

# Phase 1: Service Configuration Summary

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## Overview

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

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## Services to Configure

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### 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

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## Total Setup Time

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**Estimated:** 30-35 minutes

**Actual:** Will vary based on provider signup

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## Configuration Files

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

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

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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>` )
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## Current Status

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### 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

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## Next Steps

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### 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

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## Documentation

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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

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## Support Resources

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- 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>

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