

Quick Start Guide - AI Services



Get AI Features Working in 15 Minutes

Follow these simple steps to activate all AI features in production.



IMPORTANT: First Step

Resolve OpenAI Quota Issue

Before deploying, you need to resolve the OpenAI API quota:

1. Go to: <https://platform.openai.com/account/billing>
2. **Option A:** Add credits to your existing account
3. **Option B:** Upgrade your plan
4. **Option C:** Use a different API key with available quota

Why? Your current API key has exceeded its quota. This must be resolved for AI response generation to work.

Step 1: Add Environment Variables to Render (10 minutes)

1. Go to: <https://dashboard.render.com>
2. Click on your **CareLinkAI** service
3. Click “**Environment**” tab
4. Add these 10 variables (copy-paste from below):

Copy-Paste Variables:

```
OPENAI_API_KEY=sk-svcacct-hzBCQeR-
5f02_CcBmN31DRZdefqxl0qIKMjA_NtZ0kP4zFUeoCRXJdB5UeRwNGVkJ499VRVsMmNIT3BlbkFJT5pVqEYjkCc
ffAe4NdcLdq4uJEmTQEbzJnIUgp4T5bu46-A1PH9XActFfUAqfXHqykDnXITlEA

SMTP_HOST=smtp.gmail.com
SMTP_PORT=587
SMTP_USER=profyt7@gmail.com
SMTP_PASS=hulwxufuiodzfskq
SMTP_FROM=profyt7@gmail.com

TWILIO_ACCOUNT_SID=AC10f9f96c02e32dd9e3860dda00741964
TWILIO_AUTH_TOKEN=66ae67c6074e5fce21a3065914e3ede7
TWILIO_PHONE_NUMBER=+18444593855

CRON_SECRET=5cf97efc6b094b7c945e57851513d9da5dcd47a8ed8a85db0af3f4afb55dcde
```

1. Click “**Save Changes**”

2. Wait for deployment (~5-10 min)
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Step 2: Test Email Features (5 minutes)

Email is ready to use immediately!

1. Go to: <https://carelinkai.onrender.com/operator/inquiries/pipeline>
2. Open any inquiry
3. Click “**Send Email Response**”
4. Compose your message
5. Click “**Send**”
6. Check profyt7@gmail.com for the email

Status:  SMTP is working and tested!

Step 3: Test SMS Features (2 minutes)

SMS is ready to use immediately!

1. In the inquiry detail page
2. Click “**Schedule Follow-up**”
3. Choose “**SMS**” as the method
4. Enter a phone number
5. Set the schedule
6. The system will send SMS via Twilio

Status:  Twilio is active and verified!

Step 4: Set Up Cron Job (Optional - 5 minutes)

For automated follow-ups:

1. In Render Dashboard, click “**New +**”
2. Select “**Cron Job**”
3. Fill in:
 - **Name:** CareLinkAI Follow-up Processor
 - **Schedule:** 0 * * * *
 - **Command:**

```
bash
curl -X POST https://carelinkai.onrender.com/api/follow-ups/process -H "Authorization: Bearer 5fcfc97efc6b094b7c945e57851513d9da5dc47a8ed8a85db0af3f4afb55dcde"
```
4. Click “**Create Cron Job**”

That's It! 🎉

Features Ready Now:

- Email Sending (Working)
 - SMS Notifications (Working)
 - Automated Follow-ups (Working with cron)
 - AI Response Generation (Needs OpenAI quota resolution)
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Quick Test Checklist

Immediate Tests (No OpenAI needed):

- [x] SMTP email - Tested and working
- [x] Twilio SMS - Verified and active
- [] Send manual email response
- [] Schedule SMS follow-up
- [] Verify email delivery

After OpenAI Quota Resolution:

- [] Generate AI response
 - [] Edit and send AI-generated email
 - [] Test different AI tones
 - [] Verify AI response quality
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Troubleshooting

Email not sending?

- Check Render logs for SMTP errors
- Verify profyt7@gmail.com credentials
- Check spam folder

SMS not working?

- Verify Twilio account has balance
- Check phone number format (+1234567890)
- Review Twilio console logs

AI response generation failing?

- Check OpenAI quota/billing
 - Add credits at <https://platform.openai.com/account/billing>
 - Or update API key with available quota
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Need More Help?

See detailed guides:

- **Full Setup:** [RENDER_ENVIRONMENT_SETUP.md](#)
 - **Configuration Summary:** [CONFIGURATION_COMPLETE.md](#)
 - **Testing Guide:** Check the Configuration Complete document
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Quick Links

- **Production App:** <https://carelinkai.onrender.com>
 - **Render Dashboard:** <https://dashboard.render.com>
 - **OpenAI Billing:** <https://platform.openai.com/account/billing>
 - **Twilio Console:** <https://console.twilio.com>
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Status Summary

Service	Status	Action Required
SMTP Email	✓ Working	None - Ready to use
Twilio SMS	✓ Active	None - Ready to use
OpenAI API	⚠ Quota Issue	Add credits/billing
Cron Jobs	⌚ Pending	Set up in Render

Ready to go! Start with email and SMS features immediately.

Resolve OpenAI quota to unlock AI response generation.

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