Use Case 1: Client Onboarding with Accounting Integration

TaskAtlas collects a new client's details once, has staff verify them, then pushes them into FreshBooks with one click, so nobody re-keys client data.

Illustrative scenario: for this use case we will use Northpine Advisory Group as an example, and all figures are estimates for demonstration.

At a glance

Company	Northpine Advisory Group
Industry	Accounting and bookkeeping
Size	45 staff, about 1,200 active clients
Volume	About 30 new clients a month, more in tax season
Workflow	Client onboarding
Integration	FreshBooks, with QuickBooks Online and Xero available as plugins
Who uses it	Clients (no account needed), client services, partners

The challenge

Every new client at Northpine is typed in at least twice: once from an emailed PDF or phone call, and again into FreshBooks for billing.

- **Scattered intake.** Details arrive by email attachments, scanned forms and phone notes, and staff chase missing fields.
- **Re-keying errors.** A wrong email address or business number in FreshBooks means invoices bounce or go to the wrong contact.
- **No clear status.** Partners can't see which new clients are waiting on paperwork, waiting on review, or ready to bill.
- **Tax-season crunch.** Intake volume roughly doubles in spring, exactly when staff have the least time for data entry.

The workflow

The client fills in one form, a staff member checks it, and a single button sends the verified record to the firm's accounting system.

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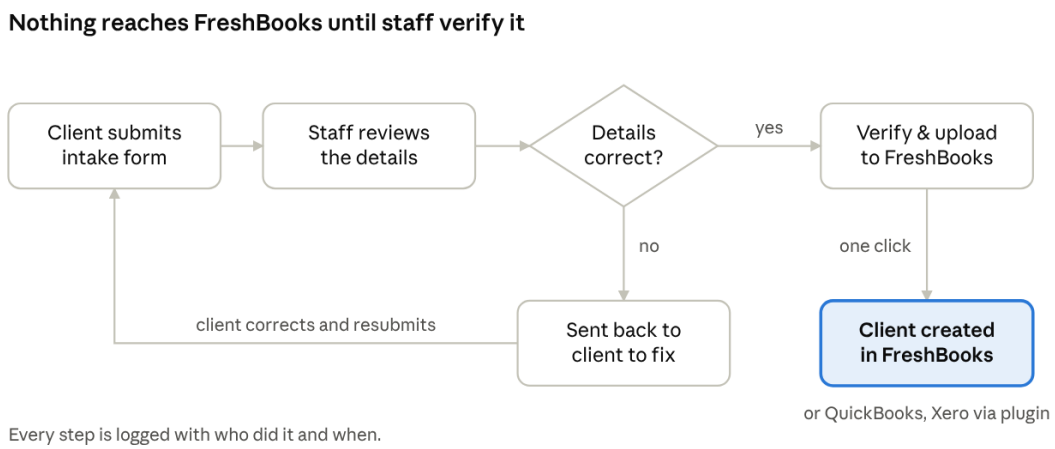

client onboarding flow · 5 steps, 1 decision

1. **Client information gathering.** The client opens a secure link and completes the intake form: legal name, contacts, business number, services and documents. No account or sign-up is needed.
2. **Staff verification.** The submission lands in client services' queue. A reviewer logs in, checks every field against the documents, and corrects or sends it back.
3. **Verify and upload.** Once the details are right, the reviewer clicks **Verify & upload to FreshBooks**. TaskAtlas creates the client in FreshBooks and saves the FreshBooks client ID back to the record.
4. **Works with any vendor.** The same step can push to other systems, such as QuickBooks Online or Xero.
5. **The button follows the plugin.** When a firm enables a vendor's plugin, the button relabels itself, for example **Verify & upload to Xero**. The workflow itself doesn't change.

Controls and audit trail

Nothing reaches FreshBooks until a named staff member has checked it, and every step is recorded.

- **Human verification gate.** The upload button stays locked until a reviewer confirms the details.
- **Role-based access.** Only client services and partners can verify and upload; the client sees only their own form.
- **Full history.** Each record logs who submitted, who edited which field, who verified, and when it was sent to FreshBooks.
- **Sync confirmation.** The FreshBooks client ID is saved back to the TaskAtlas record, so staff can see the transfer succeeded.
- **Corrections stay traceable.** If a reviewer sends the form back, the request and the client's changes are kept in the history.

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Illustrative impact

At 30 new clients a month, removing re-keying would free roughly 12 staff hours a month and cut onboarding from about a week to two days.

Measure	Before TaskAtlas	With TaskAtlas (estimated)
Staff time per new client	35 min (chasing, typing twice)	10 min (review and one click)
Staff hours per month	About 17.5	About 5
Days from first contact to billable	About 5 working days	About 2 working days
Client records re-keyed by hand	Every one	None
Status visible to partners	No	Yes, live

Assumptions: 30 new clients a month; time saved comes from removing duplicate entry and follow-up emails. Replace these with real figures from a pilot before quoting them externally.

Demo script

About five minutes; the moment that lands is the button changing from FreshBooks to Xero.

1. **Set the scene (30 sec).** "Northpine onboards 30 clients a month, and every one gets typed in twice. Let's watch one come in."
2. **Submit as the client (1 min).** Open the intake link in a private window. Point out there's no sign-up. Fill in the form and upload a document.
3. **Show the live journey (30 sec).** Switch to staff view. The request now sits in "Verify details" with an owner.
4. **Verify (1 min).** Open the record, fix one field, and click **Verify & upload to FreshBooks**. Show the confirmation and the FreshBooks client ID saved back.
5. **Swap vendors (1 min).** In settings, enable the Xero plugin. Go back to the record: the button now reads **Verify & upload to Xero**. "Same workflow, any accounting system."
6. **Show the audit trail (30 sec).** Open the history: who submitted, who edited, who verified, when it synced.
7. **Close (30 sec).** "Every integration we add is another market we can sell this exact workflow into."

Why it matters

The plugin model turns one workflow into many markets: each new vendor connector opens TaskAtlas to every firm that uses that system.

- **Repeatable package.** The same intake-verify-push pattern fits law firms, insurance brokers, wealth managers and property managers.
- **Low switching cost.** Firms keep their existing accounting or practice software; TaskAtlas sits in front of it.
- **Expansion path.** Client onboarding leads naturally into the full client lifecycle: document requests, engagement letters, e-signature and AI-drafted documents.

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