🚀 FORMALITY TAX - PRODUCTION READINESS CHECKLIST

✅ PHASE 1: CRITICAL BUSINESS APIs (DO FIRST)

💳 Stripe Payment Processing

- [ ] Create Stripe account at https://stripe.com
- [ ] Get publishable key (pk_test_...) and secret key (sk_test_...)
- [ ] Add keys to .env file
- [ ] Test with card: 4242 4242 4242 4242
- [ ] Verify payment appears in Stripe dashboard
- [ ] Create webhook endpoint for automatic notifications

📧 Email Service (Resend Recommended)

- [ ] Sign up at https://resend.com (free tier: 100 emails/day)
- [ ] Get API key (re_...)
- [ ] Add RESEND_API_KEY to .env
- [ ] Test email by completing tax evaluation
- [ ] Verify delivery in Resend dashboard

✅ PHASE 2: CLIENT COMMUNICATION

📱 SMS Notifications (Twilio)

- [ ] Create account at https://twilio.com ($15 free credit)
- [ ] Get Account SID, Auth Token, and phone number
- [ ] Add credentials to .env file
- [ ] Test SMS notifications for appointment reminders

✅ PHASE 3: BUSINESS OPERATIONS

🏢 Domain & SSL

- [ ] Purchase professional domain (e.g., yourtaxfirm.com)
- [ ] Set up DNS records
- [ ] Configure SSL certificate
- [ ] Update NEXTAUTH_URL in production

📊 Analytics & Monitoring

- [ ] Google Analytics setup
- [ ] Error monitoring (Sentry)
- [ ] Performance monitoring
- [ ] Backup systems

🧪 TESTING WORKFLOW

1. **Payment Test:**
   - Visit: /tax-evaluation
   - Complete form with test data
   - Pay with: 4242 4242 4242 4242
   - Verify: Payment success + email received

2. **AI Assistant Test:**
   - Click "Ask Melika AI" button
   - Ask: "What deductions can I claim?"
   - Verify: Intelligent response received

3. **CRM Test:**
   - Visit: /crm
   - Create new client record
   - Verify: Data saves correctly
   - Test: Client import functionality

🚨 GO-LIVE REQUIREMENTS

MINIMUM for taking payments:
- ✅ Stripe API keys configured
- ✅ SSL certificate active
- ✅ Professional domain setup
- ✅ Email confirmations working

RECOMMENDED for full service:
- ✅ All above + SMS notifications
- ✅ Client portal fully functional
- ✅ Document upload/storage working
- ✅ Tax calculation engine active

📞 SUPPORT RESOURCES

Stripe: https://support.stripe.com
Resend: https://resend.com/docs
Twilio: https://support.twilio.com
Next.js: https://nextjs.org/docs

🎯 SUCCESS METRICS

Week 1 Goals:
- [ ] First test payment processed
- [ ] Client onboarding workflow complete
- [ ] Professional domain live

Month 1 Goals:
- [ ] 10+ client tax evaluations completed
- [ ] $200+ revenue generated
- [ ] 5-star client feedback average