

OfficeLion - Tax & Accounting Practice Management Platform

Cloud-ready business platform for a Maryland-based tax and accounting company, built with ASP.NET Core (.NET 8), Azure App Service and Azure SQL Database.

Client context Tax and accounting practice operations in Maryland, USA	Core stack ASP.NET Core (.NET 8), Azure App Service, Azure SQL Database, SQL Server
Focus Case management, client portal, payments, documents, visitor log and audit trail	Value Centralized digital and in-office workflows for high-volume tax season operations

Context

OfficeLion is a cloud-ready practice management platform developed for a company based in Maryland, USA. The platform was designed to centralize daily operations for modern tax agencies and accounting firms into a secure, scalable web application.

The solution supports digital workflows and in-office operations: client intake, case management, document handling, digital signatures, payments, calendar synchronization, notifications, audit trails and visitor/queue tracking during tax season.

Business Problem

Tax and accounting firms often operate with fragmented tools, especially during tax season. Client information, documents, case status, payments, staff responsibilities and walk-in visits may be managed across spreadsheets, email threads, shared folders, manual reminders, phone calls and separate payment systems.

This creates operational risk: fragmented client information, difficult case tracking, manual follow-up, missed deadlines, unclear staff responsibility, weak visibility over walk-in clients and a higher administrative workload during peak periods.

Solution

I developed OfficeLion as a secure, cloud-ready practice management platform that centralizes the full operational workflow for tax and accounting teams.

- client intake and case/engagement management;
- client portal, document upload and organization;
- engagement letters, PDF generation and digital signatures;
- invoicing and online payments;
- calendar and deadline tracking;

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- task management and staff roles;
 - audit trail and activity logging;
 - in-office visitor registration and queue tracking during tax season.

Core Capabilities

Case & Engagement Management

Track every client engagement with practice areas, stages, resolution plans, deadlines, notes, responsibilities and team-based access controls.

Client Portal

Clients can access a secure portal, monitor case status, upload required documents and stay informed without relying only on phone calls or email follow-ups.

Document & Signature Management

Document organization, engagement letter generation, PDF workflows, contract handling and digital signatures.

Invoicing & Payments

Invoices can be created and managed inside the platform. Online payments are processed through Stripe.

Calendar & Deadlines

Deadline tracking, appointments, internal events and Google Calendar synchronization.

Task Management

Internal tasks can be assigned and tracked across the team to reduce missed responsibilities during busy periods.

Staff & Access Control

Role-based access control for accountants, preparers, administrative staff and other team members.

Audit Trail

Important user actions are logged to improve traceability, accountability and compliance readiness.

Visitor Log & In-Office Queue Tracking

OfficeLion includes a visitor tracking module designed for high-volume tax season operations.

When a client arrives physically at the office, staff can register the visit, associate it with an existing case or a new request, and track each step of the in-office tax preparation workflow.

The module helps monitor stages such as client arrival, greeting, information intake, document review, internal hand-off, payment reception, case opening, visit status, staff responsibility and visit completion.

This gives the office better visibility over who is waiting, what has already been completed, what is pending and which team member handled each step. It helps reduce confusion during peak tax season, improves internal coordination and creates a clearer operational record for every in-person client visit.

Integrations

Service	Purpose
Google OAuth & Google Calendar	Authentication and deadline tracking.
Microsoft / Outlook OAuth	Authentication and email-related workflows.
Stripe	Online payment collection.
SendGrid / Postmark	Transactional email notifications.
Twilio	SMS reminders and alerts.
iText 7	PDF generation and document workflows.

Security and Compliance Focus

- OTP-based authentication;
- role-based permissions;
- secure client access;
- protected document workflows;
- controlled staff access to client information;
- audit logging;
- DKIM-signed transactional emails;
- structured tracking of client interactions and office visits.

Technologies Used

ASP.NET Core (.NET 8), C#, Azure App Service, Azure SQL Database, SQL Server, REST APIs, Stripe, Google OAuth, Google Calendar API, Microsoft / Outlook OAuth, SendGrid / Postmark, Twilio, iText 7, HTML, CSS, JavaScript, secure authentication, role-based access control and audit logging.

Business Value

- better visibility over client cases;
- improved tracking of tax preparation workflows;
- faster document collection;
- improved payment collection;
- stronger deadline control;
- better team coordination;
- clearer handling of walk-in clients during tax season;
- reduced confusion during high-volume office operations;
- improved accountability through audit trails;
- more secure handling of sensitive financial data;
- a scalable foundation for future automation and AI-powered workflows.

Why This Project Matters

OfficeLion demonstrates my ability to design, develop and deploy business-critical software for an international client using modern .NET and Azure technologies.

It combines business workflow understanding, ASP.NET Core backend development, SQL Server and Azure SQL Database, cloud deployment with Azure App Service, third-party integrations, security and access control, document and payment workflows, in-office operational tracking, queue management, auditability and compliance-oriented design.

This project is a strong example of how I help companies build and modernize platforms that support real business operations, including both digital workflows and high-volume in-person service processes.

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