Pact Gateway Application: Page Specification

ID: uberpu-ntiva/dox-gtwy-main

This document outlines every user-facing page (view) in the main gateway application, with key design and functional recommendations.

1. Authentication

These pages are handled by the gateway before the user enters the main application.

Page: Login

- **ID:** ...-gtwy-login-page
- **Route:** /login
- **Purpose:** Authenticate the user.
- **Recommendations:**
  - **SSO First:** The primary call to action should be "Sign in with [Azure B2C]" as this is the main authentication service.
  - **Simplicity:** Keep the UI minimal. Logo, the SSO button, and a small link for "Forgot Password" or "Help".
  - **No Local Auth:** Avoid building a separate username/password system. Defer entirely to the ...-auth-b2c-integration.

2. Core Application

These pages form the main authenticated experience.

Page: Dashboard

- **ID:** ...-gtwy-dashboard
- **Route:** /
- **Purpose:** Provide an "at-a-glance" summary of action items.
- **Recommendations:**
  - **Role-Based:** This page must be dynamic. A Facilitator sees "Pending Approvals" and "Rejected Activations." An Admin sees "System Health" and "New Users."
  - **Action-Oriented:** Use "Action Cards," not just stats. (e.g., "[3] Manual Returns to Validate" -> links to the Validation UI).
  - **Site-Aware:** All data shown must reflect the currently selected site from the ...-gtwy-site-switcher component.

3. Document & Template Management

Page: Document Manager (Template Library)

- **ID:** ...-gtwy-doc-manager
- **Route:** /documents
- **Purpose:** List, find, and manage all document templates.
- **Recommendations:**
    - **Rich Metadata:** The list view should be a table with columns for: Name, Fields Mapped, Used in # Bundles, Last Updated, Status (Draft/Active).
    - **Advanced Search:** This is a library. Users need to filter by Name, Tag, or Applicable Site.
    - **Primary Actions:** Main button should be "Upload New Template" (links to ...-gtwy-upload-ui). Each row needs a "Map Fields" action (links to ...-gtwy-field-mapper-ui).

Page: Document Upload UI

- **ID:** ...-gtwy-upload-ui
- **Purpose:** Ingest a new PDF to be used as a template.
- **Recommendations:**
    - **Multi-Step Modal:** Use a modal or a simple wizard.
        1. **Upload:** Drag-and-drop file (...-tmpl-pdf-upload).
        2. **Assign Sites:** Immediately ask which sites this template applies to.
        3. **Detect Fields:** Offer a button to "Auto-Detect Fields" which runs the ...-tmpl-field-mapper service.
    - **Redirect:** On success, redirect the user directly to the Field Mapper UI for that new document.

Page: Field Mapper UI

- **ID:** ...-gtwy-field-mapper-ui
- **Route:** /documents/:id/map
- **Purpose:** The core of the app. Visually map document fields to data sources.
- **Recommendations:**
    - **Three-Panel Layout:**
        1. **Left:** Document Preview (shows the PDF, draws field boxes).
        2. **Middle:** List of detected fields (e.g., supplier_name, signature_block_1).
        3. **Right:** Properties for the *selected* field.
    - **Data Mapping:** The "Properties" panel is critical. It must allow mapping a field to:
        - A Signer Role (e.g., Signer 1 - Full Name, Signer 2 - Email).
        - A System Value (e.g., Current Date, Transaction ID).
        - A Data Feed Query (e.g., get_member_id_from_email).
    - **Save Action:** This page saves the template *mapping* (coordinates, field types, data links) to the ...-tmpl-service.

Page: Document Settings UI

- **ID:** ...-gtwy-doc-settings-ui
- **Route:** /documents/:id/settings

- **Purpose:** Manage non-field metadata for a template.
- **Recommendations:**
  - **Separate from Mapper:** Don't clutter the Field Mapper with these.
  - **Key Fields:** This is where you set Contract Start/End Dates, Exclusivity Flags, Negotiation (On/Off), and Applicable Sites.
  - **Lifecycle:** Include "Archive" or "Deactivate" template buttons here.

4. Bundles & Batch Sending

Page: Bundle List (Recipe List)

- **ID:** ...-gtwy-bundle-list-ui
- **Route:** /bundles
- **Purpose:** Manage reusable "recipes" (groups of templates).
- **Recommendations:**
  - **Show Contents:** The list view should show which templates are *in* the bundle (e.g., "Onboarding Packet: [W-9, MSA, NDA]").
  - **Quick Actions:** Each row needs a "Batch Send" button (links to ...-gtwy-batch-send-ui) and an "Edit" button (links to ...-gtwy-bundle-builder-ui).

Page: Bundle Builder UI

- **ID:** ...-gtwy-bundle-builder-ui
- **Route:** /bundles/new or /bundles/:id/edit
- **Purpose:** Create or edit a "recipe."
- **Recommendations:**
  - **Two-Panel Layout:**
    1. **Left:** Searchable list of all available *templates* (from ...-gtwy-doc-manager).
    2. **Right:** The bundle being built.
  - **Drag-and-Drop:** Users must be able to drag templates into the bundle and *re-order them* to define the signing order.

Page: Batch Send UI

- **ID:** ...-gtwy-batch-send-ui
- **Route:** /bundles/:id/send
- **Purpose:** Send one bundle to many targets simultaneously.
- **Recommendations:**
  - **"Mail Merge" Interface:**
    1. **Target List:** A text area to paste emails, a CSV upload, or a button to select from the Signer Manager.
    2. **Field Preview:** A grid that shows how data will be auto-filled for each target.
  - **Send:** This page calls the ...-esig-service to kick off all the AssureSign transactions.

5. Signers & Targets

Page: Signer Manager

- **ID:** ...-gtwy-signer-manager-ui
- **Route:** /signers
- **Purpose:** A simple CRM for known signers and businesses.
- **Recommendations:**
    - **Key Data:** Store Name, Email, and Associated Business. This "Associated Business" is crucial for data mapping.
    - **Import/Sync:** Include an "Import from Feed" button that syncs with the ...-data-etl-service (e.g., pull from a GPO member list).

6. Transactions & Returns

Page: Transactions Dashboard

- **ID:** ...-gtwy-transactions-ui
- **Route:** /transactions
- **Purpose:** "Control Tower" to monitor all in-flight and completed signings (both e-sign and manual).
- **Recommendations:**
    - **Focus on "Stuck":** The default view should be "Action Required."
    - **Unified List:** Show e-sign status (from ...-esig-webhook-listener) and manual status (e.g., "Awaiting Validation") in one list.
    - **Search:** User must be able to find a transaction by Signer Email, Document Name, or Transaction ID.

Page: Transaction Detail View

- **ID:** ...-gtwy-transaction-detail-ui
- **Route:** /transactions/:tx_id
- **Purpose:** Deep dive into one specific signing transaction.
- **Recommendations:**
    - **Audit Log:** Show a timeline: Created, Sent to Signer 1, Viewed by Signer 1, Signed by Signer 1, Sent to Signer 2, etc.
    - **Document Access:** "Download Signed PDF" (pulls from ...-store-sharepoint) and "Download Evidentiary Materials."
    - **Link to Activation:** If this transaction is part of a price activation, link to the ...-gtwy-activation-detail-ui.

Page: Manual Return Upload UI

- **ID:** ...-gtwy-manual-return-ui
- **Route:** /returns/upload
- **Purpose:** Ingest a scanned, physically signed document.
- **Recommendations:**
    - **Simple Upload:** A large "drag-and-drop" target.
    - **Immediate Barcode Match:** On upload, *immediately* call ...-rtns-barcode-matcher.
    - **Smart Redirect:**
        - If **Matched:** Redirect to the ...-gtwy-transaction-detail-ui for that transaction.
        - If **Unmatched:** Redirect to the ...-gtwy-ocr-validation-ui.

Page: OCR Validation UI

- **ID:** ...-gtwy-ocr-validation-ui
- **Route:** /returns/validate/:return_id
- **Purpose:** Human-in-the-loop correction for OCR data.
- **Recommendations:**
  - **Two-Panel View:**
    1. **Left:** The scanned PDF image.
    2. **Right:** The *expected* fields from the template.
  - **User Action:** The user reads the image and types the values (e.g., Signature Date, Member Name) into the fields on the right.
  - **Submit:** This action marks the manual transaction as "Completed."

7. Price Activations

Page: Activations Dashboard

- **ID:** ...-gtwy-activation-dashboard-ui
- **Route:** /activations
- **Purpose:** Track all price activation proposals.
- **Recommendations:**
  - **Kanban View:** This is the perfect UI for a Kanban board: Pending Submission | Submitted (Awaiting Reply) | Rejected (Action Req'd) | Approved.
  - **Cards:** Each card represents one proposal, showing the Member/Supplier Name and Status.

Page: Activation Builder UI

- **ID:** ...-gtwy-activation-builder-ui
- **Route:** /activations/new
- **Purpose:** Create and submit a new price activation proposal.
- **Recommendations:**
  - **Wizard:** A 3-step process:
    1. **Link Documents:** Select from *completed* transactions (from ...-gtwy-transactions-ui).
    2. **Add Proof:** Upload *new* supporting documents (e.g., purchase reports).
    3. **Fill Proposal Form:** A dynamic form that sends data to the ...-actv-service.

Page: Activation Detail View

- **ID:** ...-gtwy-activation-detail-ui
- **Route:** /activations/:act_id
- **Purpose:** Manage the duplex "conversation" with the external pricing system.
- **Recommendations:**
  - **Conversation Log:** This is the key feature. Show a chat-like history:
    - [PACT] 10:01 AM: Proposal Submitted.
    - [EXTERNAL] 10:05 AM: Received. (ID: ext-8a4b2).

        - [EXTERNAL] 10:30 AM: REJECTED. Reason: "Volume commitment data missing."
    - **Action Buttons:** Based on the status, show "Appeal" or "Retry (Adjust Offer)" buttons.

8. Data & Automation (Admin)

Page: Data Feeds UI

- **ID:** ...-gtwy-data-feeds-ui
- **Route:** /data/feeds
- **Purpose:** Admin page to manage ETL jobs.
- **Recommendations:**
    - **Job List:** Show all configured jobs from ...-data-etl-service.
    - **Status:** Show Last Run Time, Status (Success/Failed), and a "View Logs" link.
    - **Actions:** "Run Now" (manual trigger) and "Configure" (set schedule, API keys, etc.).

Page: Distributor Management UI

- **ID:** ...-gtwy-distributor-mgmt-ui
- **Route:** /data/distributors
- **Purpose:** Manage parent/child distributor relationships.
- **Recommendations:**
    - **Visual Tree:** This *must* be a visual "org chart" or "tree" editor. A simple table won't work.
    - **Edit-in-Place:** Allow admins to click-and-drag distributors to change their parent/child relationships.

Page: Workflow Builder UI

- **ID:** ...-gtwy-workflow-builder-ui
- **Route:** /workflows/builder/:id
- **Purpose:** Admin page to create automations.
- **Recommendations:**
    - **Visual Builder:** A "Trigger -> Condition -> Action" UI.
    - **Trigger:** Dropdown (e.g., On: Document Signed, On: Activation Rejected).
    - **Condition:** (e.g., IF: Site == 'GPO Midwest').
    - **Action:** Dropdown (e.g., THEN: Send Email to Admin, THEN: Submit to Activation Service).

9. System Administration

Page: Admin Settings UI

- **ID:** ...-gtwy-admin-settings-ui
- **Route:** /admin/settings
- **Purpose:** Global (or per-site) configuration.

- **Recommendations:**
  - **Tabbed Layout:** Use tabs for different sections: [Site Management], [User Permissions], [Pricing Tiers], [Chargeback Codes], [Integrations (API Keys)].

Page: Reporting Dashboard

- **ID:** ...-gtwy-reporting-dashboard
- **Route:** /admin/reporting
- **Purpose:** View aggregated data from the ...-data-aggregation-service.
- **Recommendations:**
  - **BI Dashboard:** This is a business intelligence view. Show charts: Volume Commitment vs. Actuals, Time-to-Sign by Template, Activation Approval Rate.
  - **Export:** Allow all reports to be exported to CSV/PDF.

Page: Recommendations UI

- **ID:** ...-gtwy-recommendations-ui
- **Route:** /admin/recommendations
- **Purpose:** Show AI-driven insights from the ...-core-rec-engine.
- **Recommendations:**
  - **Simple List:** A list of "opportunities" with "Accept" or "Dismiss" buttons.
  - **Examples:**
    - "Opportunity: 80% of users who sign W-9 also sign NDA. Recommend bundling them."
    - "Opportunity: Member Corp has exceeded Tier 2 volume. Recommend tier elevation."