

Portfolio Project: CA Firm Consulting & File Management Platform

Project Title

"Smart Client Collaboration & File Management System for a Chartered Accounting Firm"

Project Overview

A mid-sized(20+ employees) Chartered Accounting firm was struggling with long email threads, scattered file sharing, and inconsistent employee-client assignments—leading to delayed communication, misplaced documents, and inefficiency in client service delivery.






The Problem

- Client communication happened primarily over long, unstructured email threads.
 - File sharing lacked a central platform—making it hard to track or audit.
 - Multiple employees worked with the same client, but assignments were dynamic (based on availability), making continuity and context difficult.
 - No centralized dashboard for client-task tracking or document history.
-

The Solution

I designed and developed a **centralized web-based platform** that streamlined communication, file tracking, and employee-client collaboration.

Key Features:

-  **Client Dashboards:** Each client had their own portal to upload/download documents, view timelines, and communicate with the firm.
-  **Centralized Document Management:** Auto-tagged, role-based access to all client files—organized by project, date, and document type.
-  **Dynamic Staff Assignment System:** Member were assigned for each work for a client and immediately see full context and document history.
-  **Threaded Messaging System:** Replaced chaotic email threads with topic-based chat/discussion modules per client or task.
-  **Notifications & Deadlines:** Employees and clients received alerts on pending actions, document uploads, and deadline reminders.

Tech Stack

- **Frontend:** React.js
- **Backend:** Node.js with Express
- **Database:** AWS
- **Authentication:** JWT-based role management
- **File Storage:** AWS S3
- **Hosting:** AWS

Results & Impact

- Reduced email volume by ~70%
- Improved file retrieval speed from “several minutes” to “under 10 seconds”
- Allowed any defining the team member to take a client task with full clarity
- Increased client satisfaction and internal productivity

Role & Contribution

- Conducted discovery interviews with CA partners and staff.
- Mapped business workflows into digital flows.
- Managed designing of UI/UX for client and internal portals.
- Built MVP from scratch and deployed for real-time use.
- Provided ongoing tech support and improvements based on feedback.