

Full Workflow (Welcome + Sign Up + Sign In + Recovery + Profile)

0) Welcome / Home Screen

Purpose: Explain app + route supervisors to auth.

Content

- App name + short description
- “How it works”:
 - Create plan → export PDF → email workers → confirm review → sign & finalize
- Note (important):
 - **“Supervisor accounts only. Workers do not need an account for v1.”**

Buttons

- **Sign In**
- **Sign Up (Supervisor)**

A) Sign Up (Supervisor) Workflow

Step A1 — Supervisor Details

Fields (required)

- First name
- Last name
- Date of birth (date picker)
- Supervisor ID number

Optional

- Company name (recommended optional)
- Job title (optional)

UX

- Inline validation (show errors as they type)

Next →

Step A2 — Choose Login Method + Credentials

Supervisor selects **one** primary method:

Option 1: Email

- Email (required)
- Password (required)
- Confirm password (required)

Option 2: Phone

- Phone number (required)
- Password (required)
- Confirm password (required)

Recommended UX features

- Show/hide password toggle
- Password rules displayed live (simple):
 - Min 8 chars
 - At least 1 number (optional: 1 symbol)
- “Already have an account? Sign In”

Next →

Step A3 — Verify Contact (required)

Based on chosen method:

Email verification

- Send code or verification link
- User enters 6-digit code (or opens link)

Phone verification (SMS)

- Send 6-digit SMS code
- User enters code

Buttons

- Verify
- Resend code (with cooldown)
- Change email/phone

Only proceed after verified.

Next →

Step A4 — Signature Setup (required, but editable later)

Goal: Save supervisor signature for auto-fill and final approval.

Required

- Draw signature (signature pad)
- Confirm signature

Recommended

- “Clear” button
- “Redo” option
- Note:
 - “You can update your signature later in Profile.”

Next →

Step A5 — Profile Picture (optional)

Options:

- Take photo
- Upload from gallery
- Skip for now

Next →

Step A6 — Enable Biometrics (optional, recommended)

Prompt:

“Enable Face ID / Fingerprint to confirm approvals on this device?”

Choices

- Enable biometrics
- Skip (can enable later in settings)

Important note

- Biometrics confirm actions on this device only.
- Biometrics do not replace password or signature.

Next →

Step A7 — Acknowledgment (recommended for v1)

Checkboxes:

- **Required:** “I confirm I’m authorized to create plans and the information entered is accurate.”

Create Account →

Step A8 — Account Created

Show confirmation:

- “Account created”
- “Verification complete”
- “Signature saved”
- “Biometrics enabled” (if selected)

Redirect to **Dashboard / Plans Home**.

B) Sign In Workflow

Step B1 — Sign In Screen

Options

- Email + Password OR Phone + Password

Recommended

- “Show/Hide password”
- “Remember this device” (recommended)
- “Forgot password?”

If biometrics enabled on this device

- Show button: **“Sign in with Face ID/Fingerprint”**
 - Only works after at least one successful password login on that device.

Sign In →

Step B2 — Post-login device check (optional)

If a new device:

- Ask for verification code (email/SMS) once
 - (Nice-to-have; can be skipped in strict v1)

Redirect to **Dashboard**.

C) Forgot Password / Account Recovery Workflow

Step C1 — Start Recovery

User enters:

- Email OR Phone

Send code →

Step C2 — Verify Recovery Code

- Enter 6-digit code
- Resend code option

Next →

Step C3 — Reset Password

- New password
- Confirm password
- Enforce rules + show/hide toggle

Success

- “Password updated”
- Suggest: “Re-enable biometrics if needed”

Return to **Sign In**.

D) Profile & Settings Workflow (recommended in v1)

Accessible from dashboard menu.

Profile page shows

- Name
- DOB (view only or editable with confirmation)
- Supervisor ID number
- Login method (email/phone)
- Verified status
- Profile picture

Actions

1. Update signature

- Draw new signature
- Save (requires password or biometric confirmation)

2. Enable/Disable biometrics

- Toggle
- Explains it's device-based

3. Change password

- Requires old password + verification (optional)

4. Logout

Key Rules (important)

- **Signature is the legal approval artifact** (stored and applied to PDFs).
- **Biometrics are only a confirmation gate** for sensitive actions (finalize, apply final signature).
- If plan is **Under Review** or **Final**, editing is blocked regardless of who is signed in.

Recommended mandatory vs optional fields (v1)

Mandatory

- First name, last name
- DOB
- Supervisor ID number
- Email OR phone (verified)
- Password
- Drawn signature
- Authorization acknowledgment checkbox

Optional

- Profile picture
- Company name
- Biometrics