Self serve invite link #427

New issue

Merged

MayaRainer merged 50 commits into `antiwork:main` from `kanhayaKy:self-serve-invite-link` 3 days ago

Conversation 145 | Commits 50 | Checks 6 | Files changed 43 +1,366 −30

kanhayaKy commented 3 weeks ago • edited by coderabbitai bot

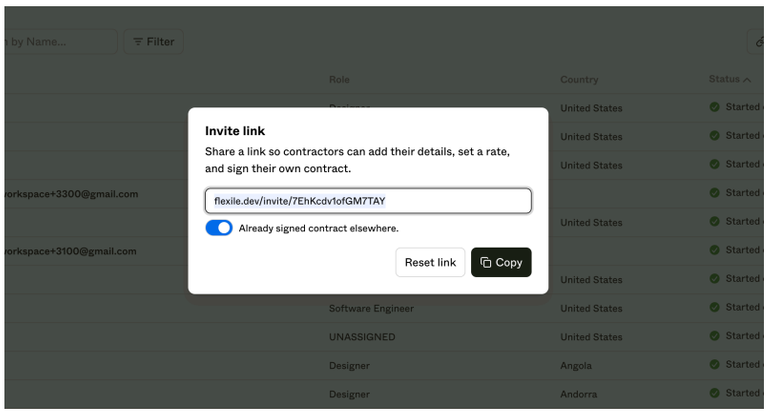
Contributor

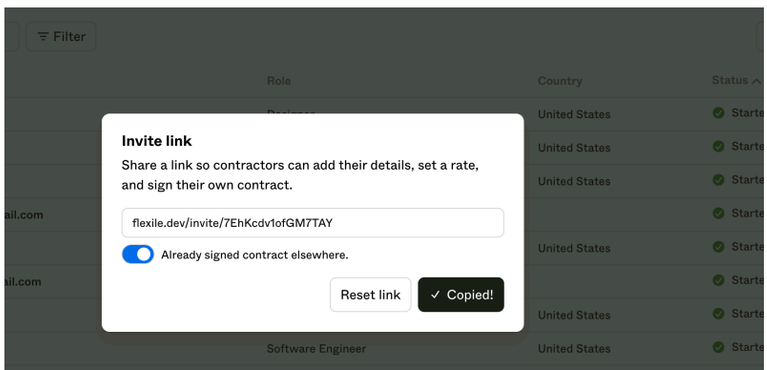
Self-Serve Invite Link Feature — Fixes #348

This feature enables admins to generate an invite link for contractors

Admin Flow

1. **Generate Invite Link**
   Navigate to the **People** page. Click on the **Invite Link** button.





Reviewers
- slavingia
- laugardie
- coderabbitai[bot]
- cursor[bot]
- MayaRainer

Assignees
- kanhayaKy

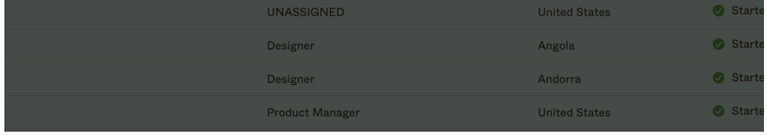
Labels
priority

Projects
None yet

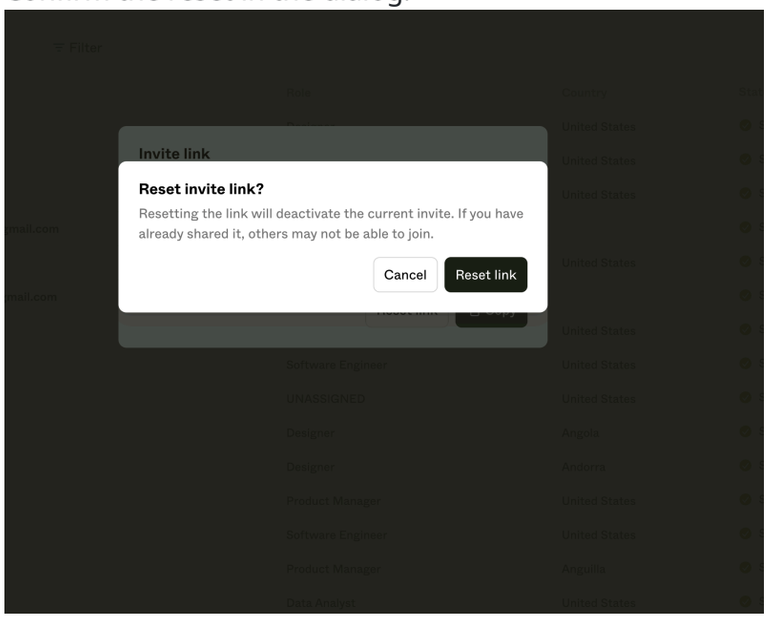
Milestone
No milestone

Development
Successfully merging this pull request may close these issues.
Self-serve invite link for admin to send...

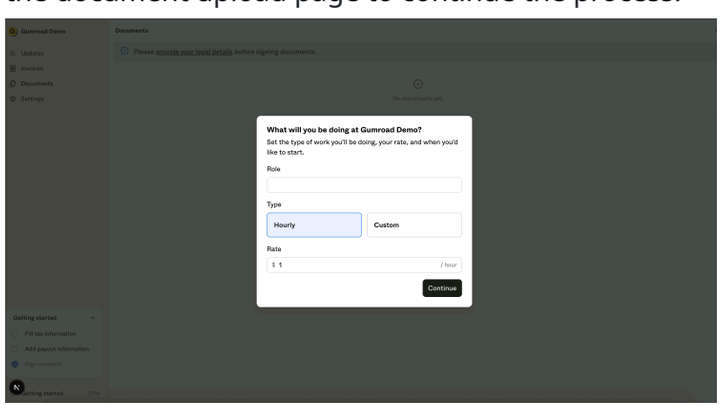
5 participants



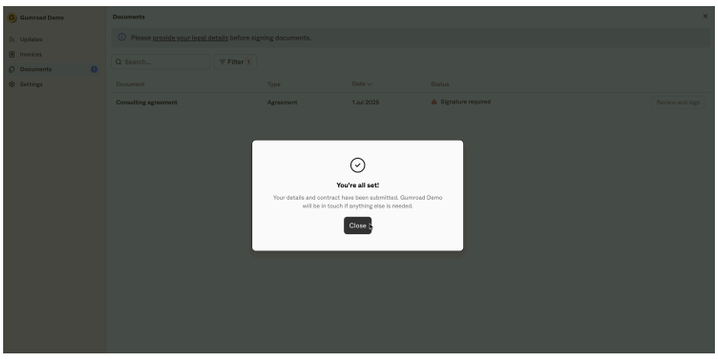
2. **Generate or Reset Invite Link**
   Confirm the reset in the dialog.



Contractor Flow

1. **Open Invite Link**
   - The contractor opens the provided invite link in their browser.
2. **Authentication**
   - If not already signed in, clicking **Accept Invite** redirects the contractor to the signup/login page.
3. **Onboarding**
   - After authenticating, the contractor is guided through the initial onboarding steps.
4. **Document Upload**
   - Once onboarding is complete, the user is redirected to the document upload page to continue the process.
   - 

5. **Confirmation**

- After submitting required documents, the contractor sees a confirmation screen indicating successful onboarding.
- 

Approach

1. Invite Link Model

A dedicated model stores invite tokens, along with the inviter, company, and an optional document template ID.
This enables tracking and management of invitations independently from users.

2. Invite Link Usage Scenarios

When a user opens an invite link, two scenarios are handled:

- **a) Unauthenticated User:**
  - The user is redirected to the sign-up flow.
  - The `invitation_token` is stored in a cookie for later use.
- **b) Authenticated User:**
  - The invite accept API is called immediately.
  - A `company_worker` entry is created for the current user, and the company context is switched.

3. Invite Acceptance and Onboarding

- **For unauthenticated users:**
  - After sign-up, the system detects the `invitation_token` and uses it to create a `company_worker` entry using the `AcceptInviteLink` service
- **For authenticated users:**
  - The invite is accepted directly, and the `company_worker` entry is created.

4. Incomplete Contractor Profile

The initial `company_worker` instance created from an invite is incomplete (missing role, rates, etc.).
The user is required to complete onboarding by filling out a modal form with these details.

5. Contract Creation (if applicable)

If the invite includes a document template, a contract is generated once the onboarding form is completed.

6. Completion

After onboarding, the contractor's profile is complete, and they can access all relevant features and actions within the company workspace.

Demo

Self.Serve.Link.Flow.1.mp4

0:00 / 1:04

Summary by CodeRabbit

- **New Features**
  - Introduced contractor invite links, allowing company administrators to generate, copy, and reset invitation links for onboarding contractors.
  - Added a modal interface for managing contractor invite links, including contract options and template selection.
  - Enabled contractors to join a company via invite links, supporting both authenticated and unauthenticated flows.
  - Implemented a two-step onboarding process for contractors joining via invite links.

- Added invite link verification and acceptance endpoints, with relevant UI feedback for invite status.

- **Improvements**
  - Updated the People page to include both "Invite link" and "Add contractor" options.
  - Enhanced onboarding flows to support contractors without predefined roles.
  - Improved UI elements for buttons and dialogs for consistency and clarity.
- **Bug Fixes**
  - Adjusted contractor listing to exclude workers without assigned roles.
- **Tests**
  - Added comprehensive backend, frontend, and end-to-end tests covering invite link generation, acceptance, onboarding, and UI interactions.
- **Chores**
  - Updated button labels from "Invite contractor" to "Add contractor" throughout the application and tests for consistency.

👍 1

kanhayaKy added 16 commits 3 weeks ago

Add InviteLink Modal, Reset Link modal and Invite Page	66e6b7a
add company invite link model	2cb00b6
Add Invite link controllers and services	efb844a
add trpc routes and generate backend routes to frontend	cd80623
add invite verification route	0ac2c3e
invite verification flow complete	6cdcb68
Merge remote-tracking branch 'origin/main' into self-serve-invite-link	95ddd50
add controllers and services for accepting invite and completing onbo…	0248a0f
update the worker onboarding state for invitation link joined workers	9c0a0e1

…

add invitation link mutations		cb2b0b3
Ui changes to complete invite link onboarding		3977b80
rename the onboarding form for more clarity		5dec2a2
enhance InviteLink and ResetLink Modals		8bfe1f4
fix the invite link flow		7ee88de
handle the invite signup for all scenarios and update the reset flow		236b18b
add tests	✕	646bf88

coderabbitai bot commented
3 weeks ago • edited

Contributor

Walkthrough

This change introduces a self-serve invite link system for company administrators to onboard contractors. It adds backend models, controllers, services, and policies for invite link management and acceptance, updates onboarding logic, and implements frontend components and TRPC routes for invite link creation, reset, verification, and acceptance. End-to-end and model/service tests are included.

Changes

Files/Paths
backend/app/models/company_invite_link.rb, db/migrate, db/schema.rb, ...
backend/app/controllers/internal/invite_links_controller.rb, ...invite_links_controller.rb
backend/app/services/accept_company_invite_link.rb, onboarding_state/user.rb
backend/app/models/user.rb,

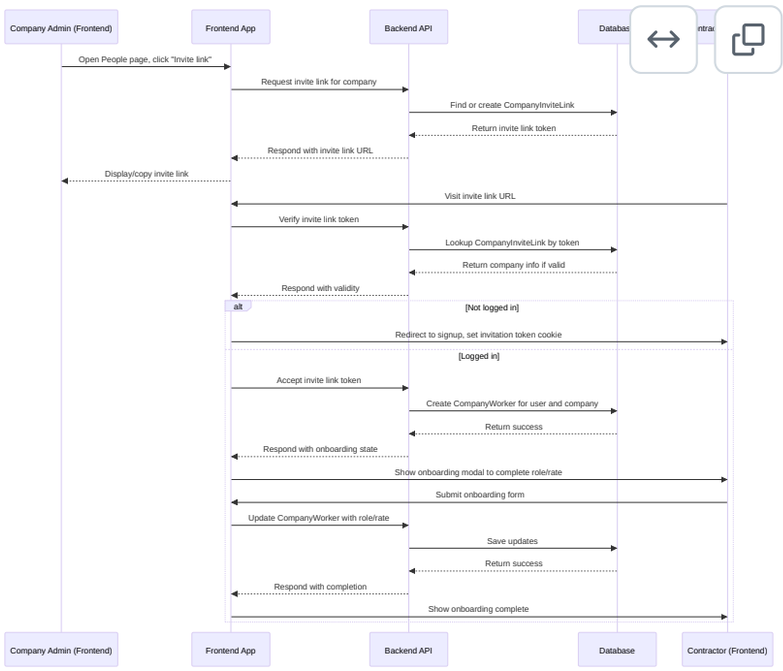
company_worker.rb, company.rb
backend/app/policies/company_administrator_policy.rb
backend/config/routes/internal.rb, frontend/utils/routes.js, routes.d.ts
frontend/trpc/routes/companyInviteLinks.ts, server.ts
frontend/app/people/InviteLinkModal.tsx, page.tsx
frontend/app/(public)/invite/[token]/page.tsx
frontend/app/documents/FinishOnboarding.tsx, page.tsx
frontend/models/constants.ts, user.ts, db/schema.ts
frontend/app/people/FormFields.tsx, components/ui/button.tsx, input.tsx, dialog.tsx
frontend/trpc/routes/contractors/index.ts
backend/spec/factories/company_invite_links.rb, spec/models/company_invite_link_spec.rb
backend/spec/services/accept_company_invite_link_spec.rb
e2e/tests/company/administrator/contractor-invite-link.spe

...contractor-invite-link...

e2e/tests/company/administrator/new-contract.spec.ts, ...

backend/spec/system/company/company_workers/listing_s ...new_contractor_spec.rb

Sequence Diagram(s)



Assessment against linked issues

Objective (Issue #)	Addressed	Explanation
Enable company admins to generate, copy, and reset contractor invite links (#348)	✅	
Allow contractors to join via invite link, fill email/rate, and self-onboard (#348)	✅	
Ensure backend supports invite link verification, acceptance, and onboarding (#348)	✅	
Provide E2E and model/service tests for invite link flow (#348)	✅	

Assessment against linked issues: Out-of-scope changes

No out-of-scope changes found.

Possibly related PRs

- Fix failing spec caused by automated company creation #416: Also modifies the `set_current` method for company assignment logic, but focuses on company creation for users without one and onboarding cleanup, not invite links.

Poem

> 🐇✨
> An invite link hops down the lane,
> Contractors join—no more admin pain!
> With roles and rates, they self-serve fast,
> Onboarding's smooth, the wait is past.
> Copy, reset, and watch them appear,
> Flexile's path is now crystal clear!
> 🥕

▼ ✨ Finishing Touches
- [ ] 📝 Generate Docstrings

Thanks for using CodeRabbit! It's free for OSS, and your support helps us grow. If you like it, consider giving us a shout-out.

▶ ❤️ Share

▶ 🪧 Tips

coderabbitai bot reviewed 3 weeks ago

View reviewed changes

coderabbitai bot left a comment Contributor •••

Actionable comments posted: 6

▶ 🧹 Nitpick comments (17)

▶ 📜 Review details

`backend/app/controllers/concerns/set_current.rb` Show resolved

`backend/app/controllers/internal/companies/invite_links_controller.rb` Outdated Show resolved

`backend/app/services/accept_company_invite_link.rb` Outdated Show resolved

`frontend/app/documents/FinishOnboarding.tsx` Outdated Show resolved

`backend/app/services/complete_invite_link_onboarding.rb` Outdated Show resolved

`frontend/trpc/routes/companyInviteLinks.ts` Outdated Show resolved

kanhayaKy added 2 commits 3 weeks ago

`Merge remote-tracking branch 'origin/main' into self-serve-invite-link` `3172bd9`

`add suggested fixes` ✕ `70dddfc`

coderabbitai bot reviewed 3 weeks ago

View reviewed changes

coderabbitai bot left a comment Contributor •••

Actionable comments posted: 1

- 🔭 Outside diff range comments (1)
- ♻️ Duplicate comments (1)
- 🧹 Nitpick comments (4)
- 📜 Review details

`backend/app/controllers/internal/companies/invite_links_controller.rb` Outdated Show resolved

add suggested fixes ✕ 31252ff

coderabbitai bot reviewed 3 weeks ago View reviewed changes

coderabbitai bot left a comment Contributor

Actionable comments posted: 0

- 🧹 Nitpick comments (1)
- 📜 Review details

kanhayaKy commented 3 weeks ago Contributor Author

@slavingia @laugardie Does this align with the issue's requirements?
I've updated the UI based on the latest discussion and used my judgment, as the Figma design was outdated.
Let me know what you think.

slavingia commented 3 weeks ago Contributor

Do we need the first page for open invite link? Can't we send straight to the signup page if not logged in, or straight to the /invoices page if they are.

slavingia commented 3 weeks ago Contributor

Overall looks good; Laura can tweak further if needed.

Would be good to add a couple e2e specs?

👍 1

kanhayaKy commented
3 weeks ago

Contributor Author ···

> Do we need the first page for open invite link? Can't we send straight to the signup page if not logged in, or straight to the /invoices page if they are.

Your suggestion makes sense—we're already doing something similar with the "Invite Contractor" flow. However, I think having an explicit "accept" action has its own benefits. It clearly communicates what the user is about to do, especially for logged-in users, and helps avoid situations where someone accidentally opens the link and gets added or signed up without realizing it.

That said, this could ultimately come down to a design decision. **@laugardie** what are your thoughts?

`add admin e2e tests for invitelink` ✕ `d67b152`

This comment was marked as outdated. Sign in to view

coderabbitai bot reviewed
2 weeks ago

View reviewed changes

coderabbitai bot left a comment

Contributor ···

Actionable comments posted: 3

▶ 🧹 Nitpick comments (3)

▶ 📜 Review details

`e2e/tests/company/administrator/contractor-invite-link.spec.ts` Outdated Show resolved

`e2e/tests/company/administrator/contractor-invite-link.spec.ts` Show resolved

`e2e/tests/company/administrator/contractor-invite-link.spec.ts` Outdated Show resolved

70 hidden items

Load more...

review changes ✕ 5dec1e5

cursor bot reviewed last week View reviewed changes

cursor bot left a comment

▼ Bug: Token Validation Fails to Halt Execution

The `require_invite_token!` `before_action` renders an error response when the token is blank but fails to halt execution, causing the main action to also render and resulting in a double render error.

▶ `backend/app/controllers/internal/invite_links_controller.rb#L33-L39`

Fix in Cursor • Fix in Web

Was this report helpful? Give feedback by reacting with 👍 or 👎

kanhayaKy commented last week Contributor Author

@MayaRainer Thanks for reviewing the PR! I've made the requested updates — here's a summary of the changes:

1. **Added a unique index** on the `(company_id, document_template_id)` pair.
2. **Renamed** the **"Invite contractor"** button to **"Add contractor"** for clarity.
3. **Updated related tests** to reflect the button label change.
4. **Removed** the `completeInviteLink` service and **moved the logic to the TRPC handler**.
5. **Applied the suggested cleanups**.

kanhayaKy requested a review from **MayaRainer** last week

clean up ✕ db9e80e

cursor bot reviewed last week View reviewed changes

cursor bot left a comment

Bug: Undefined Function Call in `useEffect` Hook

The `useEffect` hook calls `acceptInvite()` before the function is defined, causing a `ReferenceError`. Additionally, `acceptInvite` is missing from the `useEffect`'s dependency array, which violates React's rules of hooks and can lead to stale closures and incorrect behavior, as `acceptInvite` depends on `user`, `router`, `safeToken`, and `acceptInviteMutation`.

▶ `frontend/app/invite/[token]/page.tsx#L22-L27`

Fix in Cursor • Fix in Web

Bug: Database Query and Type Mismatch Errors

The `assertDefined(inviteLink?.documentTemplateId)` call is unsafe; `inviteLink` can be `undefined` from the preceding database query, leading to an unhandled error. Additionally, the `companyInviteLinks.findFirst` query has a type mismatch, using `Number(ctx.company.id)` for `companyId` and `BigInt(ctx.user.signupInviteLinkId)` for `id`, potentially causing comparison issues.

▶ `frontend/trpc/routes/companyInviteLinks.ts#L117-L125`

Fix in Cursor • Fix in Web

Was this report helpful? Give feedback by reacting with 👍 or 👎

coderabbitai bot reviewed last week View reviewed changes

coderabbitai bot left a comment Contributor

Actionable comments posted: 1

▶ 🧹 Nitpick comments (2)

▶ 📜 Review details

`frontend/db/schema.ts` Outdated Show resolved

`coderabbit suggestions` ✕ `9fb0d05`

cursor bot reviewed 5 days ago View reviewed changes

cursor bot left a comment •••

▼

Bug: Undefined InviteLink and Missing User Property

The `assertDefined(inviteLink?.documentTemplateId)` call can cause a runtime error if `inviteLink` is `undefined` (i.e., no matching invite link is found in the database). Separately, accessing `ctx.user.signupInviteLinkId` will result in a TypeScript compilation error as this property is missing from the user type definition.

▶ `frontend/trpc/routes/companyInviteLinks.ts#L114-L125`

Fix in Cursor • Fix in Web

▼ Bug: Stale Closures in `useEffect` Hook

The `useEffect` hook calls `acceptInvite` but omits it from its dependency array, leading to stale closures for variables like `user`, `router`, `inviteData`, `safeToken`, and `acceptInviteMutation`. This can cause `acceptInvite` to execute multiple times unnecessarily. Additionally, the invitation token cookie is not cleared when a user attempts to accept an invite for a company they are already a member of.

▶ `frontend/app/invite/[token]/page.tsx#L50-L63`

Fix in Cursor • Fix in Web

▼ Bug: Token Validation Fails to Halt Execution

The `require_invite_token!` `before_action` renders an error response when `params[:token]` is blank but fails to halt execution. This allows the controller action to continue, potentially causing a double render error. A `return` statement should be added after rendering the error.

▶ `backend/app/controllers/internal/invite_links_controller.rb#L34-L39`

Fix in Cursor • Fix in Web

Was this report helpful? Give feedback by reacting with 👍 or 👎

fixes ✕ d2e20cf

cursor bot reviewed 5 days ago View reviewed changes

cursor bot left a comment

▼ Bug: Stale Closures in `useEffect` Hook

The `useEffect` hook is missing `acceptInvite` from its dependency array. As `acceptInvite` is defined inline and captures component state (e.g., `user`, `inviteData`), it is unstable and changes on every render. This causes stale closures, leading `acceptInvite` to execute with outdated values. For instance, authenticated users may be incorrectly redirected to `/signup` if the `user` state loads asynchronously. Adding it to the dependencies without memoization would cause infinite re-renders. The `acceptInvite` function should be memoized with `useCallback` or the effect restructured.

▶ `frontend/app/invite/[token]/page.tsx#L58-L63`

Fix in Cursor • Fix in Web

▼ Bug: Token Validation Fails to Halt Execution

The `require_invite_token!` method renders an error response when the token is blank but fails to halt execution. This allows the `verify` or `accept` action methods to continue, resulting in a "double render" error in Rails. A `return` statement is needed after the `render` call.

▶ `backend/app/controllers/internal/invite_links_controller.rb#L34-L39`

Fix in Cursor • Fix in Web

▼

Bug: Onboarding Fails When User Has No Signed Documents

In the `completeOnboarding` mutation, the code calls `assertDefined(userSignedDocument).documentId` without checking if `userSignedDocument` is defined. If the database query for `userSignedDocument` returns no results (i.e., the user hasn't signed any documents), `userSignedDocument` will be `undefined`, causing `assertDefined` to throw a runtime error.

▶ `frontend/trpc/routes/companyInviteLinks.ts#L137-L146`

Fix in Cursor • Fix in Web

Was this report helpful? Give feedback by reacting with 👍 or 👎

coderabbitai bot reviewed 5 days ago — View reviewed changes

coderabbitai bot left a comment — Contributor

Actionable comments posted: 0

▶ 🧹 Nitpick comments (1)

▶ 📜 Review details

fix — ✕ 6b4b94c

cursor bot reviewed 5 days ago — View reviewed changes

cursor bot left a comment

▼

Bug: Invitation Handling Fails with Stale Closures

The `useEffect` hook on the invitation acceptance page has an incomplete dependency array, causing stale closures, missed invitation acceptance (e.g., after user signup), and redundant API calls. Additionally, if a user is already a member of the invited company, the frontend redirects them to the dashboard without accepting the invite or switching company context. This prevents existing administrators from gaining the worker role (as the backend expects) and leaves users in a potentially incorrect company context.

▶ `frontend/app/invite/[token]/page.tsx#L50-L63`

Fix in Cursor • Fix in Web

Was this report helpful? Give feedback by reacting with 👍 or 👎

coderabbitai bot reviewed 5 days ago

View reviewed changes

coderabbitai bot left a comment Contributor

Actionable comments posted: 1

▶ 🧹 Nitpick comments (3)

▶ 📜 Review details

`frontend/trpc/routes/companyInviteLinks.ts`

Show resolved

slavingia commented 4 days ago Contributor

Good to merge? Test suite passes locally?

jacquez-bot bot commented 4 days ago

Hi there! Thanks for your interest in contributing. I noticed a clear violation of our contributing guidelines for pull request comments. According to section 4 of the PR guidelines:

"Use native-sounding English in all communication with no excessive capitalization [...] or grammatical errors"

The comment "Good to merge? Test suite passes locally?" is a fragmentary question that doesn't follow proper English grammar structure. The guidelines show this example of proper communication:

✅ "Is this actively being worked on? I've started work on it here..."

Please rephrase your comment as complete, grammatically correct questions such as:

- "Is this ready to merge?"
- "Have you confirmed the test suite passes locally?"

This helps maintain clear, professional communication across the project. Feel free to resubmit once you've updated the comment formatting.

All reactions

kanhayaKy added 2 commits 4 days ago

`Merge remote-tracking branch 'flexi/main' into self-serve-invite-link` `a242788`

`move invite page under public, remove SimpleLayout usage` ✕ `fdcea4f`

cursor bot reviewed 3 days ago View reviewed changes

cursor bot left a comment

▼

Bug: Hook Dependency Issue Causes Stale Data

The `useEffect` hook calls the `acceptInvite()` function but does not include it in its dependency array. This violates the rules of hooks, causing `acceptInvite` to potentially capture stale values of variables like `user`, `router`, and `acceptInviteMutation`. This can lead to incorrect logic execution (e.g., not re-running when `user` state changes). Furthermore, if `acceptInvite` fails and triggers a refetch of

▶ `frontend/app/(public)/invite/[token]/page.tsx#L56-L62`

Fix in Cursor • Fix in Web

▼ Bug: Incorrect Contract Signature Lookup

The `completeOnboarding` mutation in `companyInviteLinksRouter` incorrectly identifies the user's signed consulting contract. It fetches any document signature by the user, which can prevent the system from finding the correct contract for the current company and creating the DocuSeal submission. The signature lookup should be specific to consulting contracts for the current company.

▶ `frontend/trpc/routes/companyInviteLinks.ts#L134-L155`

Fix in Cursor • Fix in Web

▼

Bug: Invite Link Service Fails Without Admin, Missing Transaction

The `AcceptCompanyInviteLink` service has two issues:

1. It assumes `company.primary_admin` exists when creating a consulting contract, leading to a runtime error if it's `nil`.
2. The `user.update!` and `CreateConsultingContract.perform!` operations are not wrapped in a transaction, which can lead to an inconsistent state if contract creation fails after the user update succeeds.

▶ `backend/app/services/accept_company_invite_link.rb#L25-L32`

Fix in Cursor • Fix in Web

Was this report helpful? Give feedback by reacting with 👍 or 👎

coderabbitai bot reviewed 3 days ago

View reviewed changes

coderabbitai bot left a comment

Contributor

Actionable comments posted: 2

▶ 🧹 Nitpick comments (3)

▶ 📜 Review details

`frontend/app/(public)/invite/[token]/page.tsx`

Show resolved

`frontend/app/(public)/invite/[token]/page.tsx`

Show resolved

vercel bot deployed to **Preview** 3 days ago

View deployment

kanhayaKy commented 3 days ago

Contributor Author

@slavingia Just pushed an update to match the refactors from #471

1. cleaned up `SimpleLayout` .
2. Moved the Invite page under `public` directory

Good to merge now. Tests are passing locally.

Before(main branch):

```
  7 flaky
    [chromium] › e2e/settings/tax.spec.ts:51:5 › Tax settings › as a contractor › allows editing tax information
    [chromium] › e2e/tests/company/administrator/end-contract.spec.ts:83:3 › End contract › allows admin to end contractor's contract in the f
uture
    [chromium] › e2e/tests/company/onboarding/checklist.spec.ts:27:3 › Onboarding checklist › completes admin onboarding checklist by adding c
ompany details, bank account, and inviting contractor
    [chromium] › e2e/tests/company/onboarding/checklist.spec.ts:101:3 › Onboarding checklist › completes worker onboarding checklist by extern
al signed contract, filling tax information and adding payout details
    [chromium] › e2e/tests/company/people/exercises.spec.ts:13:3 › People - Exercises Table › displays option grant IDs and stock certificate
IDs in exercises table
    [chromium] › e2e/tests/homepage-redirect.spec.ts:46:3 › Homepage redirect › lawyer is redirected to documents page
    [chromium] › e2e/tests/settings/payouts/add-bank-account.spec.ts:124:3 › Bank account settings › hides optional fields for AED
  1 skipped
  116 passed (10.6m)
```

After(Current branch):

```
  5 flaky
    [chromium] › e2e/settings/tax.spec.ts:381:5 › Tax settings › as a contractor › formats US tax IDs corre
    [chromium] › e2e/tests/company/administrator/edit-contractor.spec.ts:92:3 › Edit contractor › allows ed
    [chromium] › e2e/tests/company/administrator/role-autocomplete.spec.ts:75:3 › Role autocomplete › sugge
    [chromium] › e2e/tests/company/invoices/create.spec.ts:103:3 › invoice creation › considers the invoice
    [chromium] › e2e/tests/company/onboarding/checklist.spec.ts:27:3 › Onboarding checklist › completes adm
  1 skipped
  125 passed (13.5m)
```

MayaRainer commented 3 days ago

Member

Merging this for now to unblock, and I'll handle the changes in a follow-up.

MayaRainer merged commit `123404b` into `antiwork:main` 3 days ago

View details

5 of 8 checks passed

---

kanhayaKy commented 3 days ago

Contributor Author

@MayaRainer let me know if I can continue working on this and submit a PR for the discussed changes

1. Move invite page to server component
2. Get rid of cookies logic

kanhayaKy mentioned this pull request 3 days ago

Remove Docuseal #281

Open

2 tasks

blka mentioned this pull request 7 hours ago

Daily Hacker News 20-07-2025

blka/daily-hackernews#87

Open

Phillipus commented 7 hours ago

> Hi there! Thanks for your interest in contributing. I noticed a clear violation of our contributing guidelines for pull request comments. According to section 4 of the PR guidelines:
>
> "Use native-sounding English in all communication with no excessive capitalization [...] or grammatical errors"
>
> The comment "Good to merge? Test suite passes locally?" is a fragmentary question that doesn't follow proper English grammar structure. The guidelines show this example of proper communication:
>
> ✅ "Is this actively being worked on? I've started work on it here..."
>
> Please rephrase your comment as complete, grammatically correct questions such as:
>
> ```
> * "Is this ready to merge?"
>
> * "Have you confirmed the test suite passes locall
> ```
>
> This helps maintain clear, professional communication across the project. Feel free to resubmit once you've updated the comment formatting.

Get out much?

😄 9

coderabbitai bot mentioned this pull request
4 hours ago

fix: blank invite link #599 Open

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