Production Release Summary

Project Information

- **Project Name:** EvergreenFarms POS
- **Release Date:** 22/01/2026
- **Prepared By:** Mahananda Sai
- **Reviewed & Approved By:** Threveni

Release Overview

This release includes the implementation of core functional modules for the EvergreenFarms POS application. The objective of this release is to enable stable business operations for product sales, subscriptions, services, expenses, vendor billing, and delivery order management.
The release covers major functional flows with some enhancements and validations planned for upcoming phases.

Modules Included in This Release

- Product Quotes
- Product Subscriptions
- Service Subscriptions
- Vendor Invoices
- Expenses
- POS – Deliverable Orders

Feature Status Summary

- **Completed:** Feature is fully implemented and available for use
- **Pending:** Feature is partially implemented, under enhancement, or planned for a future release

📄 Production Release Document

1. Document Information

Item	Details
Project Name	: Evergreenfarms POS
Release Version	
Environment	Production
Release Date	22/1/2026
Prepared By	Mahananda sai
Reviewed By	Thriveni Mam
Approved By	Thriveni Mam

2. Release Overview

Purpose

This document describes the production release details, including completed features, pending features, known limitations, and release scope for the application.

Release Scope Includes
- Product Quotes
- Product Subscriptions
- Service Subscriptions
- Vendor Invoices

3. Modules Included in This Release

S.No	Module Name
1	Product Quotes
2	Product Subscriptions
3	Service Subscriptions
4	Vendor Invoices

4. Feature Status Summary (Overall)

Status	Description
☑ Completed	Fully developed and tested
⧗ Pending	Not implemented or partially implemented
⚠ Known Issue	Implemented but has limitations

5.1 Page Name: _Product Qoutes
Page Name: Create Product Quote

A. Completed Features

S.No	Feature	Status
1	Customer selection for quote creation	Completed
2	Product selection with quantity	Completed
3	Miscellaneous charges	Completed
4	Automatic tax calculation	Completed
5	Discounts (Percentage / Flat / Custom)	Completed
6	Delivery options based on configuration	Completed
7	Send quote to customer	Completed
8	Click on Send quote email notification sent to customer	Completed
9	Quote saved under Product Quotations (status -Draft)	Completed
10	Admin panel visibility of delivery orders	Completed

B. Pending Features

S.No	Feature	Status
1	Minimum order value validation for delivery	Pending
2	Delivery product data storage in POS Orders	Pending

Page Name: Product Quotations list

1. Core Features
Completed

S.No	Feature	Status
1	Date range filters (Today, Yesterday, Week, Month, Year, All)	Completed
2	Summary cards (Total, Approved, Draft, Expired, Paid, Processing, Partial)	Completed
3	Search by Quote Number, Customer Name, Email	Completed
4	Status-based filtering	Completed
5	Quotes list with full details and action menu	Completed
6	View Quote PDF	Completed
7	Resend PDF (status -Paid quotes)	Completed
8	Resend Payment Link (status - Approved / Partial quotes)	Completed
9	Visual status indicators with different colours	Completed
10	Pagination with configurable rows	Completed
11	Quote approval via customer email	Completed
12	Quote approval via admin application	Completed
13	Customer queries via message icon	Completed
14	Automatic product quantity reduction after approval	Completed

Pending

S.No	Feature	Status
1	Quote reject functionality	Pending
2	Quote edit functionality	Pending
3	Customer reply visibility after admin response	Pending
4	Help guide	Pending

2. Payment Flow
Completed

S.No	Feature	Status
1	Record Payment by Admin	Completed
2	Full payment support	Completed
3	Partial payment support	Completed
4	Customer payment via email payment link	Completed
5	Admin payment via Record Payment	Completed
6	Payment modes: Cash, Zelle, Cheque	Completed
7	Cheque number mandatory for cheque payments	Completed

Pending

S.No	Feature	Status
1	Disable Cash / Zelle / Cheque for delivery products	Pending

3. Email Notifications
Completed

S.No	Email Type	Status

1	Quote acceptance email to customer	Completed
2	Quote approved notification (Admin & Customer)	Completed
3	Payment invoice link email	Completed
4	Payment received confirmation email	Completed
5	Invoice created notification email	Completed

4. Dashboard Integration
Pending

S.No	Feature	Status
1	Recent product quotations	Pending
2	Recent quote status changes	Pending
3	Sales amount update in dashboard	Pending

5. Known Issues

S.No	Issue Description	Status
1	Sales amount decreases instead of increasing in dashboard	Known Issue
2	Product quantity reduces twice after quote approval	Known Issue

📦 Product Subscription – Feature Status

1. Create Product Subscription Plan
☑ Completed

S.No	Feature	Status
1	Mandatory fields (Plan Title, Product, Variant, Frequency)	Completed
2	Default tax set to 7%	Completed
3	Deliverable checkbox (Deliverable / Non-Deliverable logic)	Completed
4	Product dropdown shows only active products	Completed
5	Discount types (Amount / Percentage)	Completed
6	Discount restricted to maximum 50%	Completed
7	Add perks / benefits (visible to customers)	Completed
8	Variant configuration (Silver, Gold, Diamond)	Completed
9	Frequency options (Daily, Weekly, Bi-Weekly, Monthly, Quarterly, Half-Yearly, Yearly)	Completed
10	Variant-wise pricing, discount, and frequency	Completed

11	Real-time price summary (Base price & Final price)	Completed
12	Plan description for clarity	Completed
13	Add / Remove variant option	Completed
14	Plan reflects in listing after creation	Completed

⧗ Pending

S.No	Feature	Status
1	Non-taxable products should not calculate tax	Pending
2	Remove variant confirmation handling (by mistake removal)	Pending
3	Single unit price display clarification	Pending

2. Product Subscription – List Page
☑ Completed

S.No	Feature	Status
1	Frequency summary cards (Daily → Yearly)	Completed
2	Add Plan button	Completed
3	Search by plan name	Completed
4	Frequency filters	Completed
5	Edit action	Completed
6	Pagination	Completed
7	Base price & final price visibility	Completed
8	Details page	Completed

⧗ Pending

S.No	Feature	Status
1	Delete plan functionality	Pending
2	Card filters not working	Pending
3	Action history not available	Pending

3. Share Product Subscription Plans
☑ Completed

S.No	Feature	Status
1	View all product subscription plans	Completed
2	Plan card details (Save %, Deliverable, Variant, Amount, Tax, Frequency, Benefits)	Completed
3	Search by product / variant	Completed
4	Subscribe flow with email OTP verification	Completed
5	New customer details capture (Name, Mobile, Address)	Completed
6	Location API for street address	Completed
7	Existing customer delivery address selection	Completed

8	New customer added to customer module	Completed
9	Payment flow after verification	Completed
10	Deliverable plans create POS order	Completed

⧗ Pending

S.No	Feature	Status
1	Unit price showing as undefined for some products	Pending
2	Incognito Stripe back button behavior issue	Pending
3	Customer payment confirmation email	Pending
4	Sales invoice creation	Pending
5	Sales amount update in dashboard	Pending

4. Subscribers Page

⧗ Pending (All)

S.No	Feature	Status
1	Subscriber list with full plan details	Pending
2	Expand view with next billing cycle	Pending
3	Transaction history	Pending
4	Cancellation with reason storage	Pending
5	Filters	Pending
6	Search by customer name / email	Pending
7	Next payment schedule visibility	Pending
8	Cancellation notification to customer	Pending

5. Email Notifications – Product Subscription

⧗ Pending (All)

S.No	Email Type	Status
1	Subscription payment received email	Pending
2	Next billing cycle reminder email	Pending
3	Delivery product status update emails	Pending

6. Known Issues (Across Product Subscription)

S.No	Issue Description	Status
1	Quantity not reduced after subscription	Known Issue
2	Inactive products still allow active plans	Known Issue
3	Auto billing cycle not working	Known Issue
4	Details page missing in some flows	Known Issue
5	Non-taxable products calculating tax	Known Issue
6	Subscriber amount shows without tax	Known Issue

7. Overall Status

Module	Status
Product Subscription	⚠ Partially Implemented (Core creation completed, operational flows pending)

⚒ Service Subscription – Feature Status

1. Create Service Subscription Plan
☑ Completed

S.No	Feature	Status
1	Mandatory fields (Plan Title, Select Service)	Completed
2	Service dropdown displays all services with search	Completed
3	Variant creation (Silver, Gold, Diamond)	Completed
4	Base service price auto-fetched from Service page	Completed
5	Area input in acres (minimum 0)	Completed
6	Visits per year configuration	Completed
7	Monthly visit schedule (all months displayed)	Completed
8	Monthly schedule validation matches visits per year	Completed
9	Payment frequency discounts (Yearly, Half-Yearly, Quarterly, Monthly)	Completed
10	Discount percentage input with price summary	Completed
11	Final price summary shown for each frequency	Completed
12	Add perks / benefits for plan	Completed
13	Plan status set to Active by default	Completed
14	Created plan reflected in List page	Completed
15	Plan reflected in Request page based on service & area	Completed

⌛ Pending / Known Issues

S.No	Issue / Feature	Status
1	Maximum area restriction configuration	Pending
2	Discount allows 100% without validation	Pending

2. Service Subscription – List Page
☑ Completed

S.No	Feature	Status
1	Summary cards (All, Silver, Gold, Diamond)	Completed
2	Card filters functionality	Completed
3	Search by plan title	Completed
4	Active / Inactive toggle	Completed
5	Table columns (Plan Title, Type, Visits, Service, Base Price, Status, Actions)	Completed
7	Filters (All, Silver, Gold, Diamond)	Completed
8	Pagination	Completed

⌛ Pending / Known Issues

S.No	Issue	Status

1	Active/Inactive status not updating despite success message	Pending
2	Monthly visit schedule not shown in Service Details	Pending
3	Created On date not displayed	Pending
4	Plan area not shown in list page	Pending
5	List shows 3 variants but Edit shows merged variants	Pending

3. Edit Service Subscription Plan

☑ Completed

S.No	Feature	Status
1	Edit all plan and variant details	Completed

⧗ Pending

S.No	Issue	Status
1	Selected service name not showing in Edit page	Pending

4. Delete Service Subscription Plan

☑ Completed

S.No	Feature	Status
1	Delete plan with mandatory comments	Completed
2	Deleted plans moved to Deleted section	Completed

⧗ Pending

S.No	Feature / Rule	Status
1	Disable delete action for plans with active subscribers	Pending

5. Service Subscription – Request Page

☑ Completed

S.No	Feature	Status
1	Service & area-based subscription cards	Completed
2	Subscription card details (Plan, Variants, Frequency, Price, Benefits)	Completed

⧗ Pending / Known Issues

S.No	Issue	Status
1	Tax information missing on cards	Pending
2	Incorrect frequency label text	Pending

6. Quotes – Service Subscription

☑ Completed

S.No	Feature	Status
1	Quote creation for service subscription	Completed
2	Quote approval by Admin or Customer	Completed

⧗ Pending / Known Issues

S.No	Issue	Status

1	Subscription email shows only quarterly amount	Pending
2	Service area unit missing in PDF (sqft / acre)	Pending
3	T&C confirmation pending (50% advance payment)	Pending

7. Invoice & Payments – Service Subscription
☑ Completed

S.No	Feature	Status
1	Invoice payment via customer email	Completed
2	Admin approval from application	Completed
3	Online payment option (Card)	Completed
4	Subscription invoices stored in Invoice page	Completed
5	Subscription invoices highlighted	Completed
6	Quote stored in Quotes page	Completed
7	Amount added to invoice sales	Completed
8	Dashboard sales update	Completed

⌛ Pending / Known Issues

S.No	Issue	Status
1	Cash payment tax handling	Pending
2	Zelle payment support	Pending
3	Single payment displayed as two installments	Pending
4	Remaining amount shown as negative	Pending
5	Payment email missing receipt attachment	Pending
6	Invoice email missing payment link	Pending

8. Subscribers – Service Subscription
☑ Completed

S.No	Feature	Status
1	Service subscribers list	Completed
2	Subscriber detail view with yearly billing cycle	Completed
3	Auto billing cycle generation	Completed
4	Cancel subscription option	Completed
5	Pagination	Completed

⌛ Pending / Known Issues

S.No	Issue	Status
1	Cancellation does not ask for comments	Pending
2	Cancellation confirmation toaster issues	Pending
3	Filters not implemented	Pending
4	Search not implemented	Pending

9. Email Notifications – Service Subscription

☑ Completed

S.No	Email Type	Status
1	Quote approved email	Completed
2	Quote acceptance email	Completed
3	Auto payment invoice link email	Completed
4	Payment received & subscription active email	Completed

⧗ Pending

S.No	Email Type	Status
1	Cancellation email to customer	Pending
2	Invoice payment link email	Pending

10. Overall Status

Module	Status
Service Subscription	⚠ Core functionality implemented, operational & communication flows pending

📑 Vendor Invoices – Feature Status

1. Create Vendor Invoice

☑ Completed

S.No	Feature	Status
1	Select existing vendor (all purchase vendors listed)	Completed
2	Upload invoice file and click **Extract**	Completed
3	Extract products, tax, shipping, invoice ID, vendor info, due date	Completed
4	Manual product addition to invoice	Completed
5	Existing products auto-mapped after extraction	Completed
6	New products shown separately after extraction	Completed
7	Create new product from invoice	Completed
8	New product added to Products page with image & basic details	Completed
9	Previously linked vendor invoices shown after vendor selection	Completed
10	Manual removal of unwanted previous invoices	Completed
11	AI Verified status displayed after extraction	Completed
12	Extracted product count shown clearly	Completed
13	Automatic calculation (Subtotal, Tax, Shipping, Grand Total)	Completed

⧗ Pending

S.No	Feature / Issue	Status
1	Extract product weight and quantity accurately	Pending
2	Exact extraction of product name	Pending
3	Product search before extraction not working	Pending
4	Invoice upload support for Word / Image files	Pending
5	Vendor phone number extraction	Pending

2. Vendor Invoice – List Page

☑ **Completed (All)**

S.No	Feature	Status
1	View all vendor invoices in one list	Completed
2	Search invoice using Invoice ID	Completed
3	Filter by status (Draft, Partial, Paid) and date	Completed
4	Vendor name & invoice amount visibility	Completed
5	Automatic total amount calculation	Completed
6	Paid amount calculation	Completed
7	Due amount calculation	Completed
8	Invoice status tracking	Completed
9	Overdue invoices highlighted with overdue days	Completed
10	Expand invoice to view details	Completed
11	Products tab (Qty, Price, Tax, Total)	Completed
12	Grand total calculation	Completed
13	Payments tab view	Completed
14	Payment details (Mode, Amount, Cheque No, Paid By, Notes, Paid On)	Completed
15	Total paid amount summary	Completed
16	View returned items	Completed

3. Vendor Invoice – Return Products

☑ **Completed**

S.No	Feature	Status
1	Return option from vendor invoice list	Completed
2	Select products to return	Completed
3	Show received & already returned quantity	Completed
4	Enter return quantity	Completed
5	Return reasons (Damaged, Wrong Item, Excess, Quality, Others)	Completed
6	Add notes for returned items	Completed
7	Refund options (Full refund / Adjust invoice)	Completed
8	Adjust on new invoice	Completed
9	Adjust on existing unpaid invoice	Completed
10	Capture return method & description	Completed
11	Automatic return summary	Completed
12	Total refund calculation	Completed
13	One-click return creation	Completed
14	Return linked to original vendor invoice	Completed

4. Vendor Invoice – Record Payment

☑ **Completed**

S.No	Feature	Status
1	Record payment from vendor invoice	Completed
2	Display vendor name & invoice number	Completed
3	Show total amount & remaining balance	Completed
4	Full payment option	Completed
5	Partial payment option	Completed
6	Payment modes (Cash, Zelle, Cheque, Online Transfer)	Completed
7	Select who made the payment (excluding field staff)	Completed
8	Remaining balance auto-updated	Completed
9	Payment linked to correct vendor invoice	Completed

⏳ Pending / Known Issues

S.No	Issue	Status
1	Insufficient product error shows object ID instead of product name	Pending
2	Comments / notes on invoices	Pending
3	Invoice download / print (PDF)	Pending
4	Vendor profile link from invoice	Pending
5	Due date format standardization	Pending
6	Product names not syncing correctly	Pending
7	Category error not shown during product creation	Pending
8	Invoice amount decreases unexpectedly	Pending
9	Overdue invoice emails not sent to admins	Pending

5. Overall Status

Module	Status
Vendor Invoices	⚠️ Invoice creation & returns completed, listing and communication flows pending

🚚 POS – Deliverable Orders (Delivery Orders)

1. POS Deliverable Orders – Main Features

☑ Completed

S.No	Feature	Status
1	Centralized list to view all POS delivery orders	Completed
2	Stores POS deliverable orders and subscription deliverable orders together	Completed
3	Unique tracking number for each order	Completed
4	Display customer name	Completed
5	Display customer phone number	Completed
6	Display order source (POS Sale / Subscription)	Completed
7	Delivery status tracking (Pending, In Transit)	Completed
8	Expected delivery date display (if available)	Completed
9	Order created date display	Completed
10	Search by tracking number	Completed

11	Search by customer name	Completed
12	Filter orders by status	Completed
13	Filter orders by date range	Completed
14	Action buttons for delivery handling	Completed
15	Change delivery date from actions	Completed
16	Change order delivery status from actions	Completed

2. Pending Enhancements

S.No	Feature / Issue	Status
1	Tracking link entry for delivery	Pending
2	Ask reason for Cancelled and On Hold status	Pending
3	Restrict delivery date change for subscription orders	Pending
4	Remove Cancelled option for active subscribers	Pending
5	Store product quotation delivery orders in this list	Pending
6	Delivery information display in email	Pending
7	Restrict future dates in date range filter	Pending
8	Status summary cards for delivery orders	Pending
9	Display customer email in order list	Pending

3. Email Notifications – Delivery Orders
⧗ Pending

S.No	Email Trigger	Status
1	Email to customer on delivery status change	Pending
2	Email to customer on delivery date update	Pending

4. Overall Status

Module	Status
POS – Deliverable Orders	⚠ Core delivery tracking implemented, enhancements pending

💰 Expenses – Feature Status

1. Expense Type – Create
☑ Completed

S.No	Feature	Status
1	Create expense types for tracking	Completed
2	Enter expense type name	Completed
3	Select expense frequency	Completed
4	Frequency options (Daily, Weekly, Bi-Weekly, Monthly, Quarterly, Half-Yearly, Yearly, Custom)	Completed

| 5 | Save expense type for reuse | Completed |
| 6 | Reuse expense types while creating expenses | Completed |

2. Expense Types – List Page
☑ **Completed**

S.No	Feature	Status
1	View all expense types in one list	Completed
2	Display expense type name and frequency	Completed
3	Search expense types	Completed
4	Create new expense types	Completed
5	Edit existing expense types	Completed
6	Delete expense types	Completed
7	Support multiple frequency options	Completed
8	Pagination	Completed
9	Clean and simple list view	Completed

3. Create Expense
☑ **Completed**

S.No	Feature	Status
1	Create a new expense	Completed
2	Select expense type	Completed
3	Auto-display frequency based on expense type	Completed
4	Select expense date or date range	Completed
5	Enter expense amount	Completed
6	Select who paid the expense	Completed
7	Select payment method (Cash, etc.)	Completed
8	Add payment / contact details	Completed
9	Upload expense document (bill / receipt)	Completed
10	Add optional notes	Completed
11	One-click expense creation	Completed

4. Expenses – List Page
☑ **Completed**

S.No	Feature	Status
1	View all expenses in one place	Completed
2	Dashboard summary (Total count, Total amount)	Completed
3	Active and inactive expenses summary	Completed
4	Search expenses by expense type	Completed
5	View expense details	Completed

6	Display frequency, duration, amount, paid by	Completed
7	Display payment method	Completed
8	Display created by and created date	Completed
9	Edit expense	Completed
10	Delete expense	Completed
11	View expense details page	Completed
12	Pagination	Completed

5. Overall Status

Module   Status

Expenses   ☑ Fully Implemented

📑 Client Summary (Optional)

The **Expenses module** enables easy creation of expense types, recording of expenses with documents, tracking payment details, and viewing overall spending through a simple dashboard. The module is fully implemented and ready for production use.

Overall Release Status

The EvergreenFarms POS application is **stable for production use** with all major business-critical features implemented.

Pending items are mostly enhancements, validations, and notification-related features planned for the next phase.