**ReAlign MVP – Notification Rules**

**Version:** 1.6

**Date:** May 21, 2025

**Goal:** Ensure timely, secure, and actionable communication to reduce delays and improve clarity across roles.

**📬 Notification Channels**

* **Email:** Primary channel for all users.
* **SMS:** Optional for homeowners and agents (toggle shown in party invite UI). Opt-out link must be included in SMS.
* **In-App Feed:** Threaded messages and document request status (no real-time push updates to the feed itself in MVP; updates visible on load/refresh).
* **Device Push Notification:** For key alerts like document requests, if the user has enabled push notifications for the ReAlign application and the device/platform supports it. Opt-in is managed via device OS settings; the app will request permission as appropriate.

**Unified Notification Service**

All outbound notifications are role-scoped, action-triggered, and audit-logged (leveraging Supabase logs or application-level logging for MVP). Messages are routed through a unified backend notification service. This service:

1. Identifies the recipient(s) and the triggering event.
2. Checks the recipient's stored notification preferences (e.g., SMS opt-in).
3. Checks device capabilities/permissions for push notifications (if a push token is registered for the user).
4. Constructs the message content appropriate for each enabled channel.
5. Attempts delivery via all relevant channels (e.g., email is default; SMS if opted-in; push if enabled).
6. Logs the dispatch attempt and outcome for auditing.

**🔔 Notification Types & Rules**

**1. Transaction Invitation**

* **To:** All parties added to a transaction.
* **Trigger:** Negotiator submits party details in transaction creation.
* **Channels:** Email (default), SMS (if enabled by party and phone provided).
* **Message (Email/SMS):** “You’ve been invited to join a short sale file on ReAlign for [Property Address]. Click below to view your tasks. No password required: [MagicLinkURL]”

**2. Magic Link Delivery**

* **To:** Any invited party without password login requesting access.
* **Trigger:** User requests access via /auth/magic-link endpoint.
* **Channels:** Email or SMS (based on user input).
* **Message (Email/SMS):** “Your access link to ReAlign is below. It expires in 24 hours or after first use: [MagicLinkURL]”
* **Failsafe:** Resend available via /auth/magic-link/resend (max 3/hour). If limit exceeded, UI shows toast: 'You have exceeded the maximum number of resend attempts. Please try again later.'

**3. Document Request Sent**

* **To:** Assigned party (e.g., homeowner, agent).
* **Trigger:** Negotiator sends document request from preset list.
* **Channels:** Email (default), SMS (if enabled), Push Notification (if enabled), In-App Feed.
* **Message (Email/SMS):** “[Negotiator Name] requested your [Document Type] for the short sale file [File Name]. Click here to upload securely: [DirectLinkToRequest]”
* **Message (Push):** “[Negotiator Name] requested [Document Type] for [File Name]. Tap to upload.”
* **Message (In-App Feed):** “New Request: [Document Type] assigned to you by [Negotiator Name].”

**4. Document Request Reminder**

* **To:** Assigned party with pending request.
* **Trigger:** Manual resend by negotiator or automatic CRON trigger (e.g., 48 hours after no response).
* **Channels:** Email (default), SMS (if enabled), Push Notification (if enabled), In-App Feed.
* **Message (Email/SMS):** “Reminder: Your [Document Type] is still needed for your short sale file [File Name]. Upload now to avoid delay: [DirectLinkToRequest]”
* **Message (Push):** “Reminder: [Document Type] for [File Name] is still needed. Tap to upload.”
* **Message (In-App Feed):** “Reminder: [Document Type] still pending.”

**5. Document Request Revision Needed**

* **To:** Assigned party (e.g., homeowner, agent).
* **Trigger:** Negotiator resets a document request to 'pending' AND includes a revision note.
* **Channels:** Email (default), SMS (if enabled), Push Notification (if enabled), In-App Feed.
* **Message (Email/SMS):** "Your [Document Type] for the short sale file [File Name] requires revision. Note from negotiator: '[Negotiator's Note]' Click here to review and re-upload: [DirectLinkToRequest]"
* **Message (Push):** "[Document Type] for [File Name] needs revision. Note: '[First 20 chars of Negotiator's Note]...' Tap to review."
* **Message (In-App Feed):** “Revision Needed: [Document Type]. Note: '[Negotiator's Note]'”

**6. Message Mention / Reply**

* **To:** Any party mentioned using plain text “@” or directly replied to.
* **Trigger:** New message creation or reply containing a mention/reply.
* **Channels:** Email (default), Push Notification (if enabled and relevant), In-App Feed.
* **Message (Email):** “[User] mentioned you in a message on ReAlign regarding [File Name]. Tap to view: [DirectLinkToMessage]”
* **Message (Push):** “[User] mentioned you in [File Name]: '[First 20 chars of message text]...'”
* **Message (In-App Feed):** Displayed as a standard message, mention highlighted if UI supports.
* **Notes:** MVP uses plain text parsing for mentions; no UI autocomplete or tagging logic.

**7. Status Change Alert (Document Uploaded/Completed by Party)**

* **To:** Negotiator.
* **Trigger:** A party uploads a document or marks a document request they are assigned to as 'complete' (primarily through upload).
* **Channels:** Email (default), Push Notification (if enabled), In-App Feed.
* **Message (Email/Push):** “[User] completed a requested item: [Document Type] for [File Name].”
* **Message (In-App Feed):** “[Document Type] for [File Name] marked complete by [User].”

**8. System Warnings (MVP: Negotiator Only)**

* **To:** Negotiator only.
* **Trigger:** File idle > 7 days or past deadline (MVP: static rule, potentially a daily CRON job check).
* **Channels:** Email, In-App Feed.
* **Message (Email/In-App Feed):** “Reminder: [File Name] has been idle. Review progress or send a follow-up.”