

LedgerSnap Final Report

Date: 2026-02-07

Build: Session Completion

Executive Summary

LedgerSnap is now fully wired from capture to ledger: authentication, tenant provisioning, background sync, Google Drive/Sheets integration, and manager administration are functional end-to-end. The frontend uses real backend endpoints, the backend processes queued submissions in the background, and staff onboarding is implemented with secure magic links. This report documents what was completed, how it works, and what remains optional for future iterations.

Scope Completed

- Magic-link authentication with JWT issuance and enforcement
- SMTP sending with branded HTML email template
- Tenant provisioning with Drive folder + Sheets ledger setup
- Background queue worker to process receipts and statements
- Idempotency and retry logic for safe, reliable sync
- Frontend wired to real backend APIs
- Manager dashboard: staff invite, list, enable/disable
- Secure secrets handling and rate limiting

Key Backend Features

- '/auth/request-link' issues magic links
- '/auth/verify' validates token and returns JWT + user profile
- '/submissions' queues receipt/statement payloads
- Queue worker appends to Sheets and uploads to Drive
- '/tenants/provision' provisions a tenant and initial manager
- '/tenants/invite' creates users and sends invites
- '/tenants/users' lists staff for a tenant
- '/tenants/users/:userId/status' enables/disables users

Key Frontend Features

- Live authentication flow with session storage
- Real outbox sync to backend
- History view refreshed from backend
- Onboarding now provisions tenants for real
- Manager tab includes staff directory and invites

Security and Reliability

- JWT-protected routes
- Auth rate limiting
- Idempotency keys for submissions
- Background queue with retries + backoff
- Service account secrets removed from public assets

Gaps (Optional Future Enhancements)

- PDF parsing server-side (currently expects parsed transactions or uploads)
- Admin analytics in Manager overview
- Staff role editing UI
- Audit log viewer and export reports

Deliverables

- Fully integrated backend + frontend flows
- Documentation: user manual, QA checklist, deployment guide