

# SaaS Application Flow Document

This document outlines the polished application flow for the **Post-Sync** social media scheduling SaaS. Use it as a living blueprint to guide development, onboarding, and future enhancements.

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## 1. Onboarding & Account Setup

### Connect Social Accounts

- Prompt: "Link your social channels to start posting."
  - OAuth popups for each selected platform (e.g., X, LinkedIn, Facebook).
  - Display each platform with
    - Logo + platform name
    - Status badge: **Connected** (✓) or **Connect** button
  - Option: **Skip for now** (access to dashboard but disabled "New Post" until one account is connected).
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## 2. Home / Dashboard

- **Overview Cards:**
  - **Upcoming Posts:** next 3 scheduled posts (thumbnail, date/time, platforms).
  - **Quick Actions:** prominent + **New** button (FAB on mobile).
- **Secondary Links:**
  - **Calendar:** view scheduled posts in calendar format.
  - **Analytics:** snapshot of posting metrics.

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### 3. Create Post (Core Flow)

**Entry:** Click **+ New** (FAB or Dashboard CTA).

1. **Mode Selection:** Tabs for **Media** or **Text**.
2. **Master Content:**
  - **Media:** Drag-and-drop or file picker (images, videos, carousels).
    - Instant processing: show upload progress + toast "Media processed. Ready to post."
    - Cover image selection for videos/carousels.
  - **Text:** Rich textarea with markdown hint and hashtag suggestion option.
3. **Account & Captions Panel:**
  - **Account Checklist** (right panel): list connected platforms with checkboxes.
  - **Per-Account Caption Editor** (left panel):
    - For each checked account:
      - Caption textarea prefilled with master draft (editable).
      - Placeholder: "Caption for [Platform]..."
    - Actions:
      - **Apply to All:** bulk-copy master caption.
      - **Copy from:** quick copy between account fields.
      - Character counters for limits (e.g., Twitter 280).
4. **Schedule Controls** (sticky footer):
  - **Post Now** or **Schedule for Later**.

- Date/time picker (user timezone).

#### 5. Validation & Submission:

- Ensure each selected account has caption.
  - On submit: save to DB, enqueue jobs, toast "Your post is queued for X accounts."
  - Redirect to Dashboard or Calendar view.
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### 4. Queue & Calendar

- **Calendar View:** month/week/day toggle.
    - Draggable post cards for rescheduling.
  - **List View:**
    - Tabs: **Upcoming**, **Pending**, **Failed**.
    - Inline actions: **Edit**, **Retry**, **Delete** on hover.
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### 5. Live Posting & Status Updates

- **Worker Process** reads queue, calls each platform API with respective caption + media.
  - **Real-time Feedback** via WebSocket or polling:
    - Update UI: status dot changes from pending to ✓ or ✗.
  - **Notifications** (🔔 icon) alert on failures or successful scheduled posts.
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### 6. History & Analytics

- **History Tab:**
    - Filter by date range, platform, status.
    - **Duplicate** action for reusing content.
  - **Analytics Page:**
    - **Posts per Platform:** bar chart.
    - **Success Rate Timeline:** line chart.
    - **Top Performing Posts:** list by engagement (future integration).
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## 7. Settings & Profile

- **Profile Settings:**
    - Update email, password, avatar.
    - Default timezone and language.
  - **Preferences:**
    - Default post mode (Now vs. Schedule).
    - Notification preferences (in-app, email).
  - **Billing:**
    - Plan details, upgrade/downgrade, payment methods.
  - **Connected Accounts:**
    - Re-authenticate expiring tokens.
    - Disconnect unwanted accounts.
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## 8. Support & Feedback

- **Help & Documentation** link in avatar menu.
- **Feedback Form**: quick "Report an issue" or "Request a feature" modal.
- In-app tooltips (?) for complex features.

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**Core Loop**: Connect → Compose → Customize Captions → Schedule → Track Results.

Keep your flow lean, intuitive, and focused on giving creators fast, reliable posting with minimal clicks.

*This document should evolve as you gather user feedback and expand features. Keep it updated!*