Explaining Feature 1: Notifications for Documents via Email and WhatsApp

“Whenever a CA requests a document from a client, the system will automatically notify the client through **email** including a secure upload link and due date."

The link is **unique**, **expires after a set time**, and works only once — so it’s completely private and safe.

Clients can click it, upload the document, and they’re done.

We also send a **reminder email 24 hours before the deadline** to avoid delays.

“If the document is **not uploaded by the due date**, the system will send a **daily follow-up email** until the client uploads it.  
We can customize how many days the reminders continue — for example, stop after 3 days or 7 days.

Explaining Feature 2: Assign Client to team Member Under a Manager

Working

– Also, in Manager panel. Client assignment right with both admin and manager.  
  
**The Manager can navigate to the Team tab, view the list of their team members, and click Assign on a specific team member’s profile. This will display a list of all available clients, allowing the Manager to select and assign specific clients to that team member**.  
  
Explaining Feature 4: Admin Creates Manger & Builds Teams

Description:

Admin should be able to create new Managers, add Team Members under them, and assign clients accordingly. - Define Admin rights in view with managerial rights. For e.g.- managers can add client too as per existing demo.

**Now currently the Mangers is also add the client to team member**

* Edge Case: Ensure duplicate entries or circular hierarchies are not possible.

Prevent the same **client, team member, or manager** from being added **multiple times accidentally**.  
**Current Scenario: Name can be same but the mail should be different otherwise it is fail to added the team member, Mangers**.

Explaining Feature 5:

Technical Tasks:

Backend: Query constraints based on authenticated team member’s assigned clients.

**Yes working. The Team member should only be accessed to it client task and its documents not others.**

**Feature 6: Tasks Module for Admin and Client Manager**

Description:

A task management system integrated into the portal for Admin and Managers.

Use Cases:

* Admin creates a recurring task: “File GST for Client A every month.”- Linked with calendar
* Manager assigns ITR task to a team member with a due date and priority. - Priority setting right with?

**Yes Both working**

**Feature 7: 2FA Code Creation & Reset by Manager/Admin**

Description:

Managers/Admins can create/reset two-factor authentication (2FA) codes for their team. – Define areas where 2FA is required for eg; client allocated to team member, will he be able to see all the documents related to that client or we can add 2FA for confidential documents as well

Use Cases:

* Admin sets up 2FA for a new team member.
* Manager resets a 2FA code after device loss.

**By default, once a team member is assigned to a client, they can access all that client’s documents.But we can add 2FA protection specifically for confidential documents — for example, audit reports, agreements, or financial statements.**

**So before accessing a high-sensitivity document, the team member would be prompted for a one-time verification code (OTP).**

**In case of device loss, the Manager or Admin can reset the 2FA setup, and the system can lock out access after multiple failed attempts, for security.”**

**Feature 8: Synchronization with SharePoint, Google Sheets, Offline Files**

Pending

**Feature 9: Calendar View for Tasks with Priorities (All Roles)**

Description:

Calendar view with color-coded priorities (High, Medium, Low) for Admin, Manager, Team Member, and Clients. -

[Need an overview calendar with color codes shown as dots, similar to what we see in google calendar. Can click on any date and pop up should open. Calendar is another Most Crucial Feature. Also, need reminders a day before or as per individual profile setting.]

**Yes, working show the Task & Event along with Priority and when Click on specific Task and & Event It shows the Details.**

**Feature 10: Client Master – Multi-type Compliance with Recurrence**

Use Cases:

* Set “GST Filing” for Client A every month on the 10th. - [in consistency with other profiles]
* Auto-generate task + reminder based on frequency.

**Yes Working**

**Feature 11: Multiple Firms per Client with Consolidated Reporting**

Description:

Clients managing multiple firms can add firms and associated team members, with a unified dashboard to review everything. [Understand the bifurcation required w/ login credentials]

* **you use one login to manage all your firms from a single dashboard. You can switch between firms easily.**
* **Your team members will only see the firms and data they’re assigned to — ensuring privacy and separation.**

**Feature 12: Client Manages Their Team & Firm Tasks**

Description:

Clients can create team roles, assign managers, and delegate firm-specific tasks within their internal structure. [Client wise design of internal structure is very crucial for success of this feature]

Use Cases: [Role and Access assignments depends upon internal structure]

* Client HR assigns GST filing task to Accountant inside the portal.
* Client Manager tracks pending CA queries.

**Current Scenario: client can create team member only. The assign task is pending and need some modification for internal structure.**

**Feature 13: Client Portal Filters (Firms, Documents, Members)**

Description:

Filters for client-side UI to segment documents, teams, firms, tasks.

Use Cases:

* Filter all pending documents for Firm X.
* View all overdue tasks for Client Team Member A.- This indicates that we are creating task manager for client as well as to what open areas do we have- Open Areas with Priority assignment is crucial.

**Yes Working, Client can see the Document , Firms, Team and the Task**