

A LAUNCH PACK PREPARED FOR

ClientChase.

Keep your portal.
*Organize
the follow-up.*

Product-specific positioning, publish-ready copy
and a focused distribution plan for CPA & tax firms.

PREPARED

18 September 2026

EDITION

Founder / v1.0

DELIVERABLES

Research + copy + action plan

01 / DECISION BRIEF

Your launch, in one page.

Do not sell another place to upload documents. Sell a clearer process for the work that happens around the portal.

The strongest story is already present.
Make it concrete, not louder.

01 Keep the existing problem-led headline.

The supplied homepage already names missing tax documents. Retain that direction; sharpen what the team and client do next. [P1]

02 Explain the manual boundary before the buyer asks.

A portal link is not an integration. State who updates item status and where documents go. The copy in this pack makes that distinction visible. [P1] [P2]

03 Test one real request workflow, not a directory count.

Start with a small group of relevant firm owners and one end-to-end demo. Directory presence supports discovery; it is not evidence of demand.

START READING

Product & message

Pages 3–8: evidence, positioning, website copy and competitor context.

START USING

Assets & execution

Pages 9–21: listing copy, launch posts, 10 directory recommendations and a seven-day plan.

What this commission includes

A product review, original launch copy, researched recommendations and an execution plan. No website changes, postings, submissions, paid placements or customer results are represented as completed.

02 / OBSERVED EVIDENCE

What the product already says.

A useful review starts by preserving what is working in the supplied version.

Owner-supplied homepage screenshot, cropped for readability. [P1]

KEEP**A specific problem**

The hero names missing tax documents and the intended CPA/tax audience. There is no reason to replace this with generic “workflow productivity” language.

KEEP**Portal continuity**

The supporting text already says to keep the existing secure portal. Preserve this throughout the launch copy; it is the core positioning hypothesis.

What remains a hypothesis

The recommendation is that portal-preserving follow-up will resonate with a particular segment. Neither this screenshot nor this report proves that customers will pay for it.

Research boundary: the public ClientChase URL returned a title but not a readable page body in the research tool. This is a review of the supplied screenshots and product brief, not a fresh live-interface or backend audit. [R1] [P1] [P2]

03 / WEBSITE REVIEW

Four changes worth making — or testing.

These are editorial recommendations, not measured conversion findings.

01 / CTA CONSISTENCY

"Pilot" and "trial" tell different stories.

Observed: the supplied hero uses "Start Free Pilot" alongside "14-day free trial." [P1]

Recommendation: use one term across the button, pricing, signup and confirmation email. The base copy uses "Try ClientChase" until current trial terms are confirmed.

02 / PORTAL COMPATIBILITY

Make the lack of native integration easy to notice.

Observed: the portal-brand strip includes a small "no affiliation or native integration required" qualification. [P1]

Recommendation: bring plain-language clarification beside the main explanation: "Link to your existing portal; staff maintain the request checklist." Do not imply synchronization.

03 / STATUS OWNERSHIP

Show who marks an item received.

Observed: the request screenshot exposes staff-side item-status controls. [P2]

Recommendation: include a brief demo of a staff member reviewing an incoming document and updating the item. A dashboard alone does not explain this responsibility.

04 / PRODUCT PROOF

Separate illustrative data from customer evidence.

Observed: the hero preview contains firm names and request totals; no demo-data label is visible in the supplied crop. [P1]

Recommendation: label the preview as illustrative and use sanitized real UI to explain the workflow. Do not turn sample counts into adoption or performance claims.

04 / MESSAGE SYSTEM

A focused product for a specific gap.

Working segment to test: small CPA and tax teams with an established upload portal but fragmented request tracking.

POSITIONING STATEMENT

ClientChase helps small CPA and tax firms organize missing-document requests and schedule follow-up while keeping document uploads in the secure portal they already use.

GOOD FIT TO TEST**The portal is settled. The chase is not.**

An owner or operations lead still coordinates missing items through email and a separate tracking list. The buyer wants a narrower tool, not a firm-wide software migration.

POOR FIT**The current suite already does the job.**

A team happy with its existing requests, reminders and status workflow has little reason to add another system. Do not sell complexity to a buyer who does not need it.

Five benefits, tied to the actual workflow

Make the request specific.

Replace a vague reminder with a checklist of the items you still need.

Keep the next follow-up visible.

Schedule reminder emails rather than relying on a separate personal reminder list.

See the item status.

Keep received, missing and review statuses together for the team.

Give clients a focused view.

Share a limited request link without requiring a ClientChase account to view it.

Keep your document destination.

Use your existing secure portal for uploads instead of moving tax documents into ClientChase.

Core capability wording is based on owner-supplied product material and UI. Reminder delivery, current limits and billing were not independently function-tested. [P1] [P2]

05 / WEBSITE COPY

A clearer explanation. Not a new product promise.

Paste-ready copy. Keep the main headline direction; use the supporting text to explain the boundaries.

BUILT FOR CPA & TAX FIRMS

Stop chasing clients for missing tax documents.

Create a checklist of missing items, share a client request link and schedule follow-up emails. Clients send documents through your existing secure portal; your team keeps request status in ClientChase.

[Try ClientChase](#)[See how it works](#)

Document uploads stay in your existing portal. ClientChase tracks requests and follow-up, not the files themselves.

How it works

1

List what is missing.

Create a client request and add the document names or information you need. Keep sensitive document contents out of checklist labels.

2

Share the request.

Send the client a focused checklist link and direct document uploads to your firm's existing secure portal.

3

Keep follow-up organized.

Schedule reminder emails and keep item statuses current as your team reviews what arrives through the portal.

Implementation notes: the secondary button must lead to a real walkthrough or existing how-it-works section. Add current trial/pricing terms only after checking the live offer. No new integration or storage capability is implied.

06 / BUYER CLARITY

Answer the questions before they block the trial.

Ready-to-use FAQ copy. Keep it close to the primary offer, not hidden in a footnote.

Does ClientChase replace our document portal?

No. Your existing portal remains the place clients send documents. ClientChase organizes requests, item status and follow-up around that process.

Do our clients need a ClientChase account?

Clients can view the limited request checklist through a link without creating a ClientChase account. Any login required by your document portal is separate.

Does ClientChase detect files uploaded to our portal?

Do not assume it does. This workflow does not promise a native portal integration or automatic file detection. Keep the checklist status up to date as your team reviews incoming documents.

Does ClientChase store tax documents?

It is not a tax-document storage service. The application still handles information needed for requests and follow-up; "no document storage" does not mean "no client data."

What if our current software already handles this well?

You may not need another tool. ClientChase is for firms that want a separate, focused request-and-reminder workflow while keeping their existing document destination.

Claims deliberately left out

No quantified time savings, guaranteed faster replies, automatic portal synchronization, certification claims or invented customer endorsements. "No tax-document storage" is not a promise that no client data is processed.

[P1] [P2]

07 / COMPETITOR CONTEXT

Reminders are not a unique advantage.

Official product pages show substantial overlap. The opportunity to test is a narrower workflow, not a claim that competitors cannot follow up.

Content Snare [C1]

Documented overlap: client requests, collection, automatic reminders and review/approval. **Distinction to test:** ClientChase leaves tax-document uploads in the existing portal instead of adding a collection destination. **Honest limitation:** buyers wanting collection and follow-up together may prefer that broader approach.

TaxDome [C2]

Documented overlap: automated client requests and reminders inside a broader practice-management platform, with documents and billing. **Distinction to test:** a standalone follow-up process for a team not changing suites. **Honest limitation:** a satisfied TaxDome team may have no additional need.

Financial Cents [C3]

Documented overlap: a client portal, uploads, passwordless access and request reminders, alongside practice management. **Distinction to test:** ClientChase's deliberate separation of follow-up from document storage. **Honest limitation:** neither reminders nor passwordless client access should be marketed as unique.

Canopy [C4]

Documented scope: accounting practice management, client portal, document management and signatures. **Distinction to test:** a narrow request workflow rather than a suite replacement. **Honest limitation:** ClientChase should not be described as a feature-equivalent Canopy alternative.

Recommended competitive line

"For firms that already have a document portal but still need a clearer way to manage missing-item follow-up." Product fit is a hypothesis to validate, not a superiority claim.

Desk research, 18 September 2026. These are vendors' descriptions, not comparative hands-on tests. Competitor pricing and security rankings are intentionally excluded.

08 / LISTING COPY

One consistent story. Several useful lengths.

Core descriptions are written without a price, testimonial or unverified integration claim.

SAASYRA PROFILE INTRODUCTION

Already have a secure portal for tax documents? ClientChase organizes the follow-up around it.

Create a checklist of missing items, share a limited client request link and schedule reminder emails. Your team keeps received, missing and review statuses together while documents stay in the portal you already use.

ClientChase is a focused request-and-reminder workflow for CPA and tax firms, not a new document storage system or a replacement for a full practice-management suite.

Product name ClientChase **Website** getclientchase.com

Tagline Keep your portal. Organize the follow-up.

Suggested categories Client request management / Workflow automation

Audience CPA and tax firms; professional-service teams with recurring requests

DIRECTORY COPY / EXACTLY 50 WORDS

ClientChase helps CPA and tax firms organize missing-document requests, share client checklists and schedule follow-up emails. Documents stay in the firm's existing secure portal. Staff track what is received, missing or awaiting review in a focused workspace, without replacing their document storage system or adopting a full practice-management software suite.

DIRECTORY COPY / EXACTLY 100 WORDS

ClientChase is a request-and-reminder tool for CPA and tax firms that already have a secure document portal. Teams create checklists of missing items, share a client request link, schedule follow-up emails and maintain item statuses in one workspace. Clients can view their limited checklist without creating a ClientChase account; document uploads remain in the firm's existing portal. ClientChase focuses on organizing the follow-up process rather than storing tax documents or replacing a practice-management suite. It is suited to teams whose requests still depend on scattered email threads and separate tracking lists, with staff reviewing documents and keeping checklist progress current.

Category suggestions are editorial, not a claim that every directory exposes these labels. Choose the nearest accurate available option. Do not select tax-preparation functionality or file-storage features that ClientChase does not provide.

09 / DIRECTORY COPY

A complete description, without inflated claims.

Use where a directory requests functionality, audience and workflow details. Put URLs in the dedicated fields.

LONG DESCRIPTION / EXACTLY 300 WORDS

ClientChase is a focused client request and reminder tool for CPA and tax firms. It is designed for teams that already have a secure place to receive documents but still manage missing-item follow-up through email threads, spreadsheets or reminders.

A team starts by creating a client request and listing the items it needs. The checklist makes the request specific: which document is outstanding, which item has been received and which item needs review. Staff can keep those statuses together instead of maintaining a separate conversation for every missing document.

Clients receive a limited request link that they can view without creating a ClientChase account. The firm's existing secure portal remains the destination for document uploads. ClientChase is not a tax-document storage service, and adding a portal link should not be confused with a native integration or automatic detection of uploaded files.

Scheduled follow-up emails help the team maintain a repeatable reminder process. Request activity gives staff context about the steps taken, while the team remains responsible for reviewing the documents it receives and keeping checklist status accurate. ClientChase organizes the follow-up workflow; it does not promise that every client will respond sooner.

The product is deliberately narrower than a full practice-management suite. It does not aim to replace the firm's accounting, tax preparation, billing or document storage systems. A firm that already has an effective request-and-reminder workflow in its current software may not need an additional tool.

ClientChase is most relevant when the document destination is settled but request tracking remains fragmented. A practical starting point is one client request: create the checklist, check the client-facing link, confirm the portal destination and review the reminder settings before expanding the workflow to more clients. Keep sensitive tax information out of checklist labels and use the approved portal for the documents themselves.

KEYWORDS**Use-case language**

client document requests · missing document checklist · CPA follow-up · tax firm reminders · client request tracking

FORM ADAPTATION**Do not paste blindly.**

Remove links where prohibited. Respect character caps and actual category choices. Keep the product name and website consistent across profiles.

Word counts use whitespace-separated tokens; individual platforms may count punctuation differently. This copy does not include a price, trial duration or unsupported numerical outcome.

10 / PRODUCT HUNT

Make the narrow scope the story.

The founder publishes from their own eligible personal account. This pack supplies the writing, not a launch booking. [H1]

PRODUCT NAME

ClientChase

Use only the product name in the name field.

PRIMARY URL

getclientchase.com

Use the direct product URL. Confirm the current pricing tag in the composer.

TAGLINE / 54 CHARACTERS

Client document follow-up, without a new upload portal

DESCRIPTION / 230 CHARACTERS · WITHIN THE DOCUMENTED 260-CHARACTER LIMIT

ClientChase helps CPA and tax firms track missing-document checklists and schedule follow-up emails. Clients view a request link; documents stay in your existing secure portal. A focused follow-up tool, not another document store.

MAKER COMMENT / FOUNDER VOICE

Hi Product Hunt — I'm the founder of ClientChase.

The problem I'm focusing on is the work around a document portal: which items are still missing, what has already been requested and when the next follow-up should happen.

ClientChase gives CPA and tax firms a focused workflow for that:

- Create a checklist of missing items.
- Share a limited client request link.
- Schedule follow-up emails and maintain request status.

Documents still go through the firm's existing secure portal. ClientChase does not store tax documents, and a portal link is not a native integration or automatic upload detection. Staff still review incoming documents and keep item status current.

This is intentionally not a full practice-management replacement. A firm whose existing software already handles requests and reminders well may not need it.

I'd love feedback from accountants and tax practitioners: where does your current follow-up process break down — writing the request, deciding when to remind, or keeping the team up to date?

You can explore it at <https://getclientchase.com/>.

This is original founder copy, not a fabricated user testimonial. Ask for feedback, not coordinated votes. Recheck the current posting interface before publication. [H1]

11 / SOCIAL COPY

One buyer problem. Two different formats.

The drafts use the founder's own voice and avoid customer counts, time-saving statistics and "only tool" claims.

LINKEDIN / FOUNDER POST

A secure portal answers "Where should clients upload their documents?"

It doesn't necessarily answer "Who is still missing what, and when should we follow up?"

That's the workflow I'm working on with ClientChase, a focused request-and-reminder tool for CPA and tax firms.

The approach is deliberately narrow: create a checklist, share a limited client request link, schedule follow-up emails and keep item status visible to the team. Documents stay in the secure portal the firm already uses.

There is no promise of automatic portal synchronization. Staff still review incoming documents and update the checklist. And if your existing software already handles this well, adding another tool may not help.

I'm interested in the teams still bridging that gap with email threads and spreadsheets.

What part of document follow-up takes the most coordination in your firm?

<https://getclientchase.com/>

X / PRIMARY POST · 212 CHARACTERS INCLUDING THE URL

Keep your portal. Organize the follow-up.

ClientChase helps CPA and tax firms track missing-document checklists and schedule reminders. Documents stay in your existing secure portal.

<https://getclientchase.com/>

X / ALTERNATIVE POST · 212 CHARACTERS INCLUDING THE URL

CPA and tax firm owners: your document portal is in place, but how do you track what's still missing?

I'm building ClientChase for the checklist-and-follow-up gap — not file storage.

<https://getclientchase.com/>

Publish one X version, not both at once. The counts shown are raw text counts; platform URL handling may differ. Do not convert these drafts into an automated bulk-posting campaign.

12 / REDDIT & COMMUNITY

Be the founder. Do not pretend to be a fan.

Use only in a community or thread that permits this kind of product post. No subreddit permission has been assumed.

POST TITLE

I built a document follow-up tool for tax firms that keep their existing portal

POST BODY

I'm the founder of ClientChase, so this is a product post rather than an independent recommendation.

I'm working on a narrow problem for CPA and tax firms: documents already have somewhere to go, but the list of missing items and follow-up emails still lives in several places.

ClientChase lets staff create a request checklist, share a limited client link, schedule reminder emails and maintain item statuses. The actual documents stay in the firm's existing secure portal.

The trade-off is intentional: it doesn't store tax documents or automatically detect what arrived in another portal. Staff still review incoming files and update the checklist. If a firm's existing software already handles all of that well, another tool may not be useful.

I'd appreciate feedback on the workflow itself. Does separating the checklist from document storage solve a problem, or does it introduce one more place to maintain?

Here's the product: <https://getclientchase.com/>

BEFORE POSTING**Read the actual rules.**

Check promotion rules, account requirements and any designated feedback thread. Use this draft only where it fits; ask moderators when the permission is unclear.

WHAT TO LEARN**Does the separation help?**

Listen for the objection that a checklist outside the portal adds maintenance. That answer is more useful than collecting general praise from other founders.

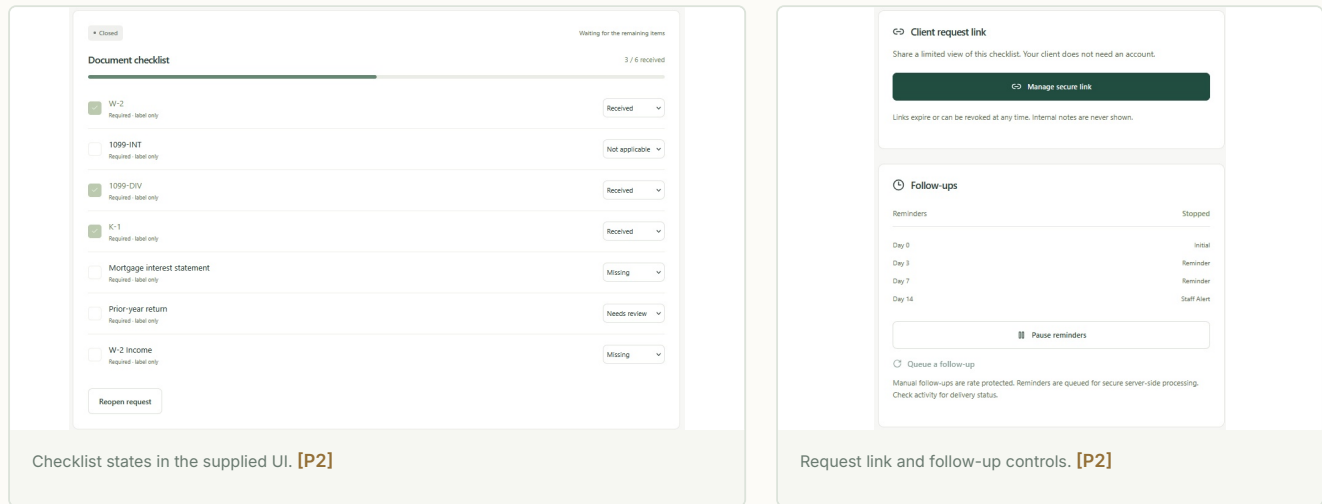
No disguise, no promise

The draft discloses the founder relationship. It does not invent a customer story, promise growth or imply that SaaSyra has already published it.

13 / PRODUCT DEMO BRIEF

Show the work. Not just the dashboard.

A recording plan using the real product. No video or finished launch-gallery artwork is represented as delivered.

**0–10 seconds**

Your document portal is already in place. ClientChase is for the follow-up around it.

10–25 seconds

Start with one request. List the missing items so the client and your team have a clear checklist to work from.

25–40 seconds

Share the limited client request link. Documents still go to your firm's existing secure portal, not into ClientChase.

40–52 seconds

Set the reminder schedule and keep item statuses current as your team reviews incoming documents.

52–60 seconds

Keep your portal. Organize the follow-up. Explore ClientChase at getclientchase.com.

GALLERY FRAME 1**Your portal stays.**

Show the request-link/portal relationship. Use sanitized demo content and label it clearly.

GALLERY FRAME 2**Know the next step.**

Show the checklist and reminder settings. Do not stage a real delivery or automatic sync that has not occurred.

Product Hunt recommends a square 240 × 240 thumbnail and gallery images of 1270 × 760, with at least two gallery images. Use proper source logo files, not an upscaled screenshot crop. [H1]

14 / DISTRIBUTION SHORTLIST

Start with a clear software profile.

Three routes to inspect first. This is a shortlist, not a list of completed or guaranteed placements.

O1 START HERE SaaSHub [D1]

Why consider it: A software-discovery listing where the request-and-reminder use case can be explained without calling ClientChase a full accounting suite.

Access: Public submission entry is visible. Domain-email verification improves priority; all products are reviewed. **Cost:** No payment is shown at the initial entry step; do not treat that as an end-to-end fee guarantee.

What to use: Use the 100-word description. Add relevant competitors, starting with Content Snare. Suggest workflow categories, not tax-return preparation.

Watch-out: Released, English-language products on their own domain are required. Check for an existing ClientChase listing first.

[Open official submission information ↗](#)

O2 BUYER PROFILE G2 [D2]

Why consider it: A B2B software profile for a buyer evaluating a specific workflow. Useful once the founder can maintain accurate product details.

Access: Create/request the profile, then claim it through the vendor flow. G2 reviews both product information and claims. **Cost:** Profile claiming is free; paid marketing products are separate.

What to use: Use the 300-word functionality description and the audience statement. Let G2 confirm the category rather than claiming a broad suite category.

Watch-out: A profile is not a supply of leads. Do not publish founder-written or invented customer reviews.

[Open official submission information ↗](#)

O3 BUYER PROFILE Crozdesk [D3]

Why consider it: Business-software discovery, with a potentially useful workflow-automation angle rather than a generic startup-launch audience.

Access: The official site routes vendors to Revleads signup. The authenticated process was not completed. **Cost:** Crozdesk advertises a free listing application.

What to use: Use the 100-word description, one clear request screenshot and a precise audience. Inspect available categories before selecting.

Watch-out: Free application does not mean acceptance, a recommendation badge or guaranteed traffic.

[Open official submission information ↗](#)

Researched 18 September 2026. Public pages were inspected; no accounts were created, forms submitted or purchases made. Fees and requirements can change. A visible form does not prove the absence of later verification.

14 / DISTRIBUTION SHORTLIST

Useful routes. Real conditions.

These recommendations include the account and scope constraints, rather than hiding them.

CONDITIONAL FIT

04 AlternativeTo [D4]

Why consider it: Relevant only as an alternative for the request-and-reminder part of a workflow, not as a feature-equivalent substitute for TaxDome.

Access: Account and verified email required. A new application and its alternatives go through moderation. **Cost:** Free review queue; optional \$5 priority review was published at research time.

What to use: Use the neutral 100-word description. Put the clean product URL in the website field, not the description; do not add UTM tags.

Watch-out: Explain the narrower scope explicitly. Free review can take months; paid priority is not approval.

[Open official submission information ↗](#)

BUYER PROFILE

05 SourceForge [D5]

Why consider it: Its business-software directory is a possible home for the product; this is not an open-source project submission.

Access: Public business-listing form requests company, contact, product, logo and audience details. JavaScript is required.

Cost: The form does not establish the final listing cost; ask before any paid package.

What to use: Use the 300-word description. Supply real company/founder details and a square product logo; do not invent a company registration.

Watch-out: The form includes consent to communications. Read the terms before the founder submits.

[Open official submission information ↗](#)

CONDITIONAL FIT

06 SoftwareSuggest [D6]

Why consider it: Software-buyer discovery may fit, but check that the category and buyer geography match the firms ClientChase actually serves.

Access: Vendor signup requires a business email and phone. Consumer-email domains are not accepted. **Cost:** A free listing is advertised; promotional services are separate.

What to use: Use the 100-word version with the no-document-storage distinction. Choose the nearest honest category after inspecting the options.

Watch-out: Do not begin without a business inbox the founder controls and approval to provide the requested contact details.

[Open official submission information ↗](#)

Researched 18 September 2026. Public pages were inspected; no accounts were created, forms submitted or purchases made. Fees and requirements can change. A visible form does not prove the absence of later verification.

14 / DISTRIBUTION SHORTLIST

Keep broad discovery in proportion.

General startup exposure is a secondary experiment, not the core case for buying ClientChase.

LOW-EFFORT TEST

07 Launching Next [D7]

Why consider it: A general startup directory: an inexpensive discovery experiment, not evidence of an accountant-heavy audience.

Access: Public form asks for startup details, founder name and email. Post-submit verification was not tested. **Cost:** Submission is free. Optional \$99 expedited consideration is outside this pack.

What to use: Headline: "Client document follow-up for busy tax firms" (8 words). Use the 100-word description and relevant tags.

Watch-out: Free submission is not a publication promise. Do not pay for speed before the channel has shown value.

[Open official submission information ↗](#)

LOW-EFFORT TEST

08 Startup Buffer [D8]

Why consider it: A general startup profile that can explain the portal-preserving workflow. Treat it as a discovery test, not a lead forecast.

Access: Form asks for a business email and says it sends a private edit link. Screenshot required; maximum 500 KB. **Cost:** No fee is stated in the inspected form; verify the complete flow before submission.

What to use: Use the 100-word description and an authentic, sanitized product screenshot. Use the founder-controlled business inbox.

Watch-out: A public form is not proof that no email action will ever be required. Keep the edit link private.

[Open official submission information ↗](#)

OPTIONAL LAUNCH

09 Unneed [D9]

Why consider it: Useful for product and messaging feedback, but a broad maker audience is not the same as qualified CPA demand.

Access: Signup/login is required to save the product. Scheduling is a separate dashboard step after submission. **Cost:** Free queue or paid scheduling. Free launch retention depends on its published score rules.

What to use: Use the short pitch and product screenshot. Choose a small number of accurate tags and inspect current queue rules.

Watch-out: Do not promise a permanent free listing or a fast launch. Spend no money purely for a backlink.

[Open official submission information ↗](#)

DEFER IF BADGE UNWANTED

10 Fazier [D10]

Why consider it: Another broad product-discovery experiment. Lower priority than clarifying the workflow for real accounting buyers.

Access: The submission page exposes plan choices. The authenticated and post-submit steps were not tested. **Cost:** Basic is free with a required homepage/footer backlink. Paid tiers remove that requirement.

What to use: Use the 50-word description plus the product URL in its proper field. Evaluate whether the badge suits the site.

Watch-out: Skip the free route if you do not want a reciprocal link. A paid tier is not included or recommended by this pack.

[Open official submission information ↗](#)

Researched 18 September 2026. Public pages were inspected; no accounts were created, forms submitted or purchases made. Fees and requirements can change. A visible form does not prove the absence of later verification.

15 / EXECUTION

Seven days. One useful test.

A founder-operated plan, not a promise of listings or revenue within a week. Directory review runs on each platform's schedule.

D₁ Align the offer and the explanation.

Approve the homepage/FAQ wording, confirm actual trial and price, and verify one real request workflow. Output: one consistent offer and a factual product sheet.

D₂ Record the workflow.

Use a demo workspace and the script on page 14. Check the request link, portal destination and reminder behavior. Output: a short, accurate walkthrough the buyer can inspect.

D₃ Publish one founder post.

Start with LinkedIn. Ask an explicit workflow question and speak with relevant accountants who choose to respond. Output: recorded objections, not just impressions.

D₄ Create two accurate discovery profiles.

Inspect SaaSHub and one B2B route such as G2 or Crozdesk. Search for duplicates first. Output: submission receipts or a documented reason to defer; neither equals a live listing.

D₅ Run buyer conversations.

Invite five relevant firm owners or operations leads through existing, appropriate relationships. Learn how they track missing items today. Five is a research target, not a promised response count.

D₆ Observe one request setup.

With permission, watch a willing practitioner set up a sample request. Note confusion, unnecessary duplicate work and the first point where help is needed. Do not collect client tax files for the study.

D₇ Choose the next experiment.

Review conversations, real request usage and verified paid events separately. Keep the story if the workflow resonates; revise it if portal separation creates more work than it removes.

Defer the launch spectacle

Keep Product Hunt as a prepared asset until the core flow is stable and the founder has time to answer questions. Do not buy placement simply to complete this checklist.

16 / LEARNING PLAN

A signup is not a paying customer.

Use a small evidence log. These are proposed measurements, not claims about installed analytics or current performance.

Signal	What counts	What does not
Qualified conversation	A CPA/tax-firm decision-maker explains the existing follow-up process.	A like, an upvote or another founder saying "cool product."
First useful setup	A real target user creates a usable request and checks its client link/portal destination.	Only clicking a call-to-action or opening a workspace.
Repeat use	The same team uses the workflow again after the first request.	A one-off demo performed only by the founder.
Paid customer	A completed payment tied to the actual product subscription/order.	Checkout opened, checkout abandoned or a free account created.
Time saving	Before/after observations of comparable work, with context and permission.	An estimate copied from a competitor's landing page.

Decision rules for this small test

A Buyers already have this solved.

Do not argue them into another tool. Narrow the audience to firms with an actual gap, or reconsider the product's advantage.

B Interest exists, but setup fails.

Fix onboarding and show the workflow more clearly before increasing outreach. A copy change cannot repair a broken product experience.

C Usage happens, but payment does not.

Ask what is missing and whether the problem is worth solving. Consider offer changes only after hearing the reason; do not interpret praise as purchase intent.

No statistical significance is claimed from a handful of conversations. For directory attribution, use allowed tracking only: AlternativeTo explicitly discourages UTM parameters on official product links. [\[D4\]](#)

17 / SALES ENABLEMENT

Useful answers. No overpromising.

Short replies for actual buyer conversations. No prospect has been contacted as part of this delivery.

"We already use TaxDome / Financial Cents."

That may already cover this workflow. ClientChase is worth considering only if your team still has a specific follow-up gap; it is not a replacement for the whole suite.

"Will we have to move documents?"

No document migration is part of this workflow. Clients continue to use your existing portal for uploads, and ClientChase keeps the request checklist and follow-up organized.

"Does it know when someone uploaded a file?"

Do not assume automatic detection. Staff review what arrives through the portal and maintain the checklist status.

"Will this save us a specific number of hours?"

We do not have a measured time-saving claim to promise. Test one request workflow and compare the follow-up effort with your current process.

“Does separating the checklist from the portal help your team, or add another thing to maintain?”

This is the most important question to carry into a pilot. It directly tests the trade-off in ClientChase's positioning rather than inviting polite approval of the interface.

18 / DELIVERY & HANDOFF

You have the assets. Here is what remains yours.

This commission is ready for founder review and use. It is not evidence that a third party purchased the service or endorsed the product.

DELIVERED**Research and launch assets**

Product-specific audit; positioning and benefits; website and FAQ copy; SaaSyra profile copy; 50/100/300-word descriptions; Product Hunt, Reddit, LinkedIn and X drafts; ten researched directory recommendations; seven-day plan; editable copy file.

NOT PERFORMED**External execution**

No website edits, directory submissions, account creation, social publication, video production, payment processing or ad spend. No promise of traffic, approval, backlinks or revenue.

Confirm these before publication

01 Product and offer truth

Check current price, trial terms, actual reminder behavior and any product changes since the supplied screenshots. Base copy intentionally omits unverified price/trial specifics.

02 Assets and identity

Use approved product artwork and sanitized real screenshots. Review founder-voice copy and remove any statement that no longer describes the product.

03 One consolidated revision

Use the included revision for factual corrections, tone or emphasis within the agreed assets. Send the section, what is wrong and the desired change; do not ask for more unsupported promises.

How this was produced

AI-assisted research, analysis, copywriting and document design. Sources and limitations are disclosed. No claim of customer interviews, hands-on competitor testing or a human marketing team's independent review is made.

SaaSyra's own listing is part of the brand context, not one of the ten independent directory recommendations. This sample can show the deliverable format, but must not be presented as customer evidence.

19 / RESEARCH NOTES

Sources you can inspect.

Public sources reviewed 18 September 2026. Source labels throughout the pack link to this register.

P1 ClientChase homepage screenshot

Owner-supplied Ana Ekran.PNG; reviewed for this brief. Supports the existing headline, portal wording, trial wording and visible CTA labels. Screenshot-version evidence, not a live-production audit.

Owner-supplied reference material; not publicly linked.

P2 ClientChase request screenshot

Owner-supplied Request.PNG; reviewed for this brief. Supports visible checklist states, request-link copy, reminder controls and portal-link field. UI evidence does not verify backend behavior.

Owner-supplied reference material; not publicly linked.

R1 ClientChase public landing page

The public URL resolved to a ClientChase title, but the page body did not render in the research tool. Current plan, trial, signup and backend behavior were not independently retested.

getclientchase.com/

C1 Content Snare — official product site

Documents request, collection, reminder and approval capabilities. Comparison does not use its marketing performance claims.

contentsnare.com/

C2 TaxDome — official product site

Describes practice management, client portal, automated requests/reminders, documents and billing.

taxdome.com/

C3 Financial Cents — official product site

Describes accounting practice management and a client portal with uploads, passwordless access and request reminders.

financial-cents.com/

C4 Canopy — official product and portal pages

Describes practice management, client portal, document management and signatures. No claim that Canopy lacks reminders.

www.getcanopy.com/accounting-client-portal/

H1 Product Hunt — How to post a product

Personal-account requirement, description of up to 260 characters, gallery guidance and pricing-tag guidance. Recheck the composer before publication.

help.producthunt.com/en/articles/479557-how-to-post-a-product

D1 SaaSHub — submission guidelines

Relevant categories and competitors, domain-email verification priority, released/English-language eligibility and review process.

www.saashub.com/services/submit

Prior generated sample PDFs were reviewed for continuity, not treated as independent proof of product functionality. Recommendations and fit assessments are SaaSyra's analysis; platform facts come from the sources above.

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D2 G2 — Create a Profile

New profile and ownership-claim workflow; free claiming and review requirements.

sell.g2.com/create-a-profile

D3 Crozdesk — vendor entry

Free application statement and official link to Revleads vendor signup. Signup destination is vendor.revleads.com/user/signup.

crozdesk.com/

D4 AlternativeTo — FAQ

Verified email, review queues, \$5 optional priority, neutral descriptions, no UTM on official URLs, and partial-alternative guidance.

alternativeto.net/faq/

D5 SourceForge — business listing form

Company/contact fields, logo, audience, functionality description, communications consent and JavaScript requirement.

sourceforge.net/software/vendors/new

D6 SoftwareSuggest — vendor listing

Free listing, business-email restriction, phone field and vendor signup.

www.softwaresuggest.com/vendors

D7 Launching Next — submission form

Free submission, optional \$99 expedited consideration, 5–8-word headline and 2,500-character description maximum.

www.launchingnext.com/submit/

D8 Startup Buffer — submission form

Business email, private edit link, one-sentence pitch, description and screenshot of up to 500 KB.

startupbuffer.com/site/submit

D9 Unneed — first submission guide

Signup to save, separate scheduling, free/paid options and free-launch retention rules.

help.unneed.best/getting-started/how-to-submit-your-first-product

D10 Fazier — submission plans

Free Basic route requires a homepage/footer backlink; paid options have different requirements.

fazier.com/submit

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