**Login Page and Onboarding Process – New User – Accounting Professionals**

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**New User Registration & Onboarding Process**

**Step 1: User Information**

* Full Name
* Email Address
* Phone Number
* Password & Confirm Password
* Security Questions (for account recovery)

**Step 2: Account Type Selection**

**New users should select their role to tailor their experience:**

* Business Users (Owner, Internal Accountant, Operational Manager, HR Manager, Staff)
* Accounting Professionals: (Bookkeepers, Accountants, Tax Professionals, Auditors, Marketing Professionals)

**Step 3: Company Information**

* **Business Name (Notifying to Employer, Pending approval)**
* **Website (Optional)**

**Step 4: Financial Information (Accountant)**

* **Banking Details** (For transactions & payroll integration, but only open to Admin, Accountant)

**Step 5: HR & Organizational Hierarchy (For Medium & Enterprise Users or HR Manager)**

* **Users Roles (for Approval workflow)**
  + **Bookkeeper**
  + **Accountant**
  + **HR Manager**
  + **Sales / Finance team**
  + **Custom Role Creation**
* **Access & Permissions Settings (Role-Based Access Control)**

**Step 6: Setup Preferences**

* **What do you want to do first?** (User Preference Selection)
  + Connect Bank Accounts (Open to Accountant, Admin)
  + Set Up Chart of Accounts (Open to Accountant, Admin)
  + Upload Financial Docs
  + Invite Team Members (Open to HR, Admin, Manager)

**Step 7: Integration Setup (Optional Open to Accountant)**

* Setup Data Ingestion Method (eMail, Cloud, Mobile, Manual Uploading)
* Import from QuickBooks, Xero, NetSuite, Sage, etc.
* Connect Payroll / HR System
* Enable Multi-Currency (if applicable)

**Step 8: Subscription Plan Selection (Optional to Accountant)**

* Free Trial / Paid Plan Options
* Billing Details
* Promo Code (If applicable)

**Step 9: Final Confirmation & Welcome Dashboard**

* Review & Confirm Information
* Agree to Terms & Conditions
* Redirect to Personalized Dashboard

**Additional Considerations**

* **AI-Powered Guided Onboarding:** A chatbot or guided setup wizard can assist new users.
* **Live Chat Support:** Help users complete onboarding seamlessly.
* **Multi-Factor Authentication (MFA):** For security, especially for enterprise clients.
* **Mobile-Friendly Login:** Ensure smooth access across devices.