RAC Xero MCP Integration - Critical Junction Handover

Current Status: Integration Phase

We are at a critical junction where we need to merge two working components:

1. Working Connection Manager (Missing from Current File)

- **Purpose**: Handles OAuth flow for connecting to 7 RAC Xero organizations
- **Features**:
  - Multi-company selection interface
  - Step-by-step OAuth authentication
  - Progress tracking through company connections
  - 30-minute session management
- **Status**: Worked perfectly in previous version, but code was lost during file replacement

2. Working Split Screen Dashboard (Current File)

- **Purpose**: Main dashboard interface with AI chat integration
- **Features**:
  - 50/50 split layout (AI Chat | Financial Dashboard)
  - Company filter checkboxes (RAC, ENT, MIN, PPM, NGA, MIL, MAR)
  - Real-time company selection for analysis
  - Resizable panels
  - Professional KPI dashboard layout
- **Status**: Interface complete but contains placeholder data

The Problem We Hit

User accidentally replaced entire index.html with split screen version, losing the working Connection Manager code. The current file has the new interface but no way to connect to Xero organizations.

What We Need to Do Next

Step 1: Code Recovery & Integration

- User has "few days ago" version with working Connection Manager
- Need to merge Connection Manager HTML/CSS/JS into current split screen file

- Preserve all OAuth functionality while adding split screen dashboard

Step 2: Integration Architecture

User Flow:
1. Connection Manager appears first (OAuth + company selection)
2. After successful connections → Hide Connection Manager
3. Show Split Screen Dashboard with real company data
4. Company filter checkboxes reflect actual connected companies

Step 3: Transition Logic

Modify `showMainDashboard()` function to:

- Hide: `#loginManager`
- Show: `#splitScreenDashboard`
- Load real connection data into company checkboxes
- Initialize dashboard with actual Xero data

Files Involved

- **Current File**: `index.html` (split screen version - working UI, no connections)
- **Recovery File**: Earlier version with Connection Manager (user needs to provide)
- **Target**: Integrated version combining both

Technical Architecture

- **Backend**: Railway deployment with 23+ MCP tools working
- **OAuth Constraint**: 30-minute sessions per company group
- **API Endpoints**: All functional for trial balance, cash position, P&L, etc.
- **Connection Strategy**: Connect to all 7 companies, filter display via checkboxes

Key Integration Points

1. **Connection Status**: Real data from `/api/connection-status` endpoint
2. **Company Mapping**: Map connection names to filter checkbox IDs
3. **Data Loading**: Dashboard cards populate from actual Xero data based on selected companies
4. **Session Management**: Maintain 30-minute OAuth windows while allowing display filtering

Critical Success Factors

- Preserve working OAuth flow (don't break what works)

- Connect company filter checkboxes to real connection states

- Remove all placeholder data and use live Xero data

- Maintain clean transition between Connection Manager → Split Screen Dashboard

Next Immediate Actions

1. User provides earlier index.html with Connection Manager code

2. Merge Connection Manager into current split screen layout

3. Update transition logic between interfaces

4. Connect real data to company filter checkboxes

5. Test complete OAuth → Dashboard flow

This is a code integration task, not a design task. Both components work individually - we need to combine them into one cohesive system.