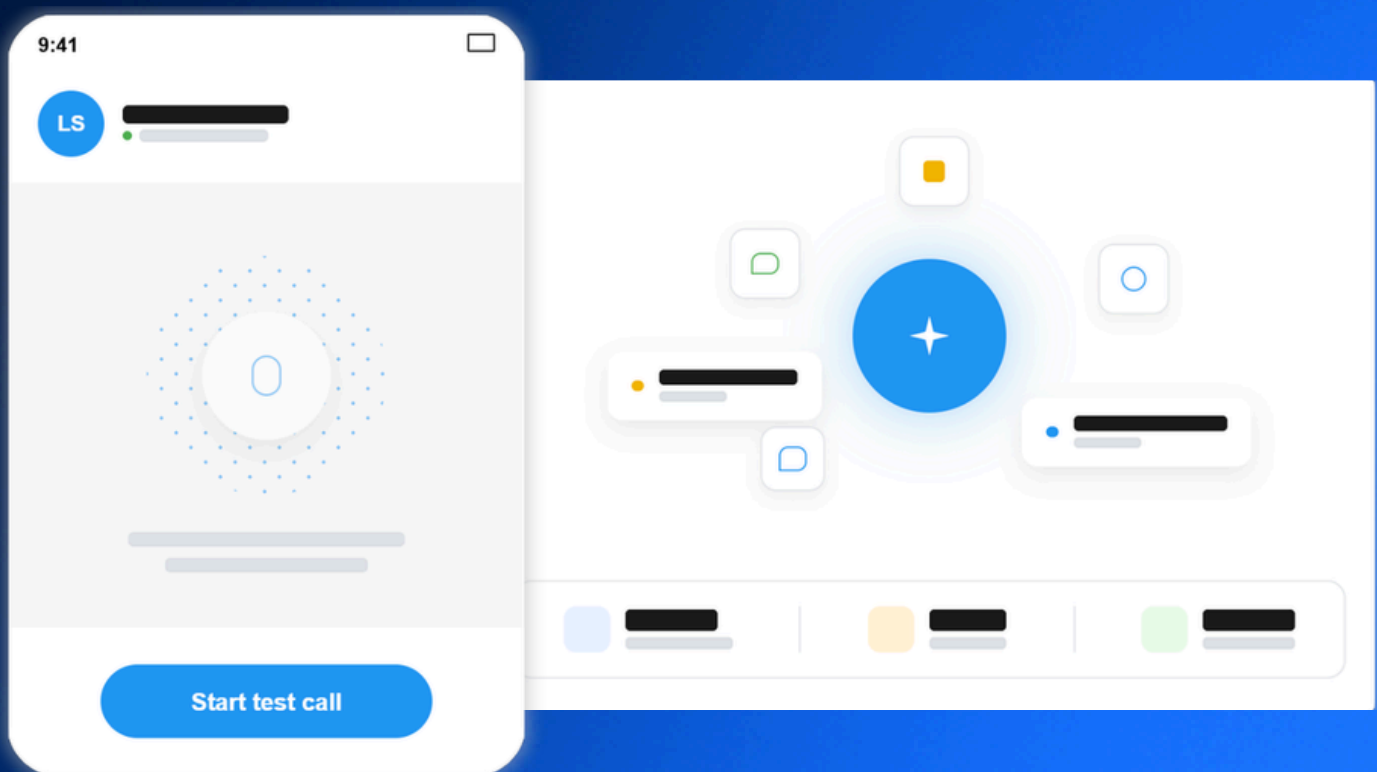


REFERENCE GUIDE

AI Agents

Text bots, phone agents, and flows



The AI Agents Module

What It Is

Your AI tools include text bots (Conversation AI), phone agents (Voice AI), Agent Studio, the Knowledge Base, and Agent Logs. Together they answer customers for you at any hour.

How It Works For Your Business

- Search for each AI tool by name: Conversation AI, Voice AI, Agent Studio, Knowledge Base, Agent Logs.
- Conversation AI replies on text, email, Facebook, Instagram, WhatsApp, and website chat.
- Voice AI answers calls and can place them. It has an Agent List tab and a Dashboard & Logs tab.
- The Conversation AI dashboard has date, channel, and agent filters plus cards like messages, appointments, and Time Saved.
- Each Agent List has a Create button: + Create Bot for text, + Create Agent for voice.

The AI Agents Module – Tips & Guidelines

Tips

- Menu names can differ by account, so go by what you see on screen.
- Some items only appear when that tool is turned on for your account.
- Use the dashboard filters to zoom in on one bot or one week.
- Watch the Time Saved card to see the work your bots take off your plate.

DO

- Click through every sub-item once
- Learn what each screen is for
- Use the filters on the dashboard
- Find both Create buttons

DON'T

- Build before you have toured
- Assume every item is turned on
- Ignore the dashboard numbers
- Mix up bots and phone agents

Guided Setup for a Text Bot

What It Is

Guided Form Setup is the easiest way to build a Conversation AI bot. A form asks a few questions and builds a working bot, with no code and no blank page.

How It Works For Your Business

- In Conversation AI, click + Create Bot and choose Guided Form Setup, then Create New Bot.
- Pick a bot type: General Q&A answers questions, and Appointment Booking also helps people book.
- Pick a Brand Voice from the dropdown, or create one. Use Edit to adjust it.
- On Bot Settings, set the name, channels, first message, primary bot toggle, wait time, and business info.
- Click Save, then choose the bot's status. Field names may differ a little on your screen.

Guided Setup for a Text Bot – Tips & Guidelines

Tips

- Use plain bot names like Front Desk Bot so several bots stay easy to tell apart.
- Not sure about the type? Start with General Q&A and add booking later.
- A short wait before replying can feel more human than an instant reply.
- Keep business info short: hours, service area, and what you offer.

DO

- Use Guided Form Setup to start
- Name bots in plain words
- Write a short, warm first message
- Save before you leave the form

DON'T

- Skip the Brand Voice step
- Name every bot Bot 1
- Write a long first message
- Forget to pick a status

Training with Web Links and Q&A

What It Is

Training gives your bot the facts it answers from. You add web pages and Q & A pairs to a Knowledge Base, and the bot looks things up there.

How It Works For Your Business

- Open the bot's training area, then pick or create a Knowledge Base. Open Uploaded Links to see what it has learned.
- Choose a crawler mode: Exact URL, All URLs with this Path, or All URLs in this Domain.
- Enter your full address starting with https, click Get Data, tick the pages you want, then click Train Bot.
- Watch the status. Getting Data means working, Trained means ready, and Failed means retry or remove.
- Use + Add Q & A for answers the pages lack, set Auto Refresh on web sources, and remove outdated ones.

Training with Web Links and Q&A – Tips & Guidelines

Tips

- Start with about five good pages, test, then add more.
- The crawler reads public pages only. Put login-only info in as a Q & A.
- Write answers as you would say them out loud, with the price or hours inside.
- Web link limits apply per Knowledge Base, so train on what matters.

DO

- Name each Knowledge Base clearly
- Untick login and junk pages
- Check the refresh date often
- Add your top questions as Q & A

DON'T

- Crawl the whole domain blindly
- Keep outdated sources
- Train on hundreds of messy pages
- Expect it to read private pages

Goals and Contact Collection

What It Is

Bot Goals tell the bot what to get done in a chat. The most common goal is collecting details and saving them to the contact record automatically.

How It Works For Your Business

- Open the Bot Goals tab and tick the standard details: name, email, phone, street address, and city.
- Add custom questions that fit your business. Three to five is a good range.
- Use the Update Contact Field dropdown on each question to choose where the answer is saved.
- Turn on Skip if Already Filled so the bot does not ask for what your software already knows. It fills empty fields only.
- Turn on the email notification and Enable Conversation Summary, then click Save.

Goals and Contact Collection – Tips & Guidelines

Tips

- Every extra question makes a visitor more likely to leave.
- If the right field is missing, create a custom field in your account first.
- Test with a fake name and city, then open the contact to see if it filled.
- Treat each alert email as a to-do: add that answer to the bot's training.

DO

- Ask only what you need
- Map every question to a field
- Turn on Skip if Already Filled
- Click Save

DON'T

- Ask ten questions
- Leave answers unmapped
- Ask for known info twice
- Assume settings auto-save

Testing and Response Modes

What It Is

Testing shows you how the bot answers before real customers see it. The response mode decides how much freedom the bot has: Off, Suggestive, or Auto-Pilot.

How It Works For Your Business

- Use the Test your Bot panel to play the customer and read each answer. Click the reset icon between scenarios.
- Open the Knowledge Base Retrieval Tester to see what the bot found in its training for a question.
- Off means the bot does nothing. Suggestive drafts replies for a person to review. Auto-Pilot sends on its own.
- In Suggestive mode, search for Conversations, read the suggested reply, edit it, then send it.
- From a contact's conversation, use the bot status icon to set that one contact to Active, Inactive, or a pause.

Testing and Response Modes – Tips & Guidelines

Tips

- Test price, hours, and location, then ask something silly to see if it admits it does not know.
- Suggestive drafts appear only after a real incoming message.
- Per-contact status works in Suggestive or Auto-Pilot with Conversation AI on.
- Move to Auto-Pilot after the drafts look right for about a week.

DO

- Test in different wordings
- Reset between scenarios
- Start in Suggestive
- Switch off single contacts as needed

DON'T

- Go straight to Auto-Pilot
- Test only one question
- Skip the Retrieval Tester
- Change global settings for one person

Booking, Handover, and Follow-Up

What It Is

These Conversation AI actions let a bot book appointments, pass a chat to a person or another bot, and follow up with people who go quiet.

How It Works For Your Business

- For booking, open Bot Goals, turn on Appointment Booking, select the calendar, and add booking instructions.
- Multi-calendar setup lets one bot book on more than one calendar. Form-based bots also have cancellation and rescheduling options.
- Test by chatting your way to a booking, then confirm the appointment shows up in your calendar.
- Human Handover lives under Setup Your Actions. Toggles cover Human Requested, Lack of Information, and Failed to Resolve Issue.
- After a handover you can assign the chat to a user, send a final message, set a pause time, create a task, and add tags. Transfer Bot and Auto Follow-Up are also actions.

Booking, Handover, and Follow-Up – Tips & Guidelines

Tips

- Pick the right calendar before you test booking.
- Give booking instructions in plain words, like which services each calendar covers.
- Set a bot pause after handover so the bot does not talk over your team.
- Always test a full booking and look for it in the calendar.

DO

- Test a real booking end to end
- Turn on the handover triggers you need
- Assign handovers to a user
- Use tags to find handed-over chats

DON'T

- Pick a calendar and never test
- Leave handover off
- Let the bot talk after handover
- Forget the final message

Building a Voice AI Agent

What It Is

A Voice AI agent answers phone calls, and can place them. You build it by choosing a voice, writing a welcome message and prompt, and connecting a Knowledge Base.

How It Works For Your Business

- Search for Voice AI, click + Create Agent, and choose Create Custom Agent. Other options include Browse Marketplace and Flow Based Builder.
- Set the Agent Name, Voice, Model & Language, and Timezone (look for the clock icon).
- Write inbound and outbound welcome messages, then set Speaker Order and Pause Duration.
- Write the Prompt, connect a Knowledge Base, and click Save.
- Use the Web Call test to talk to your agent from the browser before you connect a number.

Building a Voice AI Agent – Tips & Guidelines

Tips

- Test by Web Call first, so you can fix the agent before any real caller hears it.
- Keep welcome messages short and clear.
- Pick the right timezone so time-based answers make sense.
- Use the Knowledge Base for facts and the prompt for behavior.

DO

- Test with a Web Call
- Write a clear prompt
- Connect a Knowledge Base
- Set the timezone

DON'T

- Connect a number before testing
- Write a long welcome
- Mix facts into every prompt line
- Skip Save

Voice Deploy and Phone Numbers

What It Is

Deploying connects your voice agent to a phone number, decides when it answers, and sets working hours. It can also connect to a chat widget.

How It Works For Your Business

- Open the agent's Deploy tab. In the Phone section, select a number or a Number Pool.
- Under Call Routing, choose Answer Calls Directly or Use as Backup.
- Under Working Hours, choose All Hours or Custom Schedule.
- In the Chat section, connect or create a Chat Widget for the agent.
- To route an existing number, search for Phone Numbers, then Edit Configuration, Call Forwarding, and route to Voice AI.

Voice Deploy and Phone Numbers – Tips & Guidelines

Tips

- Lower the forwarding Timeout so voicemail does not grab the call first.
- Use a Custom Schedule if humans answer during the day.
- Use a Number Pool when one agent should answer several numbers.
- Call your own number to test the full path.

DO

- Match routing to your team's hours
- Lower the call forwarding Timeout
- Call your own number to test
- Use Custom Schedule when needed

DON'T

- Leave the voicemail timeout long
- Forget working hours
- Skip the live test call
- Assume All Hours fits everyone

Voice Actions, Logs, and Studio

What It Is

Voice AI actions let your agent do things during or after a call, and the dashboard shows how calls went. Agent Studio builds flow-based agents on a visual canvas.

How It Works For Your Business

- Click + New Action to add Call Transfer, Send SMS, Update Contact Field, Appointment Booking, Trigger Workflow, Agent Transfer, or Custom Action.
- Write a trigger condition for each action. Place it as During-call or Post-call. Post-Call settings cover notifications, a workflow, a summary, and a contact note.
- Dashboard & Logs shows Total Calls, Calls Completed, Duration, Actions Triggered, and Sentiment, with filters. Open a call log for the transcript.
- In Agent Studio, open a Flow Agent canvas with a Start Trigger, AI Agent node, Router, Search Knowledge Base, API Call, and End node.
- Use the Test tab, then publish Draft to Staging to Production. Conversation AI can also use a Trigger Workflow action.

Voice Actions, Logs, and Studio – Tips & Guidelines

Tips

- Write trigger conditions in plain words that describe when the action should fire.
- Read call transcripts and summaries to find what to fix in the prompt.
- Use Global Prompt and Variables in Agent Studio to keep shared text in one place.
- Test in Agent Studio before moving from Draft to Production.

DO

- Write a clear trigger for each action
- Check transcripts after calls
- Use the Test tab in Studio
- Publish step by step

DON'T

- Add every action at once
- Ignore the call logs
- Publish straight to Production
- Leave triggers vague

Key Terms Glossary

Conversation AI

The text bot side of AI Agents.

Voice AI

The phone agent side of AI Agents.

Channel

A place where messages arrive, like text or Facebook.

Brand Voice

A saved description of how your business sounds.

Knowledge Base

A folder of information your agents look things up in.

Crawler

A tool that reads web pages for you.

Auto-Pilot

A status where the bot sends replies on its own.

Suggestive

A status where the bot drafts and a person reviews.

Human Handover

An action that passes a chat from the bot to a person.

Call Routing

The choice of how calls reach your voice agent.

Flow Agent

An agent built on a visual canvas in Agent Studio.

Transcript

A written record of everything said in a chat or call.

Getting Help

Your software changes over time, so a button, tab, or menu name may look a little different from what you see here. If something does not match, check the in-app help for AI Agents or look for the option with the closest name.