

HopeLine Assistant – Ultimate Fix & Add Checklist (v2)

This PDF provides the complete, ultra-actionable checklist in the correct order of importance to finish the HopeLine Assistant into a fully polished, professional, sellable AI intake system.

PRIORITY 1 — CONVERSATIONS & CORE AI BEHAVIOR

- Remove all “...” placeholder text across the project.
- Replace English and Spanish system prompts with full versions.
- Rewrite quick-menu canned responses for clarity + professionalism.
- Ensure each reply ends with a “next step” question.
- Add fallback message when AI gives vague output.

PRIORITY 2 — APPOINTMENT + PRE-INTAKE SYSTEM

- Implement full PreIntakeFlow component.
- Store pre-intake data (forWho, sobrietyStatus, financialSupport, timeline, notes).
- Attach pre-intake data to appointment object in backend.
- Expand appointments schema: appointmentType, contactPreference, email, phone, summary, requestedDate.
- Improve confirmation message for users.

PRIORITY 3 — NOTIFICATIONS (EMAIL + SMS)

- Implement real email notifications via Resend or Nodemailer.
- Send staff full appointment details + summary + pre-intake.
- Add SMS client confirmation (Twilio) when ready.
- Add staff SMS notifications on new appointments.

PRIORITY 4 — AI CONVERSATION SUMMARIES

- Generate summary on appointment creation (last ~20 messages).
- Save to appointment.summary.
- Include in staff email + admin panel.
- Fail gracefully if API call fails.

PRIORITY 5 — ANALYTICS & LOGGING

- Log user messages (currently only assistant is logged).
- Add keyword-based category classifier.
- Add additional analytics counters (sessions, appointments, conversion rate, crisis count).
- Add category breakdown + peak hours.

PRIORITY 6 — ADMIN DASHBOARD POLISH

- Add search bar (name, phone, email).
- Add filters (New, Contacted, Scheduled, Completed, Cancelled).

- Make phone/email clickable (tel:, mailto:).
 - Expand appointment detail panel (summary, notes, pre-intake).
 - Add “Mark Completed” button.
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PRIORITY 7 — CRISIS HANDLING

- Add visible crisis banner: “Not for emergencies. Call/text 988.”
 - Add keyword intercept (suicide, kill myself, hurt myself, want to die).
 - Override AI response for crisis messages with safe template.
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PRIORITY 8 — MULTI-TENANT PREPARATION

- Add clientId to appointments, settings, logs, analytics.
 - Add client-specific routes.
 - Add super-admin interface for adding new businesses.
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PRIORITY 9 — CLEANUP & QUALITY OF LIFE

- Remove debug console.logs.
 - Add loading states to forms.
 - Add field validation (name/email required).
 - Add Reset Chat button.
 - Add theme controls (color, logo) for each business.
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END NOTE

Follow this checklist in order for maximum business impact.
This is the foundation for a fully sellable product.