AI Receptionist Setup
Do-It-With-Me Solution

Work with our talented professionals to set up your AI Receptionist.

Note: *Conversations AI Premium is required to receive this service.*

What to Expect Next:

Fulfillment Form

To ensure a smooth and efficient process, please fill out the fulfillment form with as much detail as possible. This will help streamline the entire experience.

Timeline: We'll review the order and start the process within 2 business days.

Onboarding Call

Our team of experts will lead an onboard call to understand your business needs and how to adjust our pre-built lead capture workflows to suit you. We will come to the call with your chat receptionist set up with your branding and customized communication style to demo. During the call, we will refine any additional knowledge sources and/or communication instructions together.

For American businesses, A2P registration is required to validate the business' use of SMS. Please be ready with your business legal information if you'd like to use SMS. Registration for A2P can take up to two weeks to complete.

Timeline: An onboard call can be booked in as little as 1 business day, depending on availability.

AI Receptionist Setup

Using the refinements during the onboarding call, we will finish setting up your AI Receptionist and enable the voice settings. We will also create a lead capture form which can be added to your website to ensure that all of your leads flow seamlessly into the CRM. We will also set up SMS registration, missed call text back or SMS follow-up messaging, and AI Voice capabilities to ensure you never miss a lead.

Timeline: Your AI Receptionist will be complete in 1 business day or 3 business days for workflows with custom integrations.

Please Note: We require access to the backend of your website in order to install the chatbot and lead form.

Training Call

This call will be used to walk you through the new lead capture process that was set up. Our team of experts will show you where you can find your leads, engage in text and email conversations with these leads, and create additional tasks for your sales team.

Timeline: This call can be booked with our team in as little as 1 business day, after AI Receptionist Setup completion depending on availability.

30 Day Check In Call

This call will be used to review your conversations, determine what knowledge or custom instructions need to be updated or refined, and ensure that your AI Receptionist is communicating effectively.

Please Note: Prior to this call, our team of experts will review 5-10 conversations in order to provide recommendations for improvement and point out wins during the call.

Timeline: This call will be booked 3-4 weeks after the completion of your AI Receptionist Setup.

AI Receptionist Setup
Integrations and Automation Creation

CRM Pipeline and Opportunity Management
In order to properly manage your leads, we will create a smart list and a sales pipeline for you in the CRM. The smart list will automatically pull all of your web chat and form leads into a single contact list. This can be used to create and send email campaigns or other tasks where you want to reach out to a group of customers. The pipeline will be used to keep track of any new opportunity that comes through the chat bot or the lead form and can show the dollar value associated with each new lead.

Additionally, you will receive a task in the CRM and a notification that you have a new lead, along with reminder notifications if the lead remains open after a few days.

Booking or Inventory Connection
If you are a service-based business and schedule meetings or book appointments with your customers, we will connect your BookMeNow Calendar (or external booking solution, if possible through open API) to the AI Receptionist to book appointments on your behalf. If you only offer services within a specific set radius, we will also configure a custom capability that handles zip code lookups to ensure your lead can be serviced by your team.

Alternatively, if you run an retail store, we can set up a custom capability (through open API) to connect your existing e-commerce website to the AI Receptionist to look up inventory information and provide real-time updates on items in stock.

Please Note: These connections require open API documentation and keys in order to be created. If APIs are not possible through your provider, or have limitations with booking directly, we will set up your receptionist to provide a booking link to your customers instead.

Automation Creation
Finally, our team will set up 3-5 automations (depending on business needs and connected platforms) to complete the process. These automations will send you notifications of your new leads and will also send your leads a follow-up to ensure they have a way to reach you in the event that they need additional support.

Please Note: The entire process of setting up your AI Receptionist (including custom API integrations), CRM pipeline and opportunities, and creating your lead capture automations will be completed within 3 business days following the onboarding call.

Requirements

Web Chat and Form Installation, SMS Registration, and API Access

In order to set your business up for success, there are a few requirements that must be met in order to deliver this service efficiently.

Information Requirements

Completing SMS Registration

- For American businesses, A2P registration is required to validate the businesses use of SMS. Please be ready with your businesses license legal information, which includes the following:
    - Legal Business Name
    - Business Category
    - Business Type
    - Country/Region
    - Business Registration Number
    - Address
    - Website or a Link to an Online Listing
- We will also need the following information for an Authorized Business Representative:
    - First and Last Name
    - Job Position
    - Title
    - Email
    - Phone Number

Gaining Access to the Website Backend

- We require backend access to your website, including:
    - Hosting Provider
    - Username/Email
    - Password

API Access

- In order to connect your third-party booking software or provide inventory lookups, we require API keys and open API documentation.
- Please note that these will vary depending on your provider. Our team will let you know what documentation and information we require during the onboarding call and/or in our email directly following the call.

Frequently Asked Questions

How does the AI-assisted web chat capture leads?
When customers interact with the chat on your website, the AI-assisted web chat will reply for you, with simple conversational behaviour designed to get a name and mobile phone number. That way, you can rest assured that you'll always capture the lead without interrupting your work day and can follow up with it later.

The AI-powered web chat will be intelligent enough to answer basic questions about the business in question, such as your location, operating hours and offerings based on your business profile and website. We will also create additional "knowledge", such as holiday hours or prices, or FAQs that may not be listed on your website.

How much does the chatbot know about the business? Can it answer questions?
The chatbot will thank the user for their questions, records them for a business person to follow up, and tries to get a name and phone number so that the business can reply and get new customers. The contact will be added to the CRM, and the conversations will show in Business App, ready for your team to follow up.

It's also possible to add "knowledge" to the chatbot from the business profile, so it can answer basic questions about services, location and contact info, and hours. You can also upload additional text to the widget to add FAQs, service & pricing details, more context on the products/services a business does and does not offer, and even instructions on how to book appointments. That way, the web chat can converse with visitors to the website and answer their questions accurately.

How do I know when a new lead comes in?
When a new lead comes in, you will receive either an email or SMS notification (or both) letting you know that a customer has filled out the web chat or the lead capture form on your website. These notifications will also come directly through the platform which you can view whenever you're logged in.

Your customer will also receive a message (email or SMS) letting them know that a team member from your business will be in touch soon.

All of these messages can be customized to your needs, or use our pre-built templates–whichever suits your business best.

Can you create custom automations for me?
We do not currently offer custom automation creation. With the AI Receptionist Setup, we include a standardized list of workflows designed to get your business up and running, and ensure that all leads are captured and responded to. During the onboarding call, we will discuss your needs for lead capture and notifications, and make adjustments to our pre-built lead-capture automation templates.

Frequently Asked Questions

Can the AI Receptionist create a quote or book an appointment?
Using the knowledge base and custom instructions, we can give the chatbot the information that it needs to create a basic quote/estimate. Any pricing or details needed in order to provide this quote will need to be provided to us during the onboard call or sent to us in an email.

If you currently use (or would like to use) the Business App Calendar to manage appointments for your team, the AI Receptionist can book the appointment directly through the web chat or during a call. For any other booking or scheduling softwares, we require API keys and documentation to determine if your software can be connected.

In the event that it cannot be used by the AI Receptionist directly, we will set up your receptionist to send your booking link instead.

Can you connect my e-commerce website to provide inventory lookups?
As long as your e-commerce provider has open API documentation and you have access to your API key(s), we can connect your inventory information to the AI Receptionist to have them answer real-time questions about product inventory.

Can you connect other tools to my receptionist beyond appointment booking and inventory lookups?
We do not currently offer custom capability creation beyond scheduling an appointment, providing inventory information, or doing a zip code lookup at this time. Our AI Receptionist Setup is meant to get your business up and running as quickly as possible using a standardized set of tools.

Can I use email and SMS to communicate with my customers?
SMS is available for all Canada and US businesses. Please let our team know in the onboard call if you'd like to utilize email, SMS, or both.

Note: If you're located in the US, please be prepared to supply your legal business information for A2P registration.

Frequently Asked Questions

What is A2P and what information do you need from me in order to set it up?

A2P stands for Application-to-Person messaging, and is required by businesses who send text messages to their customers in the US. We will need the following information from you in order to set it up:

- Legal Business Name   - Business Category   - Business Type
- Country/Region   - Address
- Website or a Link to an Online Listing

We will also need the following information for an Authorized Business Representative:

- First and Last Name   - Job Position   - Title
- Email   - Phone Number

I don't have an EIN for my business. Can you still set up A2P?

Unfortunately, this is a limitation of our SMS provider and we are unable to use a SIN/SSN instead of the EIN at this time. Our team is aware of this limitation and are looking into solutions to ensure you are still able to manage SMS conversations with your customers.

What is "Missed Call Text Back" and how does it work?

Our Missed Call Text Back feature is used to ensure that if you miss a call from a customer, they will receive an automated text message to further the conversation. This text message could be used as a thank you and to inform the customer that someone will give them a call back soon, or could open the door for an SMS conversation with AI.

This works by forwarding your business phone number to your Business App phone number, and setting up our AI Receptionist to automatically send a text message to any customer who calls into your Business App phone number.

Please Note: Our team is not currently able to assist with setting up the forwarding from your business phone number to your Business App phone number.

How do I know which Voice Configuration is right for me?

For English-only response needs, we recommend using Deepgram Aura as the responses are more accurate than with our OpenAI options. However, there may be other factors to consider, such as the required language, response times, and more. If you're unsure which may be best for you, our team will be able to recommend a solution during our onboarding call.

Please Note: Our team is looking at several new options to ensure we're able to meet your business' needs. As more options become available, we can adjust which solution you're using at any time. Just let us know if you'd like to test another configuration and we'd be happy to make the swap.