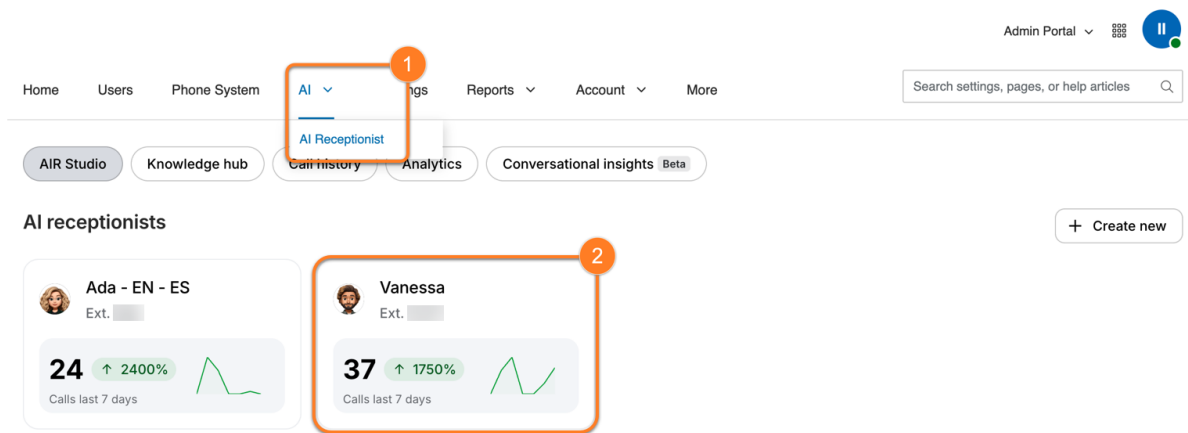


Managing AI Receptionist Skills

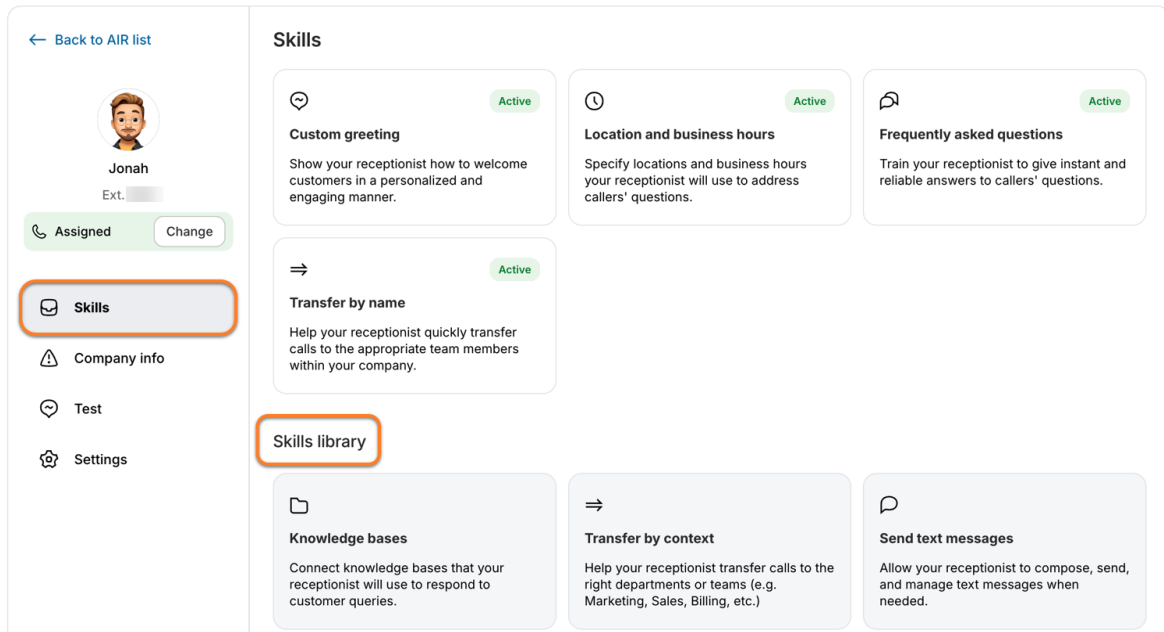
Once an admin has set up the AI Receptionist (AIR), you can add and customize different skills that the receptionist will use to provide personalized and accurate assistance to callers. You can also add enhancements such as being able to transfer callers by name or context, and sending text messages.

Accessing the AIR skills

1. Sign in to the [Admin Portal](#).
2. Click the **AI** tab dropdown and select **AI Receptionist**.
3. Click the receptionist's profile card to manage their skills.



You will land on the **Skills** page. All active skills will be listed at the top of the page. To add new skills, you can select them from the **Skills library** at the bottom of the page.



Managing the AIR skills

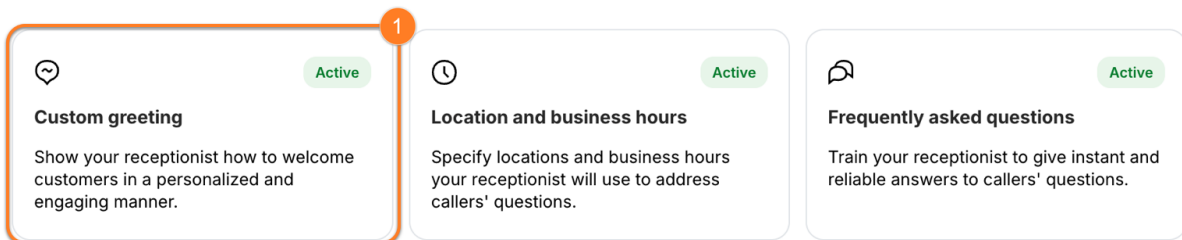
Custom greeting

When customers call your business, the AI Receptionist will greet them with the default or custom welcome message created during your initial setup.

AIR uses the business hours defined in your company settings. If you have a single-site setup, you can create one greeting for business hours and another for when your business is closed. In a [multi-site setup](#), the same greeting will play at all times.

To customize your welcome greeting:

1. Click **Custom greeting**.



2. Click the **Pencil** icon.

Custom greeting

Clear

Company greeting

Specify what the AI Receptionist should say right after picking up the call.

Hello, thanks for calling '{company_name}', I am your AI Receptionist. This call is being recorded. How can I help you?



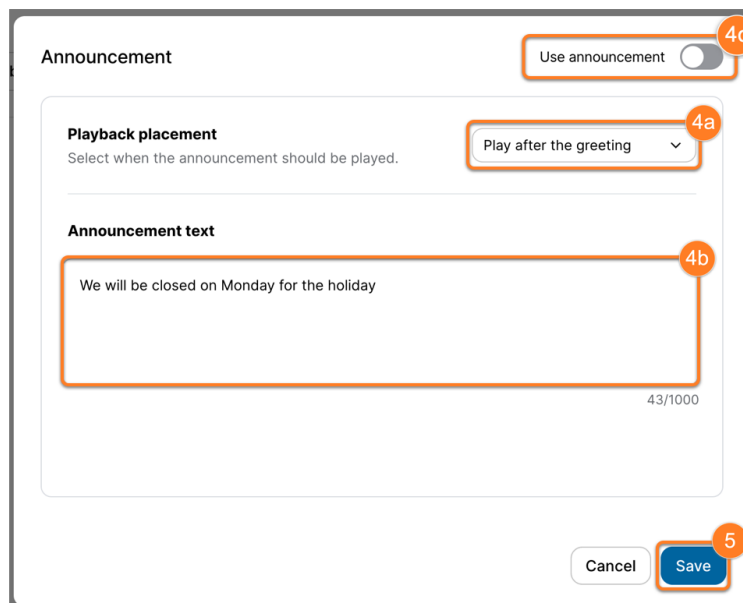
2

Announcement

Announcements can be used for company news, holiday hours, or service alerts.

+ Add

3. Enter the text for your custom greeting in the popup, then click **Save**.
4. Under **Announcement**, click **Add** if you want a special announcement made before or after the welcome greeting.
 - a. Click the dropdown and select when you want the announcement to play.
 - b. Enter the text for your announcement.
 - c. Click the **Use announcement** toggle on to immediately activate the message.
5. Click **Save**.



The image shows a configuration popup for an announcement. At the top right, there is a toggle switch labeled 'Use announcement' with a '4c' callout. Below this, the 'Playback placement' section has a dropdown menu set to 'Play after the greeting' with a '4a' callout. The 'Announcement text' section features a large text area containing the text 'We will be closed on Monday for the holiday' with a '4b' callout. A character count '43/1000' is visible at the bottom right of the text area. At the bottom of the popup, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted and labeled with a '5' callout.

Note

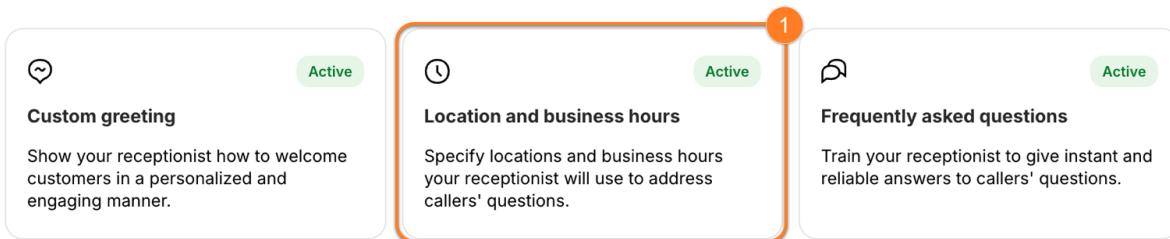
If you've created an announcement and turn the **Use announcement** toggle off, it won't be deleted and can be reactivated later.

To activate or deactivate the greeting, click the **Use Greeting skill** toggle at the top of the page.

Location and business hours

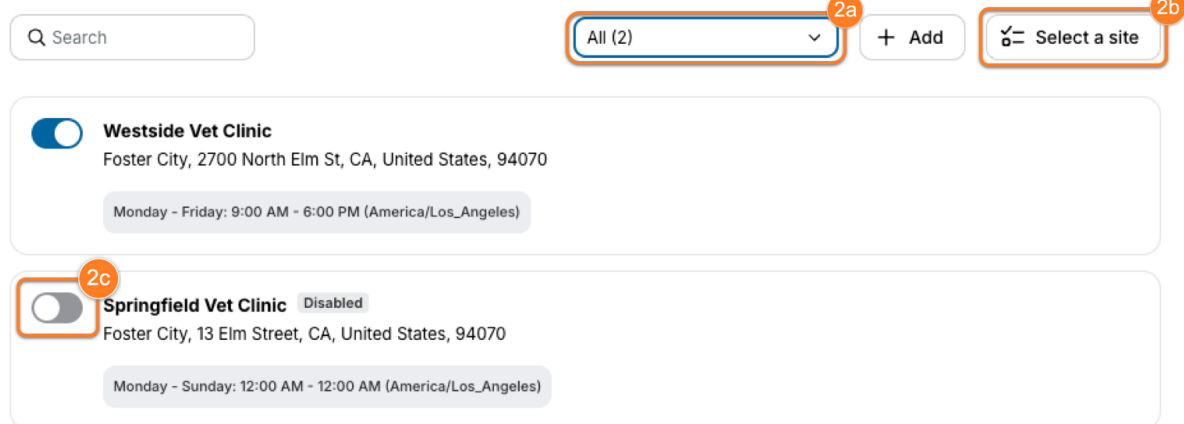
AIR will reference the location and business hours set in your company settings and share that information with callers. You can also customize these details so the receptionist shares a different location or business hours with customers.

1. Click **Location and business hours**.



2. If you have a [multi-site setup](#), you can use the dropdown (a) to show all available sites or click **Select a site** (b) and select one or more of your existing sites for the receptionist to reference. Click the toggle off (c) next to any site you want to disable.

Location and business hours



3. Click **Add** to create an additional location.
4. Enter the **Location details**.
5. Define the **Custom hours**. Your main site's standard business hours are pre-selected. If your business isn't open **24/7**, click the toggle off, then customize each day:
 - Toggle the days on or off.
 - Check the **All day** box for 24 hours, or click the **Clock** icons for a specific time range.

- Click the **Apply to** dropdown to copy those times to other days.
6. Click **Add**.

The screenshot shows a form titled "Add a custom location". It is divided into two main sections. The first section, "Location details", is enclosed in an orange box with a callout "4". It contains input fields for "Office name", "Company address", "City", "Country", "State/Province", "Zip code", and "Time Zone". The second section, "Define custom hours", is also enclosed in an orange box with a callout "5". It features a "24/7" toggle switch and a table for defining hours for each day of the week. The table has columns for the day, a toggle switch, "From" time, "To" time, an "All day" checkbox, and an "Apply to" dropdown. Monday, Tuesday, and Wednesday are currently active with 09:00 AM to 06:00 PM hours. Thursday is inactive and labeled "Closed". At the bottom right, there are "Cancel" and "Add" buttons, with the "Add" button highlighted by an orange box and callout "6".

To activate or deactivate sharing your location and business hours, click the **Use Location and business hours skill** toggle at the top of the page.

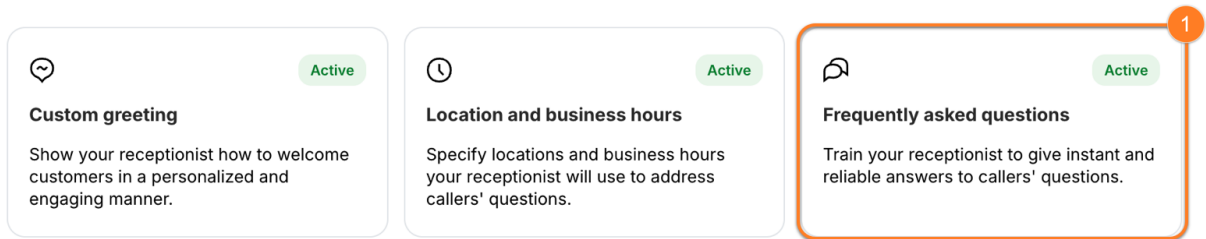
[← Back to Skills](#)

Use Location and business hours skill ☒

Frequently asked questions

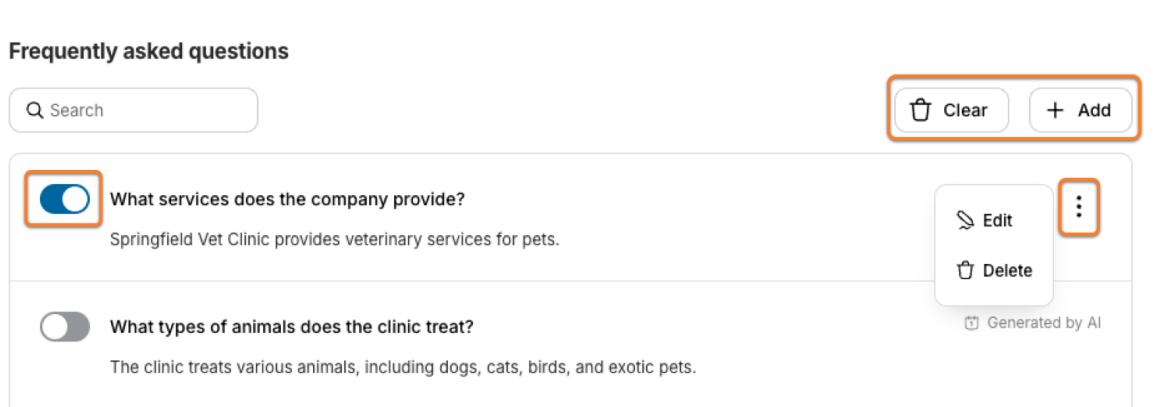
The company description entered during setup is used to auto-generate questions and answers for the FAQ skill. Customize this skill to train the AI Receptionist to provide instant and reliable answers to callers' questions.

1. Click **Frequently asked questions**.



2. From here, you can:

- **Turn off/on:** Click the question's toggle on or off depending on whether you want the AI Receptionist to reference it for callers.
- **Edit:** Hover over the question, click the three-dot **More** icon, and then select the **Pencil** icon to update the question or answer.
- **Delete:** Hover over the question, click the three-dot **More** icon, then select the **Trash can** icon. Click **Delete** again in the confirmation window.
- **Add:** Click **Add** to create an additional question and answer.
- **Clear:** Click **Clear** to delete all the questions at once. Click **Clear** again in the confirmation window.
 - If you clear all FAQs, you can click **Generate with AI** to create a new list of questions and answers, or add some in manually.



To activate or deactivate using the FAQ skill, click the **Use Frequently asked questions skill** toggle at the top of the page.

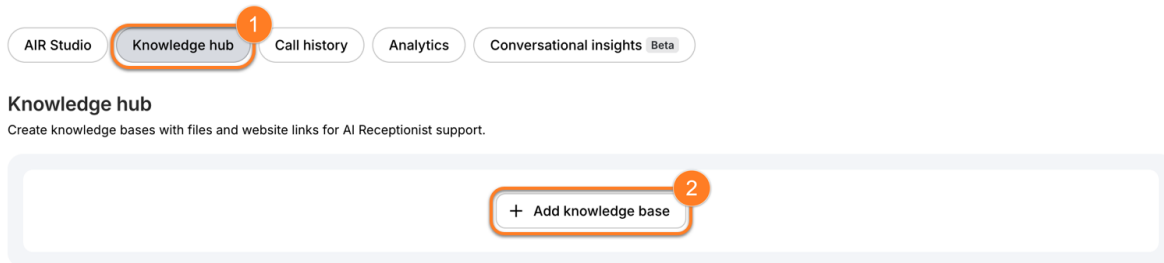
← Back to Skills

Use Frequently asked questions skill ☒

Knowledge bases

You can connect knowledge bases that include additional resources, such as files or website links, for the AI Receptionist to reference when answering customer questions.

1. On the top bar, click **Knowledge hub**.
2. Click **Add knowledge base**.



3. Enter a name, then click **Add**.

A screenshot of the 'Add knowledge base' dialog box. The title 'Add knowledge base' is at the top. Below it is a label 'Name *' followed by a text input field containing the text 'Upcoming events'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Add' (highlighted with an orange border).

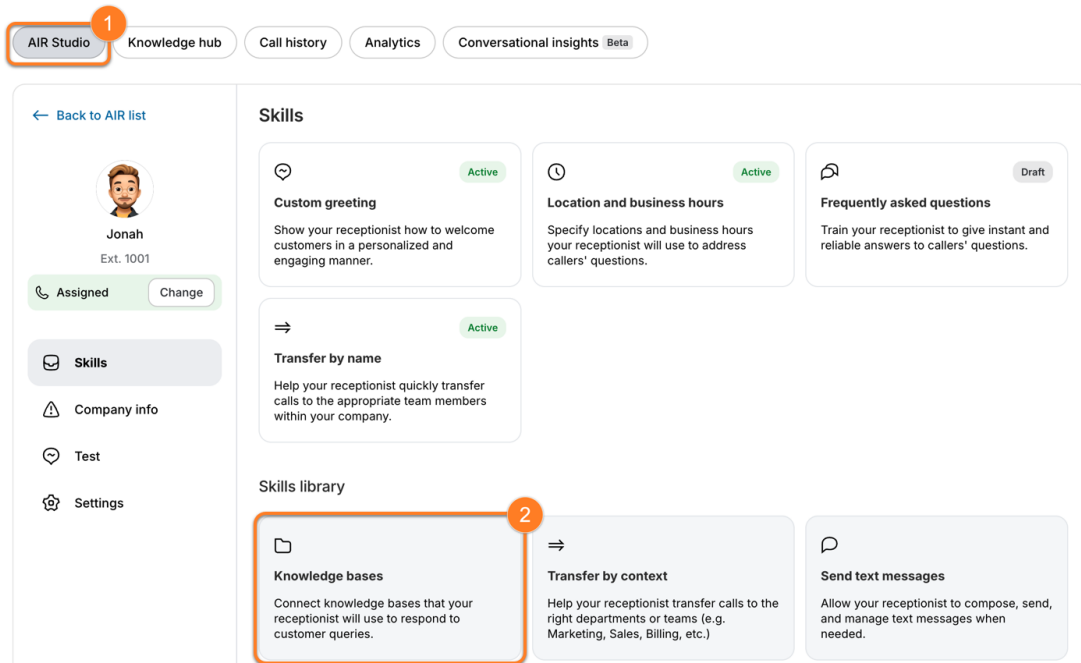
4. In the list, click the **Knowledge base name**.
5. To add a website:
 - a. Click **Add a website**.
 - b. Enter a name for the website.
 - c. Enter the full URL.
 - d. Click **Add another** at the top right to include more websites or click **Add** at the bottom.

To add a document:

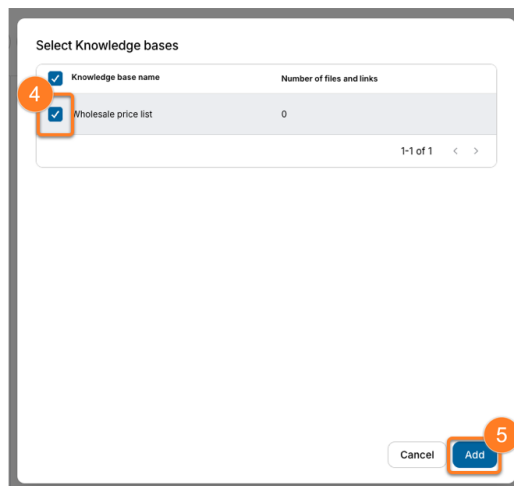
- a. Click **Upload a document** or drag and drop a PDF, DOC, DOCX, CSV, or TXT file.

After adding your documents or website URL to the Knowledge hub:

1. At the top, click **AIR Studio**, then click the receptionist's profile card.
2. Click **Knowledge bases**.



3. Click **Select knowledge bases**.
4. Check the box next to each knowledge base that you want the AI Receptionist to use.
5. Click **Add**.



To activate or deactivate using the Knowledge base skill, click the **Use Knowledge bases skill** toggle at the top of the page.

Appointment booking

If you've turned on text messaging for your AI Receptionist (AIR), it can send callers a link to book their own appointments. To allow AIR to book appointments in real-time using your team's availability, connect your Google or Outlook calendar.

Booking calls using SMS link

1. Click **Appointment booking**.



Transfer by name
Help your receptionist quickly transfer calls to the appropriate team members within your company.

Active



Send text messages
Allow your receptionist to compose, send, and manage text messages when needed.

Active



Appointment booking
Allow the AI Receptionist to book appointments with staff assignments at specified times and locations.

Beta Calendar Active

2. Click **Book using SMS link**.
3. Enter the website link to your booking system.

Appointment booking type

Select how AI Receptionist will book appointments.

Book using SMS link

☒

AI Receptionist will book appointments by texting callers a link to an online booking system.

Book using calendar access

☐

AI Receptionist will book appointments using calendar availability of assigned staff members at specified times and locations.

Provide booking link

Enter link

Text message preview



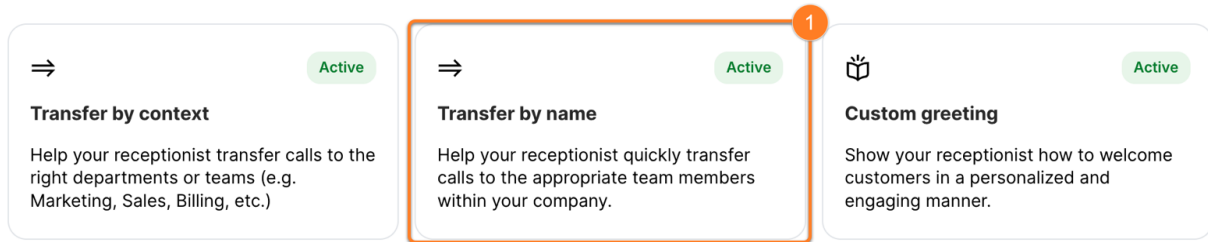
Dec 30, 2019 3:46 PM

<Company Name>. Info: You can book an appointment online:<link from the skill>.

Transfer by name

AIR can transfer callers to a specific person when they request someone by name. This feature is turned on by default, and the receptionist will reference all contacts listed in your company directory or in one or more of your company's site directories.

1. Click **Transfer by name**.



2. If you have a [multi-site setup](#), click **Select sites** to add additional directories.
3. To exclude extensions:
 - a. Click the **Sync with dial-by-name-directory** toggle on to keep the excluded extensions that are already set up in your [dial-by-name directories](#).
 - b. To exclude extensions manually, click **Exclude extensions**, check the boxes next to the names you want excluded, then click **Save**.

Transfer by name

Help your receptionist quickly transfer calls to the appropriate team members within your company.

Included extensions

Select sites

Select a site to take contacts from.

Select sites

Excluded extensions

Sync with dial-by-name directory

Keep [excluded extensions](#) synced up between the dial-by-name directory and the transfer-by-name skill. The directory updates automatically, and you can also exclude contacts manually.

3a

☒

Select extensions to exclude

If you don't want the receptionist to transfer calls to specific contacts and extensions, you can specify them here.

3b

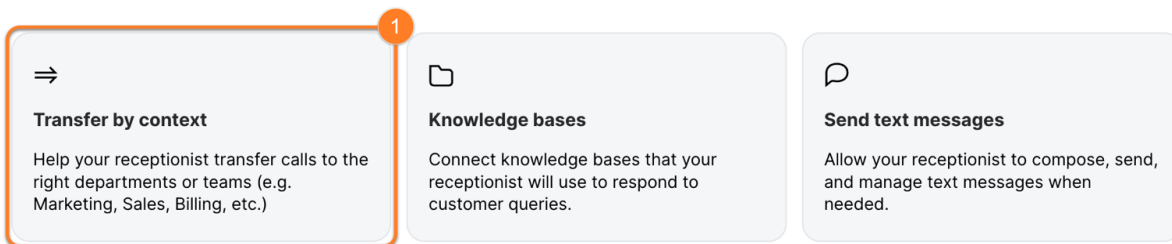
Exclude extensions

To activate or deactivate using the Transfer by name skill, click the **Use Transfer by name skill** toggle at the top of the page.

Transfer by context

You can set rules to help the AI Receptionist understand what the caller needs and transfer them to the correct extension or external number. These rules can be based on specific words or phrases the caller says.

1. Click **Transfer by context**.

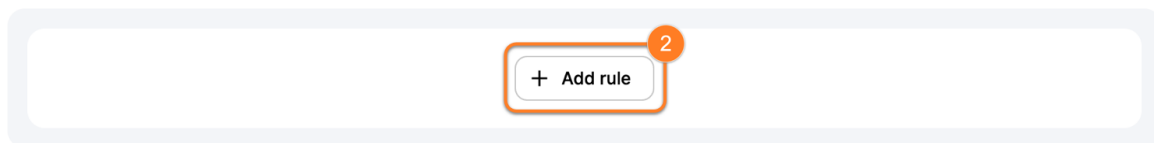


2. Click **Add rule**.

Transfer by context

Rules

Note that if no rules apply, receptionist **will transfer the call to the backup extension**.



3. For transfers within the company, click the **Search extension** dropdown and select where you want the caller to be transferred based on the context rules.
 - To transfer the caller outside of the company directory, click the **Transfer to extension** dropdown and select *Transfer to external number*, then enter the phone number.
4. Enter the custom rule for the extension or external number.
5. Click **Add**.

Add rule

Create custom rules for call transfers.

Transfer to extension ▼

Search extension ▼

Specify the types of caller issues that should be transferred to extension listed above. For example, Ext. [] - Help place an order, check order status, get help with delivery.

0/500

CancelAdd

To activate or deactivate using the Transfer by context skill, click the **Use Transfer by context skill** toggle at the top of the page.

← Back to Skills

Use Transfer by context skill ☒

Send text messages

If your account includes text messages, your AI Receptionist can send and receive texts from your callers. This feature can also be used to send callers a link to [book appointments using an SMS link](#).

1. Click **Send text messages**.

**Knowledge bases**
Connect knowledge bases that your receptionist will use to respond to customer queries.

**Send text messages**
Allow your receptionist to compose, send, and manage text messages when needed.

**Appointment booking**
Assist callers in booking appointments by texting them a link to an online booking system.

2. Click the **Extension** dropdown and select which extension AIR will use to text from.
3. Click the **Texting number** dropdown and select the phone number you want to use.
4. Once a number is selected, the **Use Send text messages skill** toggle is automatically turned on. Click the toggle off if you don't want the AI Receptionist to use texting.

[← Back to Skills](#)

Use Send text messages skill



4

Send text messages

Allow your receptionist to compose, send, and manage text messages when needed. To ensure delivery of messages with web links, email addresses, or phone numbers, state your preference during TCR registration. Learn more about [Text usage](#).

Text messaging extension and number

Extension

The extension the AI Receptionist will use to send text messages to callers.

Ext.



2

Texting number

Choose the number the receptionist will use to send text messages. You can update it anytime.



3