PhoSend Intake Book v0.401

Scope

This book records the current projected architecture, the pieces already standing, the pieces still needed, and the ordinated version line so we do not drift or loop.

Ordinated Version Line

- v0.101 — first starter plugin skeleton concept.
- v0.201 — current non-hooked bridge state.
- v0.301 — always-hooked bridge state.
- v0.401 — this book snapshot.

Current Standing Hull

The following pieces are now conceptually in place:

1. Front Compliance Engine

- WordPress site front.
- WPConsent Pro installed and active.
- TCF intentionally disabled for now.
- Banner still appears even without the custom WPCode bridge snippet.
- This confirms WPConsent can operate as its own consent interface and essential state recorder.

2. Participation Harbor Doctrine

- Visitors may remain in a public/static participation mode.
- Declined or limited consent should not dead-end the visitor.
- The harbor is a deliberate pre-port layer, not a punishment state.

3. Port Routing Doctrine

Routing now has three practical front-door states: - no choice yet - limited / declined consent - accepted consent

And a fourth business-state overlay: - communications opt-in not yet recorded - communications opt-in recorded

4. Intake Doctrine

Actual intake must remain downstream of: - cookie/privacy handling - communications consent - SMS/email operational permissioning

5. Verification Doctrine

Telnyx Verify remains the intended OTP engine for phone verification. Email finalization remains the intended completion signal.

What We Have Right Now

A. Proven

- WPConsent Pro is installed and live.
- The consent banner can appear without the custom bridge snippet.
- The starter plugin can be installed directly on the WordPress site by creating files locally on the server.
- The CTA/gate logic can be driven by a WPCode snippet reading browser-side consent state.

B. Current Bridge Behavior

The current bridge snippet is non-hooked in the stronger sense: - it reads consent state from the browser cookie heuristically - it routes the CTA accordingly - it uses a temporary cookie marker for communications opt-in - it does not yet authoritatively hook into WPForms submission records or intake table state

This is acceptable as a proving bridge, but not the final doctrine.

Version v0.201 — Non-Hooked Bridge

Definition: - browser-side only - conservative cookie inspection - temporary `phosend_comms_optin` cookie - CTA and gate shortcodes available - no authoritative server-side state coupling yet

Use: - active test bed - route proving - wording and UX proving - safe temporary harbor while intake table and WPForms hooks are still being shaped

Version v0.301 — Always-Hooked Bridge

Definition: - the same visible routing behavior as v0.201 - but the business-state signal is always sourced from a server-side hook path - the browser cookie becomes optional or secondary - the bridge always asks the authoritative record first

Planned authoritative inputs: - WPForms communications consent form submission - intake table row keyed by email and/or phone - optional user/session correlation when present

Expected behavior: - if WPConsent not chosen: require banner interaction first - if consent limited: harbor route - if consent accepted and no comms record: communications gate - if consent accepted and comms record exists: intake

What Still Needs Built

1. WPForms Hooking

Needed: - intercept the communications consent form on submission - record consent timestamp, email, phone, consent text version - set authoritative state in database - optionally set lightweight browser cookie for convenience only

2. Intake State Table Expansion

Current starter table is minimal. Needed fields include: - id - email - phone - cookie_state_snapshot - comms_opt_in - comms_opt_in_at - comms_source - intake_status - verification_id - otp_status - review_status - created_at - updated_at

3. Telnyx Operational Wiring

Needed: - send verification on intake trigger - verify OTP endpoint/page - resend limits - expiration handling - webhook support later

4. Admin Review Surface

Needed: - intake queue - status view - verification status - consent timestamps - retry visibility

5. Enforcement Tightening

Needed: - stronger WPConsent state parsing or plugin-native data source if available - fewer heuristics - more authoritative interpretation of accepted vs limited state

Practical Build Order

Phase 1

- stabilize v0.201
- confirm CTA route logic in live tests
- confirm wording and page paths

Phase 2

- implement v0.301 always-hooked state path
- record communications consent on real WPForms submission
- make CTA ask server-side state

Phase 3

- expand intake engine
- Telnyx send/verify
- email finalization

- admin queue

Phase 4

- restartability
- webhook handling
- auditability
- stronger doctrine alignment with the broader PhoSend / FireDance style

Known Global Flaw Assumption

We must assume the download/file-handoff flaw is global until proven otherwise. Therefore the working doctrine is: - prefer directly creatable server-side files - prefer pasteable snippets - prefer ordinated inline code and document drops - do not depend on sandbox file retrieval as a required path

Operational Rule Against Tail-Chasing

We should not repeatedly retest the same broken transfer path unless a materially different transport is being used. That means: - new ordinated versions should be delivered inline first - downloadable packaging is secondary - each new version should state exactly what changed

Next Deliverables

- v0.201 code snapshot: non-hooked bridge
- v0.301 code snapshot: always-hooked bridge
- v0.401 book snapshot: this document

Delta Rule

Every next ordinated output should explicitly say: - what was inherited unchanged - what was added - what remains projected only

This keeps the line straight and prevents false progress.