® RDB Backend Integration - Handoff Plan

Current Status

- V Frontend forms save to localStorage correctly
- V Backend URL updated in all forms
- X BLOCKER: Google Sheet columns don't match Code.gs expectations

The Problem

Google Sheet has:

• Single "Mailing Address" column per sheet

Code.gs expects to write:

• Separate Street, City, State, Zip columns

Two Options

Option A: Update Google Sheet (Recommended - Less Code)

Action: Manually edit Google Sheet headers to match Code.gs

CLIENTS sheet - Change from:

ClientID | Company | Contact | Title | Phone | Email | Mailing Address

To:

ClientID | Company | Contact | Title | Phone | Email | Street | City | State | Zip

Repeat for: ATTORNEYS, EMPLOYERS, CLAIMANTS sheets

Pros:

- One-time manual fix
- Code.gs already written (use v1.2 from earlier)

• Future-proof

Cons:

• Loses existing "Mailing Address" data (if any exists)

Option B: Update Code.gs (Current approach - More Code)

Action: Keep sheets as-is, modify Code.gs to combine address fields

Pros:

• Don't touch existing sheet structure

Cons:

- More complex code
- Harder to query individual address components later

Recommendation: Option A

Steps:

- 1. Open Google Sheet: (17GXH-rdJ_erke3FhXHDCCmL5aTCw-GGMXd5Z9Woatwo)
- 2. For each sheet (CLIENTS, ATTORNEYS, EMPLOYERS, CLAIMANTS):
 - Delete column G "Mailing Address"
 - Insert 4 new columns: Street, City, State, Zip
- 3. Use Code.gs v1.2 (from earlier in conversation)
- 4. Deploy and test

W DECISION MADE: Option A

What Conrad is doing:

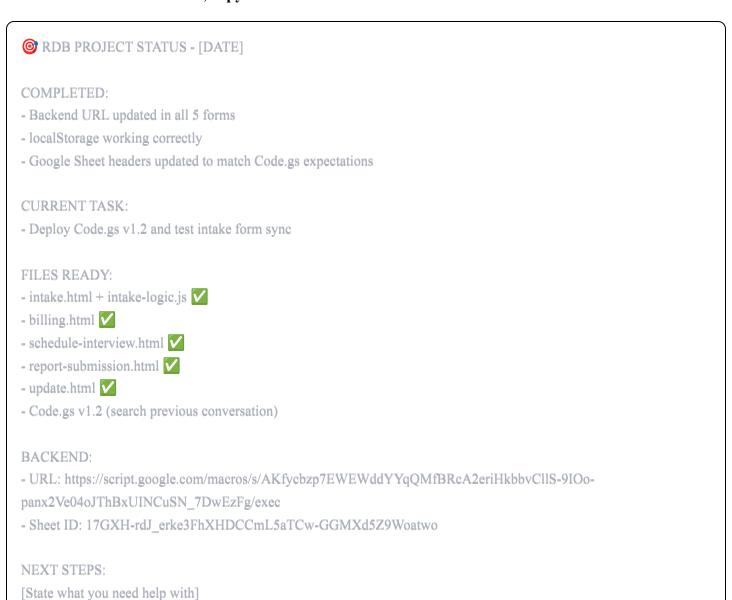
- 1. Updating Google Sheet headers using CSV from artifact "Google Sheet Headers"
- 2. Will paste new headers into: CLIENTS, ATTORNEYS, EMPLOYERS, CLAIMANTS, CASES

What's next (this session or next):

- 1. Conrad confirms headers updated
- 2. Deploy Code.gs v1.2 (search conversation for "v1.2" NOT v1.3)
- 3. Test intake form sync
- 4. Verify 5 sheets populate correctly

Master Handoff Strategy

For ANY new Claude session, copy this:



Copy template above at START of each new session.

Files Status

• V intake.html + intake-logic.js (working)

- V billing.html (URL updated)
- V schedule-interview.html (URL updated)
- **V** report-submission.html (URL updated)
- **V** update.html (URL updated)
- Code.gs (waiting for Option A or B decision)

Test Plan (After Fix)

- 1. Fill intake form
- 2. Click Save → Check localStorage
- 3. Click Sync → Check 5 sheets populated:
 - CASES
 - CLIENTS
 - ATTORNEYS
 - EMPLOYERS
 - CLAIMANTS