Ask GroupFund - Complete Documentation

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Overview

Ask GroupFund is an intelligent AI-powered chatbot system that provides customer service support via SMS (Twilio) and web interface. The system uses RAG (Retrieval Augmented Generation) to answer questions based on a knowledge base of past customer interactions, documentation, and support materials.
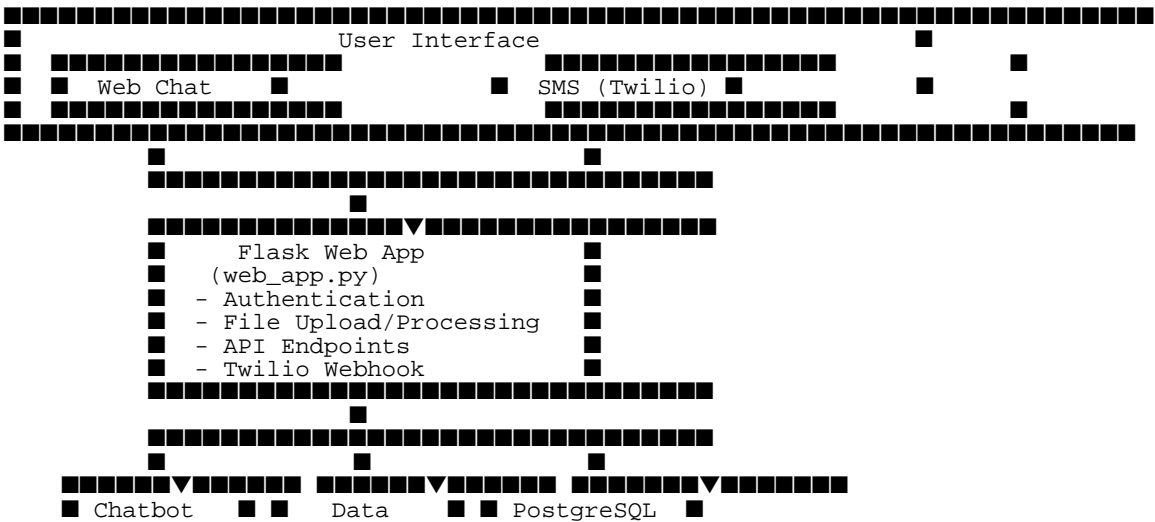
Key Features

- Multi-Channel Support: SMS via Twilio and web-based chat interface
- RAG-Powered Responses: Semantic search with LLM-generated answers
- Knowledge Base Management: Web GUI for uploading and processing training data
- Multiple File Formats: Supports .eml, .docx, .pdf, .csv, .txt, .json, .xml
- Role-Based Access Control: Admin, Internal, Sales Rep, and Customer roles
- Audience Labeling: Tag training data for specific audiences
- Conversation History: Maintains context across multiple messages
- Source Attribution: Shows which documents were used to generate responses
- GitLab Integration: Automated ingestion of commits, READMEs, and release notes
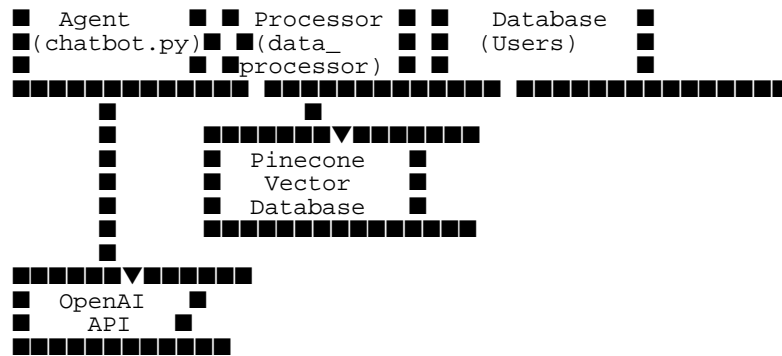- FAQ Analysis: Automatically extracts frequently asked questions

Technology Stack

- Backend: Python 3.9+, Flask
- Vector Database: Pinecone (serverless)
- LLM: OpenAI GPT-4
- SMS: Twilio
- Database: PostgreSQL (for user management)
- Deployment: Railway
- Frontend: HTML, CSS, JavaScript (Bootstrap)

Architecture

System Components

```
┌─────────────────────────────────────────────────────────────┐
│                      User Interface                         │
│  ┌─────────────────┐              ┌─────────────────┐        │
│  │    Web Chat     │              │  SMS (Twilio)   │        │
│  └─────────────────┘              └─────────────────┘        │
└─────────────────────────────────────────────────────────────┘
         ┌─────────────────────────────┐        │
                        ┌─────────────────────────▼─────────────────┐
                        │      Flask Web App                         │
                        │   (web_app.py)                             │
                        │   - Authentication                         │
                        │   - File Upload/Processing                 │
                        │   - API Endpoints                          │
                        │   - Twilio Webhook                         │
                        └────────────────────────────────────────────┘
                        ┌────────────────────────────────────────────┐
         ┌──────────▼────────┐  ┌──────────▼────────┐  ┌──────────▼────────┐
         ■ Chatbot  ■  ■   Data   ■  ■ PostgreSQL  ■
```

```
   Agent        Processor      Database
(chatbot.py)   (data_          (Users)
               processor)
                      ▼
                  Pinecone
                   Vector
                  Database

       ▼
    OpenAI
     API
```

Data Flow

• Training Data Ingestion:
• Files uploaded via web UI → data_processor.py
• Files parsed and chunked → Embedded using OpenAI
• Embeddings stored in Pinecone with metadata

• Query Processing:
• User question → chatbot.py
• Semantic search in Pinecone → Retrieve relevant context
• Context + question → OpenAI GPT-4 → Generate response
• Response + source attribution → User

• SMS Flow:
• SMS received → Twilio webhook → /sms endpoint
• Processed through chatbot → Response sent via Twilio

Key Files

• web_app.py: Main Flask application, API endpoints, authentication
• chatbot.py: RAG system, semantic search, response generation
• data_processor.py: File processing, chunking, embedding generation
• templates/index.html: Web UI template
• static/js/app.js: Frontend JavaScript
• static/css/style.css: Styles
• scripts/gitlab_connector.py: GitLab integration

Installation & Setup

Prerequisites

• Python 3.9 or higher
• Twilio account with phone number
• OpenAI API key
• Pinecone account and API key
• PostgreSQL database (for production)
• GitLab access token (optional, for GitLab integration)

Local Development Setup

• Clone the repository:
```
git clone https://github.com/evonow/twilio-chatbot.git
cd twilio-chatbot
```

• Create virtual environment:
```
python3 -m venv venv
source venv/bin/activate  # On Windows: venv\Scripts\activate
```

• Install dependencies:
```
pip install -r requirements.txt
```

• Create .env file:
```
cp .env.example .env
```

• Configure environment variables (see Configuration section)

• Initialize Pinecone index:
• Go to https://app.pinecone.io
• Create a new index:
• Name: customer-service-kb
• Dimensions: 1536 (OpenAI text-embedding-3-small)
• Metric: cosine
• Pod Type: serverless (recommended)

• Start the application:
```
python web_app.py
```

• Access the web interface:
• Open browser to http://localhost:5001
• Login with PIN 0000 (default admin)

Production Setup (Railway)

See Deployment section for detailed Railway deployment instructions.

User Guide

Login

- Navigate to the web interface
- Enter your 4-digit PIN
- The system will auto-login when 4 digits are entered
- Default admin PIN: 0000

User Roles

- Admin: Full access to all features, user management
- Internal: Access to all data (no restrictions)
- Sales Rep: Access to sales rep labeled data only
- Customer: Access to customer labeled data only

Uploading Training Data

- Navigate to "Upload Files" section (Admin only)
- Select files:
- Supported formats: .eml, .docx, .pdf, .csv, .txt, .json, .xml
- Drag and drop or click to browse
- Multiple files can be selected

- Select audience labels:
- Check one or more: Sales Reps, Customers, Internal Use
- Documents can be labeled for multiple audiences

- Click "Process Files":
- Files are uploaded and queued for processing
- Processing happens in the background
- Check "Processing Status" section for progress

- View processed files:
- Go to "Uploaded Files" section
- Filter by file type or audience
- See processing status for each file

Using the Chat Interface

- Navigate to "Ask GroupFund" section
- Enter your question in the text area
- Press Enter or click "Ask" button
- View response:
- Answer appears in the chat interface
- Source attribution shows which documents were used
- Conversation history is maintained

Managing Users (Admin Only)

- Navigate to "User Management" section
- Add new user:
- Enter PIN (4 digits)
- Enter name
- Select role
- Click "Save User"

- Delete user:
- Click "Delete" button next to user
- Confirm deletion

GitLab Integration (Admin Only)

- Navigate to "GitLab Integration" section
- Enter GitLab details:
- Repository URL (e.g., https://gitlab.com/username/repo)
- Access token (with read_api scope)
- Select content types: Commits, READMEs, Release Notes

- Click "Ingest Repository"
- Monitor progress in Processing Status section

Knowledge Base Statistics

View comprehensive statistics in the header:

- Total document count

- Top document types
- Audience breakdown
- Customer service interactions
- Release notes features
- GitLab documents

API Documentation

Authentication

Most endpoints require authentication via session cookie. Admin endpoints require Admin role.

Web Application Endpoints

GET /

- Description: Main web interface
- Authentication: Required
- Response: HTML page

GET /login

- Description: Login page
- Authentication: Not required
- Response: HTML login page

POST /login

- Description: Authenticate user
- Authentication: Not required
- Body: {"pin": "1234"}
- Response: Redirect to main page or error

POST /logout

- Description: Logout user
- Authentication: Required
- Response: Redirect to login page

GET /api/auth/status

• Description: Get current user authentication status
• Authentication: Required
• Response:
```
{
    "authenticated": true,
    "user_name": "John Doe",
    "user_role": "Admin"
}
```

POST /api/upload

• Description: Upload files for processing
• Authentication: Required (Admin)
• Body: Multipart form data with files
• Response:
```
{
    "success": true,
    "files": ["file1.eml", "file2.pdf"],
    "message": "Files uploaded successfully"
}
```

POST /api/process

• Description: Process uploaded files
• Authentication: Required (Admin)
• Body:
```
{
    "files": ["file1.eml"],
    "audience": "sales_reps,customers"
}
```

• Response:
```
{
    "success": true,
    "message": "Processing started"
}
```

POST /api/process-all

• Description: Process all uploaded files
• Authentication: Required (Admin)
• Body:
```
{
    "audience": "sales_reps,customers"
}
```

• Response:

```
{
  "success": true,
  "message": "Processing all files"
}
```

POST /api/query

• Description: Query the chatbot
• Authentication: Required
• Body:
```
{
  "query": "How do I reset my password?",
  "audience": "customers"
}
```

• Response:
```
{
  "response": "To reset your password...",
  "sources": [
    {
      "source": "email_123.eml",
      "relevance": 0.95
    }
  ],
  "conversation_id": "conv_123"
}
```

GET /api/stats

• Description: Get knowledge base statistics
• Authentication: Required
• Response:
```
{
  "total_documents": 1500,
  "document_types": {
    ".eml": 800,
    ".docx": 200,
    ".pdf": 300
  },
  "audience_breakdown": {
    "customers": 600,
    "sales_reps": 400,
    "internal": 500
  }
}
```

GET /api/files

• Description: List uploaded files
• Authentication: Required
• Query Parameters:
• filter: File type filter (optional)
• audience: Audience filter (optional)
• Response:
```
{
```

```
        "files": [
          {
            "name": "file1.eml",
            "size": 1024,
            "modified": "2024-12-01T10:00:00Z",
            "audience": ["customers"]
          }
        ]
      }
```

DELETE /api/files/clear-all

• Description: Delete all uploaded files
• Authentication: Required (Admin)
• Response:
```
      {
        "success": true,
        "message": "All files deleted"
      }
```

GET /api/examples

• Description: Get example questions for placeholder
• Authentication: Required
• Query Parameters: role: User role (optional)
• Response:
```
      {
        "examples": [
          "How do I reset my password?",
          "What are the fees?",
          "How do I create a campaign?"
        ]
      }
```

POST /api/gitlab/ingest

• Description: Ingest GitLab repository
• Authentication: Required (Admin)
• Body:
```
      {
        "repo_url": "https://gitlab.com/username/repo",
        "access_token": "token",
        "include_commits": true,
        "include_readmes": true,
        "include_release_notes": true
      }
```

• Response:
```
      {
        "success": true,
        "message": "GitLab ingestion started"
      }
```

GET /api/users

• Description: List all users
• Authentication: Required (Admin)
• Response:

```json
{
  "users": [
    {
      "pin": "1234",
      "name": "John Doe",
      "role": "Admin"
    }
  ]
}
```

POST /api/users

• Description: Create new user
• Authentication: Required (Admin)
• Body:

```json
{
  "pin": "1234",
  "name": "John Doe",
  "role": "Internal"
}
```

• Response:

```json
{
  "success": true,
  "message": "User created"
}
```

DELETE /api/users/

• Description: Delete user
• Authentication: Required (Admin)
• Response:

```json
{
  "success": true,
  "message": "User deleted"
}
```

Twilio Webhook Endpoints

POST /sms

• Description: Receive SMS from Twilio

- Authentication: Not required (Twilio signature validation)
- Body: Twilio webhook format
- Response: TwiML XML response

GET /api/twilio/status

- Description: Get Twilio integration status
- Authentication: Required (Admin)
- Response:

```
{
  "configured": true,
  "phone_number": "+13108736329",
  "webhook_url": "https://askgf.up.railway.app/sms"
}
```

GET /api/twilio/conversations

- Description: List all SMS conversations
- Authentication: Required (Admin)
- Response:

```
{
  "conversations": [
    {
      "phone_number": "+1234567890",
      "message_count": 5,
      "last_message": "2024-12-01T10:00:00Z"
    }
  ]
}
```

GET /api/twilio/conversations/

- Description: Get conversation history for a phone number
- Authentication: Required (Admin)
- Response:

```
{
  "phone_number": "+1234567890",
  "messages": [
    {
      "role": "user",
      "content": "Hello",
      "timestamp": "2024-12-01T10:00:00Z"
    }
  ]
}
```

DELETE /api/twilio/conversations/

- Description: Clear conversation history for a phone number
- Authentication: Required (Admin)
- Response:

```
{
  "success": true,
```

```
      "message": "Conversation cleared"
  }
```

Configuration

Environment Variables

Create a .env file in the project root with the following variables:

Required Variables

```
# OpenAI Configuration
OPENAI_API_KEY=sk-proj-...

# Pinecone Configuration
PINECONE_API_KEY=your-pinecone-api-key

# Twilio Configuration
TWILIO_ACCOUNT_SID=AC...
TWILIO_AUTH_TOKEN=your-auth-token
TWILIO_PHONE_NUMBER=+13108736329

# Flask Configuration
FLASK_SECRET_KEY=your-secret-key-here
FLASK_DEBUG=false  # Set to true for development
```

Optional Variables

```
# Data Directory (for persistent storage)
DATA_DIR=/data

# PostgreSQL Database (for user persistence)
DATABASE_URL=postgresql://user:pass@host:port/dbname

# GitLab Integration (optional)
GITLAB_ACCESS_TOKEN=your-gitlab-token

# Google Docs Integration (optional)
GOOGLE_DOCS_CREDENTIALS_PATH=path/to/credentials.json
```

Pinecone Index Configuration

- Create index at https://app.pinecone.io:
- Name: customer-service-kb (or customize in code)
- Dimensions: 1536 (for OpenAI text-embedding-3-small)
- Metric: cosine
- Pod Type: serverless (recommended for cost efficiency)

- Get API key from Pinecone dashboard

Twilio Configuration

- Get credentials from Twilio Console:
- Account SID
- Auth Token
- Phone Number

- Configure webhook:
- For production: https://your-domain.railway.app/sms
- For local testing: Use ngrok (see Deployment)

- A2P 10DLC Registration (required for US SMS):
- Register brand at https://console.twilio.com/us1/develop/sms/a2p-messaging
- Create campaign with "Customer Service" use case
- Wait for approval (1-3 business days)

PostgreSQL Configuration (Production)

- Add PostgreSQL to Railway project
- Get DATABASE_URL from Railway PostgreSQL service
- Add DATABASE_URL to Railway web service variables
- Users will persist across deployments

Deployment

Railway Deployment

- Create Railway account at https://railway.app

- Create new project:
- Click "New Project"
- Select "Deploy from GitHub repo"
- Connect your GitHub repository

- Configure environment variables:
- Go to Variables tab
- Add all required variables (see Configuration)

- Add PostgreSQL (for user persistence):
- Click "New" → "Database" → "Add PostgreSQL"
- Railway will automatically add DATABASE_URL to your service
- If not automatic, manually add DATABASE_URL from PostgreSQL service

- Deploy:
- Railway will automatically deploy on git push
- Or click "Deploy" button

- Get public URL:
- Railway provides a public URL (e.g., https://askgf.up.railway.app)
- Update Twilio webhook to this URL + /sms

Custom Domain Setup

- In Railway dashboard:
- Go to Settings → Domains
- Click "Generate Domain" or "Add Custom Domain"

- Update domain:
- Change from default to desired subdomain (e.g., askgf)
- Result: askgf.up.railway.app

- For custom domain:
- Add CNAME record pointing to Railway
- Railway will provision SSL certificate automatically

Local Testing with ngrok

- Install ngrok:
```
brew install ngrok  # macOS
# or download from https://ngrok.com
```

- Start ngrok:
```
ngrok http 5001
```

- Get HTTPS URL from ngrok output (e.g., https://abc123.ngrok.io)

- Update Twilio webhook:
- URL: https://abc123.ngrok.io/sms
- Method: POST

- Test SMS by sending to your Twilio number

Developer Guide

Project Structure

```
twilio-chatbot/
███ web_app.py              # Main Flask application
███ chatbot.py              # RAG chatbot agent
███ data_processor.py       # Data ingestion and processing
███ requirements.txt        # Python dependencies
███ .env                    # Environment variables (gitignored)
███ Procfile                # Railway deployment config
███ runtime.txt             # Python version
███ templates/
█   ███ index.html          # Main UI template
█   ███ login.html          # Login page
███ static/
█   ███ css/
█   █   ███ style.css       # Styles
█   ███ js/
█       ███ app.js          # Frontend JavaScript
███ scripts/
█   ███ gitlab_connector.py        # GitLab integration
█   ███ google_docs_connector.py # Google Docs integration
███ uploads/                # Uploaded files (gitignored)
```

Adding New File Types

- Add processing method to data_processor.py:
```
def process_new_format(self, file_path: str, audience: str = None):
    # Parse file
    # Extract text
    # Chunk text
    # Add to knowledge base
    pass
```

- Update ALLOWED_EXTENSIONS in web_app.py:
```
ALLOWED_EXTENSIONS = {'eml', 'docx', 'pdf', 'csv', 'txt', 'newformat'}
```

- Add routing in process_files_background:

```
elif ext == 'newformat':
    processor.process_new_format(file_path, audience)
```

- Update UI in templates/index.html:
- Add file type to upload accept attribute
- Add filter button for new type

Adding New Integrations

- Create connector script in scripts/:

```
class NewIntegrationConnector:
    def fetch_data(self, config):
        # Fetch data from external source
        pass
```

- Add API endpoint in web_app.py:

```
@app.route('/api/new-integration/ingest', methods=['POST'])
@admin_required
def ingest_new_integration():
    # Process integration
    pass
```

- Add UI section in templates/index.html

- Add JavaScript handlers in static/js/app.js

Modifying Chatbot Behavior

In chatbot.py:

- Change embedding model: Update embedding_model in _get_embedding
- Modify search parameters: Adjust top_k in _retrieve_relevant_context
- Customize prompt: Edit _generate_response system prompt
- Change LLM model: Update model parameter in OpenAI API call

Testing

- Unit tests (to be added):

```
pytest tests/
```

- Manual testing:
- Upload test files
- Query chatbot
- Verify responses and sources

- Integration testing:
- Test Twilio webhook locally with ngrok
- Test GitLab integration
- Test user authentication

Code Style

- Follow PEP 8 Python style guide
- Use type hints where possible
- Add docstrings to functions and classes
- Keep functions focused and small

Troubleshooting

Common Issues

"OPENAI_API_KEY environment variable not set"

- Solution: Add OPENAI_API_KEY to .env file or Railway variables
- Verify: Check environment variables are loaded: print(os.getenv('OPENAI_API_KEY'))

"PINECONE_API_KEY environment variable not set"

- Solution: Add PINECONE_API_KEY to .env file or Railway variables
- Verify: Check Pinecone index exists and is accessible

"Database cleared after deployment"

- Solution: Ensure DATABASE_URL is set in Railway variables
- Verify: Check PostgreSQL connection in /api/db-status endpoint
- Note: Pinecone data persists automatically (serverless)

"Users disappeared after deployment"

- Solution: Add DATABASE_URL to Railway web service variables
- Verify: Check /api/db-status endpoint shows PostgreSQL connected
- Fallback: System uses JSON file if PostgreSQL unavailable

"Twilio webhook not receiving messages"

- Solution:
- Verify webhook URL is correct and accessible
- Ensure HTTPS is enabled (required for Twilio)
- Check Twilio logs for errors
- For local testing, use ngrok

"A2P 10DLC Error 30034"

- Solution:
- Register for A2P 10DLC at Twilio Console
- Use "Customer Service" use case for fastest approval
- Wait for campaign approval (1-3 business days)

"Files not processing"

- Solution:
- Check file format is supported
- Verify file size is under 500MB
- Check Processing Status section for errors
- Review server logs for detailed error messages

"CSV files not processing"

- Solution:
- Ensure CSV has headers
- Check CSV format (standard columns: from, to, body, date)
- System will attempt to parse generic CSV formats

Debugging

- Enable debug mode:
```
export FLASK_DEBUG=true
python web_app.py
```

- Check logs:
- Railway: View logs in Railway dashboard
- Local: Check terminal output

- Test API endpoints:
```
curl http://localhost:5001/api/stats
```

• Check database status:
• Visit /api/db-status endpoint
• Verify PostgreSQL connection

Security

Best Practices

• Never commit .env file:
• .env is in .gitignore
• Use environment variables in production

• Protect API keys:
• Rotate keys regularly
• Use different keys for development/production
• Never expose keys in client-side code

• Session security:
• SECRET_KEY should be random and secure
• Sessions expire after 24 hours
• Use HTTPS in production

• Authentication:
• PINs are hashed before storage
• Admin endpoints require Admin role
• User data filtered by role

• File upload security:
• File size limit: 500MB
• File type validation
• Files stored securely

• Twilio webhook security:
• Validate Twilio signatures (recommended)
• Use HTTPS for webhooks
• Verify phone numbers

Environment Variables Security

• Development: Use .env file (gitignored)

- Production: Use Railway Variables (encrypted)
- Never: Hardcode secrets in code

User Data Protection

- User PINs are hashed using SHA-256
- Conversation history stored securely
- Role-based access control enforced
- Customer data filtered by audience labels

Support

For issues, questions, or contributions:

- Email: hello@groupfund.us
- Phone: 888-390-7620
- Website: https://www.groupfund.us
- GitHub: https://github.com/evonow/twilio-chatbot

License

[Add your license here]

Changelog

Version 1.0 (December 2024)

- Initial release
- RAG chatbot with Pinecone

- Twilio SMS integration
- Web UI with role-based access
- GitLab integration
- Multi-format file support
- Conversation history
- Source attribution
- FAQ analysis

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