**ReAlign MVP – User Onboarding & Role Flows**

**Version:** 2.3

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**Goal:** Deliver a frictionless, secure, mobile-first onboarding experience for all user types, with clear, role-specific experiences and universal standards for access and usability.

**1. Overview**

ReAlign supports two primary authentication paths designed for simplicity and security:

* **Negotiator:** Logs in via email + password.
* **All other roles** (homeowner, listing agent, buyer’s agent, escrow, buyer): Use one-time magic links delivered via email or SMS.

All users are strictly scoped to their role and the transactions they are part of. Data visibility is controlled at both the frontend (UI logic) and backend (API middleware) levels. This document outlines the specific flows for each role, ensuring a clear and intuitive experience.

**2. Shared Architecture & Principles**

* **Sessions:** Supabase JWT (JSON Web Token), expires after 1 week. No auto-refresh functionality is included in the MVP to maintain simplicity.
* **Session Expiry Handling (Negotiator):** Since token auto-refresh is disabled for MVP, if a negotiator's session is found to be expired (e.g., upon loading the application or attempting an action requiring authentication), they will be automatically redirected to the Login screen. A message will be displayed, such as: "Your session has expired. Please log in again.".
* **Auth Enforcement:** All role access is checked via useRoleAccess() in the frontend and route-level middleware in the backend.
* **Message Threads:** A single, flat message list with inline replies is used per transaction. The thread is initiated by the system with an editable introductory message from the negotiator.
* **Upload Rules:** All image uploads are compressed client-side before transfer. A maximum file size of 10MB (post-compression) is enforced. Uploads are 'private' (visible to uploader and negotiator) by default unless explicitly set to 'shared' by the uploader.
* **Document Request Status:** The negotiator can toggle any document request between 'requested', 'complete', and 'pending' (indicating a revision is needed).
* **UI Feedback:** Consistent UI feedback (e.g., toast notifications for confirmations or errors, loading indicators) will be used throughout the application to keep users informed.

**3. Negotiator Flow**

**a. Login** \* Logs in via email + password using Supabase Auth. \* Upon successful login, a JWT is stored locally (e.g., secure cookie managed by Supabase), valid for 1 week. \* Redirected to the Dashboard view.

**b. Dashboard View** \* Displays a list of all active transactions associated with the negotiator. \* Each transaction listing includes: \* File title \* Property address \* Current phase \* Completion % (if available) \* Time since last activity \* A clear Call to Action (CTA): “Start New Transaction” is present.

**c. Create New Transaction** \* **Required fields:** \* File title \* Property address \* Party list (for each party: role, full name, email, phone, SMS opt-in toggle). \* **Welcome Message:** A default welcome message template is prefilled into a multi-line textarea, allowing the negotiator to edit it before the transaction is created. \* **Upon creation:** \* A new transaction record is created in the database. \* Invited parties receive a notification (email/SMS based on preference) with a magic link to access the transaction. \* The (potentially customized) welcome message is posted as the initial message in the transaction's message thread. \* The transaction phase is set to “Transaction Initiated”.

**d. Transaction View (Negotiator)** \* **Phase Dropdown:** A dropdown menu allows the negotiator to update the current phase of the transaction. This is only visible and editable by the negotiator. \* **Party Tracker:** \* Displays each invited party (e.g., Seller, Buyer, Listing Agent) with their role. \* Shows current status (e.g., ✅ Complete, ⚠️ Pending, ❌ Overdue) and last action timestamp for each party. \* The negotiator can manually toggle these statuses. \* **Document Requests:** \* Negotiator can select document requests from a hardcoded preset list (custom creation of request types is not available in MVP). \* Assign requests to any party involved in the transaction. \* Set an optional due date for each request. \* Triggering a request sends notifications to the assigned party via available channels (email, SMS if opted-in, and in-app). \* The negotiator can mark requests as 'complete', resend reminders, or reset a request to 'pending', optionally adding a revisionNote (e.g., "Missing signature on page 2") which will be visible to the assigned party. \* **Messages:** \* Full access to start new top-level messages and reply to any message in the thread. \* Can mention users (plain text @User Name for MVP). \* Can upload files directly into the message thread or transaction. \* **Uploads:** \* Full visibility into all files uploaded to the transaction, including their metadata (uploader, timestamp, visibility). \* Can toggle the visibility of any file from 'private' to 'shared' and vice-versa. \* **Close / Archive:** \* A CTA allows the negotiator to archive the file, removing it from the active dashboard view. \* Optionally, a closure note can be entered.

**4. Homeowner & Party Flows (Listing Agent, Buyer’s Agent, Escrow, Buyer)**

**a. Access via Magic Link** \* Invited parties receive an email or SMS (if phone provided and opted-in) containing a unique magic link. \* The magic link expires after one use or after 24 hours, whichever comes first. \* **Resend Logic:** Users can request a new magic link. A rate limit of 3 resends per hour is enforced. If the resend limit (3/hour) is exceeded, the user will see an immediate toast alert in the UI stating: 'You have exceeded the maximum number of resend attempts. Please try again later.'. \* **Expired/Invalid Link:** If an expired or invalid link is used, the UI will clearly indicate this (e.g., "This link has expired or is invalid. Please request a new one.") and provide an option to request a new link.

**b. Landing View (Post-Login)** \* Upon successful authentication via the magic link, the user is taken directly to their view of the specific transaction. \* **They see:** \* Transaction title \* Property address \* Current phase of the transaction (read-only) \* A list of all parties involved in the transaction with their roles (names only, no contact details of other parties). \* **Phase Tracker (Graphical View):** \* A visual representation of the 9 standard short sale phases: Transaction Initiated, Property Listed, Initial Document Collection, Offer Received, Offer Submitted, Lender Review, BPO Ordered, Approval Received, In Closing. \* The current phase (as set by the negotiator) is clearly highlighted. \* Timeline estimates (if configured, based on transaction creation date) may be displayed. \* By default, it shows a collapsed view (e.g., “You’re currently in Phase X: [Name]”). \* Expandable (on click/tap) to show more details or descriptions for each phase. \* **“What’s Still Needed” Section (Document Requests):** \* Displays document requests relevant to the transaction, potentially grouped by the party they are assigned to. Each request shows its status (e.g., pending, complete, overdue) with clear visual badges. \* The user’s own assigned requests are interactive, allowing them to upload documents (triggering the UploadWidget) or potentially mark items as 'complete' if applicable (primarily completed through upload). \* If a document request assigned to the user was reset to 'pending' by the negotiator and a revisionNote was added, this note (e.g., 'Missing signature on page 2') is displayed directly below the document request item, providing clear context. \* **Messages:** \* Can view the single message thread for the transaction, including the pre-seeded welcome message. \* Can reply to existing messages in the thread. Only negotiators can start new top-level messages. \* **UploadWidget:** \* Users can upload documents they are responsible for or general documents relevant to the transaction. \* Uploads default to 'private' visibility (viewable only by uploader and negotiator) but can be toggled to 'shared' by the uploader at the time of upload. \* Client-side image compression is applied before upload. \* Clear feedback is provided for upload progress, success, or failure (e.g., error message 'Upload failed. Please try again.' and a 'Retry' button appear if an upload fails).

**c. Restrictions** \* Users cannot access details of other transactions they are not a party to. \* Cannot view files uploaded by other parties if those files are marked as 'private'. Shared files are visible. \* Cannot edit the transaction phase. \* Cannot initiate new top-level message threads (but can reply). \* Contact details (email/phone) of other parties in the transaction are not displayed to them.

**5. Shared UX & Design Principles**

* Built with shadcn/ui components for a modern, consistent look and feel.
* Tap targets are designed to be at least 44x44px for touch usability. The base font size is >= 16px for readability.
* The layout is mobile-first and responsive, ensuring a good experience up to tablet sizes.
* Clear visual cues are used throughout the application, including loaders during data fetching, checkmarks for completion, expandable cards for detailed views, and visual phase tracking to keep users informed of progress.

This unified document defines all onboarding and in-session experiences for every ReAlign user in the MVP, scoped for speed, clarity, and communication impact in short sale transactions, including updated session handling and feedback mechanisms.