

# **1-Page Skeleton Plan — Consulting Workflow Audit Portal (SaaS Admin Backbone)**

## **Project Goal**

Build a **client portal + audit delivery platform** that lets you onboard clients, collect intake data, run audits, deliver findings, track progress, and support retainers/subscriptions. This is both:  
**Your internal operating system** for consulting delivery

A **portfolio-grade .NET backend** proving real-world SWE skills (auth, multi-tenancy, deployments)

## **Industry-Standard Tech Stack**

### **Backend**

**.NET 8 (ASP.NET Core Web API), C#**

**Entity Framework Core** (ORM + migrations)

**PostgreSQL** (primary DB)

**Auth:** ASP.NET Core Identity + **JWT + refresh tokens**

**Authorization:** policy-based RBAC (Owner/Admin/ClientViewer)

**Validation:** FluentValidation

**API Docs:** Swagger / OpenAPI

**Logging:** Serilog

**Background jobs:** Hangfire (reminders, status nudges, scheduled reports)

**Observability:** OpenTelemetry + Health Checks

**Frontend (simple + fast)**

**Next.js + TypeScript** (or React + Vite)

**UI:** Tailwind + shadcn/ui

**Auth client:** JWT handling + refresh flow

### **DevOps / Delivery**

**Docker + docker-compose** (API + DB + Redis optional)

**CI/CD:** GitHub Actions

**Cloud:** Azure (App Service or Container Apps) + Azure Database for PostgreSQL

**Secrets:** Azure Key Vault

## **Core Product Scope (MVP)**

**Tenancy + Users**

**Organization (Client)**

Users belong to an org

Roles: **Owner (you)**, **Admin (you/team)**, **ClientManager**, **ClientViewer**

### **Workflow Audit Objects**

**Client Intake**

Questionnaire responses (structured JSON + versioning)

Tool inventory (CRM/CMS/Ads/Sheets/etc.)

File uploads (screenshots, exports)

### **Audit**

Status: Draft → In Review → Delivered → In Progress → Closed

Audit date, auditor, notes

## **Findings**

Category (Automation, Data, Marketing, Security, Ops)

Severity (Low/Med/High), Effort (S/M/L), ROI estimate

Recommendation + Next steps

Status tracking per finding

## **Deliverables**

Generated report export (PDF later) + stored version

## **Activity/Audit Log**

Who changed what, when (basic compliance + credibility)

## **Data Model (minimum entities)**

Organization

User (Identity)

OrganizationMember (role + join)

IntakeForm + IntakeResponse

Audit

Finding

Recommendation (or embedded in Finding)

Attachment (uploads)

## ActivityLog

### **API Endpoints (minimum set)**

Auth: register/login/refresh/logout, invite user

Orgs: create org, list members, assign roles

Intake: create form template, submit response, list responses

Audits: create/update, status transitions, assign auditor

Findings: CRUD, status updates, filtering/pagination

Attachments: upload/download (scoped to org + audit)

Logs: list activity by org/audit

### **Build Phases (from scratch)**

#### **Phase 0 — Setup (Day 1–2)**

Repo + solution structure (Clean Architecture)

Docker compose: Postgres + API

EF Core migrations + Swagger

Base CI pipeline (build + test)

#### **Phase 1 — Secure Multi-Tenant Foundation (Week 1)**

Identity + JWT + refresh tokens

RBAC + org scoping (every query must be org-filtered)

Global error handling + validation

#### **Phase 2 — MVP Workflow (Weeks 2–3)**

Intake forms + file uploads

Audits + findings + status tracking

Activity log

Basic frontend portal screens

### **Phase 3 — “Consulting-grade” Polish (Weeks 4–6)**

Filters/search/pagination everywhere

Background jobs (reminders, weekly summary emails optional)

Deploy to Azure + HTTPS + Key Vault

Integration tests (at least 10) + seeded demo data

Demo script + screenshots + README

### **Definition of Done (MVP launch)**

You can onboard a client in 5 minutes:

Create org → invite client

Client completes intake

You create audit + findings

Client logs in and sees deliverables + statuses

Deployed to Azure with CI/CD

Logs + health checks working

Clear README + demo walkthrough

## **Optional Monetization Layer (after MVP)**

Stripe subscriptions (retainers)

Plan entitlements (monthly audit, quarterly audit, advisory hours)

Usage limits (number of audits/findings per month)

White-label client branding