Client Portal – Technical Tasks Breakdown

# Phase 1 – Core Portal Infrastructure

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| Component | Frontend Tasks | Backend Tasks | Infrastructure / DevOps Tasks |
| Client Access & Security | Login/Signup UI, 2FA interface, permissions-based access control pages | Auth logic, JWT/token handling, 2FA service integration, role-based API access enforcement | Secure hosting setup, SSL, encryption at rest & transit, backup strategy |
| Client Onboarding | Multi-step onboarding form, client detail validation, UI feedback states | API to store onboarding info, email trigger system, DB schema for client metadata | Email template service, onboarding alert queue, log capture |
| Portal Structure | UI for 'Data Shared' / 'Data Received' tabs, folder trees, breadcrumbs | Folder management APIs, permission-scoped file access, metadata tagging logic | Storage provider (e.g., S3 or Firebase) setup, file retention policies |
| Document Sharing & Notifications | Upload forms, document previewers, notification badges | Doc metadata store, change detector, notification dispatch engine (emails/logs) | SMTP service setup, auto log archival, cron jobs for batch sync |
| QBO Integration (Optional) | QBO-linked UI folders, integration status indicators | Webhook integration with QBO APIs, file mapping handlers | OAuth QBO setup, QBO developer console config |
| Client Portal Policies | Policy UI page, file expiration notices | Policy enforcement (auto-delete, retention logic), audit log generator | Cloud audit logs config, IT support escalation policy |

# Phase 2 – Advanced Features

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| Component | Frontend Tasks | Backend Tasks | Infrastructure / DevOps Tasks |
| eSignature Module | Sign UI, document viewer, completion tracker UI | DocuSign/AdobeSign integration, webhook capture for signed doc | Signed doc archive setup, audit trails in compliance folders |
| KPI Dashboard | Chart components, filter widgets, visual analytics | Aggregate stats engine, KPI calculation logic | Analytics store setup, dashboards cron update scheduler |
| Messaging System | Real-time chat UI, unread badges, attachment preview | WebSocket server, message store, attachment DB handler | Redis queue, fallback notification service |
| Mobile App | React Native interface, biometric login screens | Mobile API layer, session tokens, refresh logic | Mobile build automation (CI/CD), device key management |
| Workflow Automation | Task timeline views, automation settings interface | Automation job engine, SLA monitor, rules database | Temporal.io/n8n/orchestration setup |
| OCR & Auto-tagging | Document tagging UI, smart preview suggestions | OCR parser, ML tagging engine, confidence threshold filters | Model training infra, error logs routing |
| Billing Module | Invoice list UI, payment status filters | Stripe integration, payment webhook listeners | QBO sync daemon, invoice log backup |
| Risk Alerts | Risk indicators UI, escalation workflows | Rule engine for risk levels, override actions, change logs | Monitoring agent for critical thresholds |
| AI Assistant | Prompt/response UI, AI status indicators | OpenAI/Gemini API integration, prompt builder, logging | API key vaults, token limits per user |