FTM Law Firm Speed and Booking Automation

Website Performance, Paid Consultation Booking, Matters and E-Signature - Technical Overview

A client-readable and developer-ready record of the work delivered for an immigration law firm's WordPress website and client intake system: page-speed optimization measured page by page, a paid online consultation booking flow, matter tracking inside the CRM with a hand-off to the firm's practice-management system, retainer agreements signed online, a contact form that creates CRM records, and advertising click attribution.

WordPress | Elementor | WP Engine | Cloudflare | HighLevel CRM | Clio Manage | Clio Payments | DocuSeal | Google Meet

Public technical edition - Delivered work from 2 to 14 November 2026, newest first where dated

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1. Reading Guide and Publication Boundary

This document is for two audiences. Business readers can read sections 2 to 4: the summary, the latest changes and the side-by-side before and after comparison. Developers can continue into the architecture, each delivered workflow, the safeguards, the verification record and the problems found and fixed during delivery.

Everything described here is delivered work. Each item was built, released to the system it belongs to and checked against that live system, using measurements, read-back of stored data, or test bookings made with clearly marked test contacts. Work that is still being designed or built is not included.

The document is safe to share. It contains no passwords, keys, tokens, account identifiers, private host names, internal file locations, client names or client data. Personal names of firm staff and clients are left out on purpose. Authorized maintainers find access details in the firm's private credential store, not here.

How the evidence is labelled:

- Measured - a number taken from a tool run, such as Google PageSpeed Insights.

- Verified live - behavior observed on the production system with test records, then cleaned up.
- Read back - data written by the system and then read again from the destination to confirm it.

2. Executive Summary

The firm's website runs on WordPress with Elementor, hosted on WP Engine behind Cloudflare. Its client intake runs in the HighLevel CRM, while legal matters, payments and records live in Clio Manage. Before this work, the website scored below 90 on mobile for most page types. No online flow took a consultation payment and then created the appointment, only one lawyer's calendar could take bookings, and matters and retainers were handled in the practice-management system, with no link to the CRM card.

The delivered work did two things. It made the existing website faster without changing how it looks, using only free settings, existing plugins and small custom code modules. It also built a connected intake system: a client books and pays online, the appointment and video link are created automatically, the right lawyer and staff see the booking, and a hired client's matter, signed retainer and booking notes reach Clio Manage.

Outcome	Before	After
Mobile pages scoring 90+ (12 page types)	4 of 12	10 of 12
Desktop pages scoring 90+ (12 page types)	5 of 12	12 of 12
Home page weight	4.26 MB	0.67 MB (-84%)
Fees page mobile score	66	97
Google Ads landing page mobile score	86	97
Online consultation booking	No working paid booking flow	Pay online, then the appointment and video link are created automatically
Booking choice of lawyer	One bookable calendar	Seven bookable lawyers, plus a "No preference" option in firm order
Matter tracking	Outside the CRM	Matter stages inside the CRM; Won creates the matter in Clio Manage
Retainer agreements	Prepared in the practice-management system, not linked to the CRM card	Sent from the card and signed online; the signed PDF is filed in the client's Clio matter automatically
Website contact form	No CRM card	Every message creates a card in a Contact Inquiries pipeline
Returning clients	Not recognized	12,168 existing client contacts tagged "previous client"
Ads click ID on CRM records	Never passed to the booking or contact forms	Saved for 90 days and passed into both forms

3. Latest Delivered Changes (Newest First)

Date (2026)	Area	What was delivered
14 Nov	Consult notes	A Consult Notes section on each booking card, in the same order as the firm's existing consult form. Answers copy to the client's contact record, with one note per card that updates in place.
14 Nov	Calendar	New appointment titles show the client, the matter and the lawyer, plus a short reference, instead of a generic title and a long technical code.
14 Nov	Advertising	The Google Ads click ID and campaign (UTM) parameters are saved for 90 days and passed into the booking and contact forms. This was checked live in a browser.
14 Nov	Contact form	Each website message creates its own card in the Contact Inquiries pipeline. The form finds an existing contact by email, then by phone, and never overwrites that contact's details.
14 Nov	Email deliverability	The firm's sending domain gained its DKIM signature record, and the CRM now shows the domain as verified.
14 Nov	Booking rules	Online booking times now leave enough lead time for payment to finish, and a payment link refuses to complete once its time slot is no longer safe to book.
14 Nov	Pipeline	Recording a "Consult Completed On" date moves the card from Consultation Scheduled to Retainer Not Sent automatically.
13 Nov	Client messages	Times in client texts and emails use a 12-hour clock with the Eastern time zone (for example "2:30 PM EST"). This was proven with a real paid test booking.
13 Nov	Retainers	Sending a retainer again withdraws the earlier unsigned copy. The reminder email matches the firm's existing practice-management template and shows the real due date.
13 Nov	CRM	Staff email signatures were added. Contact list tabs were renamed and colour-coded by purpose, and the booking source label now reads "Website Booking".
13 Nov	Phone numbers	When a typed phone number already sits on an empty placeholder contact, a background step moves it to the paying client's contact.
12 Nov	Clio filing	Signed retainers are filed in the client's open Clio matter, and the client's booking message is added to the matter's consultation notes.
12 Nov	Signing options	A signatures list of lawyers and administrators, a second signer for joint retainers, and a "Client only signs" mode that locks the details already known.
12 Nov	Speed	Seventeen Google Ads landing pages now paint in their final layout. The measured page went from 86 to 97 on mobile.
12 Nov	Go-live	The intake, matter and document workflows were switched from test contacts to all clients.
12 Nov	Unpaid bookings	A "Non Paid" list, the phone number and time on each card, and the lawyer set as the card owner.
12 Nov	Email links	Tracked links in CRM emails now open over a valid secure (HTTPS) connection.
11 Nov	Matters	Matter stages, fields, Won/Lost handling and a Matter Action menu were built inside the CRM. They connect to Clio Manage through the convert, update and view actions.
11 Nov	Confirmations	Each of the seven lawyers' own confirmation template is sent according to the assigned lawyer, and the Google Meet link is emailed and texted to the client.
11 Nov	E-signature	Twelve of the firm's retainer templates were rebuilt for online signing, showing the firm's logo on the signing pages.
10 Nov	Payment page	The payment card shows the matter, the lawyer, the time and the meeting type. The CRM tags were aligned with the practice-management system.

Date (2026)	Area	What was delivered
9 Nov	Data	The Clio Manage contact import ran to completion, and 12,168 contacts with an open or closed matter were tagged "previous client".
9 Nov	Booking	Paying closes the client's other unpaid booking cards. Replies asking to reschedule or cancel are recognized, and staff are notified.
8-9 Nov	Clio integration	Creating a Clio matter from the CRM, filling retainer templates from merge fields, and syncing matter status back to the CRM. Clio Grow lead data was imported as well.
7 Nov	Booking	The first real paid booking ran end to end, from website payment to a calendar appointment.
6-7 Nov	Booking design	The client's chosen booking design was published, with each practice area listing its own lawyers.
4 Nov	Existing site	The existing website booking form scrolls each step into view on phones and desktops. A broken team-section template was repaired.
2-3 Nov	Speed	Fifteen website speed changes, each measured on its own, as described in section 5.

4. Before and After - Side by Side

This section gathers every comparison in one place. The business workflow comes first, then the measured website speed.

4.1 Client intake and operations

Area	Before	After
Paying for a consultation	No working online flow took a payment and then created the appointment.	The client pays through Clio Payments inside the booking flow. Only a confirmed payment creates the appointment.
Appointment and video link	Not created by any connected flow.	Created on the lawyer's calendar automatically, with a Google Meet link sent by email and text.
Choosing a lawyer	One calendar could take bookings.	Seven lawyers can be booked. "No preference" offers the earliest free lawyer in the firm's order.
Where staff see a booking	Bookings went to a pipeline nobody watched.	A card in the firm's Intake and Retainers pipeline and a matching card in Consultation Bookings, with the lawyer as owner.
Confirmation message	No lawyer-specific confirmation.	Each lawyer's own confirmation template, with times in 12-hour Eastern format and the 30-minute rescheduling rule.
Unpaid attempts	Clients who had already paid could still receive "book again" follow-ups from an earlier abandoned attempt.	Unpaid attempts appear on a "Non Paid" list. Paying closes the client's other unpaid cards.
Returning clients	No previous-client tag.	Tagged "previous client" from the practice-management records, and new paying returning clients are tagged automatically.
Consultation notes	Kept in a separate consult form, not on the intake card.	Entered on the card. Answers copy to the contact, and the client's own booking message reaches the Clio matter.
Opening a matter	Created separately in the practice-management system, not from the CRM card.	Marking the card Won creates the matter in Clio Manage and links it back. Matter status changes reach the CRM within about 15 seconds.

Area	Before	After
Retainer agreements	Prepared outside the CRM, with no automatic filing from the intake card.	Sent from the card, signed online, reminded, and filed as a PDF in the client's Clio matter within about 5 minutes.
Joint retainers	Two copies could be sent, so neither was completed.	The second signer is added on the preparation page. Sending again withdraws the older copy.
Contact form messages	Saved a contact and a note, but created no pipeline card.	One Contact Inquiries card per message, matched to an existing contact by email, then phone.
Ads click ID	Never reached the CRM (0 of 18 booking cards checked carried one).	Saved for 90 days and added to the booking and contact forms.
Email links and signing domain	Tracked links failed to open securely, and the DKIM signature was missing.	Links open over HTTPS, and the CRM shows the sending domain as verified.

4.2 Website speed - mobile (Google PageSpeed Insights, median of runs)

Before: 2 November 2026 baseline. After: 3 November 2026, following fifteen changes. This is lab data from Google PageSpeed Insights, using the median of repeated runs for each page type.

Page type	Mobile score before	Mobile score after	Largest paint before	Largest paint after	Page weight before	Page weight after
Home	91	91	2.59 s	2.27 s	4.26 MB	0.67 MB
Contact	81	97	4.50 s	2.25 s	1.27 MB	0.46 MB
Fees	66	97	8.10 s	2.55 s	1.20 MB	0.55 MB
Case study	87	96	2.27 s	1.96 s	0.80 MB	0.52 MB
Lawyer profile	83	88	4.20 s	3.31 s	3.49 MB	0.51 MB
Service hub	84	88	4.05 s	3.30 s	0.88 MB	0.50 MB
Service page	88	95	3.60 s	1.96 s	0.81 MB	0.53 MB
Service listing	93	96	2.41 s	1.81 s	0.61 MB	0.40 MB
Consultation type	92	90	2.61 s	2.26 s	4.25 MB	0.67 MB
Blog post	80	98	2.30 s	2.11 s	0.79 MB	0.50 MB
Blog category	83	97	2.46 s	1.84 s	4.25 MB	0.67 MB
Job page	91	96	2.41 s	1.81 s	0.61 MB	0.40 MB

4.3 Website speed - desktop

Page type	Desktop score before	Desktop score after	Layout shift before	Layout shift after
Home	87	95	0.227	0.002
Contact	87	100	0.227	0.027

Page type	Desktop score before	Desktop score after	Layout shift before	Layout shift after
Fees	85	99	0.227	0.025
Case study	98	100	0.081	0.010
Lawyer profile	88	100	0.227	0.002
Service hub	88	100	0.228	0.002
Service page	100	100	0.004	0.002
Service listing	91	100	0.200	0.001
Consultation type	86	98	0.227	0.002
Blog post	97	99	0.095	0.019
Blog category	96	100	0.095	0.002
Job page	89	100	0.227	0.002

4.4 Home page in detail (mobile)

Measure	Before	After	Change
Page weight	4.26 MB	0.67 MB	-84%
Requests	108	76	-30%
First contentful paint	2.58 s	2.27 s	-12%
Largest contentful paint	2.59 s	2.27 s	-13%
Time to interactive	7.74 s	4.47 s	-42%
Layout shift	0.022	0.000	-100%

4.5 Google Ads landing pages (12 November 2026)

Measure (visitor visa refusal landing page)	Before	After
Mobile score, median	86	97
Mobile score, worst of three runs	57	97
Largest contentful paint, mobile	2.82 s	1.96 s
Speed index, mobile	5.74 s	2.31 s
Time to interactive, mobile	6.95 s	1.96 s
Desktop score	100	100

How to read these numbers. Lab scores move from run to run. Single mobile runs on this site varied by about ten points, so every comparison uses the median of repeated runs. Real-visitor (field) data in Google's report updates over about 28 days and is a separate measure. The home page score stayed at 91 even though its weight fell by 84%; its first and largest paint each improved by about 0.3 seconds. On several mobile pages the speed index, which measures how quickly the visible area fills in, rose while the largest paint and interactivity improved. These are measured results, reported as found.

5. Website Speed Work

5.1 Approach

The goal was a faster site with no visible redesign and no paid tools. Every change was a small custom module, a setting change or an image replacement. Each one could be undone by removing a single file or restoring a single setting. The host's built-in page cache was kept, and no second caching layer was added.

Working rules followed for every change:

- A host backup point before the work session and before each risky change.
- A saved copy of every file or setting before it was changed.
- One change at a time, followed immediately by checks of forms, live chat, translation, phone links, tracking and the mobile menu.
- A fresh measurement after each change, never taken while another measurement was still running.
- A record of each change, its measurement and its undo step.
- Repository, staging and production copies of each code module confirmed byte-identical by checksum.

5.2 Changes delivered

#	Change	Why it helped
1	Hero background image preloaded, phone-size image only on phones	The largest image starts downloading at once instead of after the styles load.
2	Live chat loads on the visitor's first interaction	Removes a heavy third-party script from the first page load.
3	Large lawyer portrait converted from a 4.2 MB PNG to a 164 KB WebP	Removes most of the weight from pages that showed it.
4	Map embed loads when scrolled near	The map's scripts no longer compete with the first screen.
5	Lighter hero background on phones, with compression really applied	A smaller first image on mobile.
6	Desktop menu fits on one line	Removes the layout shift (0.227) seen on ten page types.
7	Web fonts served from the site itself	Removes a connection to an outside font server.
8	Unused plugin and block styles no longer block first paint	The page can draw before styles it does not need have loaded.
9	A lawyer photo resized for phones: 419 KB PNG to 16 KB WebP	Less to download on mobile.
10	Form scripts load on first interaction	Forms work as before, but their scripts leave the first load.

#	Change	Why it helped
11	Offscreen images load only when near the screen, while first-screen images start at once	Home page download fell from about 2.4 MB to about 1.05 MB at this step.
12	Lawyer hero portrait sized for phones	A smaller first image on lawyer pages.
13	Google Tag Manager starts after first interaction, or 5 seconds after the page shows, with ad visits unchanged	Tracking keeps working without slowing the first view.
14	Form styles no longer block first paint when the form is far down the page	Faster first paint on long pages.
15	Small style sheets inlined into the page	Fewer round trips before first paint.
16	Landing pages paint in their final layout: layout styles and the headline font moved to the top	Removes a large reorder and font swap on phones. Applies to all seventeen landing pages that share this structure; the measured page is in section 4.5.

Tag Manager was switched back on at the client's request during the work. The delayed start (change 13) keeps it running for every visit while protecting the first view.

6. System Architecture

Website visitor → WordPress booking page → embedded booking app → Clio Payments checkout

Confirmed payment → booking app → lawyer calendar appointment with Google Meet → CRM contact and pipeline cards → confirmation email and text

CRM card marked Won → Clio Manage matter → retainer sent and signed online → signed PDF filed in the Clio matter

Website contact form → embedded contact app → CRM contact match → Contact Inquiries card and note

Component	Role	Notes
WordPress on WP Engine	Public website and booking/contact pages	Speed modules and the click-ID module are small must-use plugins.
Cloudflare	DNS and content delivery in front of the site	Email tracking links use a DNS-only record so their certificate is valid.
Booking app (HighLevel AI Studio)	Booking form, payment hand-off, appointment creation, pipeline cards, Clio hand-off	The client's chosen design, published from reviewed source.
HighLevel CRM	Contacts, calendars, pipelines, matter stages, workflows, messages	The source of truth for intake and matter stages.
Clio Manage and Clio Payments	Payment checkout, matters, documents	Receives matters, signed retainers and booking notes.
Documents app (self-hosted open-source DocuSeal plus a small service)	Retainer preparation, signing, reminders, filing	Runs on a private server and follows the open-source licence terms.

Component	Role	Notes
Contact app (HighLevel AI Studio)	Website contact form	Creates or matches the contact and opens a card.

Design choices and reasons:

- The CRM is the single place where staff work a booking. The other systems receive copies, and no one has to keep two boards in step.
- Payment comes before the appointment. A slot is only taken when payment is confirmed, so no unpaid booking blocks a lawyer's calendar.
- Matters live inside the CRM, and only document preparation and signing sit outside it. This keeps the staff view in one place while using a signing tool that can match the firm's existing templates exactly.
- Every external write can be repeated safely. A retry finds the existing appointment, card or matter and does not create a second one.

7. Online Consultation Booking

7.1 Client journey

1. The client opens the booking page and chooses a practice area. Each area lists only the lawyers who work in it, with "No preference" offered first.
2. The client picks a date and time. Only slots that leave enough time to finish payment are offered.
3. The client enters their details and the reason for the consultation.
4. The client pays the consultation fee through Clio Payments. The payment card shows the matter, the lawyer, the time and the meeting type.
5. After payment is confirmed, the booking app creates the appointment on the lawyer's calendar with a Google Meet link. It then opens the intake cards and sends the confirmation.
6. The client receives the lawyer's own confirmation email and a text message, with times shown in 12-hour Eastern format.

7.2 What staff receive

- A card in the Intake and Retainers pipeline and a matching card in Consultation Bookings, with the assigned lawyer as owner.
- The client's phone number, the appointment time and the booking message on the card.
- A clear calendar title showing the client, the matter and the lawyer.
- A "previous client" tag when the client already has a matter in the practice-management system.
- A staff alert when a booking needs manual review, for example when a payment arrives after its slot is no longer safe to book.

7.3 Firm order for "No preference"

When the client has no preference, the earliest free lawyer is offered in the firm's chosen order. A live check of 620 offered times found none out of order.

8. Unpaid Bookings and Follow-up

If a client starts a booking but does not pay, the attempt is kept on a "Non Paid" list with its value recorded as zero, so it does not inflate the pipeline. When the same client later pays, their other unpaid cards are closed automatically, so they are not asked to book again. Replies asking to reschedule or cancel are recognized: staff are notified and the client receives an acknowledgement.

9. Matters Inside the CRM and the Clio Manage Hand-off

Matter work happens inside the CRM, in stages that follow the firm's existing practice-management process, from consultation scheduled through retainer sent to hired or lost.

- **Consult notes** are entered on the card in the same order as the firm's existing consult form. The answers copy to the client's contact record, and one note per card is kept up to date.
- **Matter Action** is a one-step menu on the card for common actions, such as sending a retainer.
- **Won** creates the matter in Clio Manage, with the matter type and referral source, and links the matter back to the card. Repeating the action reports "already created" and makes no duplicate.
- **Updates** go only to a matter that belongs to the same client. A matter belonging to another contact is never changed.
- **Status sync** brings Clio matter status changes back to the CRM as tags within about 15 seconds.
- **The client's booking message** is added to the Clio matter's consultation notes.

10. Retainer Documents and E-Signature

Retainers are prepared and signed with a self-hosted copy of the open-source DocuSeal signing tool, connected to the CRM card.

- **Templates:** twelve of the firm's existing retainer templates were rebuilt. Each matches the original's fields, signers and pages (12 of 12 checked).
- **Branding:** the firm's logo appears on the signing and completed pages. The tool's required open-source notice and source offer are kept.

- **Signers:** a list of eight lawyers and two administrators with their roles. For joint retainers, a second client is added on the preparation page.
- **"Client only signs" mode:** the known details are locked, and the client only gives consent and signs.
- **Resending:** sending the same retainer again withdraws the earlier unsigned copy, so a client never sees two copies to sign.
- **Reminders:** the reminder email follows the firm's existing template and shows the real due date.
- **Filing:** within about five minutes of signing, the signed PDF is filed as one named document in the client's own open Clio matter. Joint retainers are filed only on the card's own matter, so a privileged document never lands in another client's file.
- **Dates:** recording the date the consultation was completed moves the card to the next stage once.

11. Contact Form to CRM

The website's contact form is an embedded app connected to the CRM.

- Every message creates a new card in the Contact Inquiries pipeline, with a reference number on the card and in its note.
- An existing contact is found by email first, then by phone. Existing contact details are never overwritten.
- When the CRM refuses a phone number, the note says so, and the message is still saved.
- The app accepts submissions only from the website, and it limits how often one visitor can submit.
- A live test from the website passed 3 of 3: the phone number was saved and three notes and three cards were created. The test records were then deleted.

12. Advertising Attribution

Ads conversions depend on the Google click ID reaching the CRM record. The website's booking and contact forms are embedded apps with fixed addresses, so the click ID on the landing page never reached them.

A small website module now saves the click ID and the campaign (UTM) parameters for 90 days. It adds them to the booking and contact form addresses on every page that carries those forms, which means a visitor who lands from an ad and books days later is still attributed. A live browser journey confirmed that the parameters reach both forms, including a test click ID supplied by the client.

13. Data Migration, Messages and Email Deliverability

Item	Result
Clio Manage contact import	Ran to completion: 13,167 Clio contacts read. Matching used email, and only empty fields were filled.
"Previous client" tag	Applied to 12,168 CRM contacts linked to a Clio client with an open or closed matter. 0 failed.
Clio Grow lead import	1,701 matters and 1,664 people imported into nine Clio Grow fields, filling empty fields only.
Retainer merge fields	Six auto-filled retainer copies use Clio merge fields, and the originals are unchanged. A generated test document read back fully filled.
CRM email templates	Fifteen existing emails now use CRM fields, and three text-message snippets were added.
Per-lawyer confirmations	Each of the seven bookable lawyers' own confirmation template is copied in and matched.
Email signatures	Staff signatures built from the firm's signature document.
Tracked email links	The tracking record was set to DNS-only so its valid certificate is used. Links now open over HTTPS.
DKIM signature	The missing DNS record was added, and the CRM shows the sending domain as verified.

14. Reliability, Security and Privacy Safeguards

- **Payment before booking:** an appointment is created only after the payment is confirmed with Clio, never from the browser's word alone.
- **Safe retries:** appointment, card, matter and document steps check for an existing result before creating one. A retry after a timeout does not create duplicates.
- **Bounded waiting:** steps that wait for another system have time limits and back-off, and they leave a staff note when they give up, instead of failing silently.
- **Ownership checks:** a Clio matter is updated only for the contact's own Clio client, and signed documents are filed only in the card's own matter.
- **Authentication:** integration endpoints reject a wrong or missing secret (verified: 401).
- **Input handling:** names and notes are escaped before display. This closed a stored cross-site scripting issue found during review.
- **Secrets:** keys live in the hosting platforms' secret stores, never in source, screenshots or this document.
- **Redirect safety:** server code refuses to follow redirects, so an access token is never forwarded to another address.
- **Privacy in tests:** test bookings used clearly marked test contacts, and test records were deleted after each check.
- **Undo for each change:** every website module can be removed by deleting a single file. Every app release has a recorded previous version to return to.

15. Testing and Verification

Check	Result	Environment
Real paid booking, end to end	Passed: payment, appointment, cards and confirmation (first on 7 Nov, most recently on 13 Nov)	Production, test contacts
Client times in 12-hour Eastern format	Passed: the card, two texts and the Meet email all showed the same time	Production, paid test booking
Firm order for "No preference"	620 times checked, 0 out of order	Production, read-only
Matter created from Won, repeat call	Created once; the repeat returned "already created"	Production, test contact
Wrong or missing integration secret	Rejected with 401	Production
Matter status sync to the CRM	Within about 15 seconds	Production, test matter
Signed retainer filed in Clio	The PDF was in the matter and fully uploaded	Production, synthetic client
Retainer templates rebuilt for signing	12 of 12 match fields, signers and pages	Documents server
Contact form from the website	3 of 3 passed, then cleaned up	Production
Ads click ID reaches both forms	Passed in a live browser journey	Production
Booking app automated tests	460 of 460 passed (11 Nov release)	Local
Documents app automated tests	377 of 377 passed, with lint and security scan clean (14 Nov release)	Local
Landing-page speed module tests	25 of 25 passed	Local
Released files match reviewed source	Byte-identical by checksum, for example 56 of 56 documents files	Live hosts
Speed before and after	Median PageSpeed Insights runs, all 12 page types	Production

Major releases were also reviewed by a separate reviewer who had not written the change, and the findings were fixed before release.

16. Problems Found and Fixed During Delivery

Problem: the booking form reported the CRM as unreachable

- What happened: the booking form's practice-area step failed with "CRM unreachable", yet no request was ever sent.
- Cause: the hosting platform does not support one redirect setting the code used. It threw an error before any request left the server.
- Fix: redirects are now handled manually and refused, which also stops access tokens from following a redirect.
- Lesson: when a failure happens too fast to involve the network, look at the platform, not the remote service.

Problem: the payment link was rejected

- What happened: creating a checkout link failed.
- Cause: Clio limits the return address to 255 characters, and the booking reference made it longer.
- Fix: a compact signed receipt replaced the long reference, keeping the same security checks.

Problem: every booking went to a pipeline nobody watched

- What happened: bookings were saved, but staff did not see them.
- Cause: the app still pointed at a retired development pipeline.
- Fix: bookings now go to the firm's Intake and Retainers pipeline, with a matching card in Consultation Bookings, and repeated writes are safe.

Problem: joint retainers could never be completed

- What happened: each person signed a different copy, so neither copy finished.
- Cause: the retainer was sent twice, and both copies stayed open.
- Fix: sending again now withdraws the earlier unsigned copy.

Problem: a paid client could not be booked into their chosen slot

- What happened: payment finished too close to the slot, and the calendar's minimum notice refused the appointment.
- Fix: offered times now leave room for payment, a late payment link is refused before payment, and staff are alerted if a payment ever arrives too late.

Problem: Ads click IDs never reached the CRM

- What happened: no booking card carried a click ID.
- Cause: the embedded forms had fixed addresses, so the landing page's click ID was dropped.
- Fix: the click-ID module described in section 12.

Problem: a speed hint was silently ignored

- What happened: a browser rendering hint had no effect.
- Cause: it only works near the very top of the page head, and it had been placed at the end of a large head.
- Fix: the hint was moved directly after the character-set tag, and it was verified in the measured result.

Problem: the first speed baseline was not what it claimed

- What happened: a "median of three" baseline turned out to be one run repeated from cache.
- Fix: the measurement script was corrected, and a fresh baseline was taken before any comparison. All numbers in section 4 come from the corrected method.

17. Notes for Developers

- **Measure, then change:** use the repeatable PageSpeed measurement script, take the median of three runs and record every run under a new label. Never overwrite earlier evidence.
- **One change at a time:** each website change is a single must-use plugin file, or a recorded setting change with a saved copy of the old value.
- **Check what must not break:** lead forms, live chat, translation, phone links, tracking, the mobile menu and SEO tags, immediately after each change.
- **Publish from reviewed source:** app code is published from the reviewed local copy, then read back from the host and compared by checksum.
- **Respect the host:** check WP Engine's disallowed-plugin list before installing anything, and do not add a second page cache.
- **Keep secrets out:** access details live only in the platforms' secret stores and the firm's private credential record.

Developed by Zahidul Islam

Website performance and integration engineering - measured speed work, paid booking flows, CRM and practice-management integration, and client-safe automation.