Support Marketing Agent - Project TODO

Phase 1: Database Schema & Foundation

- [x] Design and implement comprehensive database schema
- [x] Create organizations/workspaces table
- [x] Create contacts/customers table with segmentation support
- [x] Create email campaigns table
- [x] Create automation workflows table
- [x] Create helpdesk tickets table
- [x] Create order tracking table
- [x] Create integrations table (Shopify/WooCommerce)
- [x] Create subscription plans table
- [x] Create analytics/metrics tables

Phase 2: Admin Dashboard & Navigation

- [x] Build dashboard layout with sidebar navigation
- [x] Create main dashboard overview page
- [x] Implement role-based UI structure
- [x] Add navigation menu with all modules

Phase 3: Email Marketing Module

- [x] Create campaigns list page
- [x] Build campaign creation/editing interface
- [x] Create email template gallery
- [x] Build automation workflows page
- [x] Create workflow builder UI
- [x] Add demo campaigns and templates

Phase 4: Helpdesk System

- [x] Create tickets inbox interface
- [x] Build ticket detail view
- [x] Create ticket creation form
- [x] Add demo tickets and conversations
- [x] Build canned responses library

Phase 5: Order Tracking & Analytics

- [x] Create orders dashboard
- [x] Build order detail view
- [x] Create analytics overview dashboard

- [x] Add performance metrics charts
- [x] Implement demo order data

Phase 6: Integration & Settings

- [x] Create integrations management page
- [x] Build Shopify integration setup UI
- [x] Build WooCommerce integration setup UI
- [x] Create settings pages
- [x] Add subscription plans display

Phase 7: E-commerce Integrations (COMPLETED)

- [x] Shopify OAuth 2.0 flow with HMAC verification
- [x] WooCommerce REST API client
- [x] Data sync engine with mapping logic
- [x] Webhook handlers with signature verification
- [x] Duplicate detection and upsert logic
- [x] Sync status tracking and history
- [x] tRPC API endpoints for integrations

Phase 8: Email Sending (COMPLETED)

- [x] SendGrid integration
- [x] Template rendering engine (Handlebars)
- [x] Open and click tracking
- [x] Queue system with BullMQ
- [x] Webhook handler for delivery events
- [ ] End-to-end testing with SendGrid API key

Phase 9: Workflow Automation (COMPLETED)

- [x] Workflow execution engine
- [x] Trigger system (welcome, abandoned_cart, order_confirmation, shipping)
- [x] Condition evaluator
- [x] Enrollment tracking
- [x] Delay scheduler with BullMQ
- [x] Visual workflow builder with React Flow
- [x] Workflow validation system
- [ ] End-to-end testing

Phase 10: AI-Powered Helpdesk (100% COMPLETE) ✅

Phase 1: AI Classification (COMPLETED) ✅

- [x] Groq API service integration

- [x] Ticket classifier service (category, priority, sentiment)
- [x] Database schema updates (aiCategory, aiPriority, aiSentiment fields)
- [x] AI interactions tracking table
- [x] tRPC endpoints for classification
- [x] E-commerce classification prompts
- [x] Sentiment analysis prompts

Phase 2: Response Generation (COMPLETED) ✅

- [x] Response generator service
- [x] Customer context builder (VIP status, order history, ticket history)
- [x] Order-aware response templates
- [x] Tone options (professional/friendly/empathetic)
- [x] Quick action suggestions
- [x] Confidence scoring
- [x] tRPC endpoints for responses

Phase 3: Knowledge Base & RAG (COMPLETED) ✅

- [x] Vector store service (TF-IDF similarity search)
- [x] Knowledge base CRUD operations
- [x] RAG service for knowledge-grounded responses
- [x] Semantic search with relevance scoring
- [x] Knowledge source tracking in responses
- [x] Index refresh and management endpoints

Phase 4: UI Integration (COMPLETED) ✅

- [x] useAI React hooks (useAIClassification, useAIResponse)
- [x] AI Assist button in ticket detail view
- [x] AIClassificationBadge component
- [x] AISuggestedResponse component with edit capability
- [x] AIQuickActions component
- [x] AIConfidenceIndicator component
- [x] Loading states and error handling

Phase 5: Feedback & Analytics (COMPLETED) ✅

- [x] Feedback service for response ratings (positive/negative)
- [x] Analytics service with performance metrics
- [x] AI Analytics Dashboard component
- [x] Response accuracy tracking
- [x] Usage metrics by category/tone
- [x] Database migration for aiFeedback table

Phase 11: WordPress Plugin (100% COMPLETE) ✅

Phase 1: Foundation (COMPLETED) ✅

- [x] Plugin boilerplate with WordPress standards

- [x] REST API client for platform communication
- [x] API key authentication with HMAC signatures
- [x] Admin settings page
- [x] Uninstall cleanup

Phase 2: Helpdesk Widget (COMPLETED) ✅

- [x] Chat widget with customizable styling
- [x] Ticket submission form shortcode
- [x] Ticket status checking shortcode
- [x] Webhook handlers for ticket updates
- [x] Admin notifications

Phase 3: WooCommerce Integration (COMPLETED) ✅

- [x] Auto-detect WooCommerce activation
- [x] Order sync on create/update/status change
- [x] Customer sync with billing/shipping addresses
- [x] Guest customer handling
- [x] Bulk sync for existing orders/customers
- [x] AJAX order lookup

Phase 4: Email Marketing (COMPLETED) ✅

- [x] Email signup form shortcode
- [x] Popup/slide-in forms with triggers
- [x] Time, scroll, exit-intent triggers
- [x] REST endpoints for subscribe/unsubscribe
- [x] Cookie-based display control

Phase 5: AI Features (COMPLETED) ✅

- [x] Knowledge base shortcode
- [x] FAQ accordion component
- [x] AI-powered search suggestions
- [x] Semantic article search
- [x] Category filtering

Phase 6: Polish & UX (COMPLETED) ✅

- [x] Onboarding wizard (5-step setup)
- [x] Admin dashboard widget
- [x] Gutenberg blocks
- [x] WordPress.org submission-ready readme.txt

Remaining High Priority Tasks

Subscription & Billing (Week 1-2)

- [ ] Stripe SDK integration
- [ ] Tiered pricing (Free, Starter, Growth, Pro, Enterprise)

- [ ] Checkout session and customer portal
- [ ] Usage tracking (contacts, emails, workflows)
- [ ] Billing page UI

Advanced Analytics (Week 2-3)

- [ ] Revenue attribution
- [ ] Customer lifetime value calculation
- [ ] Cohort analysis
- [ ] Custom report builder

Demo Data Seeder (Week 1)

- [ ] Expand sample contacts (100+)
- [ ] Add sample workflows (5-10 active)
- [ ] Generate sample tickets with conversations
- [ ] Create sample orders with various statuses

Documentation

- [x] README.md
- [x] ARCHITECTURE.md
- [x] IMPLEMENTATION_STATUS.md
- [x] INTEGRATIONS.md
- [x] EMAIL_SENDING.md
- [x] WORKFLOWS.md
- [x] DEPLOYMENT.md
- [x] ENV_VARIABLES.md
- [x] AI_HELPDESK_IMPLEMENTATION_PLAN.md
- [x] WORDPRESS_PLUGIN.md
- [ ] API_REFERENCE.md

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