

# NexPro

Practice Management System

Complete Features List

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NexPro is a comprehensive multi-tenant SaaS practice management solution designed specifically for Chartered Accountants and accounting firms. The platform offers **142 fully implemented features** across **13 functional categories**, providing end-to-end management of clients, tasks, employees, credentials, and business operations.

Category	Features
User & Organization Management	9
Client Management	8
Task/Work Management	12
Work Types & Templates	10
Employee Management	6
Calendar & Scheduling	4
Reports & Analytics	12
Notifications & Reminders	11
Credential Vault	7
Platform Administration (Super Admin)	11
Subscription & Billing	14
Security & Compliance	24
Settings & Configuration	14
<b>TOTAL</b>	<b>142</b>

# Detailed Feature List

## 1. User & Organization Management (9 features)

- Multi-tenant organization support with complete data isolation
- User registration with organization creation (automatic tenant setup)
- JWT-based authentication with access and refresh tokens
- Role-based access control (Admin, Manager, Staff roles)
- Platform Admin (superuser) functionality for system-wide management
- User profile management with avatar upload
- Password reset via email with secure token links
- Organization settings and branding customization
- User invitation system with email notifications

## 2. Client Management (8 features)

- Full CRUD operations for client records
- Client categorization (Individual, Company, Partnership, Trust, LLP, HUF)
- Client status tracking (Active, Inactive, Pending)
- Contact information management (email, phone, address)
- Client search and filtering capabilities
- Client-wise task tracking and history
- Client notes and additional details storage
- Bulk client operations support

## 3. Task/Work Management (12 features)

- Complete task lifecycle management (CRUD operations)
- Task status workflow (Pending, In Progress, Under Review, Completed, Cancelled)
- Priority levels (Low, Medium, High, Critical)
- Task assignment to employees with workload visibility
- Due date tracking with automated reminders
- Recurring task support (Daily, Weekly, Monthly, Quarterly, Yearly, Custom)
- Task templates for quick creation
- File attachments for tasks
- Task comments and activity history
- Bulk task operations (status update, assignment, deletion)
- Task filtering by status, priority, client, assignee, date range
- Task search functionality

## 4. Work Types & Templates (10 features)

- Custom work type creation and management
- Work type categorization by service area
- Default due date settings per work type
- Recurring schedule configuration for work types
- Work type-based task templates
- Template library with predefined task structures
- Template cloning and customization
- Checklist items within templates
- Work type statistics and usage tracking
- Color coding for visual identification

## 5. Employee Management (6 features)

- Employee profile management
- Role assignment (Admin, Manager, Staff)
- Employee workload dashboard
- Task assignment history per employee
- Employee performance metrics
- Active/Inactive status management

## 6. Calendar & Scheduling (4 features)

- Interactive calendar view (Month, Week, Day)
- Task visualization on calendar by due date
- Drag-and-drop task rescheduling
- Color-coded events by status/priority

## 7. Reports & Analytics (12 features)

- Dashboard with key metrics and charts
- Task status distribution (pie charts)
- Client summary reports
- Work type analysis reports
- Staff productivity reports
- Status analysis reports
- Ad-hoc report generation with custom filters
- Date range presets (Today, Last 7 Days, Last 30 Days, This Month, etc.)
- PDF export for all report types
- Excel/CSV export functionality
- Print-friendly report formatting
- Saved report configurations

## 8. Notifications & Reminders (11 features)

- In-app notification center
- Email notifications for task assignments
- Due date reminder emails (configurable days before)
- Overdue task alerts
- Task status change notifications
- New task assignment notifications
- Comment mention notifications
- Daily digest emails (optional)
- Notification preferences per user
- Mark as read/unread functionality
- Bulk notification management

## 9. Credential Vault (7 features)

- Secure credential storage for client accounts
- Encrypted password storage
- Credential categorization (Tax Portal, Banking, Email, etc.)
- Copy-to-clipboard functionality for quick access
- Password visibility toggle
- Credential sharing within organization
- Audit logging for credential access

## 10. Platform Administration (Super Admin) (11 features)

- Organization management (view, edit, suspend)
- Trial management and extension
- User management across all organizations
- Subscription plan management
- Platform-wide analytics and metrics
- System health monitoring
- Email template management
- Platform settings configuration
- Audit logs viewing
- Bulk organization operations
- Revenue and subscription analytics

## 11. Subscription & Billing (14 features)

- Multiple subscription plans (Free, Starter, Professional, Enterprise)
- Trial period management (configurable duration)
- Feature limits by plan (clients, users, storage)
- Plan upgrade/downgrade functionality
- Subscription status tracking (Active, Trial, Expired, Cancelled)
- Billing history and invoices
- Payment integration ready (Razorpay/Stripe)

- Grace period handling for expired subscriptions
- Subscription renewal reminders
- Custom plan creation (Admin)
- Plan comparison display
- Usage tracking against plan limits
- Overage notifications
- Subscription analytics dashboard

## 12. Security & Compliance (24 features)

- JWT token-based authentication
- Token refresh mechanism
- Password hashing with Django's PBKDF2
- CORS configuration for API security
- CSRF protection
- XSS prevention
- SQL injection protection (Django ORM)
- Rate limiting on sensitive endpoints
- Secure password reset flow
- Session management
- Multi-tenant data isolation
- Role-based permission checks
- API endpoint authentication
- Secure file upload handling
- Environment variable configuration
- HTTPS enforcement (production)
- Secure cookie settings
- Input validation and sanitization
- Error handling without information leakage
- Audit trail for sensitive operations
- Credential encryption at rest
- Secure headers configuration
- Privacy policy and terms of service
- Cookie consent management

## 13. Settings & Configuration (14 features)

- Organization profile settings
- Notification preferences
- Email settings and templates
- Default task settings
- Working days configuration
- Date format preferences
- Timezone settings
- Logo and branding upload
- User preference management

- API key management
- Integration settings
- Backup configuration
- Data export options
- Account deletion/deactivation



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