

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_CcBmN31DRZdefqx10qIKMjA_NtZ0kP4zFUeoCRXJdB5UeRwNGVvk499VRVsMmNIT3BlbkFJT5pVqEYjkCc fFae4NdcLdq4uJEmTQEVzJnIUgp4T5bu46-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=5cfc97efc6b094b7c945e57851513d9da5dcd47a8ed8a85db0af3f4afb55dcde
```

1. Click **"Save Changes"**

2. Wait for deployment (~5-10 min)

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 5cfc97efc6b094b7c945e57851513d9da5dcd47a8ed8a85db0af3f4afb55dcde"
```
 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)
-

🔍 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
-

🐛 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
-

Need More Help?

See detailed guides:

- **Full Setup:** `RENDER_ENVIRONMENT_SETUP.md`
- **Configuration Summary:** `CONFIGURATION_COMPLETE.md`
- **Testing Guide:** Check the Configuration Complete document

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>

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. 💡

Last Updated: December 19, 2025