

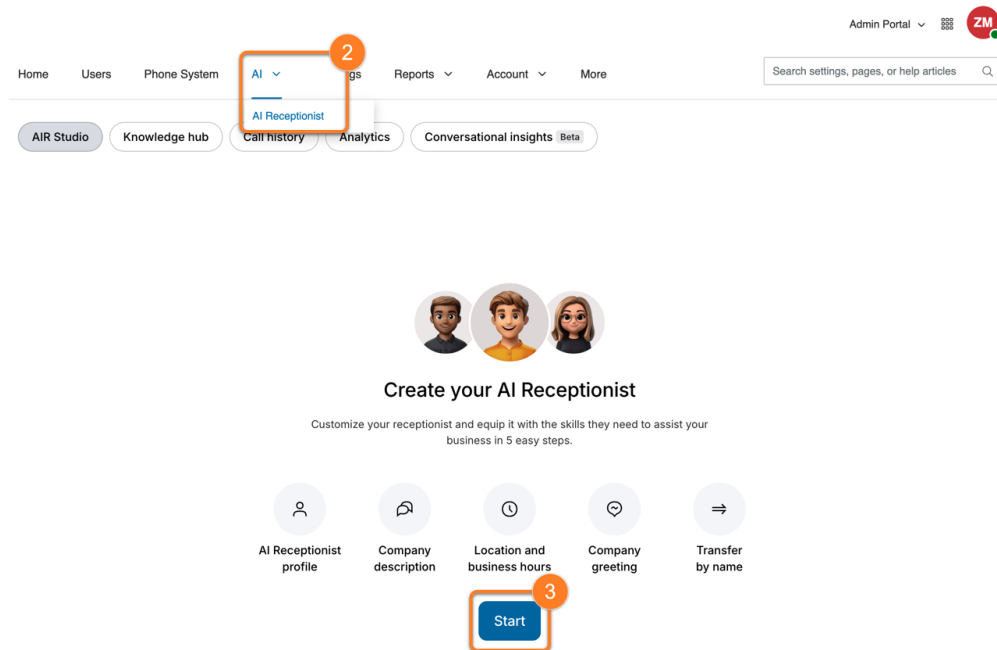
Setting up and Updating your AI Receptionist

AI Receptionists (AIR) interact with your callers and help provide them with details about your company, answer direct questions, and transfer them to different extensions based on verbal cues.

Admins with [Phone System](#) or Auto Receptionist permissions can set up and manage their AI Receptionist's skills in the Admin Portal. You can keep track of each interaction between the receptionist and your customers by viewing the transcripts and reviewing AIR analytics.

Creating your AI Receptionist

1. Sign in to the [Admin Portal](#).
2. Click the **AI** tab dropdown and select **AI Receptionist**.
3. Click **Start**, then follow the setup guide to walk you through customizing your receptionist.



AI Receptionist profile

Select the AIR's tone, personality, and primary language that best match your organization.

1. Enter a name for your receptionist.
2. Click the **Primary language dropdown**, then select the language you want to use.
3. Click the **Additional languages** dropdown if you want AIR to communicate in a secondary language.
4. Click the **Play** icon under each avatar to preview the receptionist's voice.
5. Click **Continue** to move to the next step.

AI Receptionist profile

Name your AI Receptionist and select the languages they will speak.

Name
Name your receptionist

Enter name

Primary language
Select the primary language AIR will use to communicate.

English

Additional languages
Select other languages for AIR (optional).

Select languages


Natalie
▶


Kirsten
▶


Charlotte
▶


Naomi
▶


Stanley
▶


Jonah
▶


Jackson
▶


Antonio
▶

Cancel

Continue

Company description

Enter detailed information about your company's products and services to help the AI Receptionist anticipate customer questions and generate accurate responses. This description will also be used to auto-generate questions and answers for the FAQ skill.

Add a website link if you want the receptionist to direct callers to your website. Click **Continue**.

Company description

AI will generate answers to frequently asked customer questions based on the information you provide about your products and services. Please be specific.

Company description *

Enter detailed information about your company's products and services, e.g., Our services include haircuts, full color, highlights, and specialized styling for all hair types. We also offer restorative treatments like deep conditioning and keratin treatments. The salon uses high-quality products, focusing on maintaining the integrity of your hair.

0/500

Website link

Website link

When needed, receptionist will direct callers to your website.

Back

Continue

Location and business hours

The location and business hours displayed here are taken from your company settings. The AI Receptionist will share these details with your callers. You can update or customize this information once the receptionist has been set up. Click **Continue** to confirm.

Location and business hours

Confirm locations and business hours specified in your business settings. You'll be able to add a custom location later.

AI Receptionist will use the information listed below to answer callers' questions about your locations and business hours.

Springfield Vet Clinic

Foster City, 13 Elm Street, CA, United States, 94070

Monday - Sunday: 12:00 AM - 12:00 AM (America/Los_Angeles)

Back

Continue

Company greeting

When customers call your business, the AI Receptionist will greet them with a welcome message. You can keep the default greeting or customize it to create a more personalized experience. Once complete, click **Continue**.

Company greeting

Use default greeting or design your own for the receptionist to greet customers in a polite and engaging manner. Consider telling your customers they are interacting with an AI receptionist.

Greeting *

Supports English only

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

Some jurisdictions require giving notice of call recording and transcription to every party to a call. You are solely responsible for complying with the law.

Back

Continue

Transfer by name

AIR can transfer callers to a specific person when they ask for them by name. This feature is on by default. Uncheck the box if you want to turn this feature off. The extensions that are on your [excluded extension list](#) won't be included. Click **Finish** to complete the setup.

Transfer by name

Allow AI receptionist to use your company directory to transfer calls.

 The AI Receptionist will transfer calls to a live agent if transfer by name is turned on (default).

☒ Allow transfer by name and reuse Excluded extensions list.

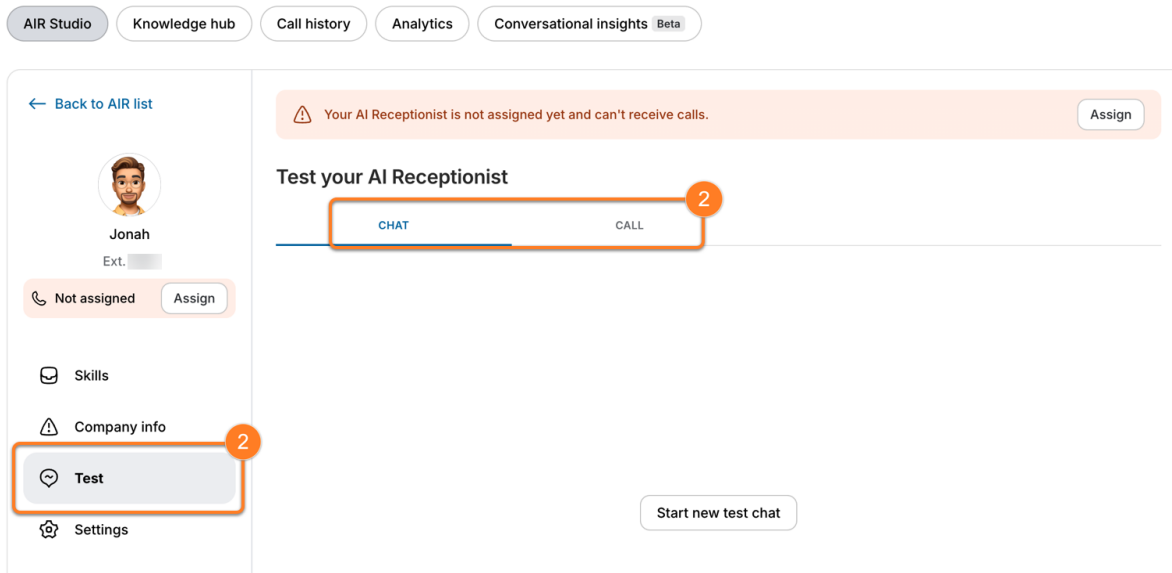
Back

Finish

Testing your AI Receptionist

You can test how the receptionist will respond to your callers either by dialing in to their extension or by using the chat feature.

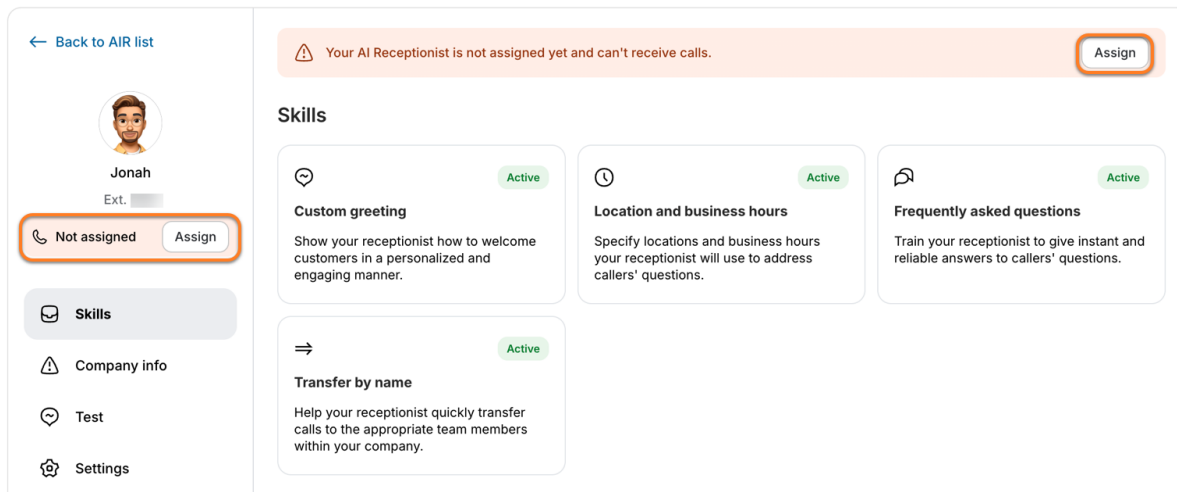
1. In the left panel, click **Test**.
2. Click one of the tabs to test your receptionist:
 - In the **Chat** tab, click **Start new test chat**, then send a sample message as if you are a caller starting a conversation, and review the receptionist's reply.
 - Click the **Call** tab to find the number or extension to call and listen to how the receptionist handles your inquiry.



Assigning your AI Receptionist

Once you've completed the setup, customized any skills, and are ready to activate the receptionist, you'll need to assign the extension in the Auto-Receptionist settings.

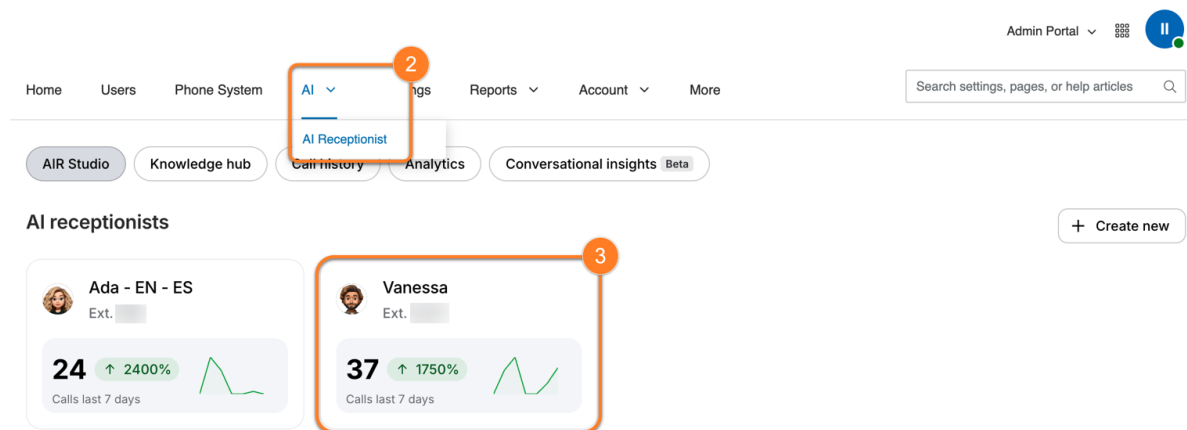
1. Click **Assign** under the receptionist's avatar or at the top right.
2. This opens **Auto-Receptionist > General Settings** in a new tab where you can assign a receptionist through a site's [Call Handling](#) settings or to an IVR menu.



Updating your AI Receptionist

You can update an AIR's settings, including details such as the receptionist's name, extension, language, and company information. You can also manage the AI Receptionist's skills for more personalized responses.

1. Sign in to the [Admin Portal](#).
2. Click the **AI** tab dropdown and select **AI Receptionist**.
3. Click on the receptionist's name that you want to update.



Updating the company info

You can update the company description entered during setup, such as your business name or the services you provide. You can also add or edit the website link that the AI Receptionist shares with callers.

1. Click **Company info**.
2. Enter a new or updated company description.
3. Add or update the website URL to direct callers to.
4. Click **Save**.

Updating the receptionist's settings

You can update the general settings, assignments, languages, and voice for your AIR.

1. Click **Settings**.
2. Click the **General** tab to update:
 - **AI Receptionist name**
 - **AI Receptionist extension**
 - **Backup extension:** Callers will be transferred to this extension if AIR can't resolve the issue.
 - **Assign to a company site:** Click **Go to Call handling** to select the sites where the AI Receptionist will answer incoming calls..
 - **Assign to direct number:** Click **Go to All Numbers** to assign a phone number that connects callers directly to the AI Receptionist.

← Back to AIR list

Jonah
Ext.

Assigned

Skills

Company info

Test

Settings

Settings

GENERAL VOICE

General

AI Receptionist name
Name your AI Receptionist

AI Receptionist extension
Enter an extension number for AI Receptionist.

Backup extension
If the AI Receptionist can't resolve the issue, caller will be transferred to this extension.

Assignments

Assign to a company site
To assign AI Receptionist to answer calls at specific company sites, go to Call Handling, select the sites you want to assign it to, and choose AI Receptionist for incoming call routing.

Assign to direct number
To assign a number, go to All Numbers and select the number you would like to use.

[Delete AI Receptionist](#)

3. Click the **Voice** tab to update:

- **Primary language:** Click the dropdown to select a different language. If you change the primary language, you'll also need to update the Company greeting to match.
- **Additional languages:** Click the dropdown to select a secondary language.
- **Voice:** Click the **Play** icon to preview how the receptionist will sound. Click the avatar to select the receptionist.

4. Click **Save**.

← Back to AIR list

Jonah
Ext.

Assigned

Skills

Company info

Test

Settings

Settings

GENERAL VOICE

Primary language
Select the primary language AIR will use to communicate.

Additional languages
Select other languages for AIR (optional).

Voice
Select your receptionist's voice to fit your business needs.

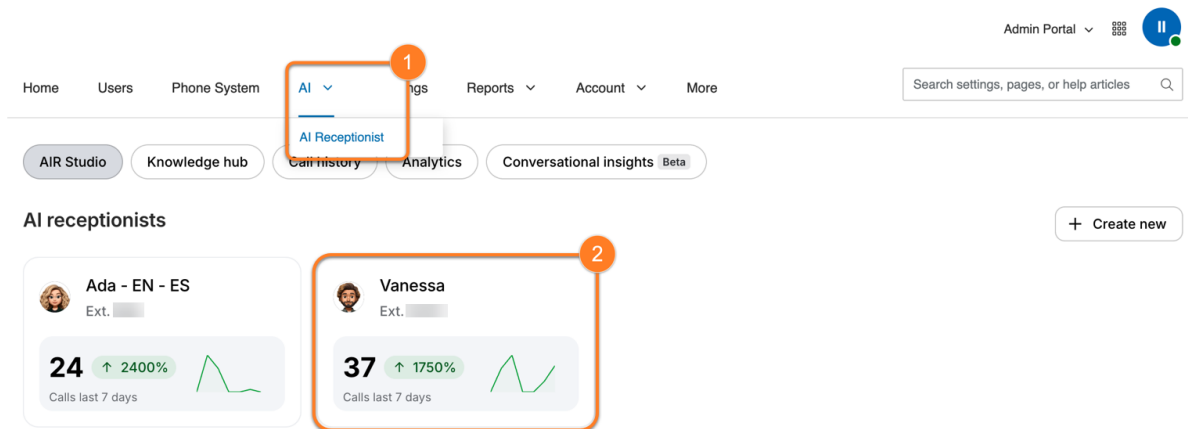
 Lena play	 Jennifer play	 Anna play	 Alice play
 Mark <input checked="" type="button" value="play"/>	 Zack play	 Richard play	 Leon play

[Delete AI Receptionist](#)

Deleting your AI Receptionist

If you want to permanently delete your receptionist:

1. Sign in to the [Admin Portal](#).
2. Click the **AI** tab dropdown and select **AI Receptionist**.
3. Click on the receptionist's name that you want to delete.



4. In the left panel, click **Settings**.
5. Click **Delete AI Receptionist**, then click **Delete** in the popup confirmation.

Note

To delete an AI Receptionist that's been assigned to an extension, you must first unassign it from all call handling rules. You may need to do this in both Business hours and Closed hours settings.

[← Back to AIR list](#)



Jonah

Ext.

Assigned

Change

 Skills

 Company info

 Test

 Settings

Settings

GENERAL

VOICE

General

AI Receptionist name

Name your AI Receptionist

AI Receptionist extension

Enter an extension number for AI Receptionist.

Ext:

Backup extension

If the AI Receptionist can't resolve the issue, caller will be transferred to this extension.

Ext.

▼

Assignments

Assign to a company site

To assign AI Receptionist to answer calls at specific company sites, go to Call Handling, select the sites you want to assign it to, and choose AI Receptionist for incoming call routing.

Go to Call handling

Assign to direct number

To assign a number, go to All Numbers and select the number you would like to use.

Go to All Numbers

Delete AI Receptionist

Save