Faith House – AI Intake Assistant Admin Dashboard

Full Specification for Replit to Implement a Top-Tier Admin Page

READ ME FIRST
This document is a complete specification for building a professional, “top-dollar firm” style admin dashboard for the Faith House sober living AI chatbot (HopeLine Assistant). Replit should use this spec to:
- Design the layout and visual structure of the admin dashboard
- Implement all necessary components and interactions
- Connect every UI element to real data and backend endpoints

The visual reference is the admin dashboard image in this project:
- /mnt/data/A_2D_digital_image_displays_an_admin_dashboard_for.png
Replit should align the layout and style with that design while using the existing tech stack (React + your current UI components).

SECTION 1 – HIGH-LEVEL GOALS

The admin dashboard must allow Faith House staff (and future clients) to:

1) See at a glance how the AI assistant is performing:
   - Total conversations
   - Total appointments
   - Conversion rate
   - Crisis-related interactions (if any)
   - Activity over time

2) Manage leads and appointments:
   - View and filter all inquiries/appointments
   - See AI-generated summaries and pre-intake info
   - Update statuses and notes
   - Quickly contact people (call/email)
   - Export data if needed

3) Feel like they’re using a polished, modern, professional system.

Replit should NOT change core backend logic or schema unless explicitly specified—only extend it where needed.

SECTION 2 – LAYOUT & NAVIGATION

2.1 Global layout
The admin dashboard should use a standard “app shell” layout:

- Left sidebar (vertical):
  - Logo / product name at top (e.g., “HopeLine Admin” or “Faith House Intake”)
  - Navigation items:
    - Dashboard (main analytics + overview)
    - Appointments
    - Conversations (optional; can be phase 2)
    - Settings
    - Logout

- Top header (horizontal, above main content):
  - Page title on left (e.g., “Dashboard” or “Appointments”)

  - Date range selector (e.g., Today / Last 7 days / Last 30 days)
  - Current user/role indicator on right (e.g., avatar or initials)

- Main content area:
  - Dashboard summary cards at top
  - Charts and lists in the middle
  - Detailed table (appointments) toward bottom

2.2 Routing
- "Dashboard" route: /admin/dashboard (or /admin default)
- "Appointments" route: /admin/appointments
- "Settings" route: /admin/settings
Replit should adapt this to the existing router (React Router or equivalent).

SECTION 3 – DASHBOARD MODULES (WHAT TO BUILD)

The main Dashboard page should include:

3.1 KPI Summary Cards (top row)
At the top of the dashboard, show a row of 3–4 "stat cards":

Card 1 – Total Conversations
- Label: "Total Conversations"
- Value: Count of unique chat sessions in the selected date range.

Card 2 – Total Appointments
- Label: "Total Appointments"
- Value: Count of appointments created in the selected date range.

Card 3 – Conversion Rate
- Label: "Conversion Rate"
- Value: (appointments / conversations) * 100, formatted with 1 decimal (e.g., 23.4%).

Card 4 – Crisis Redirects (optional, recommended)
- Label: "Crisis Redirects"
- Value: Count of conversations where category = crisis_redirect in the period.

Each card should:
- Be visually distinct (border, shadow, or subtle background)
- Use large font for the number
- Show a small sub-label ("Last 30 days", etc.)

3.2 Activity Over Time Chart
Below the cards, add a wide chart component:

- X-axis: Time (days for last 30 days, or hours for last 24 hours)
- Y-axis: Number of conversations
- Optional: overlay appointments as a second series

Data source:
- Aggregated conversation logs by createdAt
- Aggregated appointments by createdAt

The chart doesn't need to be complex: a simple line chart or bar chart is enough.

3.3 Top Topics / Categories Panel
Next to or below the chart, add a small card showing a list of categories and counts, for example:

- Pricing questions – 23
- Requirements – 18
- Availability – 15
- Application process – 9
- Crisis redirects – 2

Data source:
- conversation logs grouped by category

3.4 Recent Activity / Recent Leads Panel
Add a panel titled “Recent Leads” or “Recent Activity” that lists the last 5–10 appointments, showing:

- Name
- Appointment type (Phone call / Tour / Family call)
- Created date/time
- Status badge (New / Contacted / Scheduled / Completed / Cancelled)

Each list item should be clickable to open the full appointment detail view (see Section 5.3).

SECTION 4 – APPOINTMENTS PAGE (LIST VIEW)

The dedicated Appointments page should provide a richer, filterable table of all appointments.

4.1 Filters & Search (top of page)
- Date range selector
- Status filter:
  - All, New, Contacted, Scheduled, Completed, Cancelled
- Search bar:
  - Search by name, phone, or email

4.2 Appointments table
Columns (minimum):

- Name
- Appointment type (e.g., “Phone call”, “Tour”)
- Contact info (phone or email)
- Preferred time
- Status (badge with color)
- Created date
- Actions (e.g., View, Edit)

Behaviors:
- Clicking a row or View button opens the Appointment Detail panel (Section 5.3).
- Status badge should be editable (dropdown or inline buttons).
- Contact info should be clickable:
  - “tel:” link for phone
  - “mailto:” link for email

4.3 Pagination
- Support simple pagination (e.g., 10–25 items per page).
- Provide “Next” / “Previous” buttons or page numbers.

SECTION 5 – APPOINTMENT DETAIL VIEW

When a staff member clicks an appointment, show a slide-over panel or modal on the right side with full details.

5.1 Basic info
- Name
- Phone (click-to-call)
- Email (click-to-email)
- Appointment type
- Preferred time
- Status (editable)
- Created at

5.2 AI Summary
Display the AI-generated summary field, if implemented, in its own section:

- Label: “Conversation Summary”
- Content: the text summary generated from chat logs

5.3 Pre-Intake info
If pre-intake data exists, show it as:

- For who: Myself / Loved one
- Sobriety: Currently sober / Need detox first / Not sure
- Financial support: Yes / Not sure
- Timeline: ASAP / 30 days / Just exploring
- Notes: free text

5.4 Internal notes
- A free-text field for staff-only notes.
- Editable in this view; saved back to the database.

5.5 Actions
- Buttons for changing status (New → Contacted → Scheduled → Completed).
- Delete appointment (with confirmation).
- Optional: “Mark as high priority” toggle or star.

SECTION 6 – DATA & API REQUIREMENTS

Replit should rely on existing structures where possible and only extend them minimally.

6.1 Appointments data model
Appointments should include at minimum:

- id (string or number)
- clientId (for multi-tenant support, if used)
- name (string)
- phone (string)
- email (string)
- appointmentType (string enum: “phone_call”, “tour”, “family_call”)
- contactPreference (string enum: “phone”, “text”, “email”)
- preferredTime (string or datetime)
- status (string enum: “new”, “contacted”, “scheduled”, “completed”, “cancelled”)
- notes (string, optional)
- summary (string, optional – AI-generated)
- preIntakeData (JSON or structured fields)
- createdAt (datetime)
- updatedAt (datetime, optional)

6.2 Analytics data sources

The analytics backend should use:

- conversationLogs table (or equivalent) with:
  - sessionId
  - createdAt
  - category (pricing, availability, requirements, application_process, pre_intake, crisis_redirect, contact_info, other)

- appointments table (see above)

6.3 Required endpoints
These endpoints should exist or be created:

- GET /api/analytics/summary
  Returns:
  - totalSessions
  - totalAppointments
  - conversionRate
  - messagesByCategory[]
  - hourlyOrDailyActivity[]

- GET /api/appointments
  Supports query parameters:
  - status
  - date range
  - search term (name, phone, email)
  Returns paginated list.

- GET /api/appointments/:id
  Returns full appointment with summary + preIntakeData + notes.

- PATCH /api/appointments/:id
  Allows updating:
  - status
  - notes
  - appointmentType
  - preferredTime

- DELETE /api/appointments/:id
  Deletes an appointment (soft or hard delete based on existing conventions).

All admin routes must be protected by authentication.

SECTION 7 – FRONTEND IMPLEMENTATION DETAILS

7.1 Tech assumptions
Assume React with a component-based UI, possibly TailwindCSS and React Query (or similar). Replit should:

- Keep using existing tech stack and style system.
- Extract reusable components (StatCard, DataTable, DetailPanel) where helpful.

7.2 Component structure suggestion

Dashboard page:
- <DashboardPage>
  - <Header />
  - <StatsRow />
  - <ActivityAndTopicsRow />
  - <RecentLeads />

Appointments page:
- <AppointmentsPage>
  - <Header />
  - <FilterBar />
  - <AppointmentsTable />
  - <AppointmentDetailDrawer />

7.3 State & data fetching
- Use a centralized data fetching mechanism (React Query or similar):
  - useQuery(["analytics"], fetchAnalytics)
  - useQuery(["appointments", filters], fetchAppointments)
- Use mutations for:
  - Updating appointment status
  - Saving notes
  - Deleting appointments

7.4 Styling notes
- Use a clean, modern color palette:
  - Light background
  - White or slightly tinted cards
  - Accent color matching Faith House / Treasure Coast AI branding
- Status badges should be colored consistently:
  - new – blue
  - contacted – amber
  - scheduled – purple
  - completed – green
  - cancelled – gray

SECTION 8 – SAFETY & ACCESS

8.1 Authentication
- Ensure only authenticated admin users can access:
  - /admin/dashboard
  - /admin/appointments
  - /admin/settings
  - /api/appointments/*
  - /api/analytics/*

8.2 PHI / sensitivity
- Avoid displaying or logging more personal info than needed.
- Summary text must not store extremely sensitive details if they exist (follow existing project rules).

SECTION 9 – DONE CRITERIA

Replit should consider this admin dashboard “complete” when:

- Dashboard page shows:
  - Total conversations, total appointments, conversion rate, and (optional) crisis count.
  - A chart of activity over time.
  - A list of recent leads with status.

- Appointments page:
  - Shows a filterable, searchable table.
  - Allows status updates and notes editing.
  - Has a functional detail view with AI summary and pre-intake info.
  - Supports pagination.

- All routes are behind auth.
- No UI element is “dead”; every button or control does something meaningful.

This spec is the complete blueprint. Replit should follow it to refactor and upgrade the existing admin into the professional, “top-dollar firm” style dashboard described here.