

# CareLinkAI - Phase 1 MVP Status Matrix (Family ↔ Operator Flow)

**Last Updated:** December 8, 2025 (Post feature/operator-refresh)

## Family → Operator Interaction Flow

Area	Role	Capability	Status	Notes / Gaps
Browse listings	Family	See list of homes	DONE	Search UI backed by <code>/api/search</code> with DB fallback to mocks in dev.
Listing filters	Family	Filter by location/price	DONE	Supports care level, price, gender, availability, sort, pagination; natural language parsing.
View home details	Family	Detail page with clear CTA	DONE	Wired to real data via GET <code>/api/homes/[id]</code> ; loading/error states, photos, map, amenities, and inquiry CTAs implemented.
Inquiry/tour form	Family	Submit form with required fields	DONE	Home detail form submits to POST <code>/api/inquiries</code> with validation and success/error states.
Successful lead creation	Family	Submission creates backend Inquiry record	DONE	Inquiries are created via POST <code>/api/inquiries</code> and appear in Operator Inquiries list immediately.
AI matching intake	Family	Intake → recommended homes list	DONE	<code>/homes/match</code> posts to <code>/api/ai/match/resident</code> ; semantic + structured scoring.

## **Operator Capabilities (Enhanced in feature/operator-refresh)**

---

Area	Role	Capability	Status	Notes / Implementation
Leads list	Operator	See list of incoming home inquiries	DONE	<code>/operator/inquiries</code> with server-side pagination and filtering (status, home, date range).
Lead filtering	Operator	Filter inquiries by status/home/date	DONE	Server-side filtering via query params; date range picker; home dropdown selector.
Lead sorting	Operator	Sort inquiries by date, status	DONE	Server-side sorting with optimized queries.
Lead pagination	Operator	Navigate large inquiry lists efficiently	DONE	Server-side pagination with configurable page size.
Lead status updates	Operator	Change & persist lead status	DONE	Status workflow: NEW → IN_REVIEW → CONTACTED → CLOSED/CANCELLED. PATCH <code>/api/operator/inquiries/[id]</code> .
Lead details/notes	Operator	View full inquiry + add internal notes	DONE	Detail page at <code>/operator/inquiries/[id]</code> ; notes via PATCH <code>/api/operator/inquiries/[id]/notes</code> .
View family profile	Operator	View family contact info from inquiry	DONE	Clickable family name links to family profile; shows contact






Area	Role	Capability	Status	Notes / Implementation
				details and inquiry history.
<b>Operator → Family messaging</b>	<b>Operator</b>	<b>Message families directly from inquiry</b>	<b>DONE</b>	<b>“Message Family” button on inquiry detail deep-links to conversation. Contextual messaging integration.</b>
Create home listings	Operator	Add new assisted living homes	DONE	/operator/homes/new with full form: name, address, capacity, amenities, pricing, photos, care levels.
Edit listings	Operator	Update home details & reflect changes for families	DONE	Enhanced edit UI at /operator/homes/[id]/edit with all fields; changes reflect in search immediately.
Manage home photos	Operator	Upload, delete, reorder, set primary photo	DONE	PhotoGallery-Manager component integrated into create/edit pages. Drag-and-drop re-ordering.
View home details	Operator	See comprehensive home management view	DONE	/operator/homes/[id] with overview, photos, quick actions, and edit links.
	Operator		DONE	/operator/residents/new (cre-

Area	Role	Capability	Status	Notes / Implementation
Manage residents		Create, view, assign residents to homes		ation), /operator/residents/[id] (detail), list with filters.
Operator profile management	Operator	Edit company info, licenses, contact details	DONE	/settings/operator page with GET/PATCH /api/operator/profile . Edit company-Name, taxId, businessLicense.
Dashboard overview	Operator	See KPIs, activity feed, alerts, quick actions	DONE	Enhanced /operator dashboard with homes count, inquiries, residents, occupancy, recent activity, alerts.
Navigation & UX	Operator	Consistent navigation with breadcrumbs	DONE	Universal breadcrumb component; consistent styling; mobile-optimized responsive design.
Empty & loading states	Operator	Professional UX for empty/loading scenarios	DONE	EmptyState component and skeleton loaders applied to key pages.
Form validation	Operator	Real-time inline validation with clear errors	DONE	Zod schemas with immediate feedback; matches Aide/Provider quality bar.










# Complete Family ↔ Operator Flow Summary

---









## Family Journey

1.  Family browses homes via search with filters (location, price, care level, gender, availability)
2.  Family views home detail page with photos, amenities, pricing, and clear CTAs
3.  Family submits inquiry/tour request form with contact details and message
4.  Family can use AI matching for personalized home recommendations
5.  **NEW:** Family receives messages from operators (contextual communication)







## Operator Journey

1.  Operator creates/edits home listings with photos, amenities, pricing, care levels
2.  Operator views incoming inquiries with server-side filtering, sorting, and pagination
3.  Operator reviews inquiry detail with family contact info and message
4.  Operator updates inquiry status through workflow (NEW → IN\_REVIEW → CONTACTED → CLOSED)
5.  Operator adds internal notes to track inquiry progress
6.  **NEW:** Operator messages family directly from inquiry detail page
7.  Operator manages residents (create, view, assign to homes)
8.  Operator updates company profile and licenses
9.  Operator monitors dashboard with KPIs, activity feed, and alerts

## Key Enhancements in feature/operator-refresh

-  **Complete CRUD:** Home and resident creation/viewing now fully implemented
-  **Messaging Integration:** Direct “Message Family” button from inquiry detail
-  **Enhanced Filtering:** Server-side filtering by status, home, and date range
-  **Photo Management:** Full gallery with upload, delete, reorder, set primary
-  **Profile Management:** Operators can edit company info and licenses
-  **Professional UX:** Empty states, loading states, breadcrumbs, mobile optimization
-  **Real-time Validation:** Inline form errors with Zod schemas
-  **Responsive Design:** Mobile-optimized tables and forms

## Production Readiness

-  All core Family ↔ Operator workflows functional
-  RBAC properly enforced across all endpoints
-  No critical bugs or missing pages
-  Professional UX matching Aide/Provider quality bar
-  Mobile-responsive across all pages
-  Ready for operator onboarding and family engagement

---

Legend:

- TODO = not validated / not implemented
- WIP = partially working or needs polish
- DONE = works and meets the Phase 1 definition of done