🎯 Core Objective

Rebuild YouConnect's **client onboarding experience** as a **self-guided, modular onboarding flow**, replacing the existing multi-week, CX-led manual setup.

The new experience should:

- Be **self-service**, but **CSM-assisted if needed**
- Educate users contextually at every step ("why we ask this")
- Be **modular, progressive, and revisitable** (not one long flow)
- Focus on **functionality & logic** first, **UI fidelity later**
- Mirror the usability and guided tone of **SynkedUP's onboarding stepper flow**

🧩 High-Level Flow Structure

🔹 Pre-Onboarding / Welcome

- Brief welcome screen — purpose and duration ("Set up your company in ~10 min")
- CTA: **"Start Setup"**
- No video walkthroughs on every screen — only one intro video if needed.
- Immediately begin **Module 1: Company Setup**

🧭 Onboarding Modules (Functional + UX Breakdown)

Module 1 — Company Setup

"Tell us about your bank / organization"

- Collect company information (name, type, etc.)
- Ask whether they do **Commercial**, **Environmental**, or **Residential** appraisals.
- Provide right-hand **education sidebar** explaining each term and its impact.
- No scrolling — 2–3 focused questions per page.
- End with a completion modal: “Your company information is ready.”

Module 2 — Definitions

“Define your Request Types, Properties, and Order Form”

- **Request Types (Order Types)**
  - Define what kinds of requests the bank processes.
  - Example: Appraisal → Vendor → Reviewer.
  - Educational context: Explain why these definitions matter.
- **Property Form**
  - Change labels for existing inputs.
  - Mark fields as required / hidden.
  - Add custom fields.
  - Education: “Tailor your property input forms to your team’s workflow.”
- **Order Form**
  - Define fields for lender order submission.
  - Adjust labels, required fields, hidden inputs, and add custom fields.
  - Education: “This is the main form your lenders will use.”

⚙️ *Goal*: Give flexibility for field configuration while still providing best practices and pre-filled templates.

Module 3 — User Setup

> "Add your team members and roles"

- Define roles:
    - **Bank Admin**
    - **Job Manager / Analyst**
    - **Loan Officer**
- Assign permissions and routing relevance (these are used later in routing configuration).
- Education sidebar: "Each role determines visibility and task assignment."

Module 4 — Routing Setup

> "Define how requests are routed"

Routing is complex — so this is its **own module** with a linear mini-flow.

Substeps within this module:

1. **Routing Overview**
    - Education: Explain routing logic and fallback rules.
2. **Request Type Routing**
    - Configure routing paths per request type.
3. **Assigned Area**
    - Define fallback areas and responsible managers.

4. **Logical Routing**
   - Create conditional rules: e.g., *“If property type = Commercial, assign to Job Manager X.”*

💡 *No nested flows.*
Each routing configuration appears linearly — no modals inside modals. The user always knows where they are (“Step 2 of 4”).

Module 5 — General Settings

“Fine-tune your defaults and preferences”

- System-level settings that drive global behavior:
  - Bid Engagement Panel templates
  - Default views
  - Other configuration panels from current Realwired documentation
- Not exposed earlier in the process (should appear **after** routing setup)
- Education sidebar: “These settings define how your organization works globally.”

📋 Additional Features / Global Rules

🧱 IT Readiness Checklist

- Moved **outside** the linear flow.
- Appears on the **Get Started page** as a parallel “task list.”
- It’s a confirmation checklist (no output data).
  - Example: “Have you set up your email domain?” ✅ Yes / No

- Acts as a progress tracker alongside modules.

🏁 Get Started Page (Hub Page)

After completing **Module 1**, users land on this page.

This page shows:

- Progress tracker for **Modules 1–5**
- The next module with CTA: **“Start Module”**
- Completed modules with ability to **revisit and edit**
- Upcoming modules grayed out
- IT Readiness Checklist
- Minimal branding (logo + modules list)
- No navigation — acts as an **interstitial checkpoint** before entering the main app.

Pattern:

1. Complete Module → Confetti celebration → Return to Get Started Page
2. Start next Module → Linear flow → Repeat

🧠 Functional & UX Guidelines

- **Focus on logic, not final UI** for now (no heavy styling or illustrations).
- **Left column:** Questions + Inputs
- **Right column:** Contextual education (purpose, examples, importance).
- No “nested” steps inside a step — everything linear and trackable.

- Keep each screen **short, simple, and scroll-free.**
- Allow users to **go back and reconfigure** completed modules.
- Use **pre-filled defaults and best-practice examples** wherever possible.
- Celebrate completion with **positive feedback (e.g., confetti, progress modal).**
- “Next” replaces “Begin Guided Setup” since the user is already in flow.

🧩 Summary of Identified Modules

Module	Focus Area	Description
1	Company Setup	Basic org info, types of appraisals, overview
2	Definitions	Define request types, property forms, and order forms
3	User Setup	Add users, assign roles, set permissions
4	Routing	Build routing flows, assigned areas, fallback rules
5	General Settings	Global defaults, bid templates, system preferences

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🧱 Implementation Roadmap (Vibe Coding Plan)

1. **Scaffold project folder** for `youconnect-onboarding`
2. **Create base Next.js + ShadCN setup**
3. **Design functional flow** with reusable stepper components:
    - `ModuleStepper` (module tracker)
    - `LinearFlow` (question navigation)

    - `EducationSidebar`

4. **Implement Get Started Page** as module hub
5. **Add IT Checklist as checklist component**
6. **Add confetti or success component after each module**
7. **Enable progress persistence via local storage / API later**
8. **Test for UX heuristics** — scroll-free, two questions per view, clear CTA