CRM for Accounting Firms

Product : CRM
Frontend: React.js (Material UI)
Backend: Node.js, Express.js, PostgreSQL
Authentication: JWT + Google OAuth
Deployment: Render / Lightsail

🔧 Development Process:

1. Requirement Gathering & Wireframing – Built client flows, tax calendar, dashboard.

2. Design Sprint – Created wireframes for lead tracking, invoice module.

3. Backend Module Setup – PostgreSQL models for clients, invoices, files.

4. Frontend Integration – Dashboard views, filtering, and messaging UI in React.

5. Security Implementation – Encrypted document upload, OTP-based access.

6. Testing & Validation – End-to-end testing with Postman & Cypress.

7. Deployment – Live environment on Render with database backups.

8. Ongoing Support – Client onboarding help, bug fixes, and compliance updates.