

Feature #3: AI Tour Scheduling Assistant - Implementation Complete

Overview

Feature #3 implements a complete AI-powered tour scheduling system for CareLinkAI, enabling families to request tours and operators to manage them efficiently.

Implementation Status: 100% COMPLETE

Backend (100% Complete)

-  Database schema with TourRequest and TourSlot models
-  AI scheduling service (ai-tour-scheduler.ts)
-  Notification service (tour-notifications.ts)
-  Permissions and RBAC updated
-  All 8 API endpoints created and working

Frontend (100% Complete)

-  Tour request modal component with multi-step wizard
 -  Family tours page
 -  Operator tours dashboard
 -  Operator tour detail page
 -  Schedule Tour buttons integrated
 -  Navigation links added to sidebars
 -  All components tested and verified
-

Architecture

Database Models

TourRequest Model

```
model TourRequest {}  
  id          String      @id @default(cuid())  
  familyId    String  
  homeId      String  
  operatorId   String  
  requestedTimes Json       // Array of DateTime objects  
  aiSuggestedTimes Json?     // Array of DateTime objects with reasoning  
  confirmedTime DateTime?  
  status        TourStatus  @default(PENDING)  
  outcome       TourOutcome?  
  familyNotes   String?    @db.Text  
  operatorNotes String?    @db.Text  
  cancelledAt   DateTime?  
  cancelledBy   String?  
  cancellationReason String? @db.Text  
  createdAt     DateTime   @default(now())  
  updatedAt     DateTime   @updatedAt  
}
```

TourStatus Enum

- PENDING - Tour requested, awaiting operator confirmation
- CONFIRMED - Tour confirmed by operator
- COMPLETED - Tour has taken place
- CANCELLED - Tour cancelled by family or operator
- RESCHEDULED - Tour rescheduled to different time
- NO_SHOW - Family didn't show up for confirmed tour

API Endpoints

Family Endpoints

1. Request a Tour

```
POST /api/family/tours/request
```

Request Body:

```
{  
  "homeId": "string",  
  "requestedTimes": ["IS08601 datetime"],  
  "familyNotes": "string (optional)"  
}
```

2. Get Available Time Slots

```
GET /api/family/tours/available-slots/[homeId]?startDate=ISO8601&endDate=ISO8601
```

Response:

```
{
  "success": true,
  "suggestions": [
    {
      "time": "ISO8601 datetime",
      "reason": "string"
    }
  ]
}
```

3. List Family Tours

```
GET /api/family/tours?status=PENDING|CONFIRMED|etc
```

Operator Endpoints

1. List Operator Tours

```
GET /api/operator/tours?status=PENDING&homeId=string
```

2. Confirm Tour

```
POST /api/operator/tours/[id]/confirm
```

Request Body:

```
{
  "confirmedTime": "ISO8601 datetime",
  "operatorNotes": "string (optional)"
}
```

3. Reschedule Tour

```
POST /api/operator/tours/[id]/reschedule
```

Request Body:

```
{
  "newTime": "ISO8601 datetime",
  "operatorNotes": "string (optional)"
}
```

4. Cancel Tour

```
POST /api/operator/tours/[id]/cancel
```

Request Body:

```
{
  "cancellationReason": "string"
}
```

Shared Endpoints

Get Tour Details

```
GET /api/tours/[id]
```

Returns full tour details with permission-based data filtering.

Frontend Components

UI Components (src/components/tours/)

1. TourStatusBadge.tsx

Colored badge component displaying tour status with appropriate icons.

Statuses:

- PENDING (yellow)
- CONFIRMED (green)
- COMPLETED (blue)
- CANCELLED (red)
- RESCHEDULED (purple)
- NO_SHOW (gray)

2. TimeSlotSelector.tsx

Interactive time slot selector with date/time formatting.

Features:

- Visual selection states
- Disabled state for unavailable slots
- Reason display for each slot
- Support for multiple selections

3. TourCard.tsx

Reusable tour display card with role-based views.

Features:

- Displays tour information
- Status badge
- Action buttons (View Details, Cancel)
- Role-based data (family vs operator view)

4. TourRequestModal.tsx

Multi-step wizard for requesting tours.

Steps:

1. Date Range Selection
 - Next 30 days default
 - Start and end date pickers

1. Time Slot Selection
 - AI-suggested optimal times
 - Visual slot selector
 - Availability indicators

2. Notes and Confirmation
 - Optional notes field
 - Tour summary review
 - Submit button

Features:

- Form validation
 - Loading states
 - Error handling
 - Success confirmation
 - API integration
-

Page Components

Family Side

/dashboard/tours (page.tsx)

Tour management page for families.

Features:

- List of all tours (upcoming & past)
- Filter tabs (All, Upcoming, Past)
- Tour cards with quick actions
- Cancel tour functionality
- Empty states
- Loading and error states

Tour Actions:

- View Details
- Cancel Tour

Tour Request Flow:

1. Family views home on search results page
2. Clicks “Schedule Tour” button
3. TourRequestModal opens with multi-step wizard
4. Family selects date range and preferred time
5. Adds optional notes

6. Submits request
7. Redirects to Tours page to view status

Operator Side

/operator/tours (page.tsx)

Tour request management dashboard for operators.

Features:

- Stats cards (Pending, Confirmed, Completed)
- Search by family name or home name
- Filter by status dropdown
- Tour cards with family information
- Quick actions (View & Respond, Decline)
- Empty states

/operator/tours/[id] (page.tsx)

Detailed tour request view and management.

Features:

- Family contact information (name, email, phone)
- Home details
- Requested times list
- AI-suggested times with reasoning
- Confirmed time display
- Family notes
- Operator notes (editable)
- Action buttons based on status

Actions:

- Confirm Tour (with time selection)
- Reschedule Tour (change confirmed time)
- Cancel/Decline Tour (with reason)

Navigation Integration

Sidebar Links Added

Family Users:

- “My Tours” → /dashboard/tours
- Icon: FiCalendar
- Shown in mobile bar: Yes

Operator Users:

- “Tour Requests” → /operator/tours
- Icon: FiCalendar
- Shown in mobile bar: No

Integration Points

Search Results Page

- Added “Schedule Tour” button to each match result

- Opens TourRequestModal on click
- Pre-fills home ID and name

File Modified: src/app/dashboard/find-care/results/[id]/page.tsx

Permissions & RBAC

New Permissions Added

```
// Tour Scheduling Permissions
TOURS_REQUEST: 'tours:request',           // Family can request tours
TOURS_VIEW: 'tours:view',                  // View tours
TOURS_VIEW_ALL: 'tours:view_all',          // View all tours (operator/admin)
TOURS_CONFIRM: 'tours:confirm',             // Confirm tour requests
TOURS_RESCHEDULE: 'tours:reschedule',      // Reschedule tours
TOURS_CANCEL: 'tours:cancel',               // Cancel tours
TOURS_MANAGE_SLOTS: 'tours:manage_slots', // Manage available tour slots
```

Role Mappings

ADMIN:

- All tour permissions

OPERATOR:

- TOURS_VIEW_ALL
- TOURS_CONFIRM
- TOURS_RESCHEDULE
- TOURS_CANCEL
- TOURS_MANAGE_SLOTS

FAMILY:

- TOURS_REQUEST
- TOURS_VIEW
- TOURS_CANCEL (own tours)
- TOURS_RESCHEDULE (own tours)

AI Scheduling Service

Location: src/lib/tour-scheduler/ai-tour-scheduler.ts

Function: suggestOptimalTimes(homeId, options)

Features:

- Analyzes existing tour schedule
- Considers home capacity and operating hours
- Spreads tours throughout the day
- Returns 3-5 suggested time slots
- Provides reasoning for each suggestion

Algorithm:

1. Fetch home details and existing tours

2. Define operating hours (9 AM - 5 PM)
 3. Calculate optimal time intervals
 4. Filter out conflicting times
 5. Return top suggestions with reasoning
-

Notification Service

Location: `src/lib/notifications/tour-notifications.ts`

Function: `sendTourConfirmationEmail(data)`

Sends emails to:

- Family (tour requester)
- Operator (tour manager)

Email Content:

- Home name and address
 - Confirmed tour date/time
 - Family and operator contact info
 - Notes from both parties
-

Testing Checklist

Family User Flow

- [x] Request a tour from search results
- [x] View AI-suggested time slots
- [x] Add notes to tour request
- [x] View all tours on Tours page
- [x] Filter tours (All, Upcoming, Past)
- [x] Cancel a pending tour
- [x] View tour details

Operator User Flow

- [x] View tour requests dashboard
- [x] See pending tours count
- [x] Search tours by family/home name
- [x] Filter tours by status
- [x] View tour request details
- [x] Confirm a tour with time selection
- [x] Reschedule a confirmed tour
- [x] Cancel/decline a tour with reason

RBAC Testing

- [x] Family cannot access operator tour pages
- [x] Operator cannot see other operators' tours
- [x] Admin can view all tours

- [x] Permissions enforced on all API endpoints

Mobile Responsiveness

- [x] Tour request modal works on mobile
 - [x] Tours page responsive layout
 - [x] Operator dashboard responsive
 - [x] Navigation links accessible on mobile
-

Build Verification

 **Build Status:** SUCCESS

Pages Created:

- /dashboard/tours - 4.28 kB
- /operator/tours - 2.97 kB
- /operator/tours/[id] - 4.95 kB

API Routes:

- /api/tours/[id]
 - /api/family/tours
 - /api/family/tours/request
 - /api/family/tours/available-slots/[homeId]
 - /api/operator/tours
 - /api/operator/tours/[id]/confirm
 - /api/operator/tours/[id]/reschedule
 - /api/operator/tours/[id]/cancel
-

Demo Accounts

Family User

Email: demo.family@carelinkai.test

Password: DemoUser123!

Access: Can request tours, view own tours, cancel tours

Operator User

Email: demo.operator@carelinkai.test

Password: DemoUser123!

Access: Can view all tours, confirm/reschedule/cancel tours

Usage Guide

For Families

Requesting a Tour:

1. Navigate to “Find Care” or “AI Match”

2. Browse matching homes
3. Click “Schedule Tour” on any home card
4. Follow the 3-step wizard:
 - Select date range (next 30 days)
 - Choose preferred time from AI suggestions
 - Add any notes or questions
5. Submit request
6. View status on “My Tours” page

Managing Tours:

1. Go to “My Tours” from sidebar
2. View upcoming and past tours
3. Click “View Details” to see tour information
4. Cancel tours if needed (up to 24 hours before)

For Operators

Managing Tour Requests:

1. Navigate to “Tour Requests” from sidebar
2. See dashboard with pending tours count
3. Use search to find specific requests
4. Filter by status (Pending, Confirmed, etc.)
5. Click “View & Respond” on any tour

Confirming Tours:

1. Open tour request detail page
2. Review family information and notes
3. See requested times and AI suggestions
4. Click “Confirm Tour”
5. Select preferred time slot
6. Add operator notes if needed
7. Submit confirmation

Rescheduling Tours:

1. Open confirmed tour detail page
2. Click “Reschedule Tour”
3. Select new date and time
4. Add reason/notes
5. Submit update
6. Family receives notification

Known Limitations

1. **Virtual Tours:** Not yet implemented (planned for future)
2. **Tour Reminders:** Email reminders 24 hours before tour (to be implemented)
3. **Calendar Integration:** Export to Google Calendar (future enhancement)
4. **Video Tours:** In-app video tours (future feature)

5. Tour History: Detailed tour outcome tracking (partial implementation)

Future Enhancements

Short Term

- [] Email reminder system (24h before tour)
- [] SMS notifications integration
- [] Tour outcome recording (showed up, converted, etc.)
- [] Tour feedback collection

Medium Term

- [] Calendar integration (Google, Outlook)
- [] Automated tour rescheduling suggestions
- [] Virtual tour booking
- [] Tour availability blocks for operators

Long Term

- [] Video tour integration
- [] AI tour guide chatbot
- [] Tour analytics and reporting
- [] Multi-home tour coordination

Files Created/Modified

New Files Created (Frontend)

```

src/components/tours/
  └── TourStatusBadge.tsx
  └── TimeSlotSelector.tsx
  └── TourCard.tsx
  └── TourRequestModal.tsx

src/app/dashboard/tours/
  └── page.tsx

src/app/operator/tours/
  └── page.tsx
  └── [id]/
    └── page.tsx

```

New Files Created (Backend)

```

src/lib/tour-scheduler/
└── ai-tour-scheduler.ts

src/lib/notifications/
└── tour-notifications.ts

src/app/api/family/tours/
├── request/route.ts
├── route.ts
└── available-slots/[homeId]/route.ts

src/app/api/operator/tours/
├── route.ts
└── [id]/
    ├── confirm/route.ts
    ├── reschedule/route.ts
    └── cancel/route.ts

src/app/api/tours/[id]/
└── route.ts

```

Modified Files

```

src/components/layout/DashboardLayout.tsx (added navigation links)
src/app/dashboard/find-care/results/[id]/page.tsx (added Schedule Tour button)
src/lib/permissions.ts (added tour permissions)
prisma/schema.prisma (added TourRequest and TourSlot models)

```

Deployment Notes

Environment Variables

No new environment variables required.

Database Migration

```
npx prisma migrate deploy
```

Build Command

```
npm run build
```

Verification Steps

1. Check that all tour API endpoints are accessible
2. Verify tour request modal opens correctly
3. Test tour creation flow end-to-end
4. Confirm operator can manage tours
5. Validate email notifications are sent

Support & Troubleshooting

Common Issues

Issue: Tour modal doesn't open

Solution: Check that home ID is passed correctly, verify user is authenticated

Issue: AI suggestions not showing

Solution: Verify date range is within next 30 days, check API response

Issue: Tour confirmation fails

Solution: Check operator permissions, verify tour status is PENDING

Issue: Navigation link not showing

Solution: Verify user role has correct permissions, check roleRestriction array

Debug Mode

Enable debug logging:

```
// In tour components, check console for:  
console.log('Tour request data:', data);  
console.log('Available slots:', slots);
```

Credits

Feature Implemented By: CareLinkAI Development Team

Implementation Date: December 2024

Documentation Version: 1.0

Last Updated: December 16, 2024

Conclusion

Feature #3: AI Tour Scheduling Assistant is **100% complete** and **production-ready**. All backend APIs, frontend components, and integrations are implemented and tested. The feature provides a seamless experience for families to request tours and operators to manage them efficiently.

Status:  READY FOR DEPLOYMENT