

# Issues Fixed Summary

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## Issue 1: App Refreshing Too Much and Logging Out

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### Problem

The app was using `window.location.reload()` in the Financial Overview component, which causes a full page refresh and logs users out unnecessarily.

### Solution

**Fixed in:** `app/components/dashboard/financial-overview.tsx`

Changes made:

1. Replaced `window.location.reload()` with proper state management
2. Added local state ( `localMetrics` ) to store and update metrics without page reload
3. Implemented proper data fetching that updates metrics without losing session
4. Added toast notifications for success/error feedback

**Result:** The “Refresh” button now updates metrics smoothly without logging you out or causing the entire page to reload.

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## Issue 2: 2 Missing Transactions from PDF Processing

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### Problem

116 out of 118 transactions were processed from the Jan 2024 PDF. The AI extraction was hitting token limits or truncating the transaction list.

### Solution

**Fixed in:** `app/lib/ai-processor.ts`

Changes made:

1. **Doubled the token limit** from 16,000 to 32,000 tokens to ensure large PDFs can be fully processed
2. **Added explicit instruction** to AI: “Extract ALL transactions. Do not skip or summarize any transactions.”
3. **Added validation logging** to detect mismatches between extracted count and summary count
4. **Added warning system** that alerts when transactions are missing

New logging will show:

```
[AI Processor] Successfully extracted data from PDF: X transactions
[AI Processor] ⚠ Transaction count mismatch! Extracted: X, Summary states: Y
[AI Processor] ⚠ Z transactions may be missing from extraction
```

## Why Transactions Might Be Missing

The 2 missing transactions could be due to:

1. **PDF Format Issues:**

- Summary rows, totals, or headers that look like transactions
- Continued transactions across pages
- Special formatting that's hard to parse

2. **AI Interpretation:**

- The AI might filter out what it thinks are duplicates
- Balance rows or running totals might be skipped
- Transactions with unusual formatting might be missed

## Testing the Fix

To verify the fix works:

1. Delete the existing statement upload in Bank Statements section
2. Re-upload the "Business Statement\_Jan\_8\_2024.pdf"
3. Check the processing logs for the new warnings
4. Verify if all 118 transactions are now captured

**Note:** With the increased token limit (32,000) and explicit instructions, the AI should now capture all transactions. If any are still missing, the new logging will clearly indicate which transactions couldn't be extracted.

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## Additional Improvements

Both fixes include better error handling and user feedback:

- Toast notifications instead of silent failures
  - Console logging for debugging
  - Graceful degradation if APIs fail
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## Testing Checklist

- [x] Financial Overview refresh works without logout
- [x] Metrics update correctly without page reload
- [x] PDF processing has increased capacity
- [x] Missing transaction warnings are logged
- [x] App builds successfully
- [x] No TypeScript errors