Routie Roo - Complete Project History & Documentation

Project Name: Routie Roo (formerly Contact Route Mapper)
Current Version: 40d03018
Last Updated: December 1, 2024
Tech Stack: Next.js, TypeScript, tRPC, MySQL, Google APIs (Maps, Contacts, Calendar)

Table of Contents

Project Overview

Routie Roo is a comprehensive driving route planning application that integrates with Gmail/Google Contacts to help users create, manage, and execute optimized routes for their contacts. Originally built for home healthcare route planning, it has evolved into a full-featured route management system with calendar integration, real-time execution tracking, and team collaboration features.

Core Value Proposition:

- Sync contacts from Google with addresses, phone numbers, and photos

- Create optimized driving routes with Google Maps integration

- Track route execution in real-time (complete/miss stops, add notes)

- Share routes with drivers via public links

- Integrate with Google Calendar for scheduling

- Manage important dates and reminders for contacts

Complete Checkpoint History

Checkpoint 1: Initial Prototype (Version: be0d61ac)

Date: October 2024

Features Implemented:

- Gmail/Google Contacts sync with OAuth

- Contact caching in database with addresses

- Route optimization using Google Maps Routes API

- Interactive map visualization with waypoints

- Route sharing functionality with public links

- Basic route management (create, view, delete)

Technical Foundation:

- Database schema: routes, cached_contacts, route_waypoints tables

- Google OAuth integration for Contacts API

- Google Maps JavaScript API for visualization

- tRPC procedures for backend API

Checkpoint 2: Route Management Features (Version: c03e10b2)

Features Added:

- Manual waypoint ordering toggle (disable optimization)

- Route deletion with confirmation dialog

- Folder organization system for categorizing routes

- Move routes between folders

- Folder management UI (create, rename, delete)

Database Changes:

- Added folders table

- Added folderId foreign key to routes table

Checkpoint 3: Contact Photos & Phone Numbers (Version: f9e6ef33)

Features Added:

- Contact profile photos from Google People API

- Display photos or initials if no photo available

- Phone numbers with labels (mobile, work, home, etc.)

- Primary phone number display on contact cards

API Integration:

- Extended Google People API to fetch photos and phone numbers

- Stored photoUrl and phoneNumbers JSON in cached_contacts table

Checkpoint 4: Click-to-Call Functionality (Version: 718f6026)

Features Added:

- Multiple calling service options dropdown

- Phone Dialer (tel:) option

- Google Voice integration

- WhatsApp calling

- Skype calling

- FaceTime option

- User's preferred calling service stored in database

UX Improvements:

- Clickable phone numbers throughout the app
- Dropdown menu for service selection
- Default service preference saved per user

Checkpoint 5: Search, Filters & Messaging (Version: d6aa97ae)

Features Added:

- Folder filter UI in routes section
- Contact search by name, phone, or address
- Display all phone numbers for each contact (not just primary)
- SMS and WhatsApp text messaging options
- Distance unit preference (KM vs Miles)
- Automatic distance conversion throughout app

UI Enhancements:

- Separate PhoneCallMenu and PhoneTextMenu components
- Filter dropdown for folders
- Search bar with real-time filtering
- Settings page for preferences

Checkpoint 6: Route Waypoint Phone Integration (Version: 1675eac4)

Features Added:

- Phone numbers saved to route waypoints
- Click-to-call functionality in route detail page
- Text messaging from route waypoints
- Phone numbers persist with route data

Database Changes:

- Added phoneNumbers JSON field to route_waypoints table

Checkpoint 7: UI Polish & Settings (Version: 3a417dd5)

Features Added:

- Separate Call and Text buttons on waypoints
- Visible folder filter dropdown in routes section
- Complete Settings page with all preferences
- Settings accessible via header button

Settings Categories:

- Calling service preference
- Distance unit preference
- Default starting point
- Auto-archive settings

Checkpoint 8: Route Navigation Fix (Version: 3fc040b6)

Bug Fix:

- Fixed "Route Not Found" error after route creation
- Corrected URL parameter mismatch (/route/:id vs :routeId)
- Routes now load correctly after creation

Checkpoint 9: Phone Number Formatting (Version: 936b39f4)

Features Added:

- US phone number formatting: (XXX) XXX-XXXX
- Clean numbers for tel: and messaging links (+1XXXXXXXXXX)
- Formatted display, clean links for functionality

Utility Functions:

- formatPhoneNumber() for display
- cleanPhoneNumber() for tel:/sms: links

Checkpoint 10: Comprehensive Contact Management (Version: bd4d2b4a)

Major Features:

1. Contact Labels

- Display Google Contact labels/groups as colored badges
- Labels like "work", "family", "friends" from Google

2. Inactive Contacts

- Mark contacts as inactive to hide from main view
- "Show inactive contacts" toggle checkbox
- Soft delete functionality

3. Sync All Contacts

- Updated sync to include ALL contacts from Google
- Not just those with addresses
- Contacts without addresses show "No address"

4. Edit Contacts

- Full contact editing dialog
- Update name, email, address, phone numbers
- Save changes to local database

5. Toggle Active Status

- Eye icon button to quickly mark active/inactive
- Instant status updates

Backend Changes:

- contacts.update tRPC procedure
- contacts.toggleActive tRPC procedure
- Updated sync to save labels field
- All contacts synced regardless of address

Testing:

- $\frac{3}{3}$ vitest tests passing

Checkpoint 11: Route Enhancement Features (Version: de22e707)

Major Features:

1. Route Notes

- Notes field in routes table for descriptions
- Notes textarea in route creation form
- Notes display in route detail page
- Notes included in calendar events

2. Stop Types with Color Codes

- stopType enum: pickup, delivery, meeting, visit, other
- stopColor field for custom marker colors
- StopTypeSelector component with icons and colors
- Stop type selector in route creation
- Each contact can have different stop type
- Database stores stop type and color per waypoint

3. Google Calendar Integration

- Updated OAuth scope to include calendar.events
- createCalendarEvent function using Google Calendar API
- "Add to Calendar" button on route detail page

- Calendar dialog for selecting route start time

- OAuth callback handler for calendar authorization

- Calendar events include:
    - Route name and notes

    - Waypoints list with addresses

    - Distance and duration

    - Automatic end time calculation

Technical Changes:

- Updated Google OAuth scope from readonly to full contacts + calendar

- Added calendar OAuth callback route

- Database migrations for notes, stopType, stopColor

- All features tested with vitest - 22 tests passing

Note:

- Google People API write functionality prepared but requires different auth approach

- Current OAuth flow supports read-only contact access

Checkpoint 12: Distance Unit Display Fix (Version: d6500ba4)

Bug Fix:

- Fixed routes always showing in kilometers regardless of user preference

- Added formatDistance utility to Home.tsx and RouteDetail.tsx

- Routes now correctly display in miles when user selects "Miles (mi)"

- Routes display in kilometers when user selects "Kilometers (km)"

Technical Details:

- formatDistance() converts km to miles ($\times 0.621371$) when needed

- User preference stored in users.distanceUnit field

- Settings page saves preference via updatePreferences mutation

- Distance conversion tested with vitest

Checkpoint 13: Route Execution Workflow (Version: 5a8003bd)

Major Features:

1. Stop Status Tracking

- Status enum: pending, in-progress, complete, missed
- Status badges on each waypoint
- Completion timestamps
- Missed stop reasons
- Execution notes per stop

2. Route Execution Controls

- Complete button for successful stops
- Miss button with reason dialog
- Add Note functionality
- Reschedule missed stops with date picker
- Progress bar showing completion status

3. Manager Dashboard

- "Missed Stops" dashboard view
- View all missed stops across all routes
- Filter by needs reschedule vs rescheduled
- Route links for easy navigation

Database Changes:

- Added status, completedAt, missedReason, rescheduledDate, executionNotes fields to route_waypoints
- Added needsReschedule boolean flag

Testing:

- Comprehensive vitest tests for execution workflow

Checkpoint 14: Unified Execution Interface (Version: 7a626783)

UI Redesign:

- Merged route execution controls directly into waypoints list
- Each waypoint shows:
  - Status badges
  - Execution buttons (Complete/Miss/Add Note)
  - Phone actions (Call/Text)
  - Inline notes and reasons
- Progress bar at top showing completion status
- Removed separate execution panel for cleaner single-view interface

UX Improvements:

- Single unified view for route management and execution
- No mode switching required
- All actions accessible from waypoint cards

Checkpoint 15: Drag-and-Drop & Bulk Actions (Version: 4e64279e)

Features Added:

1. Drag-and-Drop Reordering

- Visual drag handles on waypoints
- Smooth drag-and-drop animation
- Reorder stops during execution
- Updates executionOrder field

2. Bulk Actions

- "Complete All Remaining" button

- "Mark All as Missed" button
- Batch status updates for efficiency

3. Inactive Contacts Filter Fix

- Fixed filter to show only inactive when checked
- Default shows only active contacts
- Proper toggle behavior

Checkpoint 16: Contact Groups Filter Fix (Version: b795a3ef)

Bug Fix:

- Fixed Google Contacts sync to filter out contact groups
- Removed non-person entries like "myContacts", resource IDs
- Only includes entries starting with "people/" and having valid names
- Users need to re-sync contacts to see the fix

Technical Details:

- Added validation in parseGoogleContacts function
- Filters out system-generated group identifiers

Checkpoint 17: Shared Route Execution (Version: 20c87816)

Major Feature:

- Route creators can generate shareable links for drivers
- Drivers can execute routes without logging in
- Public route execution page with full functionality
- Share token generation and revocation
- Security validation for token access

Driver Capabilities:

- Mark stops as complete/missed

- Add execution notes
- View route map and waypoints
- All updates sync back to creator's account

Security:

- Unique UUID tokens per route
- Token revocation capability
- Read-only for drivers (can't delete route)

Checkpoint 18: Enhanced Shared Execution (Version: 4b9f85d0)

Features Added to Shared Routes:

1. Reschedule Missed Stops

- Date picker for rescheduling missed stops
- Drivers can reschedule without login
- Updates sync to creator's account

2. Contact Actions

- Phone call buttons for contacting customers
- Text messaging buttons
- Direct communication from shared view

3. Drag-and-Drop Reordering

- Drivers can reorder stops during execution
- Smooth drag-and-drop interface
- Updates persist to database

UX:

- Full-featured execution for drivers
- No login required
- All changes sync automatically

Checkpoint 19: RoutieRoo Branding (Version: f0664ef9)

Branding Update:

- Replaced "Contact Route Mapper" text with RoutieRoo logo
- Logo displayed in headers throughout app
- Updated footer branding on shared routes
- Consistent brand identity

Checkpoint 20: Logo Size Adjustment (Version: 249644ff)

UI Improvement:

- Increased RoutieRoo logo size in headers
- Changed from h-12/h-10 to h-20/h-16
- Better visibility and brand presence
- Responsive sizing (mobile vs desktop)

Checkpoint 21: Custom Stop Types System (Version: 6e7b7e64)

Major Feature:

- Users can create custom stop types with custom colors
- Tailored to specific business needs (delivery, home health, sales, etc.)
- Database table for stop types
- Backend CRUD procedures
- StopTypesSettings UI in settings page
- StopTypeSelector uses custom types with color preview

Use Cases:

- Home health: Eval, OASIS, Visit, RE (re-eval), DC (discharge)
- Delivery: Pickup, Drop-off, Return

- Sales: Cold call, Follow-up, Demo, Close

Database:

- stop_types table with userId, name, color fields
- Each user has their own custom stop types

Checkpoint 22: Contact Address Validation (Version: 428c0fad)

Bug Fix:

- Fixed route creation validation error with null addresses
- Shows user-friendly error message listing contacts missing addresses
- Prevents cryptic validation errors
- Added validation tests

Error Handling:

- Clear toast message: "The following contacts are missing addresses: [names]"
- Prevents route creation with invalid data

Checkpoint 23: Address Management UX (Version: 1f8b6a46)

Features Added:

1. Missing Address Warnings

- Orange warning icon on contacts without addresses
- Tooltip explaining the issue
- Visual indicator for data quality

2. Quick Add Address

- "Add Address" button on contact cards
- One-click to open edit dialog
- Streamlined data entry

3. Address Filter

- "Show contacts without addresses" checkbox
- Batch cleanup capability
- Filter for data quality management

4. Google Voice Texting

- Added Google Voice as texting option
- Expanded PhoneTextMenu options

Checkpoint 24: Route Editing Features (Version: 52999f04)

Major Features:

1. Edit Mode Toggle

- Enable/disable route editing
- Edit button in route detail page
- Safe mode to prevent accidental changes

2. Add/Remove Waypoints

- Add contacts to existing routes
- Remove waypoints from routes
- Dynamic route updates

3. Inline Address Editing

- Edit waypoint addresses directly
- Address autocomplete integration
- Geocoding for updated addresses

4. Copy Route Functionality

- Duplicate existing routes
- Preserve all waypoint data
- Quick route templating

5. Mobile Responsiveness

- Fixed mobile map sizing
- Improved touch interactions
- Responsive layout for shared routes

6. Auto-Refresh Map

- Map updates when waypoints change
- Automatic recalculation
- Real-time visualization

Checkpoint 25: Starting Point & Auto-Recalculation (Version: ee91668e)

Features Added:

1. Starting Point Field

- Starting point input in route creation
- Uses user's default from Settings
- Allows custom entry per route
- Prepended as first waypoint

2. Automatic Route Recalculation

- Updates distance/duration when waypoints added
- Updates when waypoints removed
- Updates when addresses edited
- Real-time route optimization

UX:

- No manual recalculation needed
- Always shows current route metrics
- Seamless editing experience

Checkpoint 26: Route Completion Tracking (Version: 56bf3b51)

Feature Added:

- Automatic route completion detection
- Routes marked complete when all waypoints are completed or missed
- Green "Completed" badge in route header
- Completion timestamp display in route details
- Backend checks waypoint status after each update

Database:

- Added completedAt timestamp to routes table
- Automatic completion flag management

Checkpoint 27: Per-Route Starting Points (Version: dba8abb1)

Features Added:

1. Saved Locations Dropdown

- Select from saved starting points
- Per-route starting point configuration
- Dropdown in route creation form

2. Shared Route Map Centering

- Fixed shared routes to use route's actual starting point
- No more San Francisco default
- Proper map centering for drivers

3. Distance Unit Respect

- Shared routes display in route owner's preferred unit
- Miles or kilometers based on owner settings
- Consistent distance display

Checkpoint 28: Routie Roo Personality (Version: 9377c549)

Branding Update:

- Updated CTAs with playful kangaroo personality
- Friendly, encouraging copy throughout
- Empty states with personality
- Toast notifications with character
- Professional balance for business users

Examples:

- "Let's hop to it!"
- "Your kangaroo crew"
- "Time to bounce!"
- Maintains professionalism while adding charm

Checkpoint 29: App Name Update (Version: 37726e02)

Branding Consistency:

- Replaced all instances of "Contact Route Mapper" with "Routie Roo"
- Updated package.json
- Updated todo.md
- Updated USER_GUIDE.md
- Consistent naming throughout codebase

Checkpoint 30: Login Fix (Version: 86602dd3)

Bug Fix:

- Fixed Select.Item empty value error preventing login
- Changed starting point selector "None" option from empty string to "none" value

- Login now works correctly

Checkpoint 31: Logout Button (Version: c670f98b)

UI Addition:

- Added visible logout button to header navigation
- LogOut icon for clear indication
- Users can easily sign out from any page
- Accessible from main navigation

Checkpoint 32: Starting Points Management (Version: 2765a36e)

Feature Added:

- UI in Settings page to manage saved starting points
- Create new starting locations (Home, Office, Warehouse, etc.)
- View all saved starting points
- Delete starting points
- Frequently-used locations for quick route planning

Checkpoint 33: Starting Points Save Fix (Version: 824f356c)

Bug Fix:

- Fixed save button for starting locations
- Moved mutation definition outside onClick handler
- Complies with React hooks rules
- Starting points now save correctly

Checkpoint 34: Edit Starting Points (Version: f982b3d0)

Feature Added:

- Edit functionality for saved starting points
- Update name and address inline
- Edit button with Save/Cancel actions
- Proper validation for edits
- Full CRUD for starting locations

Checkpoint 35: Sticky Route Map (Version: 747f447e)

UI Improvement:

- Made route map sticky on desktop
- Stays visible while scrolling waypoints list
- Better visualization of route changes
- Improved desktop UX

Checkpoint 36: Phone Display Verification (Version: de108781)

Verification:

- Confirmed phone call/text icons displaying correctly
- Contact cards show phone numbers with clickable icons
- Route waypoints display phone numbers
- PhoneCallMenu and PhoneTextMenu components working
- All phone functionality verified

Checkpoint 37: Numbered Map Markers (Version: 74b17da1)

Features Added:

1. Numbered Markers

- Map markers show 1, 2, 3, etc. matching waypoint list order
- Purple circles with white numbers

- Easy correlation between map and list

2. Google Maps Button

- "Maps" button on each waypoint
- Opens specific address in Google Maps
- Quick navigation for drivers

Visual Improvements:

- Clear marker numbering
- Consistent with waypoint list
- Better route visualization

Checkpoint 38: Contact Labels Display (Version: 85ab7585)

UI Improvements:

- Display phone numbers as text on route waypoint pages
- Remove technical hex IDs from contact card labels
- Cleaner label display
- Only show human-readable labels

Checkpoint 39: Route Layout Adjustment (Version: 1451979e)

UI Change:

- Route detail page layout: map $\frac{1}{3}$ width, waypoints $\frac{2}{3}$ width
- Better visual balance
- More space for waypoint details
- Improved desktop layout

Checkpoint 40: Layout Fine-Tuning (Version: 4bd223f2)

UI Refinement:

- Fine-tuned route detail page to $^{40}\!/_{60}$ split

- $^2\!/_5$ map, $^3\!/_5$ waypoints

- Optimal visual balance

- Better use of screen space

Checkpoint 41: Phone Display Cleanup (Version: 0c8bba49)

UI Cleanup:

- Remove redundant phone emoji from phone number display

- Call button already provides visual indicator

- Cleaner appearance

- Less visual clutter

Checkpoint 42: Label Filtering Fix (Version: 9b0a26f6)

Bug Fix:

- Fix contact label filtering to exclude hex IDs of 12+ characters

- Remove technical Google contact group IDs from display

- Only show user-friendly labels

- Improved label quality

Checkpoint 43: Export, Import & Calendar View (Version: 3572920b)

Major Features:

1. Route Export to CSV

- Export routes with full waypoint details

- CSV format for spreadsheet import

- Includes all route metadata

2. Contact Import from CSV

- Import contacts from CSV file
- Google Maps address validation
- Bulk contact creation

3. Calendar View

- Monthly calendar showing scheduled routes
- Navigate between months
- Visual route scheduling
- Added calendars table for multi-calendar support
- Added scheduledDate field to routes

Database:

- calendars table created
- scheduledDate field added to routes

Checkpoint 44: Waypoint Labels Display (Version: 1bd53a82)

Features Added:

- Google Contact labels display on waypoint cards
- Labels show as badges on route detail pages
- Label filtering for contact selection
- Added label filter dropdown on home page
- Filter contacts by Google Contact labels

Database:

- Added contactLabels field to route_waypoints table
- Stores labels with each waypoint

UX:

- Labels like "myContacts", "starred", custom groups
- Visual grouping of contacts

- Easy filtering by label

Checkpoint 45: Label Display Cleanup (Version: 9d58b624)

UI Improvement:

- Removed "myContacts" and "starred" from label display
- Only show custom user-created labels from Google Contacts
- "Filter by Label" dropdown appears when custom labels exist
- Cleaner label presentation

Checkpoint 46: Mobile Map Markers Fix (Version: c1f05643)

Bug Fix:

- Fixed map pins not displaying on mobile devices
- Added map resize trigger for mobile rendering
- Small delay before rendering markers
- Proper mobile map initialization
- Shared route execution links work on mobile

Checkpoint 47: Label Dropdown Fix (Version: 9f2588f5)

Bug Fix:

- Fixed label dropdown to properly extract custom Google Contact labels
- Labels in contactGroups/ format now parsed correctly
- Filter dropdown appears when custom labels exist
- Proper label name extraction

Checkpoint 48: Route Scheduling (Version: 06d6ce5c)

Feature Implementation:

- Route scheduling with date picker

- Date input field in route creation form

- Backend saves scheduledDate to database

- Calendar view displays scheduled routes on calendar grid

- Unscheduled routes show in separate section

- All tests passing ($^6/_6$)

Checkpoint 49: Custom Label Resolution (Version: 226909bd)

Major Fix:

- Fixed custom Google Contact labels by fetching contact group names

- Added fetchContactGroupNames function

- Updated parseGoogleContacts to resolve group IDs to readable names

- Simplified frontend filtering

- Users must re-sync contacts to see custom labels

- Labels like "Clients", "Family", etc. now display correctly

- All tests passing ($^4/_4$)

Checkpoint 50: Shared Route Distance Display (Version: f1a2e048)

Bug Fix:

- Fixed distance display in SharedRouteExecution

- Was showing raw meters instead of km/miles

- Added proper distance conversion

- Markers already rendering correctly

- Added distance display tests

Checkpoint 51: Missing Coordinates Handling (Version: ba2c1d0d)

Bug Fix:

- Fixed shared route execution map not rendering with missing coordinates
- Added filtering to skip waypoints without lat/lng
- Display warning banner for missing coordinates
- Map shows route line and numbered markers for valid locations only
- Graceful degradation for incomplete data

Checkpoint 52: Route Re-Optimization (Version: 2bbb4cdb)

Feature Added:

- Route re-optimization for newly added stops
- Finds optimal positions for new stops
- Preserves manually reordered existing stops
- Backend algorithm for smart insertion
- UI button with loading state
- 4 passing tests

How It Works:

- Detects newly added stops
- Calculates optimal insertion positions
- Maintains manual ordering of existing stops
- Updates route distance and duration

Checkpoint 53: Default Starting Point Fallback (Version: ee0cd3f1)

Feature Added:

- Automatic fallback to default starting point from user settings
- Priority order: custom > saved > default from settings > none

- No need to manually select starting point each time
- Uses user's configured default automatically

Checkpoint 54: Hide Completed Routes Filter (Version: a549c00c)

Feature Added:

- "Hide completed routes" checkbox filter in route list
- Filters out routes where all waypoints are complete
- Works alongside existing folder filter
- Cleaner route library view
- Focus on active routes

Checkpoint 55: Route Archive System (Version: 494ab206)

Major Feature:

- Comprehensive route archive system
- Manual archive/unarchive functionality
- Separate archived routes page
- Configurable auto-archive settings
- Database schema updates
- Backend procedures for archive management
- Frontend UI with archive buttons
- Passing tests

Archive Features:

- Archive completed routes manually
- Auto-archive after configurable days (7, 30, 60, 90)
- View archived routes in separate section
- Restore archived routes
- Archive date tracking

Checkpoint 56: Route Header Button Reorganization (Version: 70a007f6)

UI Improvement:

- Reorganized route detail page header buttons

- Flex-wrap layout for responsive design

- Logical grouping: primary/sharing/secondary actions

- Shortened button labels for cleaner appearance

- Adapts to screen size

- Better visual hierarchy

Checkpoint 57: Route Notes System (Version: 2d889072)

Major Feature:

- Timestamped notes/comments system for routes

- Add, edit, and delete notes

- Track important context (gate codes, client preferences, delivery instructions)

- Notes display with relative timestamps

- User permissions (users can only modify their own notes)

- All 5 tests passing

Use Cases:

- Gate codes and access instructions

- Client preferences and special requests

- Delivery instructions

- Team communication

- Historical context

Checkpoint 58: Auto-Archive Settings UI (Version: 39fc5aa3)

Feature Added:

- Auto-archive settings in Settings page

- Configure automatic archiving of completed routes

- Options: 7, 30, 60, or 90 days after completion

- Option to disable auto-archiving

- Settings saved to user preferences

- Clean dropdown interface

Checkpoint 59: Route Progress Badges (Version: a582c3eb)

Feature Added:

- Route completion progress badges on route cards

- Shows "X/Y stops complete"

- Backend calculates waypoint counts via SQL subqueries

- Color-coded badges:
  - Green = complete

  - Blue = in progress

  - Gray = not started

- All 3 progress badge tests passing

Checkpoint 60: Git & Railway Documentation (Version: 6162a838)

Documentation Added:

- Created README.md with project overview and quick start

- Added SETUP_INSTRUCTIONS.md with step-by-step Git + Railway setup

- Prepared project for Git repository initialization

- Documented environment variables and deployment process

- Ready for user to push to GitHub and deploy to Railway

Checkpoint 61: Google OAuth for Railway (Version: 9b2b4dbd)

Major Change:

- Replaced Manus OAuth with direct Google OAuth for Railway deployment

- Updated client/src/const.ts to use Google OAuth flow

- Rewrote server/_core/oauth.ts to implement standard Google OAuth2

- Added googleapis and jsonwebtoken packages

- Updated ENV configuration with Google OAuth credentials

- Login redirects to /api/oauth/google

- Callback at /api/oauth/callback exchanges code for tokens

- Ready to test on Railway deployment

Checkpoint 62: OAuth Implementation Fix (Version: b9847842)

Bug Fix:

- Fixed Google OAuth implementation for Railway deployment

- Fixed OAuth2Client redirectUri private property error

- Created getOAuth2Client helper function for dynamic redirect URIs

- All TypeScript errors resolved

- Server running successfully with no errors

- Ready to commit and deploy to Railway

Checkpoint 63: OAuth Session Bug Fix (Version: c01051cb)

Critical Bug Fix:

- Fixed OAuth session bug preventing user login on Railway

- JWT payload was missing required 'appId' field

- Updated oauth.ts to include appId in JWT payload

- Replaced jsonwebtoken library with jose (already installed)

- Session validation now works correctly

- All tests passing ($^3/_3$)

Error Fixed:

- " [Auth] Session payload missing required fields" error resolved

---

Checkpoint 64: Calendar OAuth Redirect Fix (Version: 593746b0)

Bug Fix:

- Fixed Google Calendar OAuth redirect URI issue on Manus

- App was using req.headers.host (internal Azure container address)

- Added ENV.publicUrl configuration

- Updated googleOAuthRoute.ts and routers.ts to use public URL

- Uses https://routieroo.manus.space for calendar OAuth callbacks

- Fixes "redirect_uri doesn't comply with Google's OAuth 2.0 policy" error

---

Checkpoint 65: Main Login OAuth Fix (Version: 96f665f3)

Bug Fix:

- Fixed main login OAuth redirect URI to use public Manus domain

- Updated oauth.ts to use ENV.publicUrl for main login callbacks

- Previously fixed googleOAuthRoute.ts for calendar callbacks

- Resolves "redirect_uri doesn't comply with Google's OAuth 2.0 policy" errors

- Uses public routieroo.manus.space domain instead of internal Azure addresses

---

Checkpoint 66: All OAuth Redirects Fixed (Version: fb3a31de)

Comprehensive Fix:

- Fixed all three OAuth redirect URIs (login, contacts sync, calendar)

- Updated oauth.ts for main login

- Updated googleOAuthRoute.ts for contacts sync callback

- Updated routers.ts for both contacts sync and calendar OAuth flows

- All redirect URIs use ENV.publicUrl (https://routieroo.manus.space)

- No more internal Azure container addresses

- Resolves all "redirect_uri doesn't comply with Google's OAuth 2.0 policy" errors

---

Checkpoint 67: Calendar Integration Improvements (Version: 7c9316fa)

Features Added:

- Calendar selection dialog for choosing which calendar to use

- Created individual waypoint events (one event per stop)

- Removed contactGroups/myContacts label from display

- Added googleCalendarId field to routes table

- Better calendar organization

Checkpoint 68: Calendar Debugging (Version: 9b89c8a1)

Debugging Addition:

- Added calendar.readonly OAuth scope

- Detailed error logging to debug calendar integration issues

- Removed contactGroups/myContacts from label display

- Logs show when sync starts, when handleGoogleCallback is called, and sync results

---

Checkpoint 69: Contact Refresh Fix (Version: 09c47145)

Bug Fix:

- Fixed contact refresh button not working

- getGoogleAuthUrl procedure was using plain string state format

- Updated to use correct JSON state format with userId and action fields

- Both getGoogleAuthUrl and refresh procedures now use JSON state

- Contact refresh now properly syncs labels and pulls in missing contacts

Checkpoint 70: Multi-User SaaS Platform (Version: bf27551d)

Major Transformation:

- Transformed Routie Roo into multi-user SaaS platform

- Public landing page with kangaroo branding

- Hero section, features showcase, sign-up CTA

- User registration via Google OAuth

- Admin role assignment (checks email angelaneason@gmail.com)

- Data isolation (all queries filter by userId)

- Admin dashboard with user management

- Route access control for private routes

- Shared routes remain accessible without authentication

- Fixed TypeScript errors in DocumentsTab and ReminderHistory

- All existing user data preserved

- Angela retains admin access

Checkpoint 71: Calendar Default View (Version: 53750cc3)

UI Change:

- Changed calendar default view from Day to Month

- Users see monthly calendar grid when opening Calendar page

- Easier to see scheduled routes and events at a glance

- Better overview of schedule

Checkpoint 72: Calendar Event Colors (Version: 977e580d)

UI Improvement:

- Calendar event popup dialog displays events with calendar colors

- Events show same background colors as calendar grid

- Route events: blue

- Rescheduled stops: orange

- Google Calendar events: assigned calendar colors

- Text colors automatically adjust to white for contrast

- Better visual identification of event sources

Checkpoint 73: Calendar Color Fix (Version: 297169ec)

Bug Fix:

- Fixed calendar event colors in popup dialog

- Was displaying gray instead of actual Google Calendar colors

- Backend now fetches and includes backgroundColor from each calendar

- Events display with proper vibrant colors (red, purple, orange, etc.)

- Colors match calendar they belong to

- Both calendar grid and event popup show correct colors

Checkpoint 74: Stop Type Selection Fix (Version: e810f070)

Bug Fix:

- Fixed "Cannot read properties of undefined (reading 'contactName')" error

- Error occurred when planning routes with stop types

- Issue: unsafe non-null assertions when mapping selected contacts to waypoints

- Updated contact filtering with proper TypeScript type guards

- Ensures all contacts are non-null before processing

- Removed unsafe non-null assertions throughout waypoint mapping

- Stop types now work correctly when creating routes

Checkpoint 75: Stop Type Display Improvements (Version: c642bbff)

Bug Fixes & Features:

1. Stop Type Dropdown Fix

- Stop type dropdown now allows selection changes
- Removed custom SelectValue content that prevented selection
- Select component works properly

2. Stop Type Badges on Waypoints

- Added stop type badges to Hop-By-Hop Navigation view
- Waypoints display stop type (pickup, delivery, meeting, other)
- Shows assigned color next to status badge
- Hidden for default "visit" type to reduce clutter
- Users can see stop types during route execution

Checkpoint 76: Custom Stop Type Map Markers (Version: caf4763c)

Feature Added:

- Map markers display custom icons based on stop types
- Uses stop type color assigned during route creation
- Different marker shapes:
  - Pickup: arrow pointing right
  - Delivery: arrow pointing down
  - Visit, meeting, other: circular markers
- All markers maintain numbered labels
- Visual differentiation makes stop purpose clear at a glance

---

Checkpoint 77: Stop Type Selector Fix (Version: 8c6a1bda)

Bug Fix:

- Fixed stop type selector reverting to "other" instead of saving selected type
- Issue: custom content inside SelectTrigger prevented internal state management
- Moved color dot indicator outside Select as absolutely positioned overlay
- SelectValue now works correctly
- Dropdown properly saves and displays selected stop type
- Works for all types: pickup, delivery, meeting, visit, other

Checkpoint 78: Custom Stop Type Colors Fix (Version: 11a5e6e6)

Bug Fix:

- Fixed custom stop types to display correct colors and labels
- Issue: onChange handler only looked at default stop types
- Custom types fell back to "Other" with gray color
- Updated StopTypeSelector to pass both type and color to onChange
- Improved color matching logic for custom stop type names
- Custom types from database (Eval, OASIS, Visit, RE, DC) now display correctly
- Shows assigned colors and proper labels

Checkpoint 79: Stop Type Database Schema Fix (Version: 9c7cb8fe)

Bug Fix:

- Fixed route creation error with custom stop types
- Issue: stopType column was enum limited to default values
- Rejected custom stop type names like "Eval", "OASIS", "RE (re-eval)"
- Changed stopType column from enum to varchar(100)
- Accepts any custom stop type name from database
- Routes can now be created successfully with custom stop types

Checkpoint 80: Stop Type Validation Fix (Version: 6f63d90d)

Bug Fix:

- Fixed tRPC validation error preventing route creation with custom stop types
- Zod schema was validating stopType as enum limited to default values
- Changed stopType validation from z.enum to z.string()
- Accepts any custom stop type name from database
- Routes create successfully with custom types: "Eval", "OASIS", "RE (re-eval)", "DC (discharge)"

Checkpoint 81: Mobile Responsive Design (Version: c286e177)

Major Feature:

- Made Routie Roo fully mobile-responsive for phones and tablets
- Added mobile.css with touch-friendly optimizations:
    - Minimum 44px touch targets for buttons and inputs
    - 16px font size to prevent iOS zoom
    - Better spacing for cards and forms
    - Responsive tables
    - Landscape mode adjustments
- Updated viewport meta tag to allow user scaling up to 5x
- Existing grid layout stacks to single column on mobile
- Dashboard sidebar is collapsible
- All pages work seamlessly on mobile devices

Checkpoint 82: Mobile Button Layout Fix (Version: a3866198)

Bug Fix:

- Fixed mobile layout where buttons were getting cut off

- Updated RouteDetail page to stack buttons vertically on mobile

- Buttons go full width below sm breakpoint

- Changed Edit Route, Add Contact, Complete All Remaining, Mark All as Missed buttons

- Responsive flex layout prevents text truncation

- All button text fully visible and touch-friendly on mobile

Checkpoint 83: Default Stop Type Feature (Version: a434f1b8)

Major Feature:

- Implemented default stop type for automatic assignment during route creation

- Database: Added defaultStopType and defaultStopTypeColor fields to users table

- Backend: Updated settings.updatePreferences to accept default stop type

- Frontend: Added "Default Stop Type" selector to Settings page (Routes tab)

- Dropdown shows all custom stop types with color indicators

- Option to select "None (manual selection)" to disable auto-assignment

- Route creation automatically assigns user's default stop type to all contacts

- Falls back to "visit" type if no default is set

- Users can still change individual stop types in route details screen

- Testing: 4 passing tests

User Workflow:

1. Go to Settings → Routes tab

2. Select a default stop type (e.g., "Visit" for Prairie PT)

3. Create a new route by selecting contacts

4. All contacts automatically get the default stop type

5. Adjust individual stop types in route details if needed

Checkpoint 84: Route Creation Simplification (Version: def605c2)

Bug Fixes & UI Improvements:

1. Stop Type Validation Fix

- Changed stopType validation from hardcoded enum to string
- Supports custom stop type names
- Updated database schema: stopType column VARCHAR(100)
- Added type assertions for TypeScript compatibility

2. UI Simplification

- Removed redundant "Stop Types" selector from route builder
- Simplified route creation flow
- Users rely on default stop type from Settings
- Individual stop types can be changed in route details screen

Technical Changes:

- Updated routeWaypoints schema in drizzle/schema.ts
- Modified validation in server/routers.ts
- Removed StopTypeSelector import from Home.tsx
- Added type assertions in db.ts and routers.ts

User Workflow:

1. Set default stop type in Settings
2. Create route by selecting contacts - all get default type
3. Route builder is cleaner without per-contact stop type selectors
4. Edit individual stop types in route details if needed

Checkpoint 85: Comprehensive Waypoint Editing (Version: d665f81f)

Major Feature:

- Added "Edit Details" button to every waypoint card

- Created edit dialog for changing stop type and contact name

- Added updateWaypointDetails backend mutation

- Supports stop type, contact name, and color updates

UI Improvements:

- Stop type now displays FIRST on every waypoint (before patient name)

- Always visible stop type

- Stop type badge uses custom colors from user settings

- Replaced "Edit Address" button with "Edit Details" button

Technical Changes:

- Added routes.updateWaypointDetails tRPC mutation

- Edit dialog state management in RouteDetail.tsx

- Modified SortableWaypointItem to show stop type prominently

- Imported StopTypeSelector for editing

User Workflow:

1. Open any route in route details

2. Click "Edit Details" on any waypoint card

3. Change stop type (with color picker) and/or contact name

4. Save changes - updates immediately visible

5. Stop type shows first on each waypoint for easy scanning

Checkpoint 86: Complete Waypoint Editing (Version: 30279c30)

Feature Expansion:

- Edit Details dialog now includes ALL waypoint fields:
  - Contact Name

  - Stop Type (with color picker)

  - Address (with autocomplete)

  - Phone Numbers (add/edit/remove multiple)

- Phone number management: add multiple phones, edit number and label, remove entries
- Dialog scrollable for long phone lists

Backend Updates:

- Extended updateWaypointDetails mutation to accept address and phoneNumbers
- Single mutation handles all waypoint field updates

User Workflow:

1. Click "Edit Details" on any waypoint
2. Update any combination of: name, stop type, address, phone numbers
3. Add/remove phone numbers with +/X buttons
4. Save once - all changes applied together

Benefits:

- No more switching between multiple dialogs
- Edit everything about a waypoint in one place
- Faster workflow for updating waypoint information

Checkpoint 87: Google Contacts Sync Infrastructure (Version: 8b7ebbac)

Features Added:

- Edit Details dialog includes labels field
- contactId stored in waypoints for tracking Google contacts
- Automatic sync helper called on waypoint updates (OAuth integration pending)
- Stop type validation fixed to accept custom types
- Improved waypoint display with stop type badges

Database:

- contactId tracking for reliable Google sync

- Labels field in waypoints

Sync Infrastructure:

- Backend prepared for two-way Google Contacts sync
- OAuth token handling ready
- Sync helper functions created

Checkpoint 88: Two-Way Google Contacts Sync (Version: 90e31f7e)

Major Feature:

- Implemented automatic two-way Google Contact sync
- When editing waypoint details (address, phone numbers, labels), changes sync back to Google Contacts

Features:

- OAuth token storage in database
- Automatic token refresh for expired tokens
- Google People API integration with etag handling
- Graceful error handling (doesn't block waypoint updates)
- contactId tracking for reliable sync

How It Works:

1. User edits waypoint details (address, phone, labels)
2. Changes save to local database
3. If contactId exists, changes sync to Google Contacts
4. Token automatically refreshed if expired
5. Errors logged but don't fail the update

Checkpoint 89: Contact Editor Google Sync (Version: 583d848e)

Feature Added:

- Added Google Contact sync to Kangaroo Crew contact editor

- Changes made to contacts in Kangaroo Crew now sync back to Google Contacts

- Matches functionality already present in route waypoint editing

- Both editing paths maintain two-way sync with Google

- Address and phone number changes propagate to Google

Checkpoint 90: Calendar Event Improvements (Version: 2a7848c5)

UI Improvements:

- Starting points excluded from calendar events

- Event titles show stop type instead of stop number

- Example: "Eval: John Smith" instead of "Stop 1: John Smith"

- More meaningful calendar events

- Reduces clutter from starting points

Checkpoint 91: Calendar Event Editing (Version: 201f5ec1)

Feature Added:

- Implemented calendar event editing with Google Calendar sync

- Added Edit button to Google Calendar events in event details dialog

- Created EditEventDialog component with fields:
    - Title

    - Start/end time

    - Location

    - Description

- Backend mutation handles token refresh

- Calls Google Calendar API to update events

- Changes sync immediately to Google Calendar

Checkpoint 92: Automatic Calendar Sync (Version: 4b01756b)

Major Feature:

- Implemented automatic calendar sync for routes with visual indicators
- Automatic updates when routes are edited

Features:

- Calendar event ID tracking in waypoints
- Automatic event creation when adding waypoints to routes with calendar
- Automatic event deletion when removing waypoints
- Automatic event updates when modifying waypoint details (name, address, stop type)
- Visual "On Calendar" badges on route cards and route details pages
- Token refresh handling for Google Calendar API
- Comprehensive error handling

Visual Indicators:

- "On Calendar" badge on route cards in library
- "On Calendar" badge on route details page
- Shows which routes are synced to calendar

How It Works:

1. User adds route to calendar
2. System tracks calendar event IDs for each waypoint
3. When waypoints are added/removed/edited, calendar automatically updates
4. No manual calendar management needed

Checkpoint 93: Calendar Event Clicking (Version: 2341817c)

Bug Fix:

- Fixed calendar event clicking functionality

- Individual calendar events (day/week/month views) now clickable

- Non-route events (Google Calendar) open EditEventDialog directly

- Route events navigate to route details page

- "More" button dialog already had edit functionality working

---

Checkpoint 94: Calendar Event Edit Fix (Version: 336f8cdc)

Bug Fix:

- Fixed "Missing Event Information" error when editing Google Calendar events

- Added googleEventId field to event objects returned by calendar.getEvents

- EditEventDialog can now properly identify and update events

- Calendar events include both internal ID and original Google event ID

Checkpoint 95: Calendar Event Time Format Fix (Version: 927d7480)

Bug Fix:

- Fixed "timeRangeEmpty" error when updating calendar events

- Issue: datetime strings weren't properly formatted for Google Calendar API

- Updated EditEventDialog to append '.000Z' suffix to datetime strings

- Complies with RFC3339 format required by Google Calendar API

- Event updates now work correctly with proper timezone handling

---

Checkpoint 96: Remove from Calendar Fix (Version: c6894269)

Bug Fix:

- Fixed "Remove from Calendar" button to actually delete events from Google Calendar

- clearCalendarEvents procedure now:
    1. Fetches all waypoints with calendar event IDs
    2. Deletes each event from Google Calendar using API

3. Clears calendarEventId from all waypoints

    4. Clears calendar tracking fields from route

- Events properly removed from both database and Google Calendar

- Proper token refresh handling

Checkpoint 97: Mobile Navigation System (Version: 2984b337)

Major Feature - Phase 1:

- Implemented mobile-responsive navigation system

- Bottom tab bar (MobileNav component)

- Slide-out menu (MobileMenu component)

- Sticky compact header

- Mobile-first CSS utilities

Features:

- Bottom tab bar with icons for Home, Routes, Calendar, Settings, More

- Slide-out drawer menu for additional navigation

- Safe area insets for notched devices

- Touch-friendly sizing

- Responsive breakpoints

- Desktop navigation hidden on mobile (<768px)

- Mobile nav hidden on desktop (≥768px)

Documentation:

- Created MOBILE_OPTIMIZATION.md

- Phase 1 complete, ready for Phase 2

Checkpoint 98: Mobile Navigation Documentation (Version: 23749314)

Documentation Update:

- Comprehensive documentation in MOBILE_OPTIMIZATION.md

- Mobile navigation system fully documented

- All changes from Phase 1 recorded

- Ready for Phase 2: contact list optimization

Checkpoint 99: Mobile Contact Cards (Version: ca837b99)

Major Feature - Phase 2:

- "Your Kangaroo Crew" contact list fully optimized for mobile

Mobile Contact Cards:

- Touch-optimized card layout with 12px photos and 44px buttons

- Expandable details for dates, comments, phone numbers

- Quick action buttons (Call, Text, Navigate) with tel:/sms: links

- Bottom action bar (Details, Docs, Edit, Toggle Active)

- Status indicators and label badges

Swipe Gestures:

- Left swipe reveals color-coded actions

- Green = Call, Blue = Text, Purple = Navigate

- Smooth animations with auto-close

- Only shows relevant actions based on contact data

Floating Action Button:

- FAB for "Add Contact" positioned bottom-right above mobile nav

- 56px touch-friendly circle

- Hidden on desktop

Responsive Design:

- Mobile (<768px): MobileContactCard with swipe gestures

- Desktop (≥768px): Original compact list layout

- Header buttons stack vertically on mobile
- All buttons have touch-target class (44px minimum)

Testing:

- $^{10}/_{10}$ unit tests passing

Checkpoint 100: Mobile Route Planning (Version: 077b382d)

Major Feature - Phase 3:

- Route planning form and route list fully optimized for mobile

Route Creation Form:

- All inputs use touch-target class (44px minimum)
- text-base (16px) to prevent iOS zoom
- Route Name, Notes, Scheduled Date, Starting Point, Folder inputs optimized
- Create Route button: full-width, large size, touch-friendly
- All form fields stack properly on narrow screens

Route List:

- Header stacks vertically on mobile
- Folder filter and hide completed checkbox responsive
- Route cards have mobile-friendly padding
- Archive and Delete buttons always visible on mobile (no hover required)
- All action buttons use touch-target class

Responsive Design:

- Mobile (<768px): Vertical layouts, full-width inputs, always-visible actions
- Desktop (≥768px): Horizontal layouts with hover effects
- Proper breakpoints at 640px (sm), 768px (md), 1024px (lg)

Testing:

- $^{14}/_{14}$ unit tests passing

- Combined with Phase 2: $^{24}/_{24}$ total tests passing

Checkpoint 101: Mobile Layout Fixes (Version: ef0810d3)

Bug Fixes:

1. Fixed Horizontal Scrolling

- Changed main layout from grid to flex-col on mobile

- Layout only uses 2-column grid on large screens (lg:grid)

- All sections fit within mobile viewport

2. Fixed Mobile Navigation 404 Errors

- Routes tab scrolls to #routes-section on home page

- Added id= "routes-section" to Your Hop Library section

- Smart scroll behavior: navigates to home first if on different page

- All other tabs navigate normally

Mobile Navigation Behavior:

- Home tab: Navigates to / (blue when on home page)

- Routes tab: Scrolls to routes section (blue when on home page)

- Calendar tab: Navigates to /calendar (blue when on calendar page)

- Settings tab: Navigates to /settings (blue when on settings page)

- More button: Opens mobile menu drawer

Testing:

- $^{10}/_{10}$ unit tests passing

- Combined: $^{34}/_{34}$ total tests passing

Checkpoint 102: Pull-to-Refresh (Version: 415e1b4c)

Major Feature:

- Added native mobile refresh gesture for contacts and routes

Pull-to-Refresh Implementation:

- Custom PullToRefresh component using native touch events
- Works only when at top of page (scroll position = 0)
- Pull threshold: 80px to trigger refresh
- Maximum pull distance: 120px with resistance
- Visual feedback with animated indicator

User Experience:

- Pull down from top: Shows "Pull to refresh" with down arrow
- Pull past threshold: Shows "Release to refresh" with up arrow
- Release: Shows "Refreshing…" with spinner animation
- Smooth transitions with 0.3s easing

Refresh Behavior:

- Refetches all data: contacts, routes, folders, starting points
- Uses Promise.all for parallel fetching
- Prevents multiple simultaneous refreshes
- Only active on mobile (touch events)

Visual States:

1. Idle: No indicator visible
2. Pulling (< 80px): "Pull to refresh" with increasing opacity
3. Ready (≥ 80px): "Release to refresh" at full opacity
4. Refreshing: Spinner with "Refreshing…" text

Testing:

- $^{15}/_{15}$ unit tests passing

- Combined: $^{49}/_{49}$ total tests passing

Checkpoint 103: Route Details Mobile (Version: 4bbc9aa5)

Major Feature - Route Details Mobile Optimization:

Layout Changes:

- Changed from grid to vertical stack on mobile (flex-col → lg:grid)
- Map height responsive: 400px mobile, 500px tablet, 600px desktop
- Added mobile-content-padding to main container
- Sticky header at top with z-30

Header Optimizations:

- Back button shows only icon on mobile, text on desktop
- Route name truncates to prevent overflow
- Reduced padding: py-3 mobile, py-4 desktop
- Reduced gaps: gap-2 mobile, gap-3 desktop
- Hidden less important buttons on small screens:
  - Re-optimize: hidden on mobile (sm:flex)
  - Copy Link, Calendar: hidden on mobile (md:flex)
  - Copy Route, Export, Archive: hidden on mobile/tablet (lg:flex)

Action Buttons:

- Edit Route and Add Contact stack vertically on mobile
- Full-width on mobile (w-full), auto-width on desktop (sm:w-auto)
- Complete All and Mark as Missed stack on mobile
- All buttons have touch-target class (44px minimum)

Waypoint List:

- Reduced padding: p-3 mobile, p-4 desktop

- Edit button text shortened: "Edit" on mobile, "Edit Details" on desktop
- All waypoint buttons have touch-target class
- Phone call/text buttons remain accessible
- Drag handle maintains touch-none for smooth dragging

Mobile UX Improvements:

- Sticky header stays visible while scrolling waypoints
- Essential actions (Open in Maps, Complete, Miss) always visible
- Less critical actions hidden to reduce clutter
- Touch targets meet 44px minimum
- Buttons stack to prevent horizontal overflow

Testing:

- $^{15}/_{15}$ unit tests passing
- Combined: $^{64}/_{64}$ total tests passing

Checkpoint 104: Calendar & Settings Mobile (Version: 42059fe5)

Major Feature - Calendar & Settings Mobile Optimization:

Calendar Page Optimizations:

Layout & Spacing:

- Added mobile-content-padding for bottom nav clearance
- Reduced padding: p-3 mobile, p-6 desktop
- Header stacks vertically on mobile (flex-col → sm:flex-row)
- Reduced margins: mb-4 mobile, mb-6 desktop

Header & Navigation:

- Title size: text-xl mobile, text-3xl desktop
- Subtitle size: text-sm mobile, text-base desktop
- Header buttons full-width on mobile (w-full → sm:w-auto)

- Add Event and Back buttons flex-grow on mobile
- All buttons have touch-target class (44px minimum)

Calendar Sidebar:

- Hidden on mobile (hidden → lg:block)
- Full-width on tablet (w-full → lg:w-64)
- Main layout stacks vertically (flex-col → lg:flex-row)

Calendar Controls:

- Card padding reduced: p-3 mobile, p-6 desktop
- Navigation header stacks: flex-col → sm:flex-row
- Previous/Today/Next buttons have touch-target class
- Calendar title size: text-base mobile, text-xl desktop
- View switcher (Day/Week/Month) full-width on mobile
- View buttons flex-grow equally (flex-1 → sm:flex-none)
- All view buttons have touch-target class

Settings Page Optimizations:

Layout & Spacing:

- Added mobile-content-padding to main container
- Main padding: py-6 mobile, py-8 desktop
- Header padding: py-3 mobile, py-4 desktop
- Added gap-3 to header for consistent spacing

Header:

- Back button shows only icon on mobile (hidden → md:inline for text)
- Back button has touch-target class
- Settings title: text-2xl mobile, text-3xl desktop

Tabs:

- Tab list: 2 columns on mobile (grid-cols-2), 4 on desktop (sm:grid-cols-4)

- Added gap-1 between tabs for touch separation

Form Inputs:

- All Input fields: h-11 (44px) and text-base (16px) to prevent iOS zoom
- All Select triggers: h-11 and text-base
- Scheduling email input: touch-friendly sizing
- Reminder intervals input: touch-friendly sizing
- Starting point name/address inputs: touch-friendly sizing

Buttons:

- Add starting point button: w-full mobile, sm:w-auto desktop with touch-target
- View Reminder History button: w-full with touch-target
- Connect Google Calendar button: touch-target class
- All action buttons meet 44px minimum touch target

Mobile UX Standards Applied:

- 16px font size (text-base) on all inputs to prevent iOS auto-zoom
- 44px minimum height (h-11 or touch-target) on all interactive elements
- mobile-content-padding on main containers for bottom nav clearance
- Responsive padding and margins (smaller on mobile, larger on desktop)
- Full-width buttons on mobile where appropriate
- Hidden less-critical UI elements on mobile

Testing:

- $^{24}/_{24}$ unit tests passing
- Combined: $^{88}/_{88}$ total tests passing

Checkpoint 105: UI Polish & Housekeeping (Version: 1bbf34f4)

Changes Made:

1. Fixed Stretched Logo

- Added w-auto object-contain to logo images

- Desktop header logo: h-32 w-auto object-contain

- Mobile header logo: h-16 md:h-24 w-auto object-contain

- Prevents logo stretching, maintains aspect ratio

2. Updated Calendar Button Label

- Changed from "Calendar" to "Add to Calendar"

- Makes button purpose clearer

- Consistent with user expectations

3. Changed Copy Button Label

- Changed from "Copy" to "Duplicate Route"

- More descriptive and clear

- Reduces ambiguity (copy link vs copy route)

4. Added Creation Date Display

- Added "Created" field to Route Details card

- Displays route creation timestamp using toLocaleString()

- Positioned after "Stops" count with border separator

- Consistent styling with other metadata fields

Testing:

- $^{11}/_{11}$ unit tests passing

- Combined: $^{99}/_{99}$ total tests passing

Checkpoint 106: Logo Size Fix (Version: c935b504)

Bug Fix:

- Adjusted logo dimensions for proper visibility on desktop

- Loading screen logo: h-16 w-16 (consistent square sizing)

- Header logo: h-12 w-12 md:h-16 md:w-16

- Fixed width and height maintain proper visibility

- object-contain preserves aspect ratio without stretching

- Mobile: 48px × 48px (h-12 w-12)

- Desktop: 64px × 64px (h-16 w-16)

Why This Works:

- Fixed dimensions instead of w-auto prevents logo from becoming too small

- object-contain ensures fit within box without distortion

- Responsive sizing: smaller on mobile, larger on desktop

- Square container maintains consistent appearance

Checkpoint 107: Duplicate Route Navigation Fix (Version: c8e0197c)

Bug Fix:

- Fixed 404 error when clicking "Duplicate Route"

- Changed from window.location.href to navigate() (wouter's client-side navigation)

Problem:

- window.location.href caused full page reload

- Race condition: browser tried to load route before database transaction committed

- Resulted in 404 error

- Route would appear on home page after manual navigation

Solution:

- navigate() performs client-side routing without page reload

- Works seamlessly with React state and tRPC cache

- No race condition since app stays in same session

- Immediate navigation to duplicated route

Testing:

- $^9/_9$ unit tests passing

- Combined: $^{108}/_{108}$ total tests passing

Checkpoint 108: Mobile Actions Menu (Version: 316533ed)

Major Features:

Problem 1: No Buttons Visible on Mobile

- All action buttons hidden on mobile with hidden md:flex or hidden lg:flex

- Impossible to duplicate routes, add to calendar, export, or archive on mobile

Solution 1: Mobile Dropdown Menu

- Created responsive dropdown menu with "⋮" (MoreVertical) button

- Shows on mobile screens only (md:hidden)

- Contains all 7 essential actions:
    - Duplicate Route
    - Add to Calendar
    - Copy Link
    - Share
    - Export CSV
    - Re-optimize
    - Archive

- Groups related actions with separators

- Aligns to right edge with proper width (w-56)

- Desktop layout unchanged

Problem 2: Duplicate Route Still Causing 404

- Even with navigate(), 404 persisted

- tRPC cache didn't include newly created route

- Navigation happened before cache updated

Solution 2: Cache Invalidation + Delay

```javascript
const utils = trpc.useUtils();

const copyRouteMutation = trpc.routes.copyRoute.useMutation({
  onSuccess: async (data) => {
    toast.success("Route copied successfully!");
    // Invalidate routes list to include the new route
    await utils.routes.list.invalidate();
    // Small delay to ensure data is available
    setTimeout(() => {
      navigate(`/routes/${data.routeId}`);
    }, 100);
  },
});
```

Why This Works:

1. utils.routes.list.invalidate() - Forces tRPC to refetch route list

2. await - Ensures invalidation completes before proceeding

3. setTimeout(100ms) - Gives database and cache time to sync

4. navigate() - Client-side navigation with fresh cache data

Testing:

- $^{20}\!/_{20}$ unit tests passing

- Combined: $^{128}\!/_{128}$ total tests passing

Checkpoint 109: Admin Pages Mobile Optimization (Version: afb1bf36)

Features:

- Optimized all 5 admin pages for mobile:
  - Missed Stops

  - Reschedule History

  - Archive

  - Changed Addresses

- Admin Users
- Consistent touch-friendly buttons (44px)
- Responsive layouts (flex-col sm:flex-row)
- Mobile-first padding

Duplicate Route Fix:

- Fixed persistent 404 error when duplicating routes
- Added proper data prefetching before navigation
- Invalidates all routes queries
- Prefetches new route data before navigating
- 300ms fallback delay if prefetch fails

Testing:

- $^{36}/_{36}$ new tests passing
- Combined: $^{164}/_{164}$ total tests passing

Checkpoint 110: Settings Contacts Tab Layout (Version: c5f54e01)

UI Improvements:

- Made "Preview Email Templates" button full-width (matching "View Reminder History")
- Improved spacing around "Enable Date Reminders" toggle
- Added clear visual separation with border dividers
- Toggle section uses flex layout with proper gap spacing
- Prevents text from being squished
- All buttons touch-friendly (44px)
- Consistently styled

Testing:

- $^{23}/_{23}$ new tests passing

- Combined: $^{187}/_{187}$ total tests passing

Checkpoint 111: Logo & Map Marker Verification (Version: cefb7667)

Changes:

- Increased logo size in header from h-12 to h-16 on mobile (h-20 on desktop)
- Better visibility for branding

Verification:

- Map marker colors working correctly for new routes with custom stop types
- Old routes show default blue (expected - created before custom stop types feature)
- All tests passing ($^{187}/_{187}$)

Checkpoint 112: Stop Reordering System (Version: dee2933d)

Major Features:

1. Stop Number Input Fields

- Replaced drag-and-drop with stop number input fields
- Easier reordering on mobile and desktop
- Type new position number to reorder stops

2. Save Order Button

- Appears when stop positions change
- Saves new order to database
- Visual feedback for unsaved changes

3. Backend Infrastructure

- Added reorderWaypoints procedure
- Added hasManualOrder flag to routes table

- Tracks whether route has been manually reordered

4. Database Schema Updates

- Added gap stop fields (isGapStop, gapDuration, gapDescription) for future implementation
- Contact labels already displaying on stops
- TypeScript errors resolved

Checkpoint 113: Contact Photos on Waypoints (Version: 908f0857)

Features Added:

1. Contact Photos on Waypoints

- Contact photos (or initials) now display on waypoint cards
- Matches contact list design
- Better visual identification

2. Map Markers Fix

- Fixed map markers disappearing when reordering stops
- Map properly updates when stop order changes via number inputs
- Real-time map refresh

Checkpoint 114: UI/UX Improvements (Version: 637009d6)

6 Improvements Completed:

1. Calendar Excludes Starting Point

- Starting point no longer creates calendar event
- Only actual stops get calendar events

2. Add To Calendar Button Text

- Changed button label for clarity
- "Add to Calendar" instead of "Calendar"

3. Removed Copy Link Button

- Simplified route detail header
- Reduced button clutter

4. Route Name Moved to Card

- Route name now in route details card
- Better organization of information

5. Labels Under Contact Name

- Contact labels display below name
- Better visual hierarchy

6. Route Notes Feature Fixed

- Created missing route_notes table
- Route notes functionality now working
- Can add timestamped notes to routes

Checkpoint 115: Gap Stop Feature (Version: 5d1644f7)

Major Feature:

- Added ability to insert non-contact time blocks into routes
- Lunch breaks, meetings, travel time, etc.

Features:

- "Add Gap Stop" button in route detail page
- Gap stop creation dialog (name, duration in minutes, optional description)
- Backend mutation to create gap stops (waypoints with isGapStop=true)
- Gap stops display with clock icon and gray styling
- Happy emoji with clock marker on map
- Gap stops can be reordered with regular stops

- Calendar integration: Gap stops don't create calendar events, but duration is added to timing calculations

How It Works:

1. Click "Add Gap Stop" button
2. Enter name (e.g., "Lunch Break"), duration (minutes), optional description
3. Gap stop appears in stop list with clock icon and gray background
4. On map, shows as happy emoji with clock
5. When adding route to calendar, gap stops are skipped but their duration shifts subsequent event times

Example: Stop 1 at 9:00 AM (30 min) → Gap Stop "Lunch" (60 min) → Stop 2 starts at 10:30 AM (not 9:30 AM)

Checkpoint 116: Gap Stop UI Refinements (Version: 08f1719c)

Updates:

1. Cute Emoji Icon

- Replaced simple clock icon with happy emoji holding clock image
- Shows in both stop list and map
- Consistent visual identity

2. Hidden Inappropriate Actions

- Hidden Complete, Miss, Add Note buttons for gap stops
- Gap stops only show Edit Details and Remove buttons
- Gap stops are time blocks, not contact stops
- Cleaner action button layout

Visual Improvements:

- Friendly happy emoji with clock character throughout UI
- Better visual distinction between gap stops and contact stops

---

Checkpoint 117: Gap Stop Position Control (Version: a0b07144)

New Features:

1. Insert After Stop # Field

- Users can specify exactly where to insert gap stops

- Leave blank to add at end (default)

- Enter stop number to insert right after that position

- Backend logic handles position insertion and shifts subsequent stops

2. Map Marker Cleanup

- Removed gap stop markers from map

- Gap stops are time blocks, not physical locations

- Only appear in stop list

- Cleaner map visualization showing only physical stops

3. Visual Identity

- Gap stops still display with cute emoji in stop list

- Easy identification

How to Use:

- Click "Add Gap Stop" button

- Enter name (e.g., "Lunch Break") and duration (minutes)

- Optionally enter stop number in "Insert After Stop #" field (e.g., "3" to insert after stop 3)

- Leave blank to add at end

- Gap stop appears in correct position

Calendar Integration:

- Gap stops don't create calendar events

- Duration added to timing calculations

- Subsequent stops start at correct time

Checkpoint 118: Shared Route View Fixes (Version: c4e9783a)

Fixed Issues:

1. Contact Address Validation

- Already implemented: error toast when adding contact without address
- User-friendly error message

2. Stop Type Colors in Shared View

- Map markers now display correct custom colors
- Visit/delivery/pickup colors instead of all blue
- Consistent with owner view

3. Google Profile Photos in Shared View

- Contact photos now display with stop number badge overlay
- Better visual identification
- Matches owner view design

Technical Changes:

- SharedRouteExecution.tsx: Updated marker fillColor to use waypoint.stopColor
- SharedRouteExecution.tsx: Added photoUrl display with numbered badge overlay
- Improved visual consistency between owner and shared views

Checkpoint 119: PhotoUrl Backfill (Version: 5155ceda)

What Was Done:

1. Backfill Script

- Created backfill script (scripts/backfill-photo-urls.mjs)
- Populated photoUrl for all existing route waypoints
- Updated 9 waypoints initially, 24 total with photos

2. Frontend Update

- Updated addWaypoint mutation to accept and save photoUrl field
- Updated AddContactToRoute component to pass photoUrl

Results:

- All past routes now display Google profile photos
- All future routes automatically save photoUrl when contacts added
- Consistent photo display across owner and shared views

Technical Changes:

- server/routers.ts: Added photoUrl to addWaypoint input schema
- client/src/pages/RouteDetail.tsx: Added photoUrl to addWaypoint mutation call
- scripts/backfill-photo-urls.mjs: One-time migration script (can be run again if needed)

Checkpoint 120: Improved Photo Backfill (Version: b4b18e0b)

Bug Fix:

- Fixed Google profile photos not displaying in routes
- Created improved backfill script that matches waypoints to contacts by name
- For old routes without contactId, matches by name
- Backfilled 96 waypoints with photoUrl and contactId
- New routes already save contactId correctly

Checkpoint 121: Stop Type Color Backfill (Version: c40b510b)

Bug Fix:

- Fixed stop type colors not displaying correctly in routes
- Old routes created with default blue color before custom stop types configured
- Created update script that maps stop types to user's custom colors

- Updated 81 waypoints
- Route 390001 and all other routes now display correct custom colors:
  - Yellow for Visit
  - Pink for OASIS
  - Cyan for RE
  - Red for DC
  - Blue for Eval

Checkpoint 122: Copy Route Preservation (Version: 9e03649b)

Bug Fix:

- Fixed route copy to preserve custom stop type colors, contact photos, and contact IDs
- copyRoute procedure was only copying stopType but not stopColor, photoUrl, or contactId
- Copied routes were reverting to default blue markers
- Now when duplicating routes, all waypoints maintain original custom colors and photos

---

Checkpoint 123: Color Legend (Version: 1a37b0e8)

Feature Added:

- Added color legend to route detail page
- Displays all stop types used in the route with custom colors
- Legend automatically extracts unique stop types from waypoints
- Excludes starting point and gap stops
- Shows color circles and stop type names in Route Details card
- Only appears when route has actual stop types

Checkpoint 124: Draggable Scheduler Notes (Version: a1e774e1)

Major Feature:

- Added draggable scheduler sticky notes with red pushpin graphic
- Notes are global reminders for scheduler (not shared with routes)

Features:

- Add/complete/delete notes with checkboxes
- Toggle expand/collapse
- Drag to move anywhere on screen
- Positioned top right on desktop, centered on mobile
- Full touch support for mobile devices
- Database table for persistent storage per user

Checkpoint 125: Sticky Note Redesign (Version: 60ecb4da)

Redesign:

- Redesigned scheduler sticky notes to look like real sticky note paper
- Reminders appear directly on orange/yellow sticky note background
- Cursive handwritten-style font
- Pushpin at top for dragging
- Maintains all functionality: add/complete/delete, toggle expand/collapse, drag anywhere, mobile touch support

---

Checkpoint 126: Sticky Note Text Overlay (Version: f0746819)

Redesign:

- Reminder text now appears directly ON the sticky note graphic image
- Entire sticky note with pushpin used as background
- Text overlaid on pink/coral paper area in cursive handwritten font

- Entire note is draggable

- Works on mobile with touch support

Checkpoint 127: Sticky Note Layout Fix (Version: 5c63f1e8)

UI Fix:

- Moved "Reminders" title down to avoid overlapping pushpin

- Reduced input field size to fit better on sticky note

- Adjusted padding and spacing for better visual alignment

- Better layout on sticky note graphic

Checkpoint 128: Sticky Note Title Removal (Version: 8254b348)

UI Simplification:

- Removed "Reminders" title from sticky note

- Sticky note graphic itself communicates purpose

- Adjusted spacing for more room for actual notes

- Cleaner, more intuitive design

Checkpoint 129: Sticky Note Resize (Version: 4d2773f4)

Features Added:

- Moved input field down to avoid pushpin overlap

- Made all note text bold for better readability

- Added resize functionality with drag handle in bottom-right corner

- Minimum 250x250px

- Works on both desktop and mobile with touch support

Checkpoint 130: Complete Sticky Note Redesign (Version: abfc765a)

Major Redesign:

- Now uses yellow pushpin graphic at top with light purple background (#e9d5ff)
- No more overlap issues - pushpin is draggable, content area has proper padding
- Unlimited scrolling for notes
- Resizable (250-500px width, 300-700px height)
- Each note has semi-transparent white background for readability
- Bold cursive text throughout

Checkpoint 131: Sticky Note Positioning Fix (Version: 4bbf0ca2)

UI Fix:

- Increased initial Y position to 60px so pushpin isn't cut off at top
- Made pushpin larger (20x20)
- Added invisible drag area at top of sticky note for easier dragging
- Pushpin now fully visible and draggable

Checkpoint 132: Sticky Note Collapse Behavior (Version: 6f43d63e)

Feature Fix:

- Fixed sticky note collapse behavior
- Now shrinks to 50px height when collapsed (just shows pushpin and small bar)
- Expands to full size when opened
- Added smooth transition animation
- Resize handle only shows when expanded
- Add reminder functionality works properly when expanded

Checkpoint 133: Sticky Note Collapse Fix (Version: 53c112ff)

Bug Fix:

- Fixed sticky note collapse to properly shrink to 50px height
- Was only hiding content before
- Added smooth transition animation
- Resize handle only shows when expanded
- Sticky note now minimizes to small bar with pushpin visible

---

Checkpoint 134: Mobile Sticky Note Behavior (Version: c47eced4)

Mobile Optimization:

- Reduced z-index from 50 to 40 to prevent blocking modals
- Sticky note starts collapsed on mobile (< 768px) to avoid covering content
- Smaller dimensions on mobile (240x300 vs 280x400)
- Positioned lower on mobile (y: 120px vs 60px) to avoid header overlap
- Auto-adjusts size and position on window resize
- All 8 mobile behavior tests passing

Checkpoint 135: Mobile Sticky Note Toggle (Version: 99007f80)

Major Fix:

- Fixed sticky note causing horizontal scroll on mobile
- Sticky note now hidden by default on mobile (< 768px)
- Added floating purple pushpin button (bottom-right) on mobile to show sticky note
- Added close button (X) on sticky note for mobile users
- Desktop behavior unchanged - sticky note always visible
- Sticky note uses fixed positioning and overlays content without affecting page width

- All 10 mobile behavior tests passing

- No more horizontal scroll on mobile

Checkpoint 136: Mobile Viewport Fix (Version: 1c9e5cac)

Major Fix:

- Fixed mobile viewport issues causing stretched layout

- Added overflow-x: hidden and max-width: 100vw to html and body

- Made header responsive with flex-col on mobile, flex-row on desktop

- Reduced logo size on mobile (h-16 vs h-24)

- Navigation buttons show icons only on mobile, full text on desktop

- Moved sticky note toggle button to bottom-6 for better visibility

- Server restarted to apply CSS changes

- Mobile layout should now fit properly without stretching

Checkpoint 137: Calendar Mobile Layout (Version: 8a9b2065)

Mobile Optimization:

- Calendar page now responsive with smaller padding on mobile (p-2 vs p-6)

- Sidebar collapses by default on mobile (< 768px)

- Header buttons show icons only on mobile with responsive layout

- Removed fixed min-width from week view that was causing horizontal overflow

- Calendar card has overflow-hidden to prevent content extending beyond bounds

- Back to Home button visible and accessible on mobile

- All text and elements scale appropriately for mobile screens

- Calendar page fully navigable on mobile without horizontal scroll

---

Checkpoint 138: Home Page Mobile Width (Version: e306fdb5)

Mobile Optimization:

- Added responsive padding to main container (px-2 md:px-4) and header (px-2 md:px-4)

- Made grid explicitly single column on mobile (grid-cols-1)

- Reduced gap spacing on mobile (gap-4 md:gap-6)

- Made folder select dropdown full width on mobile (w-full md:w-[180px])

- Adjusted padding for mobile (py-4 md:py-8)

- Home page now fits properly within mobile viewport without horizontal scrolling

---

Checkpoint 139: Contact Label Mobile Layout (Version: e173fb51)

Mobile Optimization:

- Fixed contact label badges to span full width on mobile devices

- Changed label container from flex-wrap to flex-col on mobile (md:flex-row on desktop)

- Changed label badges from inline-block to block on mobile (md:inline-block on desktop)

- Labels now stack vertically on mobile for better readability

- Horizontal inline layout maintained on desktop

Checkpoint 140: Contact Label Full Width (Version: 4a311831)

Mobile Optimization:

- Fixed contact label badges to truly span full width on mobile

- Added w-full class to label badges on mobile (md:w-auto on desktop)

- Labels stretch across entire contact card width

- Full-width blocks on mobile for maximum readability

- Inline layout on desktop

Checkpoint 141: Label Text Wrapping Fix (Version: 52f32537)

Bug Fix:

- Fixed label text wrapping issue
- Added whitespace-nowrap, overflow-hidden, text-ellipsis to label badges
- Labels display on single line without wrapping
- Long labels like "PT Randy Harms" show on one line with ellipsis if needed
- Prevents multi-line text wrapping

Checkpoint 142: Sticky Note Default Hidden (Version: dbe8ca54)

UI Change:

- Changed sticky note behavior to be hidden by default on all devices
- Floating pushpin button appears on both desktop and mobile
- Users can toggle sticky note visibility
- Gives users more screen space and cleaner interface by default
- Easy access via floating button when needed

Checkpoint 143: Pushpin Button Desktop Fix (Version: 3f85deb8)

Bug Fix:

- Fixed pushpin button not appearing on desktop
- Removed md:hidden class from floating toggle button
- Now shows on all devices when sticky note is hidden
- Made close button (X) visible on desktop for consistency
- Users can toggle sticky note visibility on both desktop and mobile
- Purple pushpin button in bottom-right corner

Checkpoint 144: Label Display & Mobile Text Fix (Version: ae812c4c)

Bug Fixes:

1. Mobile Label Truncation

- Fixed labels showing full text instead of truncated
- Labels now show "R. Harms", "Abundant" instead of "PT…", "*Appl…"

2. Route Waypoint Labels

- Fixed labels not displaying on route waypoints
- Properly extracts label names from contactGroups/ format
- No longer filters them out

3. Mobile Text Overflow

- Fixed mobile text overflow on route detail page
- Made header and action buttons responsive with proper wrapping

4. TypeScript Compilation

- Fixed TypeScript errors related to isGapStop type checking

Checkpoint 145: Label & Stop Type Color Fix (Version: ee326744)

Bug Fixes:

1. Contact Label Display

- Extract full label names from contactGroups/ format on contact cards
- Extract full label names on route waypoints
- Fixed mobile label text wrapping to show full names

2. Stop Type Colors

- Fix stop type colors to use user's custom settings
- No more hardcoded defaults

3. Label Backfill

- Added label backfill migration button in Settings
- Backfill labels for existing routes

4. Mobile Text Overflow

- Fixed mobile text overflow on route detail page

Checkpoint 146: Default Color & Label Filter (Version: 87f0e879)

Bug Fixes:

1. Default Stop Type Color

- Updated default stop type color to black (#050505)
- New routes use correct color

2. Label Filtering

- Filtered out Google's internal hex ID labels (12+ character hex strings)
- Only show human-readable labels in contact display and label dropdown

---

Checkpoint 147: Label Display & Sticky Note Colors (Version: c2cb97c8)

Bug Fixes & Updates:

1. Mobile Contact Card Labels

- Fixed text wrapping with CSS (whiteSpace: nowrap, wordBreak: keep-all, hyphens: none)
- Removed min-w-0 constraint causing wrapping

2. Route Waypoint Labels

- Fixed labels not displaying by adding hex ID filtering

3. Sticky Note Colors

- Updated background to bright yellow (#ecec56)

- Replaced pushpin with purple pushpin image
- Updated floating toggle button to match yellow theme with purple pushpin

Note: Labels work best without spaces or hyphens (use / or . instead)

Checkpoint 148: Label Color Map Markers (Version: b7590700)

Major Feature:

- Implemented label color map markers with dual-color design
- Map markers show label color in center with stop type color as border
- Works when contact has exactly one label with assigned color
- Falls back to stop type color only for:
    - Contacts with multiple labels
    - No labels
    - No colored labels
- All 5 tests passing

Checkpoint 149: Label Colors Settings Fix (Version: ca800efd)

Bug Fix:

- Fixed label colors settings to filter out system-generated Google Contacts group identifiers
- Removed contactGroups/* from settings UI
- Only user-friendly label names appear in settings

Checkpoint 150: Label Color Legend (Version: f5d1927a)

Feature Added:

- Added label color legend to route detail page
- Displays below stop type legend

- Shows which label groups are represented on route
- Only shows contacts with exactly one colored label
- Includes explanatory text about dual-color markers

Checkpoint 151: Archive Filter (Version: 98497a29)

Feature Update:

- Updated route library to exclude archived routes from main display
- Archived routes only appear in Archive section
- Keeps main library clean and focused on active routes

Checkpoint 152: Archive Confirmation & Delete (Version: b4af89d7)

Features Added:

- Archive confirmation dialog to prevent accidental archiving
- Delete button with confirmation in Archive section
- Permanent route removal capability
- Archive date display and restore functionality already implemented

---

Checkpoint 153: Route Library Height (Version: f414daab)

UI Improvement:

- Removed height restriction from "Your Hop Library" section
- Expands to match height of "Plan Your Next Hop" section
- More space to view routes without scrolling constraints

Checkpoint 154: Notes Textarea Height (Version: d97cfec7)

UI Improvement:

- Increased Notes textarea height from 3 to 5 rows

- Better visual balance with Your Hop Library section

- More space for route notes in Plan Your Next Hop section

Checkpoint 155: Multiple Contacts & Coordinates Validation (Version: fc778479)

Two New Features:

1. Multiple Contacts Per Route Setting

- Added allowMultipleVisits field to users table

- Toggle in Settings > Routes tab

- When disabled (default): prevents duplicate contacts in routes

- When enabled: allows same contact multiple times (useful for multiple service types, delivery + pickup, etc.)

- Updated route creation logic to respect setting

2. Missing Coordinates Validation

- Validation during route creation to detect waypoints with null lat/lng

- Warning toast when creating routes with missing coordinates

- Prominent warning banner in route detail page

- Lists which stops are missing coordinates

- Helps identify and fix geocoding issues before sharing routes

Checkpoint 156: Route Copy & Export Removal (Version: 35736283)

UI Improvements:

1. Copy Icon on Route Cards

- Added copy icon button to each route card in library

- Appears on hover with archive and delete buttons

- Directly copies route and navigates to new copy

- More convenient than going into route detail page

2. Removed "Copy Route" Button

- Removed from route detail page top action bar
- Streamlines action bar
- Copy functionality now available from route cards

3. Removed "Export" Button

- Removed from route detail page
- Simplifies interface
- Can be re-added later if needed

Checkpoint 157: Address Update & Google Sync (Version: 419094db)

Major Features:

1. Address Geocoding Fix

- When updating waypoint address, automatically geocodes to get GPS coordinates
- Saves latitude/longitude to database
- Waypoint appears on map after address update
- Fixes missing coordinates issue

2. Two-Way Google Contacts Sync

- When "Update contact address permanently" selected, address syncs back to Google Contacts
- Updates both local contact card AND Google Contacts in one action
- Gracefully handles sync errors (logs warning but doesn't fail update)
- Keeps all devices and apps in sync

3. Coordinate Persistence

- Contact cards store coordinates when addresses updated
- Future routes using contact have correct coordinates immediately

Result:

- Fixes missing coordinates warning issue
- Ensures address changes propagate everywhere

Checkpoint 158: Edit Address Button & Dialog (Version: 027d49b8)

Major Features:

1. Edit Address Button

- Added "Edit Address" button to each waypoint card
- Appears next to "Edit Details" for easy access
- Opens address edit dialog with Google Places autocomplete

2. Address Update Dialog

- Two radio button options:
    - "Temporary (route only)" - Updates only this route's waypoint
    - "Update contact address permanently" - Saves to contact card AND syncs to Google Contacts
- Automatically geocodes address to get GPS coordinates
- Validates address with Google Maps before saving

3. Two-Way Google Contacts Sync

- When "permanent" selected, changes sync back to Google Contacts
- Keeps all devices and apps using Google Contacts in sync
- Gracefully handles sync errors without failing update

Result:

- Fixed missing "Update contact address permanently" option
- Ensures address changes propagate everywhere

Checkpoint 159: Consolidated Address Editing (Version: 40d03018) - CURRENT

Major Consolidation:

- Consolidated address editing functionality into Edit Details dialog

- Removed separate "Edit Address" button from waypoint cards

- Added address update scope radio buttons to Edit Details dialog:
    - "Temporary (route only)" - Updates only waypoint

    - "Update contact address permanently" - Updates waypoint, contact card, AND syncs to Google Contacts

- Updated backend to handle address geocoding and Google Contacts sync when updateContact flag is true

- Unified interface for editing all waypoint details including address changes

Benefits:

- Single dialog for all waypoint editing

- No more switching between Edit Details and Edit Address

- Cleaner UI with fewer buttons

- Consistent editing experience

Technical Architecture

Frontend Stack

- **Framework:** Next.js 14 with App Router

- **Language:** TypeScript

- **Styling:** Tailwind CSS 4

- **UI Components:** shadcn/ui (Radix UI primitives)

- **State Management:** tRPC React Query hooks

- **Routing:** wouter (lightweight client-side routing)

- **Maps:** Google Maps JavaScript API with React integration

- **Forms:** React Hook Form with Zod validation

Backend Stack

- **API Layer:** tRPC 11 (end-to-end type safety)

- **Runtime:** Node.js with Express 4

- **Database:** MySQL (TiDB) with Drizzle ORM

- **Authentication:** Google OAuth 2.0 with JWT sessions

- **File Storage:** AWS S3 for document uploads

- **Serialization:** SuperJSON for Date/Map/Set support

External APIs

- **Google People API:** Contact sync (read/write)

- **Google Calendar API:** Calendar event management

- **Google Maps Routes API:** Route optimization

- **Google Maps Geocoding API:** Address validation

- **Google Maps Places API:** Address autocomplete

Database Schema (Simplified)

Core Tables:

- `users` - User accounts with OAuth tokens and preferences

- `cached_contacts` - Synced Google Contacts with addresses, phones, photos

- `routes` - Created routes with metadata

- `route_waypoints` - Individual stops in routes with status tracking

- `folders` - Route organization

- `stop_types` - Custom stop type definitions per user

- `starting_points` - Saved starting locations

- `route_notes` - Timestamped notes on routes

- `contact_documents` - Documents attached to contacts
- `scheduler_notes` - Sticky note reminders
- `reschedule_history` - Historical record of rescheduled stops

Key Features

Contact Management

- Sync contacts from Google with OAuth
- Display contact photos or initials
- Multiple phone numbers with labels
- Contact labels/groups from Google
- Mark contacts as active/inactive
- Edit contact details with Google sync
- Important dates tracking (birthdays, renewals, etc.)
- Custom comment options
- Document uploads per contact
- Bulk document upload by label
- Address validation with Google Maps
- Changed addresses report for manual Google sync

Route Planning

- Select contacts from synced list
- Custom starting points (saved or custom)
- Route optimization with Google Maps
- Manual waypoint ordering option
- Custom stop types with colors
- Gap stops for breaks/meetings
- Route notes and metadata

- Folder organization
- Schedule routes with date picker
- Multiple visits to same contact (optional)

Route Execution

- Real-time status tracking (pending/complete/missed)
- Completion timestamps
- Missed stop reasons
- Reschedule missed stops
- Execution notes per stop
- Drag-and-drop reordering (or number input)
- Progress indicators
- Bulk actions (complete all, miss all)
- Automatic route completion detection

Map Visualization

- Interactive Google Maps display
- Numbered markers matching waypoint list
- Custom stop type colors on markers
- Dual-color markers (label + stop type)
- Route polyline with directions
- Sticky map on desktop
- Routie Roo mascot for starting point
- Gap stops excluded from map

Sharing & Collaboration

- Generate shareable route links
- Public route execution page
- Drivers can mark stops complete/missed

- Drivers can add notes and reschedule

- Phone call/text buttons for drivers

- No login required for drivers

- Updates sync back to creator

Calendar Integration

- Google Calendar OAuth

- Add routes to calendar with individual stop events

- Automatic calendar sync when routes edited

- View all calendars in unified view

- Calendar sidebar with visibility toggles

- Edit Google Calendar events

- Remove routes from calendar

- Rescheduled stops appear on calendar

- Gap stop duration included in timing

Settings & Preferences

- Calling service preference (Phone, Google Voice, WhatsApp, Skype, FaceTime)

- Distance unit (kilometers vs miles)

- Default starting point

- Saved starting points management

- Auto-archive settings (7/30/60/90 days)

- Custom stop types with colors

- Custom comment options for contacts

- Important date types

- Email reminders for important dates

- Default stop type for route creation

- Allow multiple visits to same contact

- Default stop duration for calendar events

- Calendar event duration mode (stop only vs include drive time)

Admin Features

- User management dashboard
- Merge duplicate accounts
- Transfer data between users
- Delete users
- View all routes across users
- Missed stops dashboard
- Reschedule history tracking
- Archive management
- Changed addresses report
- Reminder history log

Mobile Optimization

- Fully responsive design
- Bottom tab navigation
- Slide-out menu
- Pull-to-refresh
- Swipe gestures on contact cards
- Touch-friendly buttons (44px minimum)
- Mobile-optimized forms (16px font to prevent iOS zoom)
- Sticky note toggle button
- Mobile actions dropdown menu
- Responsive calendar views

Branding & UX

- Routie Roo kangaroo mascot
- Playful, encouraging copy

- Themed page headers ("Hop to it!", "Kangaroo Crew")

- Professional balance for business users

- Empty states with personality

- Toast notifications with character

Current Status

Production Ready Features

✅ Contact sync with Google
✅ Route planning and optimization
✅ Map visualization
✅ Route execution tracking
✅ Sharing with drivers
✅ Calendar integration
✅ Mobile responsive design
✅ Multi-user SaaS platform
✅ Admin dashboard
✅ Two-way Google Contacts sync
✅ Custom stop types and colors
✅ Gap stops for breaks
✅ Important dates and reminders
✅ Document management
✅ Scheduler sticky notes

Known Limitations

- Google OAuth app unverified (shows warning screen)

- Limited to 100 test users until verified

- Email reminders require manual cron job setup

- Export to GPX/KML not yet implemented

Next Steps

1. Get Google OAuth app verified for production
2. Implement automated email reminder system
3. Add GPX/KML export for GPS devices
4. Implement bulk address validation tool
5. Add address history tracking
6. Implement address confidence scoring

Deployment

Current Deployment

- **Platform:** Manus Cloud (Azure-based)
- **URL:** https://routieroo.manus.space
- **Environment:** Production
- **Database:** TiDB (MySQL-compatible)
- **File Storage:** S3-compatible storage

Railway Deployment (Alternative)

- Google OAuth implementation ready
- Environment variables documented
- Git repository prepared
- Deployment guide available in SETUP_INSTRUCTIONS.md

Documentation Files

- `README.md` - Project overview and quick start
- `SETUP_INSTRUCTIONS.md` - Git and Railway deployment guide

- `USER_GUIDE.md` - End-user documentation
- `MOBILE_OPTIMIZATION.md` - Mobile optimization phases and guidelines
- `COMPLETE_TODO_LIST.md` - Full task list with completed items
- `PROJECT_HISTORY.md` - This file (complete checkpoint history)

End of Project History Document

Last Updated: December 1, 2024
Current Version: 40d03018
Total Checkpoints: 159