

EZ360PM Web App

Comprehensive User Manual & Ops Runbook

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Audience: owners/admins/managers/staff using EZ360PM daily, and platform operators (Django staff) preparing production go-live.

Scope: end-to-end feature guide, permission rules, settings catalog, Ops console behavior, storage/S3 posture, and a blind-spot audit of likely dead ends.

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1. Overview and Core Concepts

EZ360PM is a multi-tenant (multi-company), role-based CRM and project management system with integrated accounting and subscription gating. The design assumption is: companies operate independently, and users can belong to one or more companies via employee profiles.

Core concepts

- bullet **Active company:** Almost every page operates in the context of the currently selected company. If missing, you are redirected to onboarding or company switch.
- bullet **Employee profile:** Your permissions are determined by your role on the active company (staff/manager/admin/owner).
- bullet **Support Mode:** Platform staff can temporarily enter a company context for support without becoming an employee.
- bullet **Soft-delete:** Most business objects use soft-delete; reports exclude deleted rows.
- bullet **Immutable financial history:** accounting postings are designed to be repeatable/idempotent and auditable.
- bullet **Private media:** receipts and project files are stored privately and served via expiring presigned URLs.

2. Roles, Permissions, and Visibility Rules

Role hierarchy: staff → manager → admin → owner. Minimum-role checks gate sensitive areas (e.g., accounting reports, receipts, settings).

Practical access matrix

Area	Staff	Manager	Admin	Owner	Django Staff (platform)
Company context required	Yes	Yes	Yes	Yes	Yes (or Support Mode proxy)
Clients / CRM	View per visibility	Full	Full	Full	Support Mode only
Projects	Assigned-only (recommended) / company scope	Full	Full	Full	Support Mode only
Time entries	Create + submit	Approve + bill	Approve + bill	Approve + bill	Support Mode only
Documents (proposals/estimates)	View/insert	Full	Full	Full	Support Mode only
Accounting reports	No (typically)	Yes (manager+ enforced)	Yes	Yes	Support Mode only
Billing / plan / seats	View own	Limited	Admin+	Owner+	Ops only
Ops console	No	No	No	No	Yes (is_staff=True)

Project visibility rule (implemented): staff users only see projects where they are assigned (Project.assigned_to = their employee profile). Manager+ see all projects for the company.

3. Getting Started (Onboarding, Company Switch, Team)

3.1 Create your account

- bullet Register with email + public username.
- bullet Verify email (if enabled in your deployment).
- bullet Optional: enable 2FA (TOTP) after first login (recommended before production go-live).

3.2 Company onboarding and switching

- bullet First login triggers company onboarding if you are not an employee anywhere yet.
- bullet Use the company switcher to select your active company.
- bullet If you remove yourself or lose access, you will be redirected to company switch.

3.3 Team management

- bullet Owners/admins invite employees and set roles (staff/manager/admin).
- bullet Seat limits are enforced by plan tier. When at limit, adding employees is blocked.
- bullet Best practice: keep at least two admins/owners per company (reduces lockout risk).

4. CRM: Clients

Clients represent customers/organizations you invoice. Clients are company-scoped and support search and import/export.

Common tasks

- bullet Create a client: CRM → Clients → New.
- bullet Search clients using the list page search box.
- bullet Import clients via CSV import (use the provided mapping UI).
- bullet Export clients to CSV for external systems.

5. Projects: Projects and Project Files

Projects organize work, time, documents, and files. Staff visibility is assignment-based.

5.1 Project lifecycle

- bullet Create project: Projects → New (link to a client, assign staff).
- bullet Edit project details: Projects → open project → Edit.
- bullet Delete project: soft-delete; removed from lists and excluded from reporting.

5.2 Project files (private)

- bullet Open project → Files tab.
- bullet Upload file (S3 enabled): browser uploads directly to S3; the server stores the object key.
- bullet Download file: uses /projects//files//download/ and redirects to a short-lived signed URL.
- bullet Delete file: removes DB row; storage object remains unless lifecycle/cleanup policy is added.

5.3 Dropbox sync (integration stub)

- bullet Projects include a 'sync-dropbox' route used for integration workflows.
- bullet Requires Dropbox configuration (see integrations/). If not configured, treat as a planned feature.

6. Time Tracking: Timer, Entries, Approvals, Billing

Time entries support a state machine: draft → submitted → approved → billed (plus void). Managers can approve and bill time.

Common tasks

- bullet Start/stop timer from the Time screen; assign to a project.
- bullet Create manual time entry for past work.
- bullet Submit time for approval (if your workflow uses approvals).
- bullet Managers approve/reject submitted time.
- bullet Convert unbilled approved time into an invoice via the documents workflow.

7. Documents: Proposals, Estimates, Invoices

Documents share line item/tax logic and are company-scoped. Public token views may exist for client-facing access depending on configuration.

7.1 Proposals

- bullet Create proposal from templates (if enabled).
- bullet Send proposal link or export PDF (if PDF is enabled).

7.2 Estimates

- bullet Create estimate and send to client.
- bullet Accept/decline flow (if enabled). Accepted estimates can convert into invoices.

7.3 Invoices

- bullet Create invoice: choose client + project (optional), add line items, apply taxes.
- bullet Mark sent/void as needed; invoices post accounting entries when issued/paid depending on settings.
- bullet Stripe checkout: generate a payment link/session; paid webhooks reconcile payments.
- bullet Partial payments: invoice balance decreases; overpayments create client credit ledger entries.

8. Payments: Partial payments and client credit

- bullet Record payment against an invoice (Stripe or manual).
- bullet Partial payments are supported; invoice status updates automatically.
- bullet Overpayments generate credit to the client's credit ledger and can auto-apply to future invoices (if enabled).
- bullet Ops drift tools exist to repair mis-linkage (platform staff only).

9. Expenses: Expense capture and receipts

- bullet Create expense and categorize (merchant catalog supported).
- bullet Upload receipt (S3 direct upload when enabled).
- bullet Receipt open/download is permission-gated and uses presigned URL.
- bullet Expenses post accounting entries automatically (company chart of accounts).

10. Accounting: Chart of Accounts, Journals, Reports, Period Locks

- bullet Chart of Accounts: company-specific; seeded defaults on company creation.
- bullet Journals: invoice/payment/expense flows post journal entries idempotently.
- bullet Reports: Profit & Loss, Balance Sheet, Trial Balance, General Ledger, Revenue by Client, Accounts Aging.
- bullet Period locks (if enabled): prevent changes/postings inside locked periods (admin+).

11. Billing: Trial, Plans, Seats, Stripe flows

- bullet 14-day trial enforcement; after expiration, app is locked down to billing/profile/dashboard depending on middleware rules.
- bullet Plans: Standard vs Premium (and any additional plan codes).
- bullet Seat limits enforced when adding employees.
- bullet Stripe Checkout used for upgrades; Stripe customer portal supported; webhooks sync subscription status.

12. Security: Email verification, 2FA, lockout, reCAPTCHA, support mode

- bullet **Email verification:** user.email_verified flag; recommended before enabling invites and external client flows.
- bullet **2FA:** per-user TOTP (RFC6238). Enable from profile/security section (recommended for all admins/owners).
- bullet **Lockout:** account lockout system blocks repeated failed logins; ops can view/reset (platform staff).
- bullet **reCAPTCHA:** used to protect public write actions depending on settings; see core/recaptcha.py and ENV vars.
- bullet **Support Mode:** platform staff can enter/exit support mode; actions should be audited and used sparingly.

13. Ops Console (Platform Staff Only)

- bullet Access: /ops/ requires Django is_staff=True.
- bullet Dashboard: top-level operational metrics and quick links.
- bullet Alerts: track and resolve ops alerts.
- bullet Storage: configuration summary, smoke tests, production readiness checklist evidence.
- bullet Backups: record backup runs and restore tests.
- bullet Retention: run prune jobs; review retention settings.
- bullet Drift tools: recalc balances, link orphan payments, post missing journal entries.
- bullet Launch Gate: consolidated readiness list + toggles.
- bullet Company detail/timeline: subscription diagnostics and activity history.

14. Storage/S3: Direct uploads, private downloads, AWS posture

Direct upload (presigned POST) is used to keep large files off the web dyno and enforce permissions server-side.

14.1 Direct upload flow

- bullet Browser requests presign: POST/GET to core:presign_private_upload with kind and target metadata.
- bullet Server validates company context + role and returns policy fields.
- bullet Browser uploads to S3 using the returned policy.
- bullet Browser posts back the resulting object key to Django via the form hidden field.

14.2 Private download flow

- bullet User hits open/download route.
- bullet Server enforces permissions then redirects to an expiring signed URL.

14.3 AWS posture checklist (must be set in AWS console)

- bullet Block Public Access ON for private bucket.
- bullet CORS JSON configured for your site origin(s) (for presigned POST).
- bullet Lifecycle rules: abort incomplete multipart uploads; optionally expire ops smoke objects.
- bullet Confirm signature version s3v4, and ACLs disabled (AWS_DEFAULT_ACL=None / default_acl=None).

15. Known Blind Spots / Dead Links (pre-launch fixes)

Automated template URL scan flagged these references as likely broken:

bullet 404.html and 500.html link to **dashboard:home** (suggest replace with **core:app_dashboard**).

bullet Getting Started links to **documents:numbering** (confirm correct URL or update).

bullet Time list links to **timetracking:time_create** (confirm correct URL or update).

Recommendation: fix these three template references before launch to avoid user-visible navigation dead ends during error handling and onboarding.

Appendix A. Key Routes (Quick Reference)

Accounts

- bullet **login/** → accounts:login
- bullet **register/** → accounts:register
- bullet **logout/** → accounts:logout
- bullet **profile/** → accounts:profile
- bullet **verify-email//** → accounts:verify_email
- bullet **verify-email/resend/** → accounts:verify_email_resend
- bullet **verify-required/** → accounts:verify_required
- bullet **2fa/setup/** → accounts:two_factor_setup
- bullet **2fa/verify/** → accounts:two_factor_verify
- bullet **2fa/disable/** → accounts:two_factor_disable

Companies

- bullet **onboarding/** → companies:onboarding
- bullet **switch/** → companies:switch
- bullet **switch/set/** → companies:set_active
- bullet **settings/** → companies:settings
- bullet **team/** → companies:team_list
- bullet **team/invite/** → companies:invite_create
- bullet **invite//** → companies:invite_accept
- bullet **team/invite//resend/** → companies:invite_resend
- bullet **team/invite//revoke/** → companies:invite_revoke
- bullet **team/employee//unlock/** → companies:employee_unlock

Crm

- bullet **clients/** → crm:client_list
- bullet **clients/new/** → crm:client_create
- bullet **clients/import/** → crm:client_import
- bullet **clients/import//map/** → crm:client_import_map
- bullet **clients/import//done/** → crm:client_import_done
- bullet **clients/import//report.csv** → crm:client_import_report_download
- bullet **clients/export/** → crm:client_export
- bullet **clients//edit/** → crm:client_edit

bullet **clients//delete/** → crm:client_delete

Projects

bullet **projects/** → projects:project_list

bullet **projects/new/** → projects:project_create

bullet **projects//** → projects:project_detail

bullet **projects//files/** → projects:project_files

bullet **projects//files/sync-dropbox/** → projects:project_files_sync_dropbox

bullet **projects//files//open/** → projects:project_file_open

bullet **projects//files//download/** → projects:project_file_download

bullet **projects//files//delete/** → projects:project_file_delete

bullet **projects//edit/** → projects:project_edit

bullet **projects//delete/** → projects:project_delete

Timetracking

bullet **time/** → timetracking:entry_list

bullet **time/new/** → timetracking:entry_create

bullet **time//** → timetracking:entry_detail

bullet **time//edit/** → timetracking:entry_edit

bullet **time//delete/** → timetracking:entry_delete

bullet **time//submit/** → timetracking:entry_submit

bullet **time//approve/** → timetracking:entry_approve

bullet **time/settings/** → timetracking:settings

bullet **time/timer/** → timetracking:timer_panel

bullet **time/timer/start/** → timetracking:timer_start

bullet **time/timer/stop/** → timetracking:timer_stop

Documents

bullet **invoices//apply-credit/** → documents:invoice_apply_credit

bullet **invoices//credit-notes/new/** → documents:credit_note_create

bullet **invoices//credit-notes/edit/** → documents:credit_note_edit

bullet **invoices//credit-notes/post/** → documents:credit_note_post

bullet **settings/documents/** → documents:document_settings

bullet **invoices/recurring/** → documents:recurring_plan_list

bullet **invoices/recurring/new/** → documents:recurring_plan_create

- bullet **invoices/recurring//** → documents:recurring_plan_edit
- bullet **invoices/recurring//run/** → documents:recurring_plan_run_now
- bullet **invoices/recurring//toggle/** → documents:recurring_plan_toggle

Payments

- bullet **payments/** → payments:payment_list
- bullet **payments/new/** → payments:payment_create
- bullet **payments//edit/** → payments:payment_edit
- bullet **payments//refund/** → payments:payment_refund
- bullet **payments//delete/** → payments:payment_delete
- bullet **invoices//reconcile/** → payments:invoice_reconcile
- bullet **credits/** → payments:credit_summary

Expenses

- bullet **expenses/** → expenses:expense_list
- bullet **expenses/new/** → expenses:expense_create
- bullet **expenses//edit/** → expenses:expense_edit
- bullet **expenses//delete/** → expenses:expense_delete
- bullet **expenses//receipt/** → expenses:expense_receipt_open
- bullet **merchants/** → expenses:merchant_list
- bullet **merchants/new/** → expenses:merchant_create

Accounting

- bullet **accounting/** → accounting:home
- bullet **accounting/profit-loss/** → accounting:profit_loss
- bullet **accounting/balance-sheet/** → accounting:balance_sheet
- bullet **accounting/trial-balance/** → accounting:trial_balance
- bullet **accounting/general-ledger/** → accounting:general_ledger
- bullet **accounting/reconciliation/** → accounting:reconciliation
- bullet **reports/** → accounting:reports_home
- bullet **reports/revenue-by-client/** → accounting:revenue_by_client
- bullet **reports/project-profitability/** → accounting:project_profitability
- bullet **reports/accounts-aging/** → accounting:accounts_aging

Billing

- bullet **billing/** → billing:overview

- bullet **billing/set-plan/** → billing:set_plan
- bullet **billing/mark-active/** → billing:mark_active
- bullet **billing/start-checkout/** → billing:start_checkout
- bullet **billing/portal/** → billing:portal
- bullet **billing/webhook-history/** → billing:webhook_history
- bullet **billing/webhook-history//** → billing:webhook_event_detail
- bullet **billing/locked/** → billing:locked

Ops

- bullet **healthz/** → ops:healthz
- bullet **ops/dashboard**
- bullet **alerts/** → ops:alerts
- bullet **alerts//resolve/** → ops:alert_resolve
- bullet **storage/** → ops:storage
- bullet **storage/smoke/run/** → ops:storage_smoke_run
- bullet **storage/posture/toggle/** → ops:storage_posture_toggle
- bullet **security/** → ops:security
- bullet **launch-checks/** → ops:launch_checks
- bullet **launch-gate/** → ops:launch_gate
- bullet **reconciliation/** → ops:reconciliation
- bullet **drift/** → ops:drift_tools
- bullet **drift/recalc/** → ops:drift_recalc
- bullet **drift/link-payment/** → ops:drift_link_payment
- bullet **drift/post-missing/** → ops:drift_post_missing
- bullet **launch-gate//toggle/** → ops:launch_gate_toggle
- bullet **retention/** → ops:retention
- bullet **retention/prune/** → ops:retention_prune
- bullet **backups/** → ops:backups
- bullet **backups/record-run/** → ops:backup_record_run
- bullet **backups/record-restore-test/** → ops:backup_record_restore_test
- bullet **releases/** → ops:releases
- bullet **companies//** → ops:company_detail
- bullet **companies//timeline/** → ops:company_timeline
- bullet ... (1 more)

Core

Appendix B. Environment Variables (Quick Reference)

See docs/ENV_VARS.md for full descriptions and deployment-specific guidance.