URGENT: Proposal Generator Bug Fix Checklist

THE PROBLEM IN ONE SENTENCE

Form data and spreadsheet data are NOT flowing through to the generated proposal — everything shows $0, NaN%, $N/A, and generic placeholder text.

PROOF THE DATA EXISTS

I uploaded these spreadsheets for Cowtown Corner:

Metric	Actual Value	What PDF Shows
Monthly Volume	**$34,738.26**	$0
Transactions	**309**	0
Current Fees	**$810.83**	$0
DP Monthly Cost	**$64.95**	missing
DP Monthly Savings	**$745.88**	missing
IC Monthly Cost	**$653.65**	missing
IC Monthly Savings	**$157.18**	missing

I filled out the form with:

- Business: Cowtown Corner
- Owner: Robert Smith
- Website: https://www.bobsmufflerservice.com/
- Agent: [my info]

What PDF shows: "PCBancard Representative" and no contact details.

FIX THESE 6 THINGS

1. FORM DATA NOT PASSING THROUGH

Test: Add `console.log(formData)` on submit and `console.log(req.body)` on server. **Expected:** All filled fields should appear. **Likely bug:** Form state not being included in API request body.

2. PDF PARSING BROKEN

Test: Add `console.log('Extracted:', extractedData)` after parsing. **Expected:** Real numbers from spreadsheet. **Likely bug:** Either (a) using Excel parser on PDF files, or (b) regex patterns don't match the actual PDF text structure.

The PDFs have this structure:

```
VS Interchange    Volume    Rate    Cost
Discount Rate     $21,838.52    0.80%    $174.71
```

Parse accordingly.

3. WEBSITE SCRAPING NOT RUNNING

Test: Add `console.log('Scraping:', websiteUrl)` before scrape function. **Expected:** Should log the URL and attempt to find logo. **Likely bug:** Either (a) function never called, or (b) no fallback selectors for logo.

4. SIDE-BY-SIDE COMPARISON MISSING

Test: Check if `dual_pricing` and `interchange_plus` objects exist before rendering. **Expected:** Both should have `monthly_cost` , `monthly_savings` , `annual_savings` . **Likely bug:** Only parsing one spreadsheet, or not combining results.

5. NaN AND $N/A ERRORS

Test: Search codebase for division operations without null checks. **Fix:** Wrap all divisions in safe function:

```
const safePercent = (a, b) => (b && b !== 0) ? ((a/b)*100).toFixed(2) + '%' : '—'
```

6. TABLE TEXT TRUNCATED

Test: Check column width definitions. **Fix:** Increase "Description" column width or enable text wrapping.

QUICK VALIDATION SCRIPT

Add this before generating the proposal:

```
function validateBeforeGeneration(data) {
  const errors = [];

  // Check form data
  if (!data.agent_first_name) errors.push('Missing agent first name');
  if (!data.agent_email) errors.push('Missing agent email');

  // Check spreadsheet data
  if (!data.current_monthly_volume || data.current_monthly_volume === 0) {
    errors.push('Spreadsheet parsing failed: volume is $0');
  }
  if (!data.current_monthly_fees || data.current_monthly_fees === 0) {
    errors.push('Spreadsheet parsing failed: fees is $0');
  }

  // Check both options exist
  if (!data.dual_pricing?.monthly_cost) errors.push('Dual pricing data missing');
  if (!data.interchange_plus?.monthly_cost) errors.push('IC+ data missing');

  if (errors.length > 0) {
    console.error('VALIDATION FAILED:', errors);
    throw new Error('Cannot generate proposal: ' + errors.join(', '));
  }

  console.log('✓ Validation passed, generating proposal...');
}
```

ACCEPTANCE CRITERIA

The fix is complete when this test passes:

Input: Cowtown Corner spreadsheets + filled form **Output PDF must show:**

- Agent name (not “PCBancard Representative”)
- Agent phone and email

- Business owner name (Robert Smith)
- Monthly volume: $34,738.26
- Current fees: $810.83
- Dual Pricing row with $64.95 cost, $745.88 savings
- Interchange+ row with $653.65 cost, $157.18 savings
- No “NaN%”, no “$N/A”, no “$0” (unless truly zero)
- Equipment section shows actual volume, not “$N/A”
- Logo from website (if found) or cleanly omitted

START HERE

1. Add console.log statements at each pipeline stage
2. Run a test generation
3. Check console output to find where data disappears
4. Fix that specific stage
5. Repeat until all data flows through