

EZ360PM – Post A–Z Hardening & Professional-Grade Launch Plan

Phase 0 – Baseline & Guardrails

- Define Production Baseline v1 (supported modules, roles, subscription rules).
- Create hardening checklist as acceptance gate.
- Establish staging environment mirroring production.
- Implement rollback strategy via deploy tags.
- Document uptime targets and backup recovery objectives.

Phase 1 – Security Hardening Pack

- Mandatory email verification before company access.
- 2FA required for owner/admin roles.
- Login throttling and progressive lockout rules.
- Session rotation and secure cookies (HttpOnly, SameSite).
- Strict company isolation enforcement.
- Security headers: HSTS, CSP, X-Frame-Options, etc.
- Webhook signature validation and environment-separated keys.

Phase 2 – Financial & Data Integrity Pack

- Invoice immutability after Sent/Paid state.
- Journal entries immutable once posted.
- Decimal-only money handling with cent precision.
- Idempotent Stripe webhook processing.
- Payment reconciliation view for transparency.
- Expanded audit logging for all financial actions.

Phase 3 – Backup & Recovery Pack

- Automated database backups with retention policy.
- Restore test performed and documented.
- Secure media/file storage strategy (S3 or managed disk).
- Soft-delete guardrails for destructive actions.

Phase 4 – Monitoring & Observability Pack

- Integrate Sentry (or equivalent) for error monitoring.
- Health endpoint for uptime monitoring.
- Webhook failure and email delivery alerts.
- Slow query logging and performance metrics.

Phase 5 – UX & Premium Experience Pack

- Guided onboarding checklist for new users.
- Sensible defaults for invoices, taxes, chart of accounts.
- Clear empty states and inline help text.
- Pagination and performance optimizations.
- Consistent success and error messaging.

Phase 6 – Launch Readiness Gate

- 2FA and throttling verified in production.
- Invoice immutability and reconciliation validated.
- Backup restore test completed successfully.
- Monitoring alerts tested.
- End-to-end flow tested (client → project → invoice → payment → reports).

Core Principles of Greatness

- Trust: financial correctness and auditability.
- Reliability: backups, monitoring, and disciplined releases.

- Speed to Value: clean onboarding and intuitive UX.