
5.5	Button click opens modal with intake	intake-button.js

Embed Code

```
<script src="https://preintake.ai/intake-button.js" data-firm="{firmId}" data-position="bottom-right"></script>
```

Phase 6: Lead Flow (Ongoing)

Step	Action	Details
6.1	Visitor clicks "Free Case Evaluation"	Customer's website
6.2	Modal opens with AI intake	Powered by Claude
6.3	Visitor completes conversation	Practice-specific screening
6.4	AI analyzes & routes lead	Qualified / Flagged / Declined
6.5	Qualified leads emailed to firm	To configured deliveryEmail
6.6	Firm reviews & follows up	Their workflow

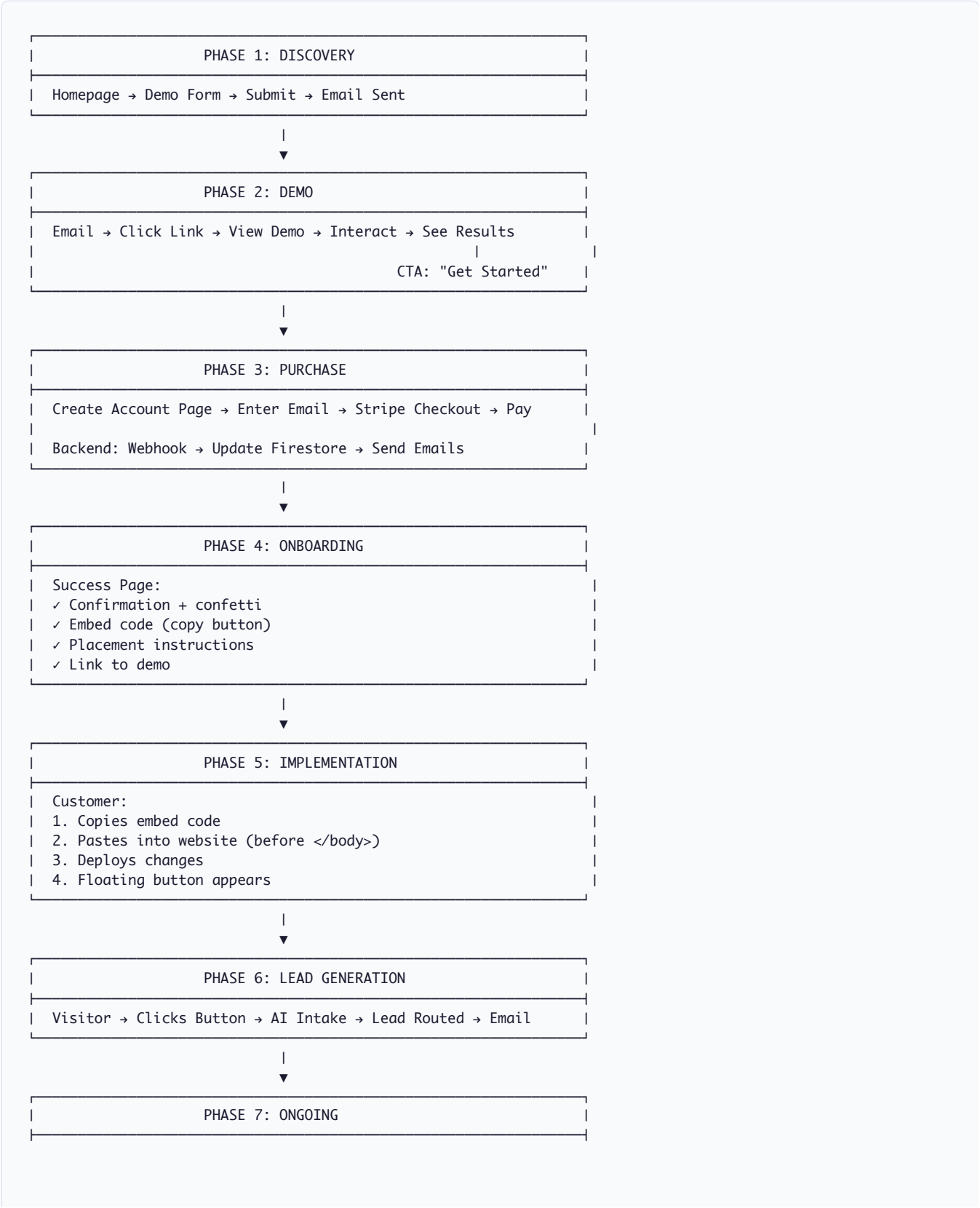
Lead Routing Outcomes

Qualified	Lead meets all criteria → Email sent to firm with full details
Flagged	Needs review → Email sent with concerns noted
Declined	Doesn't meet criteria → Visitor shown resources, no email

Phase 7: Ongoing Subscription Management

Event	System Action
Monthly renewal	Stripe charges card automatically ($129/mo)
Payment succeeds	invoice.payment_succeeded webhook → Firestore updated
Payment fails	invoice.payment_failed webhook → status: past_due
Customer cancels	customer.subscription.deleted webhook → status: cancelled

Visual Flow Diagram



```
|  Monthly: Stripe auto-charges → Webhook → Firestore updated     |
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Current Gaps & Future Improvements

Gap	Current State	Potential Improvement
Customer Dashboard	None - changes via email to support	Self-service portal
CRM Integration Setup	Manual via support	Automated webhook configuration
Settings Updates	Manual via support	Self-service portal
Analytics / Reporting	None for customers	Lead dashboard with metrics
Cancel Subscription	Via Stripe portal or email	Self-service cancellation

Technical Reference

Key Files

File	Purpose
preintake/index.html	Homepage with demo request form
preintake/create-account.html	Account creation page
preintake/payment-success.html	Post-payment onboarding
preintake/intake-button.js	Embeddable widget script
functions/templates/demo-intake.html	Demo template for generation
functions/stripe-functions.js	Payment processing & webhooks

Key API Endpoints

Endpoint	Purpose
generateDemoIntake	Creates personalized demo from form submission
getWidgetConfig	Retrieves firm configuration for widget/pages
createCheckoutSession	Creates Stripe checkout session

stripeWebhook	Handles Stripe events (payment, subscription)
verifyCheckoutSession	Verifies payment on success page
serveDemo	Serves demo from Firebase Storage