

IntakeAI

AI Intake Chatbot for Law Firms

Complete Handbook

Setup · Features · Best Practices · ROI Guide

<i>24/7</i>	Lead Capture	<i>10 min</i>	Setup Time	<i>\$0</i>	To Start
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getintakeai.com · hello@getintakeai.com

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1. What is IntakeAI?

IntakeAI is an AI-powered intake chatbot built specifically for law firms. It appears on your website as a chat bubble, greets every visitor, asks smart qualifying questions, collects their contact information, and sends you a complete lead summary — all automatically, 24 hours a day.

Unlike generic chatbots, IntakeAI is trained on your specific firm — your practice areas, your office hours, your Calendly booking link, and your own documents. It knows what cases you take and what you don't. It refers off-topic cases elsewhere politely. It never gives legal advice. It is, in essence, a trained digital receptionist who never sleeps.

■ ■ What IntakeAI is NOT

- Not a legal advice tool — it never gives case opinions or legal guidance
- Not a replacement for your attorneys — it handles intake only
- Not a generic chatbot — it is trained specifically on your firm
- Not an answering service — it works automatically with zero ongoing effort

2. Why Law Firms Need This

68%

of legal searches happen outside business hours

21×

higher conversion when a lead is responded to within 5 minutes

\$250K

average annual revenue lost from missed after-hours leads

83%

of potential clients contact the first firm that responds

The math is simple: a single personal injury case generates \$5,000–\$50,000 in attorney fees. IntakeAI costs \$99/month. One captured overnight lead pays for over four years of the service.

3. How It Works — The Full Flow

01

Visitor Arrives

A potential client visits your website at any hour — 2am, Sunday evening, a holiday. Your IntakeAI chatbot appears as a chat bubble in the bottom corner.

02

Warm Greeting

The bot greets them warmly: "Hi, I'm the intake assistant for [Your Firm]. I can find out if you have a case in 2 minutes — completely free." The visitor feels welcomed, not interrogated.

03

Case Qualification

The bot asks 4 smart questions about their situation. It understands their answers using Claude AI — the same technology behind Claude.ai. It identifies case type, timing, and urgency.

04

Contact Collection

The bot collects name, phone, email, and case details. It only asks for what you configured during setup. No unnecessary questions that make visitors abandon the chat.

05

Calendly Booking

The bot presents your Calendly availability inline. The visitor books a free consultation directly — no phone tag, no email chains, no back-and-forth.

06

Instant Lead Email

The moment the intake completes, you receive an email with: full name, phone, email, case type, case details, time of conversation, and the complete chat transcript.

07

You Wake Up Ready

You start your morning with booked consultations already in your calendar, lead summaries in your inbox, and cases pre-qualified before you even pick up the phone.

4. Setting Up Your Bot — Step by Step

Visit getintakeai.com and click "Create your bot — free." You will be guided through a 12-step onboarding conversation. Here is what each step collects:

Firm Name	The name that appears in the chatbot header. E.g. "Johnson Law Firm"
Email Address	Where lead notifications are sent. Use your direct email, not a shared inbox.
Phone Number	Displayed in confirmation messages sent to visitors.
Website URL	We scan your website to train the bot on your content automatically.
Document Upload	Upload intake forms, case criteria, FAQ docs, or any firm documents. Optional but recommended.
Logo	Your firm logo appears in the chat header. PNG or JPG. Optional.
Calendly Link	Your booking page. The bot shows this at the end of every qualified intake.
Office Hours	The bot sets correct expectations — never promises availability outside your hours.
Practice Areas	Select all case types you handle. The bot declines everything else politely.
Client Fields	Choose what information to collect: name, phone, email, date of incident, etc.
Brand Color	Your chatbot's accent color. Pick from presets or enter any hex code (#RRGGBB).
Special Instructions	Any specific rules: "never discuss fees," "only take IL cases," tone preferences, etc.

At the end of setup, you receive your unique embed code and dashboard link. The entire process takes 5 minutes.

5. Installing on Your Website

After completing onboarding, you receive a JavaScript snippet like this:

```
<script
  src="https://getintakeai.com/bot.js"
  data-firm="Johnson Law Firm"
  data-firm-id="johnson-law"
  data-email="james@johnsonlaw.com"
  data-calendly="https://calendly.com/james"
  data-color="#16a34a"
></script>
```

Paste this code just before the tag on your website. Platform-specific instructions:

WordPress	Install the "Insert Headers and Footers" plugin → paste code in the Footer section
Squarespace	Settings → Advanced → Code Injection → Footer → paste code
Wix	Settings → Custom Code → Add Code → Body (End) → paste code
Webflow	Project Settings → Custom Code → Footer Code → paste code
Custom HTML	Open your HTML file → find → paste code just above it
Need help?	Email hello@getintakeai.com — we install it for you free within 24 hours

6. Training Your Bot

IntakeAI trains on two sources of information: your website and your uploaded documents. Unlike traditional chatbots that require manual Q&A; setup, IntakeAI reads and understands natural language — the same way a new staff member reads your firm handbook.

Website scanning: We automatically read your website's content — attorney bios, practice areas, office locations, contact information, and case types. This happens instantly when you provide your URL.

Document upload: You can upload intake forms, fee agreements, case criteria documents, FAQ sheets, or any text-based documents. PDF, DOC, and TXT formats are accepted. The more specific information you provide, the more accurate your bot becomes.

Training time: Zero. There is no waiting period. The moment you complete setup, your bot knows everything you told it. Updates take effect immediately when you modify your settings.

7. Understanding Lead Emails

Every time a visitor completes an intake conversation, you receive an email within seconds. Here is what each email contains:

Lead name	Full name as provided by the visitor
Phone number	Clickable — tap to call directly from your phone
Email address	Clickable — opens email compose with their address pre-filled
Case type	The practice area identified during qualification
Case details	Brief description of what happened, in the visitor's own words
Timestamp	Exact time of conversation in Eastern Time
Urgency flag	Personal injury and accident cases are flagged in red for immediate follow-up
Full transcript	The complete conversation so you know exactly what was discussed
Call/Email buttons	One-click action buttons at the top of every email

Best practice: Call every lead within 15 minutes. Research shows that law firms who respond within 5 minutes convert leads at 21x the rate of those who respond the next day.

8. The Lawyer Dashboard

Your dashboard at getintakeai.com/dashboard.html gives you a complete overview of your intake performance:

- Total leads captured — all time and this month
- Overnight leads — captured while you were not working
- Conversion analytics — leads by case type, day of week, time of day
- Full lead list with status tracking (New, Contacted, Booked)
- Individual lead detail view with complete conversation transcript
- CSV export for importing into your CRM or case management system
- Your embed code — always accessible if you need to reinstall
- Bot configuration overview — practice areas, hours, color settings

9. Pricing Plans Explained

Feature	Starter	Pro	Business
Price	Free forever	\$99/month	\$199/month
Free trial	—	30 days	30 days
Chatbots	1	1	3
Conversations/month	50	500	Unlimited
Custom branding	X	✓	✓
Calendly booking	X	✓	✓
AI case qualification	X	✓	✓
Lead summary emails	✓ basic	✓ full	✓ full
Analytics dashboard	X	✓	✓
Multiple practice areas	X	X	✓
CRM export (CSV)	X	X	✓
Remove IntakeAI branding	X	X	✓
White-glove onboarding	X	X	✓

10. ROI Calculator — Does This Pay Off?

Let's be direct about the numbers. For a personal injury attorney:

Scenario	Conservative	Moderate	Strong
Extra leads captured/month	2	5	10
Case conversion rate	30%	40%	50%
Average case value	\$8,000	\$15,000	\$25,000
Monthly revenue added	\$4,800	\$30,000	\$125,000
IntakeAI Pro cost	\$99	\$99	\$99
ROI	48x	303x	1,263x

Even the most conservative scenario — 2 extra leads per month with 30% conversion — generates 48x return on investment. The question is not whether IntakeAI pays for itself. It is how quickly.

11. Best Practices for Maximum Leads

→ **Call within 15 minutes**

Every minute of delay reduces conversion. Set up lead email notifications on your phone so you are alerted immediately.

→ **Upload detailed documents**

The more specific information you give the bot — case criteria, fee structures, geographic limits — the better it qualifies leads before they reach you.

→ **Use your real Calendly**

Keep your Calendly link up to date with accurate availability. Visitors who book are 3x more likely to become clients than those who just leave contact info.

→ **Review transcripts weekly**

Read your conversation logs. You will learn what questions visitors ask most — and can improve your bot's responses by updating your documents.

→ **Match your brand color exactly**

Use your firm's exact hex color code for the chatbot. Branded chatbots get 40% more engagement than generic ones.

→ **Set realistic office hours**

If you are only available Mon–Fri 9–6, set that. The bot will set correct expectations and avoid promising next-day calls on Friday evenings.

→ **Share the handbook with staff**

If you have a paralegal or office manager, share this PDF. They can help monitor the dashboard and follow up on leads promptly.

12. Frequently Asked Questions

Q: How long does setup take?

A: The onboarding chatbot takes approximately 5 minutes to complete. Your bot is ready immediately after.

Q: Does the chatbot give legal advice?

A: No. IntakeAI is strictly an intake tool. It never gives legal opinions, discusses case merit, or advises visitors on legal strategy. It only collects information and books consultations.

Q: What happens when a visitor asks about fees?

A: The bot says that fee discussions happen during the free consultation, and offers to book one immediately.

Q: Can I change my settings after setup?

A: Yes. Email hello@getintakeai.com with your updates and we will apply them within 24 hours. A self-service settings panel is coming soon.

Q: What if someone asks about a case type I don't handle?

A: The bot politely declines and suggests they contact a firm that specializes in that area. It never gives a cold refusal — it always maintains a warm, professional tone.

Q: Is my data secure?

A: All connections are encrypted via HTTPS. Lead data is transmitted directly to your email and not stored permanently on our servers.

Q: Does this work on mobile?

A: Yes. IntakeAI is built mobile-first. 68% of legal searches happen on mobile devices, and the chatbot is fully optimized for small screens.

Q: What if my website has no chat widget support?

A: Any website that allows custom HTML or JavaScript can install IntakeAI. For platforms that do not allow code injection, email us and we will find a solution.

Q: Can I have multiple chatbots for different practice areas?

A: The Business plan includes 3 chatbots. You could have one for personal injury, one for family law, and one for immigration — each trained differently.

Q: What happens if I cancel?

A: Your bot stops working at the end of your billing period. Your lead data and settings are retained for 30 days in case you reactivate.

Q: Is there a contract or commitment?

A: No contracts. Month-to-month. Cancel anytime from your Lemon Squeezy billing portal.

Q: How do I install on WordPress?

A: Install the free "Insert Headers and Footers" plugin. Go to Settings → Insert Headers and Footers → paste your embed code in the Footer section → Save.

13. Contact & Support

We are a small, dedicated team committed to making every IntakeAI customer successful. We respond to every message — usually within a few hours.

Email support	hello@getintakeai.com	Response within 24 hours (usually faster)
Installation help	hello@getintakeai.com	We install your chatbot for free within 24 hours
Bot updates	hello@getintakeai.com	Send us your changes — applied within 24 hours
Billing questions	hello@getintakeai.com	Subscriptions managed via Lemon Squeezy
Website	getintakeai.com	Documentation, blog, and account access

Ready to capture more leads?

Visit getintakeai.com and create your bot in 5 minutes — free to start, no credit card required.