Faith House – HopeLine Assistant

Upgrade & Feature Specification (For Replit)

Use this as the master checklist for everything the upgraded chatbot should handle.

SECTION 1 – CORE GOALS
- Turn HopeLine Assistant into a serious intake + pre-qualification system, not just a basic FAQ bot.
- Save staff time by summarizing chats and auto-notifying them with context.
- Increase conversions from website visitor → tour/phone-call booking.
- Make the whole system configurable so it can be reused for other sober living / recovery homes.

SECTION 2 – SYSTEM PROMPT & AI LOGIC UPGRADES
- Replace any placeholder system prompts (containing "...") with a full, explicit system prompt.
- Define the bot identity clearly: "HopeLine Assistant", virtual assistant for The Faith House (sober living / structured recovery home).
- Set a clear tone: warm, calm, non-judgmental, human, simple language.
- Define core responsibilities:
  - Answer questions about The Faith House (what it is, who it's for, rules, requirements, general pricing, application process).
  - Help users figure out their best next step (ask more questions, check if they might qualify, request a tour/call).
  - Encourage, but never pressure or make unrealistic promises.
- Define hard safety limits:
  - The bot is NOT a therapist, counselor, or doctor.
  - No diagnoses, no medication advice, no crisis counseling.
  - If user mentions self-harm, suicide, harming others, or any emergency:
    - Acknowledge how hard it sounds.
    - Clearly tell them the bot cannot handle emergencies.
    - Direct them to call 988 (US Suicide & Crisis Lifeline) or 911 in immediate danger.
    - Do NOT continue "talking them through it" – always escalate verbally to real humans.
- Make the system prompt pull in real business data from settings:
  - Business name, tagline.
  - Knowledge base fields: about, requirements, pricing, application process.
  - Operating hours + after-hours message.
- Add multi-language support to the system prompt:
  - English and Spanish versions with same rules and goals.
  - Use the language toggle already present in the UI to choose prompt language.

SECTION 3 – CONVERSATION FLOWS & UX IMPROVEMENTS
- Add a strong initial greeting message when the chat opens.
- Add 2–4 "Quick Action" buttons at the start of the conversation,

such as:
  - “See if I qualify”
  - “Learn about pricing & rules”
  - “Schedule a tour or call”
  - “Ask a general question”
- Ensure the “menu” or quick actions are visually obvious and clickable inside the chat window.
- Make the bot default behavior:
  - Answer question.
  - Offer a relevant next step (button) instead of leaving the user hanging.
- Add language toggle persistence:
  - Save the user’s chosen language in local storage.
  - Send the selected language with each request so backend picks correct system prompt.
- Make the widget fully branded via config/settings:
  - Primary color, accent color, optional logo, welcome text.
  - All styling pulled from a centralized clientSettings object (to support future clients).

SECTION 4 – PRE-INTAKE & QUALIFICATION FLOW
- Add a light “Pre-Intake Flow” separate from simple chat (similar to appointment flow component).
- Trigger the pre-intake when user clicks “See if I qualify” or when AI detects they might be a good candidate.
- Ask structured questions such as:
  - Are you looking for yourself or for a loved one?
  - Are you currently sober, or would you need detox first?
  - Do you have some income or support to help with program costs?
  - What’s your ideal timeline? (ASAP, within 30 days, just exploring)
- Save pre-intake answers tied to the user session and/or with the appointment.
- Make it easy for staff to see these answers in the admin panel.

SECTION 5 – APPOINTMENT / TOUR BOOKING IMPROVEMENTS
- Keep the existing appointment flow but refine it:
  - Clear steps: basic info → preferred time → confirmation.
  - Simple and mobile-friendly layout.
- Auto-fill name/email/phone from previous chat messages if they’ve already been provided.
- Support different types of appointments (e.g., “Tour”, “Phone call”, “Family info call”) via a dropdown.
- Allow configurable time slots or integrate with a scheduling tool (Calendly, Google Calendar) as a future upgrade.

SECTION 6 – NOTIFICATIONS & STAFF WORKFLOW
- Replace all fake/stub notification logic (console.log) with real notifications.
- Email notifications:
  - Send to configurable staff email(s) on new appointment or high-intent lead.
  - Include key data: name, contact info, preferred time, and a short summary of the conversation.
- Optional SMS notifications:

  - If enabled and a notification phone number is set, send SMS when new appointment is created.
- Conversation summary for staff:
  - When an appointment is created, fetch the last X messages from that session.
  - Use the AI to generate a short summary: who they are, what they're looking for, urgency, any important context.
  - Store this summary with the appointment record and include it in staff notifications.

SECTION 7 – ANALYTICS & REPORTING UPGRADES
- Use existing analytics table/logs but upgrade the dashboard:
  - Show number of sessions over a selected timeframe.
  - Show number of appointments created.
  - Calculate conversion rate: appointments / total sessions.
  - Show top question themes/categories (FAQ topics).
  - Show most active times of day / days of week.
- Use analytics to feed improvements:
  - Identify missing knowledge base items.
  - See if certain questions keep coming up.
  - Track if changes increase appointment conversions.

SECTION 8 – ADMIN PANEL & SETTINGS IMPROVEMENTS
- Ensure the admin panel supports full configuration of:
  - Business name, tagline.
  - Knowledge base text for about/requirements/pricing/application.
  - Operating hours configuration with after-hours message.
  - Notification settings: staff email(s), SMS phone number, enable/disable flags.
  - Branding: primary color, possibly logo URL.
- Make all these settings editable without code (forms in admin UI).
- Add a "Test notification" button for staff to verify email/SMS settings.
- Make language content (English/Spanish) easily editable in admin (if possible) or at least structured in config files.

SECTION 9 – SECURITY, PRIVACY & SAFETY
- Make sure no sensitive personal data is logged unnecessarily in analytics.
- Redact or minimize storage of highly sensitive text in long-term logs.
- Clarify in the UI that:
  - This is not an emergency service.
  - For emergencies, call 988 or 911.
- Ensure HTTPS is enforced in production.
- Confirm that environment variables (API keys, email credentials, etc.) are stored securely and not exposed to the client.

SECTION 10 – MULTI-TENANT / RESELLER PREP (TREASURE COAST AI)
- Design the settings layer so the same codebase can support multiple clients in the future.
- Abstract "Faith House" specific labels into configuration:
  - Business name, location, program type (sober living / recovery

home).
  - Custom knowledge base and copy.
  - Branding colors and logos.
- Prepare a “template config” that can be duplicated for other sober living homes or rehabs.
- Ensure onboarding a new client is mostly:
  - Create new config.
  - Update branding/knowledge base.
  - Deploy new widget/embed code.

SECTION 11 – NICE-TO-HAVE FUTURE UPGRADES
- Deeper scheduling integration (Calendly/Google Calendar API) for real-time slot booking.
- Follow-up drip messages via email/SMS for no-shows or people who started but didn’t finish booking.
- Tagging / light CRM features inside the admin (e.g., lead status, notes, outcome tracking).
- Export of leads/appointments as CSV for reporting or external CRM import.