**Login Page and Onboarding Process – New User – Individual User**

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**New User Registration & Onboarding Process**

**Option A: HR Setup the Access  
  
Option B: Individual User setup by themselves  
  
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
* Website (Optional)
* **Notifying to Employer, Pending approval**

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

* **Personal Banking Details** (For reimbursement & payroll integration)

**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: 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.