CUSTOMER FAQS:
AI Receptionist



1. What is AI Receptionist?

AI Receptionist is an AI-powered voice agent that answers incoming calls, understands what callers need, provides information about your business, and connects callers to the appropriate destination when human assistance is needed.

Instead of requiring callers to navigate traditional phone menus, AI Receptionist uses natural conversation to help answer questions and determine where a caller should be transferred.

2. What information can AI Receptionist use to answer caller questions?

AI Receptionist can use several sources of information that you configure.

1. **Knowledge Collections** allow AI Receptionist to answer questions using supported business content, including documents and publicly accessible websites.
2. **FAQs** let you provide direct answers to common customer questions.
3. **Business Details** provide information such as your company name, business hours, location, contact information, company description, and services.

3. What can the AI Receptionist do?

AI Receptionist includes the core capabilities needed to create an AI-powered front door for your business:

- Answer incoming calls using natural voice conversations
- Understand why a caller is calling
- Transfer callers based on their request for up to five configured transfer destinations
- Provide recipients with a summary of the caller's interaction with the AI Receptionist and the reasoning for transferring the call to them.

- Answer more in-depth FAQs
- Provide information such as business hours, location, contact information, and services
- Escalate callers when it cannot confidently assist or when a caller requests a person
- Use customized greetings, wrap-up messages, fallback responses, and conversation guardrails
- Appointment Scheduling (Coming Soon)
- Provide AI Agent performance analytics and usage dashboards
- Store AI Agent conversation transcripts and summaries in Archiving

4. How does AI Receptionist know where to transfer a caller?

Your account administrator creates transfer rules that tell AI Receptionist what types of requests should go to specific destinations.

For each rule, the administrator can specify a single transfer destination phone number and instructions describing the types of caller requests that would initiate a transfer to that destination. You can also provide examples of what callers might say to help the AI Receptionist recognize when to make the transfer.

5. How many transfer destinations can I configure?

Currently, you can configure up to five transfer rules for each AI Receptionist, with one destination phone number per rule. For example, you could create separate transfer rules for Sales, Billing, Support, and Customer Service.

6. Can AI Receptionist answer questions without transferring the caller?

Yes. You can give AI Receptionist access to Knowledge Collections, FAQs, and Business Details so it can answer appropriate questions without requiring an employee to handle the call.

If the caller needs human assistance, AI Receptionist can then transfer the call based on your configured rules.

7. What happens if AI Receptionist cannot help a caller?

Administrators can configure fallback and escalation behavior for situations where AI Receptionist cannot confidently continue assisting a caller.

AI Receptionist can also escalate when the caller asks to speak with a person, helping maintain access to human assistance when needed.

8. Can I customize and test my AI Receptionist?

Yes. Administrators can select a voice profile and communication style and give the AI Receptionist a name.

You can also configure greetings, wrap-up messages, transfer messages, fallback responses, escalation behavior, conversation guardrails, and transfer rules.

9. What languages does AI Receptionist support?

AI Receptionist supports English-language conversations. Additional language support is planned for a future release.

10. What types of destinations can AI Receptionist transfer calls to?

AI Receptionist can transfer callers to phone number-based destinations that you configure. For example, you can assign the phone number of an employee, a Unified Communications (UC) hunt group, or a Contact Center (CC) call queue as a transfer destination.

Each transfer rule includes a single destination phone number along with instructions that tell AI Receptionist when a caller should be transferred there. Administrators can configure up to five transfer rules, and create separate transfer scenarios for teams or functions such as Sales, Billing, Technical Support, or Customer Service.

11. Can callers explain what they need instead of selecting a menu option?

Yes. AI Receptionist is designed to understand caller requests through natural conversation.

Instead of navigating a traditional phone menu, callers can explain what they need in their own words. AI Receptionist can then use that request to provide relevant information or determine the appropriate configured destination when a transfer is needed.

12. Does my account have access to the AI Receptionist?

AI Receptionist is available to UC and CC accounts that have a UC 4.0 versioned license and have purchased AI Agent minute blocks.

AI Receptionist can be created and managed through AI Builder in the Control Panel. If a CC account has an AI Standard or AI Advanced license, AI Builder can additionally be accessed through the Contact Center Admin Portal.

13. How does billing and purchasing work for AI Receptionist?

AI Receptionist uses prepaid, monthly recurring AI Agent minute blocks that are available in 500, 2,500, and 10,000-minute options. You can purchase multiple blocks and stack them to match your account's expected usage.

Purchased minutes are pooled across all AI Agents on the account and apply to the applicable monthly billing period. You can purchase and manage AI Agent minute blocks in the Control Panel under Subscription > AI Agents.

New accounts receive 30 onboarding minutes at no charge when AI Agents are first enabled. These onboarding minutes are valid for two calendar months from the enablement date.

14. What happens if I buy additional AI Agent minute blocks halfway through the month?

When you purchase additional AI Agent minute blocks during a billing period, both the charge and the included minutes are prorated for the remainder of that billing period. Starting with the next billing cycle, you receive the full monthly minute allowance and are charged the full recurring monthly price.

If you cancel minute blocks during the billing period, the change takes effect with the next billing cycle. You keep the minutes already granted for the current period and are not refunded for the remaining days in that period.

15. What happens if I use all of my purchased AI Agent minutes?

AI Agent accounts can be configured with No Overage or Overage Allowed. No Overage is the default setting.

If Overage is enabled, usage beyond the purchased minute allowance is billed at the applicable overage rate. If No Overage is selected, your account does not receive additional overage allowance once purchased minutes are exhausted. Overage settings are managed at the account level.

If you select No Overage and consume all your AI Agent minutes, calls to your AI Receptionist will be routed to the configured Error destination.

16. When does AI Agent minute usage stop if AI Receptionist transfers a call?

AI Agent minutes are consumed while the caller is interacting with AI Receptionist. Once AI Receptionist transfers the call and the AI Agent interaction ends, AI Agent minute consumption stops.

Any other charges associated with the transferred call are separate from AI Agent minute usage and subject to your applicable calling plan.

17. How can I review AI Receptionist performance and conversations?

The AI Agent Performance dashboard provides visibility into AI Receptionist performance and usage, helping review trends and understand how the agent is handling calls.

AI Agent conversation transcripts and summaries are also available in Archiving, for deeper review of individual interactions.

18. What capabilities can I expect to see next for AI Receptionist?

AI Receptionist will continue to expand with new capabilities that help your business capture more opportunities and simplify call handling. Planned capabilities coming soon include:

- **Scheduling Links:** AI Receptionist will be able to send a scheduling link by SMS, helping turn caller interest into booked appointments while reducing manual scheduling for employees
- **Dial by Name:** Callers will be able to ask for an employee by name and be connected directly, providing a simpler way to reach the right person.

These capabilities are planned for a future release and are not available today.

