



Meridian Accounting

CLIENT PORTAL, BOOKING TABLET & MOBILE APP · CASE STUDY

A complete concept design and build — website, engagement request with online retainer payment, an in-office booking tablet and mobile app, plus a self-service admin panel for daily client and staff management.

Concept & Vision

"An accounting firm that shows you a live dashboard, not a quarterly PDF — upload documents securely, watch your position update in real time, and pay invoices online."

Meridian Accounting is a fictional accounting & advisory platform, developed as a full concept to demonstrate what a trustworthy client-portal experience looks like when the visual identity and information architecture are built specifically for the subject — not adapted from a generic template.

TARGET AUDIENCE

Small business owners and individuals who want their numbers visible year-round — not a bookkeeper they only hear from at tax time.

BRAND PERSONALITY

Precise, composed, quietly confident. Emerald green on a deep navy ground, closer to a trusted advisor than a discount tax-prep chain.

PRIMARY GOAL

Convert a consultation into a signed, retained engagement — using a real service catalog, transparent pricing, and a checkout that takes under a minute.

OWNERSHIP

Office staff manage services, engagements, and staff rosters independently, with no developer needed for routine updates.

Design System

COLOR PALETTE



Void
#0F1720



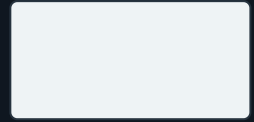
Surface
#17222D



Ember (Emerald)
#2F9E6E



Wine
#6F8894



Cream
#EEF3F5

A deep navy replaces pure black throughout — it reads as precise and composed rather than corporate, and lets the emerald accent carry every call to action, evoking growth and trust.

TYPOGRAPHY

Your numbers, always current. Never a mystery.

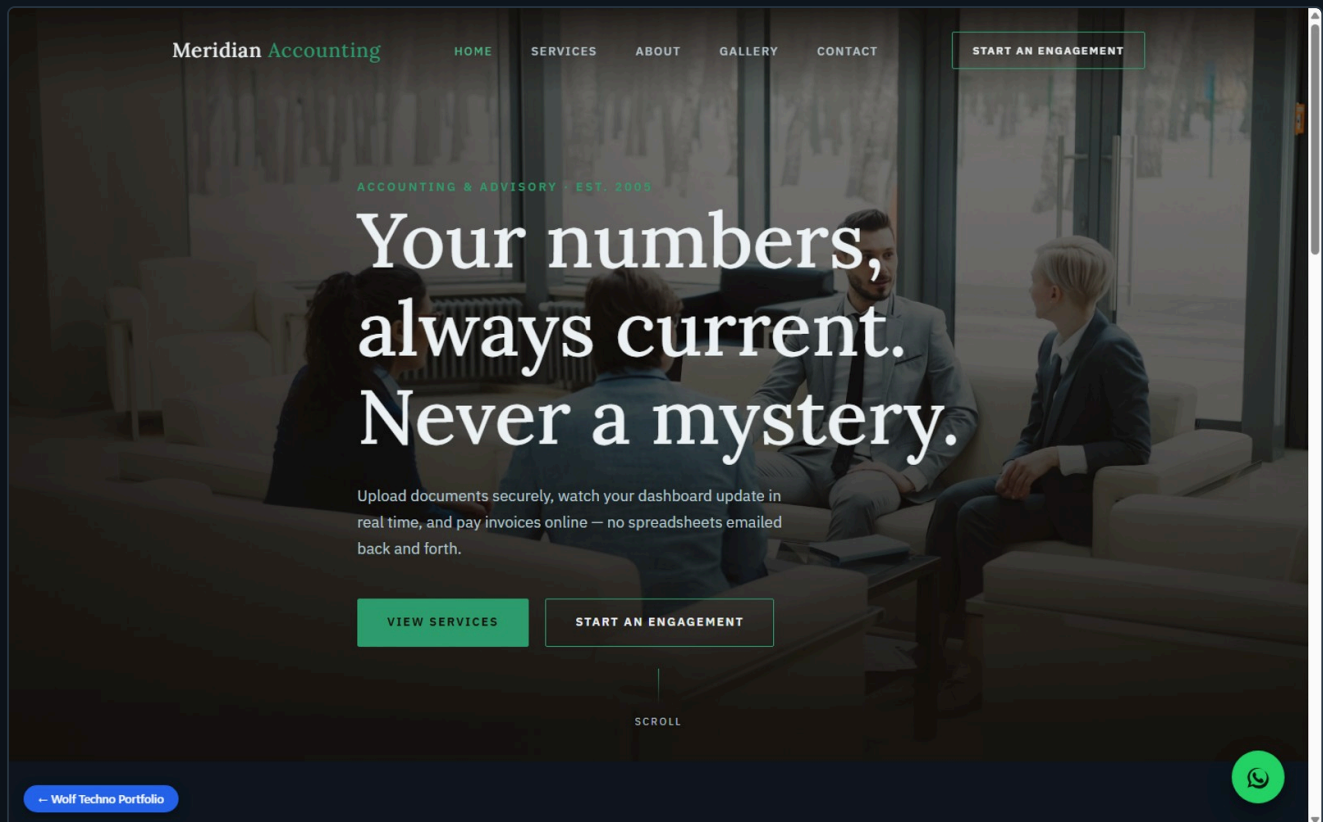
Lora pairs a composed, editorial display face with IBM Plex Sans for body copy and interface text — a deliberate pairing for a professional services platform, not the default safe choice.

LORA · DISPLAY | IBM PLEX SANS · BODY & UI

LAYOUT APPROACH

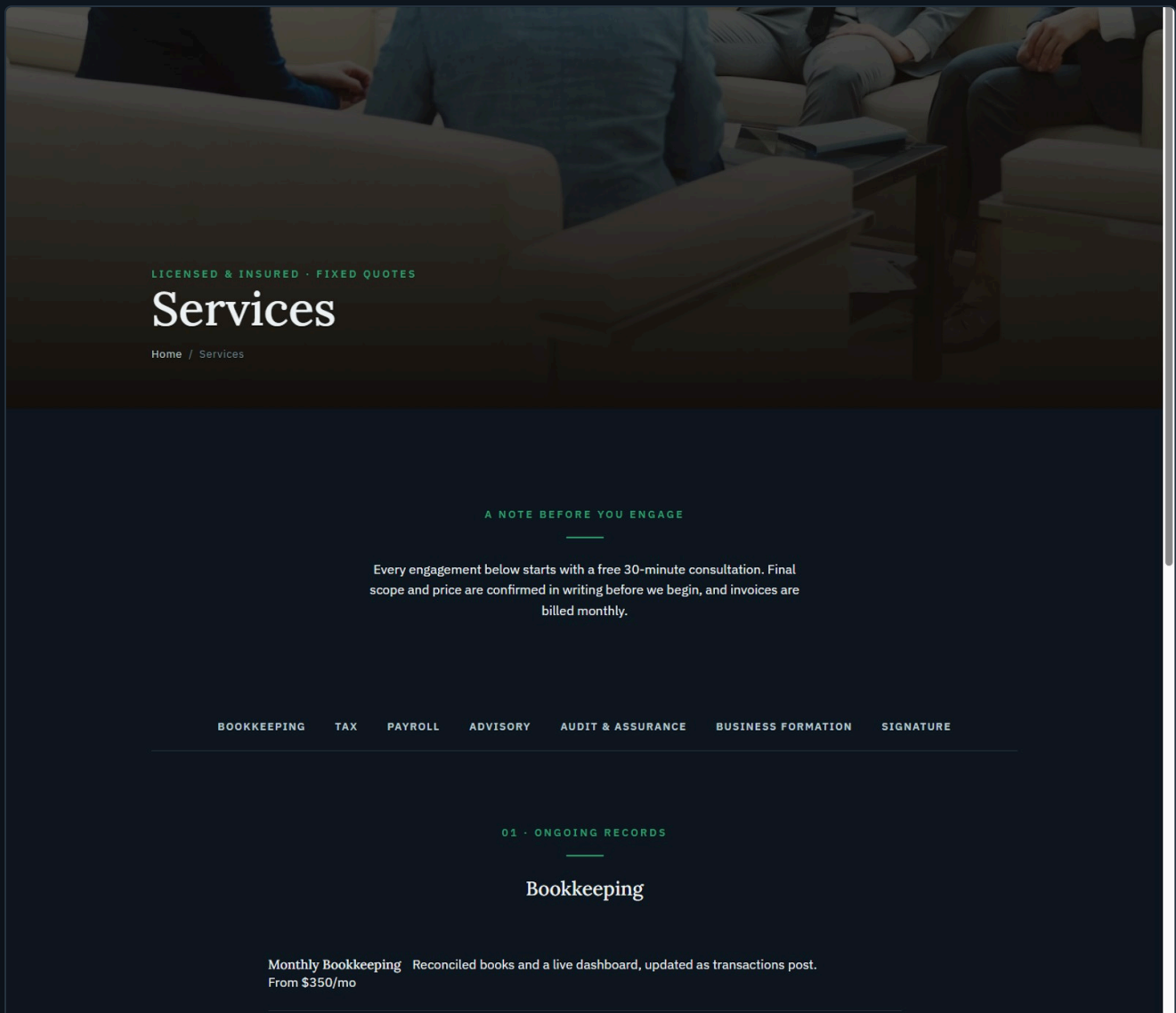
Full-bleed office and desk photography, generous negative space, and thin emerald hairline dividers replace the coupon-heavy layouts common in tax-prep templates — real consultations and real documents carry the page, not stock icons.

Home



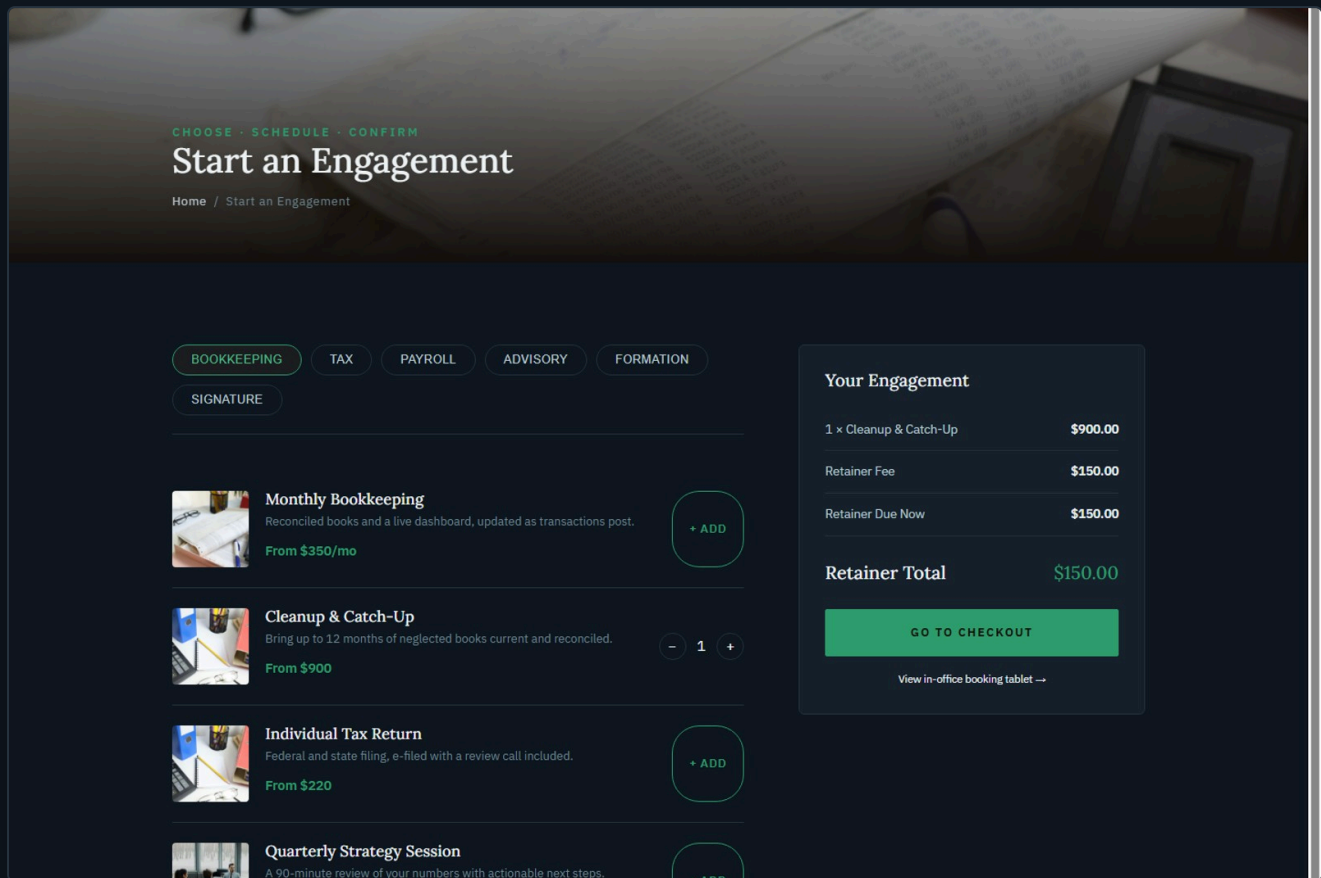
Purpose: establish tone in the first three seconds. A full-height client-consultation photograph, a single-sentence thesis statement, and two clear actions — view services or start an engagement — before the visitor scrolls past the fold.

Services



Purpose: read like a real service catalog, not a wall of stock icons. Service name, starting price, and a one-line description — grouped by category, jump-linked at the top for fast navigation across all seven categories.

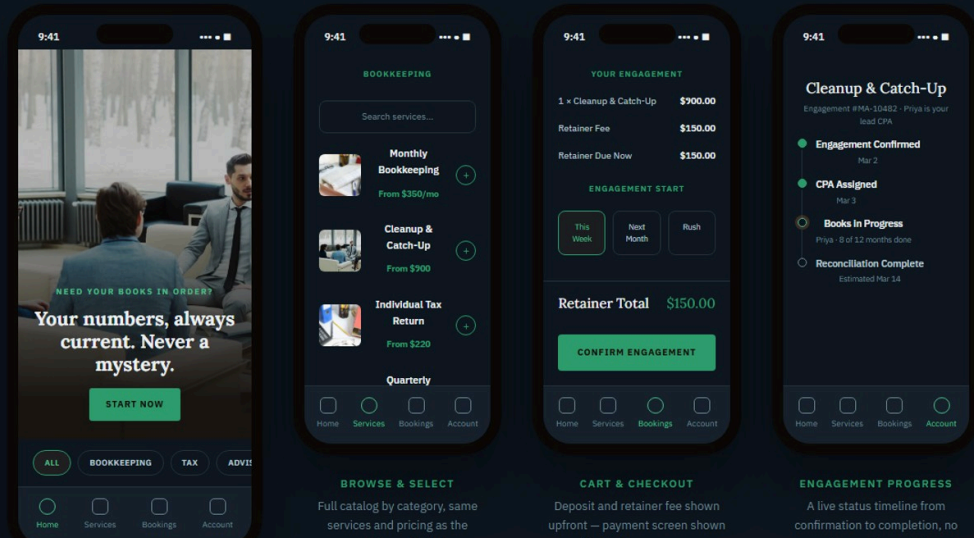
Start an Engagement



Purpose: browse services by category, add one to an engagement request, and see the retainer due before checkout — the same catalog and pricing that live on the Services page, reused rather than duplicated.

iOS & Android Companion App

The same booking system that powers the website and the in-office tablet, reshaped for a native mobile companion — browsing, checkout, and live engagement tracking in one continuous flow.



Purpose: four native-style screens — discover, browse, engage & pay, and live engagement-progress tracking — built from the same design system and the same service data as the website and the in-office tablet. Shown as a design mockup; at implementation time it becomes a native iOS & Android build wired to live engagement data.

Dashboard & Engagement Management

FixPoint Services

Dashboard

Services

Bookings & Dispatch

Staff Accounts

Gallery

Company Info

Signed in as admin

Sign Out

← Wolf Techno Portfolio

Dashboard

A quick look at what's live on the site right now.

42

SERVICES

39

VISIBLE ON SITE

7

SERVICE CATEGORIES

18

BOOKINGS TODAY

Quick actions

Everything here updates the live website immediately — no need to touch any code.

+ Add Service

Manage Gallery

View Bookings

Edit Company Info

Recent activity

ACTION	ITEM	WHEN
Booking confirmed	Booking #FP-10482	2 hours ago
Photo uploaded	Gallery — "Panel Rewire"	Yesterday
Service listed	Ceiling Fan Installation	3 days ago

Purpose: give office staff a plain-language overview the moment they log in — live counts, not raw database numbers — plus one-click paths into the things they'll touch most often: services, engagements, staff, and company info. Services are added, priced, and hidden from the same panel; engagements flag unassigned clients automatically; staff accounts get short login codes for the booking tablet.

Technical Foundation

Built for a specific business reality: an independent accounting practice that needs a fast, dependable site today, full content control tomorrow, and no dependency on a developer — or on us — for either.

CUSTOMER-FACING SITE

- ✓ Hand-built HTML, CSS & JavaScript — no framework overhead
- ✓ Fully responsive across desktop, tablet, and mobile
- ✓ Full engagement flow — browse, request, and pay a retainer online
- ✓ In-office booking tablet, same catalog as the website
- ✓ Mobile app design mockup — discover, engage, and track your CPA's progress
- ✓ Runs on any standard web host, no special server required

ADMIN PANEL

- ✓ PHP & MySQL — supported by virtually every hosting provider
- ✓ Secure login with hashed passwords
- ✓ Add, edit, hide, or remove services in real time
- ✓ Auto-generated staff login codes for the booking tablet
- ✓ Engagement records with automatic unassigned-client flags
- ✓ Edit hours, address, and contact info without touching code

No external cloud database or third-party platform dependency — the entire project (site, images, and database export) is a self-contained package that transfers to any new host or domain in minutes.

The Value, In Plain Terms

01

It looks like a \$15,000 build, not a \$200 template

The design decisions — palette, typography, photography, layout — are specific to this platform, not recognizable as a reused tax-prep theme.

02

The team never has to call a developer for routine changes

New service, new price, updated hours — all handled from a simple admin panel built for someone with no technical background.

03

It's portable, by design

No proprietary platform lock-in. The finished project can move to any hosting provider or domain the client already owns.

04

It's fast — for clients and for search engines

Hand-written, dependency-free front-end code loads quickly on any connection, which matters for both user experience and search ranking.

INTERESTED IN A PLATFORM LIKE THIS FOR YOUR BUSINESS?

**Every project in this portfolio is
built the same way — from scratch,
for the business it's made for.**

Design & Development Portfolio · 2026