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Project Pitch –

Insighters Inc. Workflow Automation

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Project Importance

- New Client Onboarding
 - Currently has three levels of redundancy
 - Can implement a technical solution to automate manual data inputs and file generation
- File Storage Transfer
 - Transition secure file storage between applications
 - Cut costs and improve accessibility
- Efficiency, Security, and Modernization
 - Improve client onboarding experience for their customers
 - Save employees time and effort
 - Improve security by reducing human error and client data access



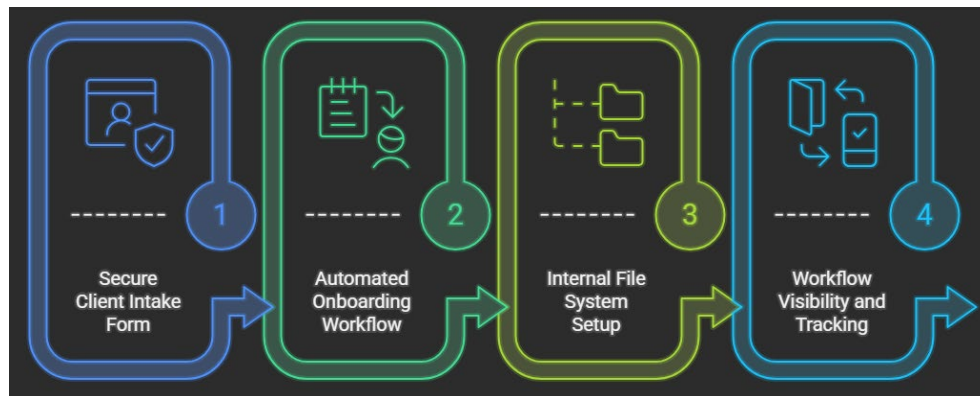
User Categories



- Primary Users
 - Internal accounting staff (office managers, accountants)
- Secondary Users
 - Internal firm owners and managers at Insighters
- External Users (Limited Access)
 - New clients completing onboarding intake forms

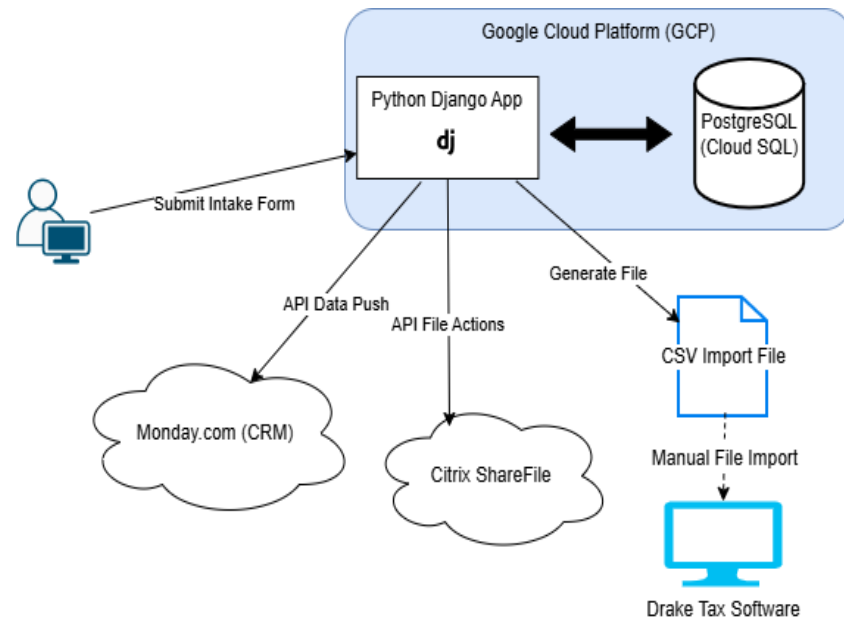
Core Features

- Secure client intake form
 - Allows new clients to securely submit required onboarding information
- Automated onboarding workflow
 - Reduces manual data entry and repetitive setup tasks for staff
- Internal file system setup
 - Automatically creates standardized folders for each new client
- Workflow visibility and tracking
 - Shows onboarding status and progress for internal users



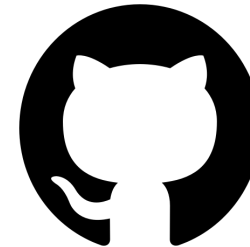
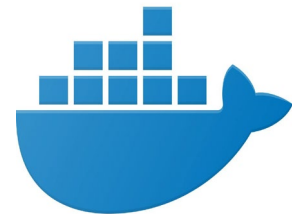
Technical Architecture and Stack

- Core Framework:
 - Python (Django) on Google Cloud
 - Server-Side Rendering for Security
 - PostgreSQL (or MySQL) via Cloud SQL
- API Integrations:
 - Monday.com (GraphQL API): CRM Client Creation
 - Citrix ShareFile (REST API v3): Folder Provisioning & File Upload
- Legacy Bridge:
 - Custom CSV Generator for Drake Tax



Development Environment

- Local Development:
 - VS Code and Docker Desktop
- Version Control:
 - GitHub with Branch Protection Rules
- Cloud Infrastructure:
 - Google Cloud Run: Serverless container deployment
 - Google Secret Manager: Secure storage for API keys
- CI/CD Pipeline:
 - Google Cloud Build



Existing Related Applications

- Zapier
 - Workflow Automation Software used to automate different web applications
 - Automates repetitive task without the need for code or a developer
- Cons of Application
 - Application has monthly fee which add to the overhead cost of the company
 - Application cannot be customized to the internal systems of the company



High Priority Obstacles

- Lack of Useable External API
 - In House software (Drake Portal) does not have external API needed for workflow automation
- Understanding of Internal Systems Needed
 - Contacted IT Support for access and a better understanding of internal systems
- Confidentiality, Data Integrity, and Security
 - Internal work cannot begin until we are presented with an NDA of some form and work consists of sensitive data
- User Training and Post Project Maintenance
 - Third party consultant provides technical support for the company and internal employees will need additional training

