

ID	Task Name	Story	Estimation (hours)	Priority	Sprint When Finished
1	Init Repo & Environment	Setup a clean GitHub repo with .gitignore configured so that we don't accidentally commit API keys or junk files.	1	P0	S1
2	Docker Setup (Local)	Generate a Dockerfile and docker-compose setup so that the app runs identically on the cloud as it does on local	6	P0	S1
3	Django Project Init	We want a basic Django directory structure with settings.py configured for environment variables so we can start coding safely.	3	P0	S1
4	Database Models	We want a Client database model (Name, Email, SSN) so that we can structure the data we collect.	4	P1	S1
5	Data Validation	Ensuring the data goes into the database in a clean, standardized format.	3	P2	S1
6	Intake Form (Full)	Promoted. Implement the full Business Intake Form (HTML + Forms.py)	6	P1	S1
7	Env Variable Setup	New Requirement for local deployment. Set up env variables for local testing and	4	P1	S1
8	Local SQL Provisioning	Create a local Postgres SQL database for testing and logic that can be migrated to the	6	P1	S1
9	Temp Login Logic	Create logic for temp logins to give to prospective clients for onboarding	4	P1	S1
10	Cloud SQL Provisioning	Moved to S2. We want a managed PostgreSQL database on GCP so that client data is persistent and backed up. Moved to S2. Possible move to S3	4	P2	S2
11	Cloud Build Pipeline	Moved to S2; need further client feedback on choice of GCP or AWS. Possible move to S3	8	P1	S2
12	Secret Manager Setup	Moved to S2. We want API keys stored in Google Secret Manager (not code) for compliance reasons. Possible move to S3	3	P1	S2
13	Monday.com Connector	Monday's API is easier than ShareFile's. Getting this working early proves the "Integration" concept works.	6	P0	S2
14	Error Logging	Vital for debugging when things break in production.	3	P2	S2
15	Upload Validation	Important for safety, but the feature technically "works" without it. Add this once the basic upload is stable.	4	P2	S2
16	Frontend Polish	Making it look pretty is the last step. A ugly form that works is better than a pretty form that doesn't.	5	P3	S2
17	PDF Generator	Need the logic to format the text correctly for Drake	8	P0	S2
18	Monday.com Internal Workflows	Take data sent over from middleware and trigger workflows using Monday.com internal features	6	P1	S2
19	Temp Email Solution	Based on client feedback, email over completed PDFs to Insighters	4	P1	S2
20	Sharefile Auth	Nothing else works until the app can securely "login" to Citrix. Expect to struggle with Token Refreshes.	8	P0	S3
21	File Upload Logic	Need to handle the file in memory (request.FILES) and stream it to the API without saving it to the server disk.	8	P1	S3
22	Folder Automation	Dependent on Task 11. Once we have Auth, creating a folder is just a single API call.	4	P1	S3
23	Save PDF to Sharefile	Reuse the "File Upload" logic from Sprint 2 to save this text file.	2	P1	S3
24	Penetration Testing	Need time to find vulnerabilities before finalizing for Insighters	6	P1	S3
25	Documentation	Converting that clean data into the specific weird format Drake Tax wants	6	P2	S3
26	Final Presentation	Rehearsing the demo and polishing slides	5	P2	S3