

Phase 1: Service Configuration Summary

Overview

This document summarizes the service configuration process for CareLinkAI's AI features.

Services to Configure

1. OpenAI API

Purpose: AI response generation

Required: Yes

Credentials: 1 (API Key)

Setup Time: 5 minutes

2. SMTP Email

Purpose: Email sending

Required: Yes

Credentials: 5 (Host, Port, User, Pass, From)

Setup Time: 10-15 minutes

3. Twilio SMS

Purpose: SMS notifications

Required: Yes

Credentials: 3 (SID, Token, Phone)

Setup Time: 10 minutes

4. Cron Job

Purpose: Automated follow-ups

Required: Yes

Credentials: 1 (Secret)

Setup Time: 5 minutes

Total Setup Time

Estimated: 30-35 minutes

Actual: Will vary based on provider signup

Configuration Files

- `SERVICE_CONFIGURATION_CHECKLIST.md` - Step-by-step guide
- `.env.example` - Environment variable template

- `.env` - Local configuration (not in git)
 - Render Dashboard - Production configuration
-

Test Endpoints

Created test endpoints to verify each service:

- `POST /api/test/openai` - Test OpenAI API
 - `POST /api/test/smtp` - Test email sending (optional: `{"to": "email@example.com"}`)
 - `POST /api/test/twilio` - Test SMS sending (required: `{"to": "+1234567890"}`)
 - `POST /api/follow-ups/process` - Test cron job (requires `Authorization: Bearer <CRON_SECRET>`)
-

Current Status

Local Environment (.env)

- ✗ OPENAI_API_KEY - Not configured
- ✗ SMTP_HOST - Not configured
- ✗ SMTP_PORT - Not configured
- ✗ SMTP_USER - Not configured
- ✗ SMTP_PASS - Not configured
- ✗ SMTP_FROM - Not configured
- ✗ TWILIO_ACCOUNT_SID - Not configured
- ✗ TWILIO_AUTH_TOKEN - Not configured
- ✗ TWILIO_PHONE_NUMBER - Not configured
- ✗ CRON_SECRET - Not configured

Production Environment (Render)

Status: Unknown - needs manual check in Render Dashboard

Next Steps

Immediate Actions:

1. ✅ Gather all credentials (see SERVICE_CONFIGURATION_CHECKLIST.md)
2. ⏳ Update local .env file
3. ⏳ Update Render environment variables
4. ⏳ Test each service locally
5. ⏳ Deploy to Render
6. ⏳ Verify production functionality

Testing Sequence:

1. Test OpenAI API connection
2. Test SMTP email delivery
3. Test Twilio SMS delivery

4. Test cron job execution
 5. End-to-end inquiry workflow test
-

Documentation

All configuration details are documented in:

- `SERVICE_CONFIGURATION_CHECKLIST.md` - Comprehensive setup guide
 - `.env.example` - Environment variable reference
 - `src/app/api/test/*/route.ts` - Test endpoint implementations
-

Support Resources

- OpenAI: <https://platform.openai.com/docs>
 - SMTP (Gmail): <https://support.google.com/mail/answer/185833>
 - Twilio: <https://www.twilio.com/docs>
 - Render: <https://render.com/docs>
-

Generated: December 19, 2025