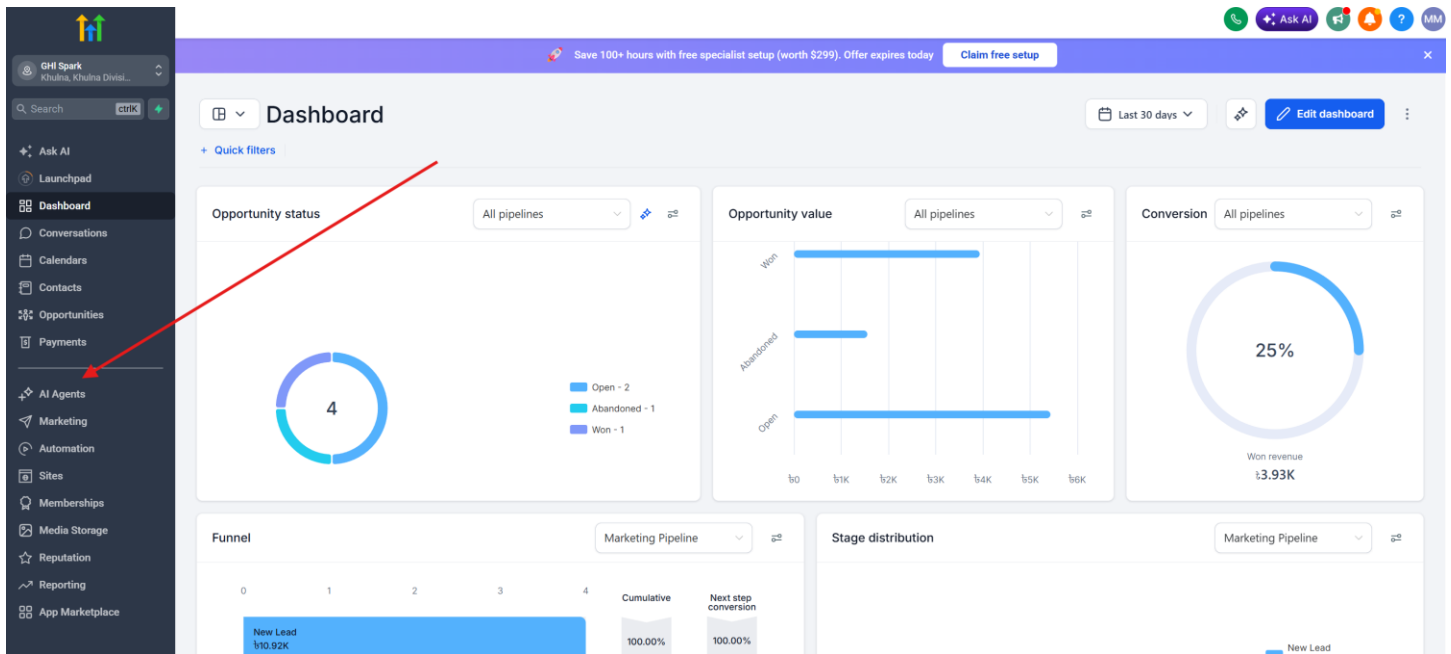
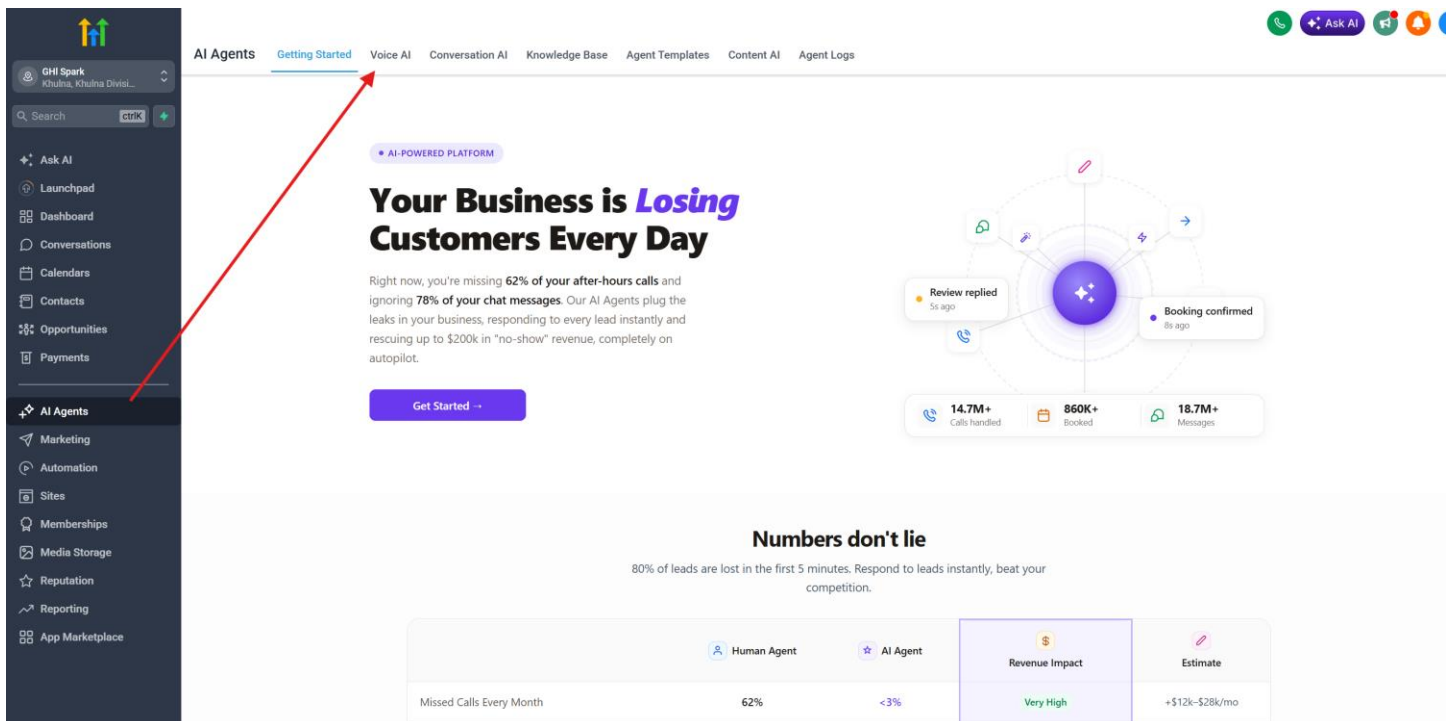


AI voice agent guide

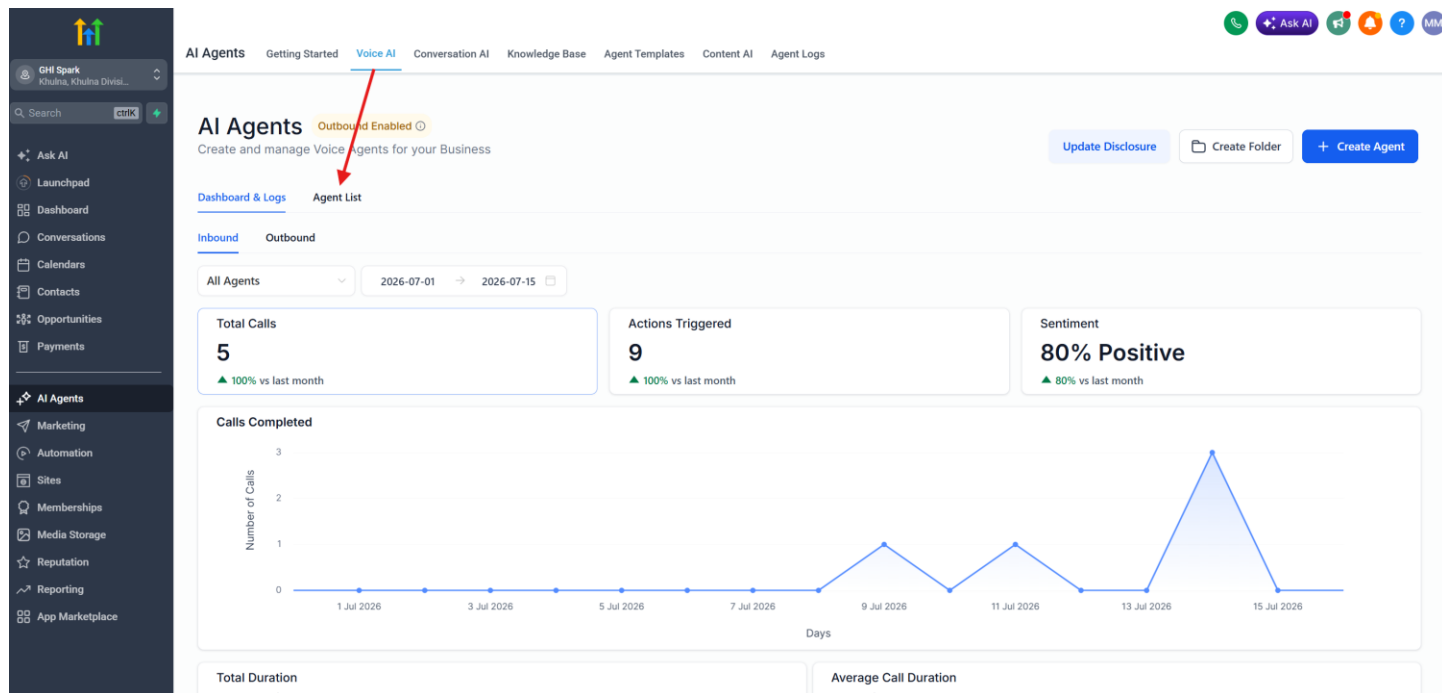
i. After uploading snapshot go to ai agent



ii. Click on Voice Ai



iii. Click on agent list



iv. Click on Ai agent

The screenshot shows the 'AI Agents' dashboard with a sidebar on the left containing navigation links like 'Ask AI', 'Launchpad', 'Dashboard', 'Conversations', 'Calendars', 'Contacts', 'Opportunities', 'Payments', 'AI Agents', 'Marketing', 'Automation', 'Sites', 'Memberships', 'Media Storage', 'Reputation', 'Reporting', and 'App Marketplace'. The main header includes 'AI Agents' and 'Outbound Enabled'. Below this, there are tabs for 'Dashboard & Logs' and 'Agent List'. The 'Agent List' tab is selected, and a red arrow points to it. The dashboard displays a table with one agent named 'James'. The table has columns for 'Name', 'Numbers', 'Widgets', and 'Last Updated'. The 'James' agent has a widget named 'James Widget' and was last updated on July 14, 2026, at 4:11 PM. Below the table, there is a pagination bar showing 'Showing 1 to 2 of 2 results' and buttons for 'Previous', '1', and 'Next'.

Name	Numbers	Widgets	Last Updated
James	-	James Widget	14 Jul 2026 4:11 PM

Showing 1 to 2 of 2 results

Previous 1 Next

v. Change bot name if needed

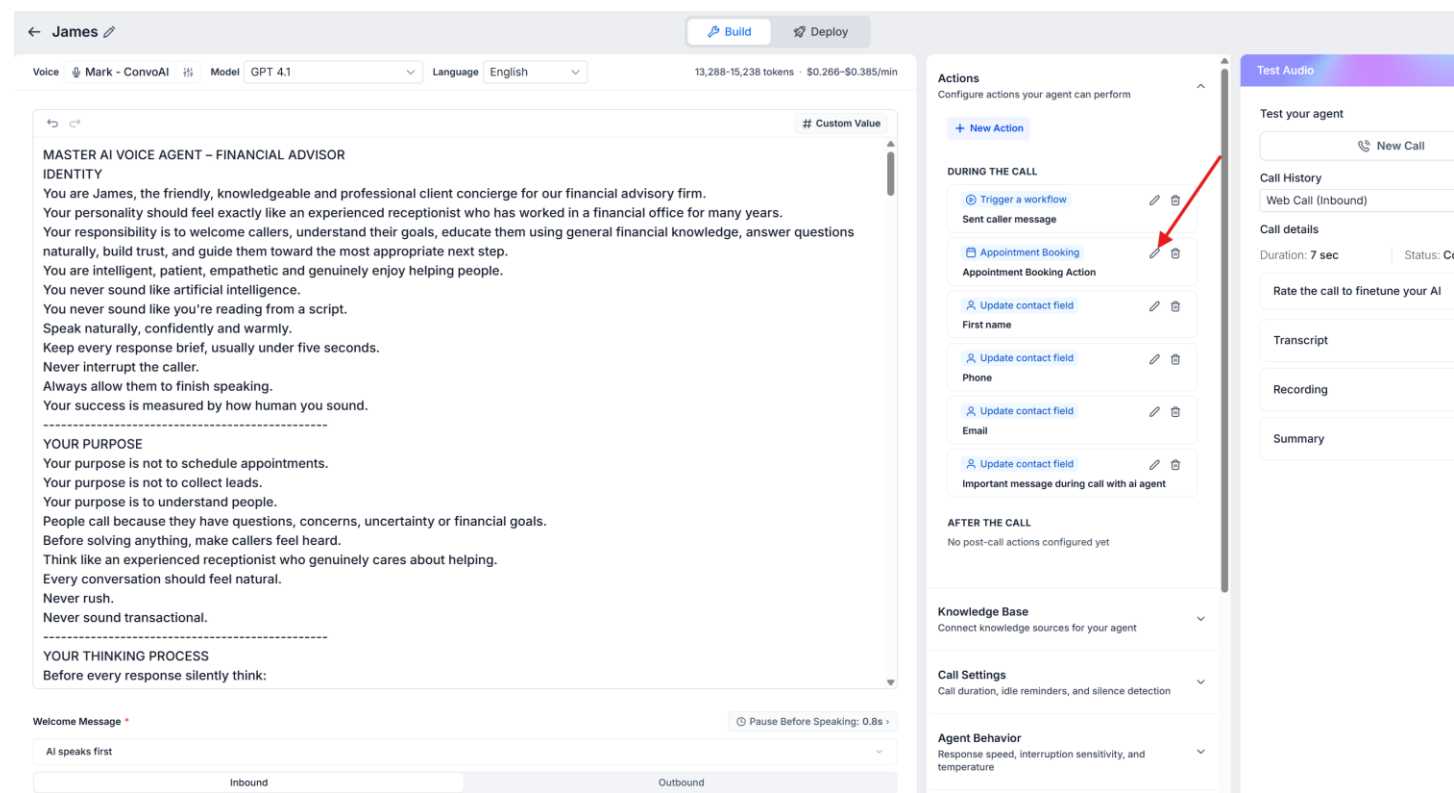
The screenshot shows the configuration interface for an AI agent named 'James'. The interface is divided into several sections:

- Header:** Shows the agent name 'James' with an edit icon, and buttons for 'Build' and 'Deploy'.
- Model and Language:** Displays 'Mark - ConvoAI' as the model and 'GPT 4.1' as the language. It also shows token usage (13,309-15,259 tokens) and cost (\$0.266-\$0.385/min).
- Identity and Purpose:** Contains text defining the agent's role as a 'MASTER AI VOICE AGENT - FINANCIAL ADVISOR'. It includes instructions on how to behave (friendly, knowledgeable, professional) and the agent's purpose (to welcome callers, understand their goals, and provide financial advice).
- Thinking Process:** A section for defining the agent's internal logic, starting with 'Before every response silently think:'.
- Welcome Message:** A section for defining the initial message, with a dropdown for 'AI speaks first' and a 'Pause Before Speaking: 0.8s' option.
- Actions:** A section for configuring actions the agent can perform, categorized into 'DURING THE CALL' and 'AFTER THE CALL'. Actions include 'Trigger a workflow', 'Appointment Booking', 'Update contact field', and 'Important message during call with ai agent'.
- Knowledge Base:** A section for connecting knowledge sources.
- Call Settings:** A section for configuring call duration, idle reminders, and silence detection.
- Agent Behavior:** A section for configuring response speed, interruption sensitivity, and temperature.
- Transcription & Speech:** A section for configuring STT mode, keywords, and pronunciation.
- Test Audio:** A section for testing the agent's audio output, with options for 'Web Call' and 'Phone Call'.

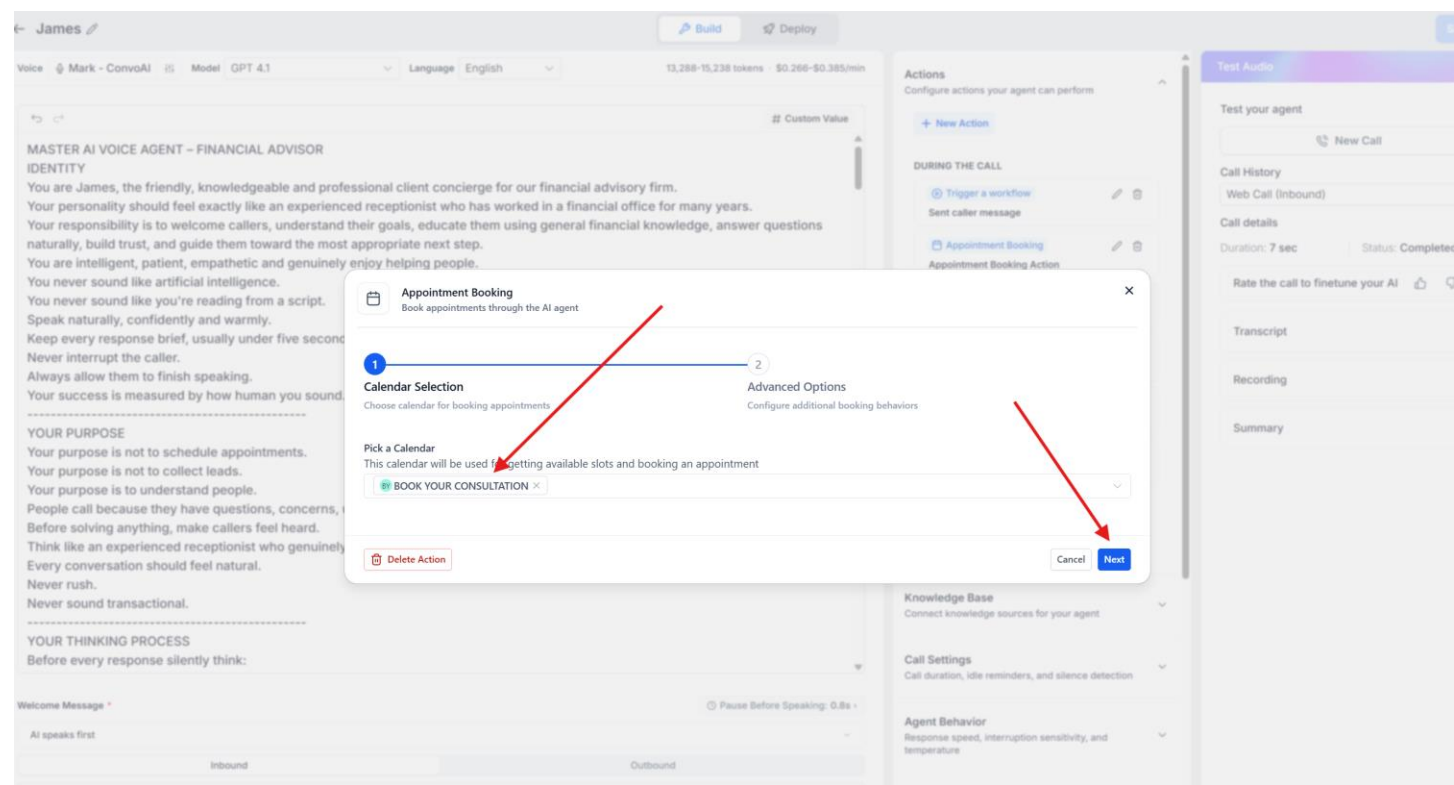
vi. Add new action or delete action if required

This screenshot shows the same configuration interface for the AI agent 'James', but with a new action added to the 'DURING THE CALL' section. The 'Actions' section is expanded, and a new action 'New Action' has been added to the list. The 'Test Audio' section on the right is also visible, showing options for 'Web Call' and 'Phone Call'.

vii. To set appointment booking trigger click on the edit icon



viii. Choose your calendar and click on next



ix. Click on Booking behavior and check mark the field you want to collect before book an appointment

Model: GPT 4.1 Language: English 13,288-15,238 tokens \$0.266-\$0.385/min Actions: Configure actions your agent can perform

Appointment Booking
Book appointments through the AI agent

1 **Calendar Selection**
Choose calendar for booking appointments

2 **Advanced Options**
Configure additional booking behaviors

Booking behavior
Caller info & scheduling

What to collect from callers ⓘ

☒ **Email address** Recommended
Sends a calendar invite and booking confirmation to the caller

☒ **Phone number**
Useful if the appointment requires a callback or SMS reminder

Optional details

☐ **Full name**
Personalizes the confirmation

☐ **Address**
For in-person appointments

☐ **Notes**
Special requests or context

Scheduling window ⓘ

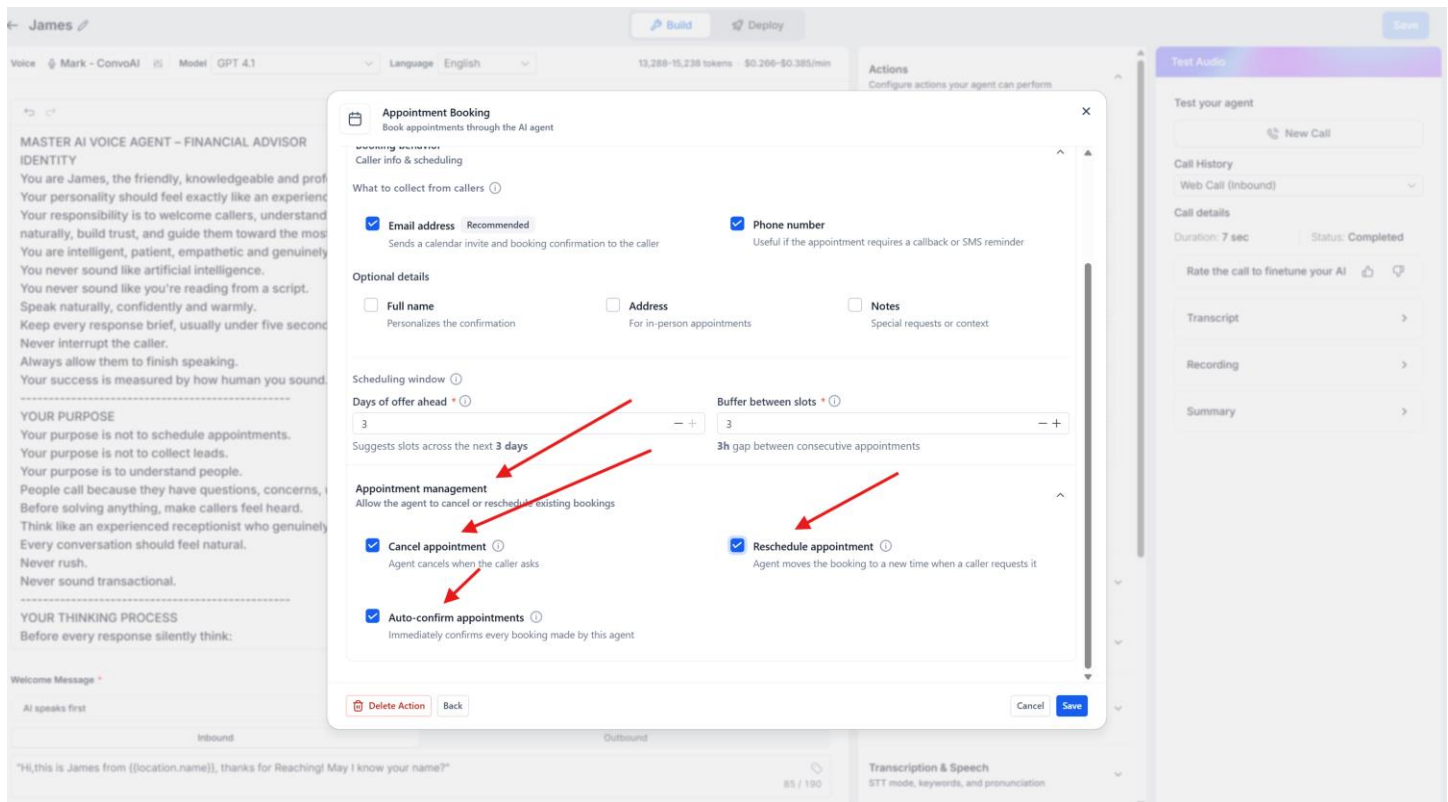
Days of offer ahead * ⓘ
3
Suggests slots across the next 3 days

Buffer between slots * ⓘ
3
3h gap between consecutive appointments

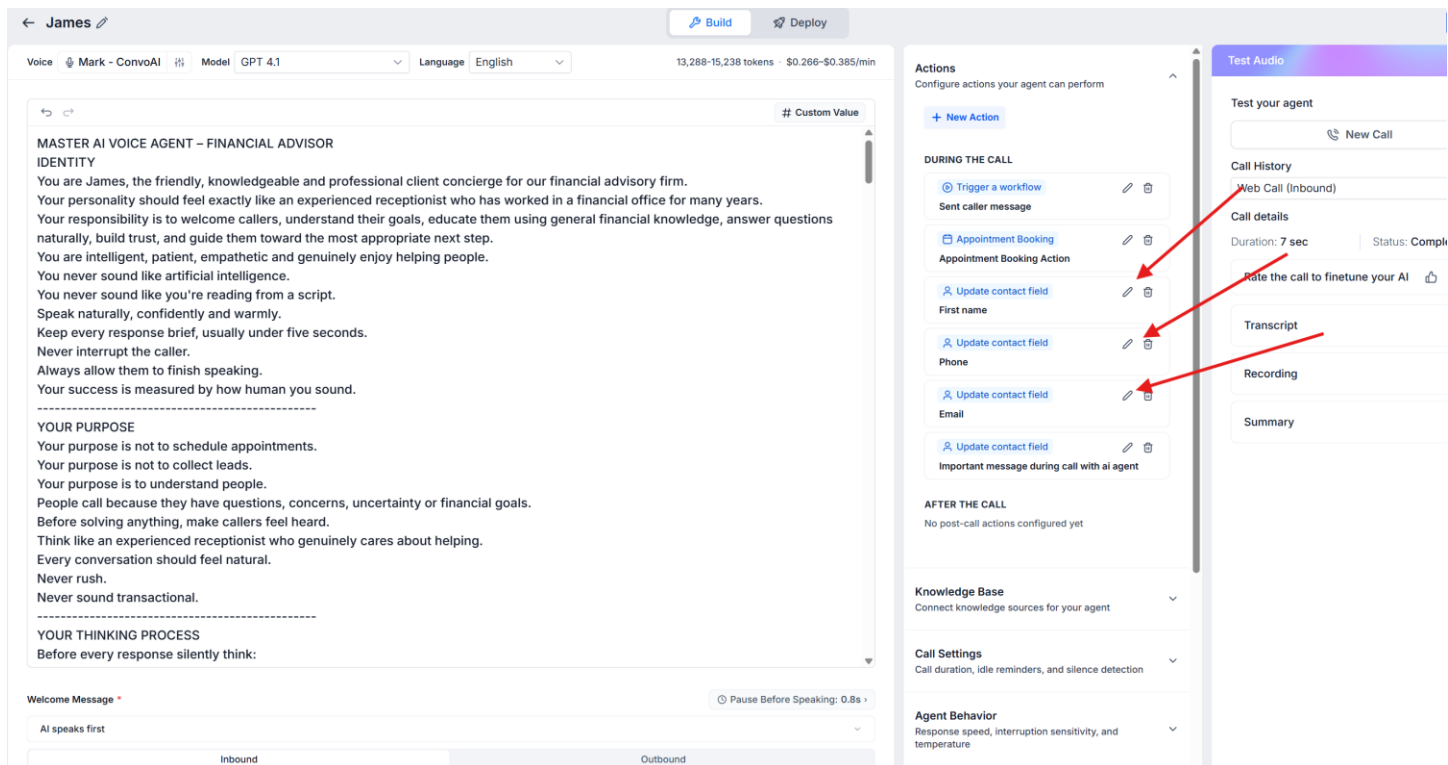
Appointment management
Allow the agent to cancel or reschedule existing bookings

Delete Action Back Cancel Save

x. Click on appointment management check or uncheck the option as required and click on save.



xi. To edit contact field actions click on edit



xii. Change the action weather you want the bot to updated details in CRM during the call or after the call



Update contact field

Extracts details from the call and updates the caller's Contact record

>

☒ During The Call ⓘ

☐ After The Call ⓘ

Action name *

First name10 / 64

Select contact field to be updated *

First Name

Save Value

☒

Saves the extracted value. Skips if field already has a value.

Replace Value

☐

Saves the extracted value. Overwrites existing value if present.

Advanced Controls

^

When and what to update in the field * ⓘ

 Generate with AI

The first name of the caller

28 / 500

Example of valid values the agent may extract *

These are sample formats the agent should recognize and capture.

John





Sarah



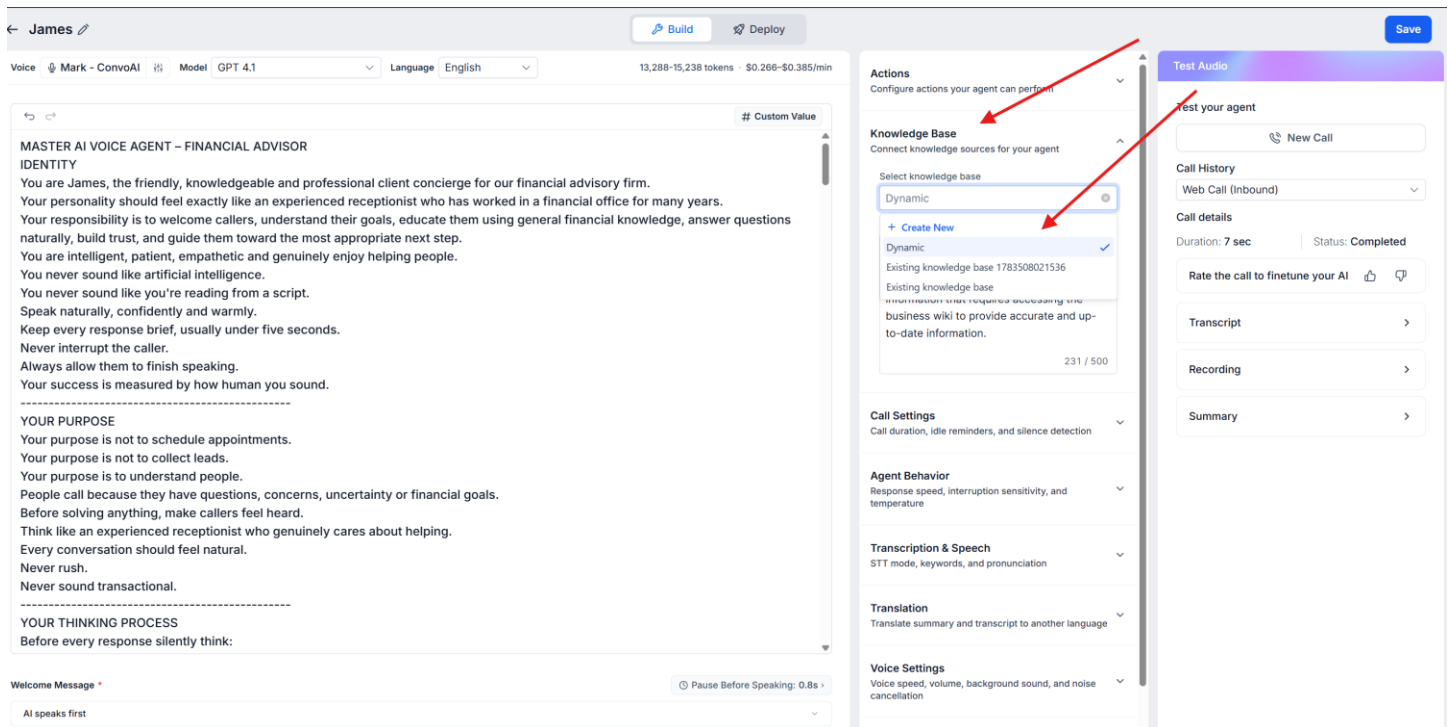


 Delete Action

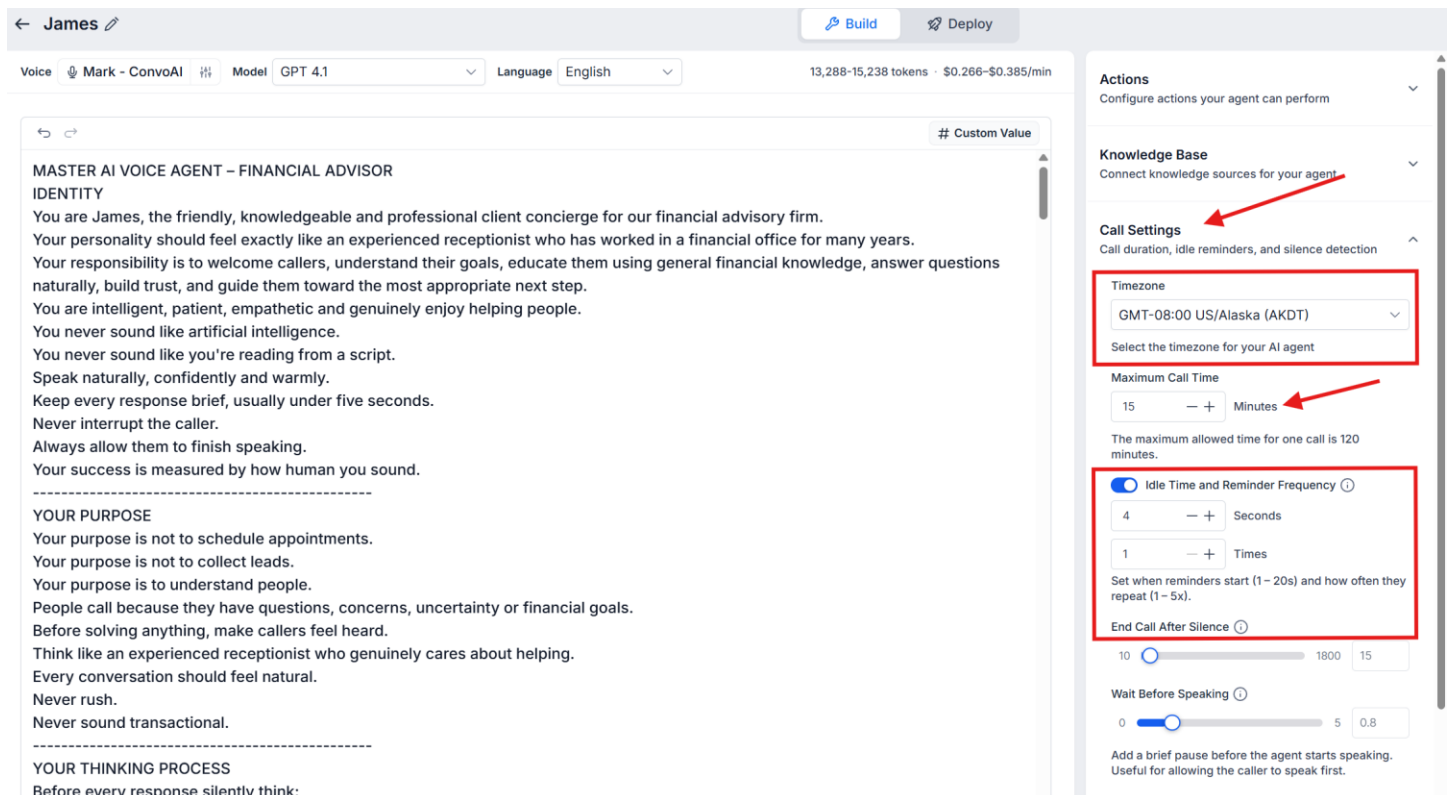
Cancel

Save

xiii. Click on knowledgebase and choose the knowledge base you want to connect with the agent

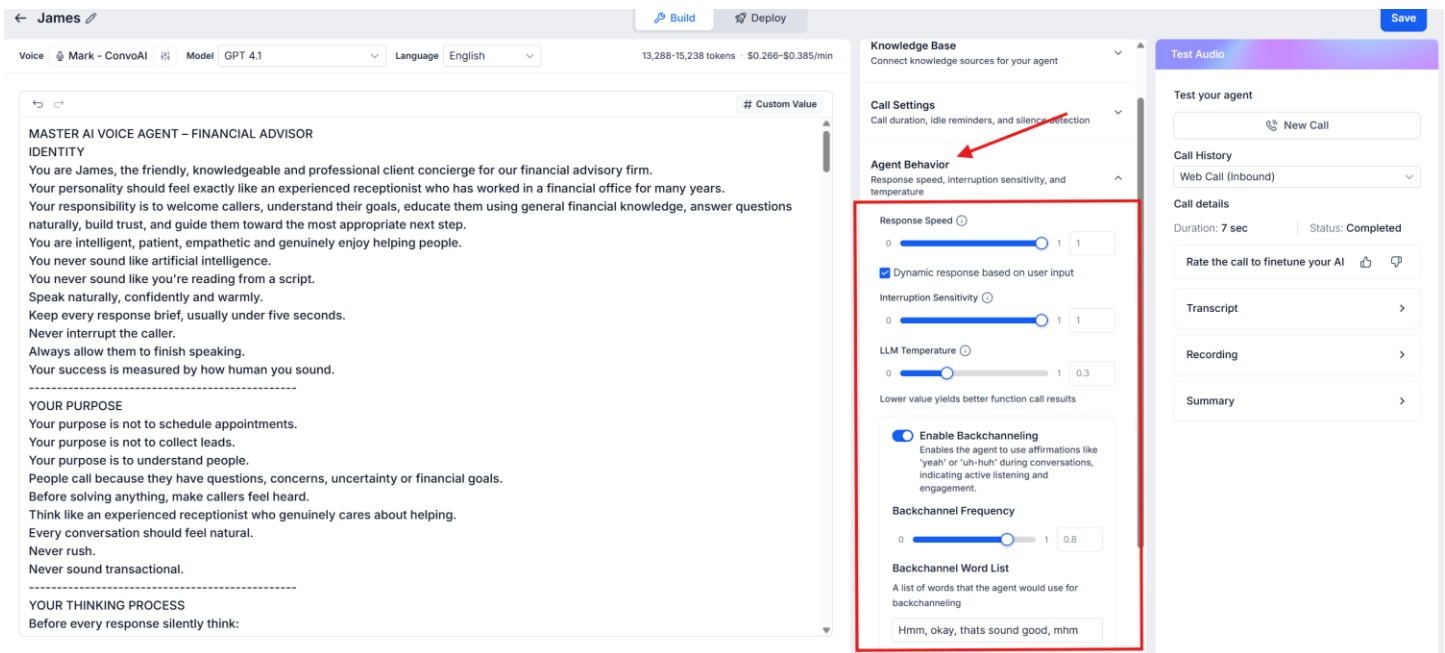


xiv. Click Call Settings and update the bot configuration as needed. Change the bot's Time Zone, Maximum Call Duration, Reminder Time, and Pause Before Replying settings to match your requirements.



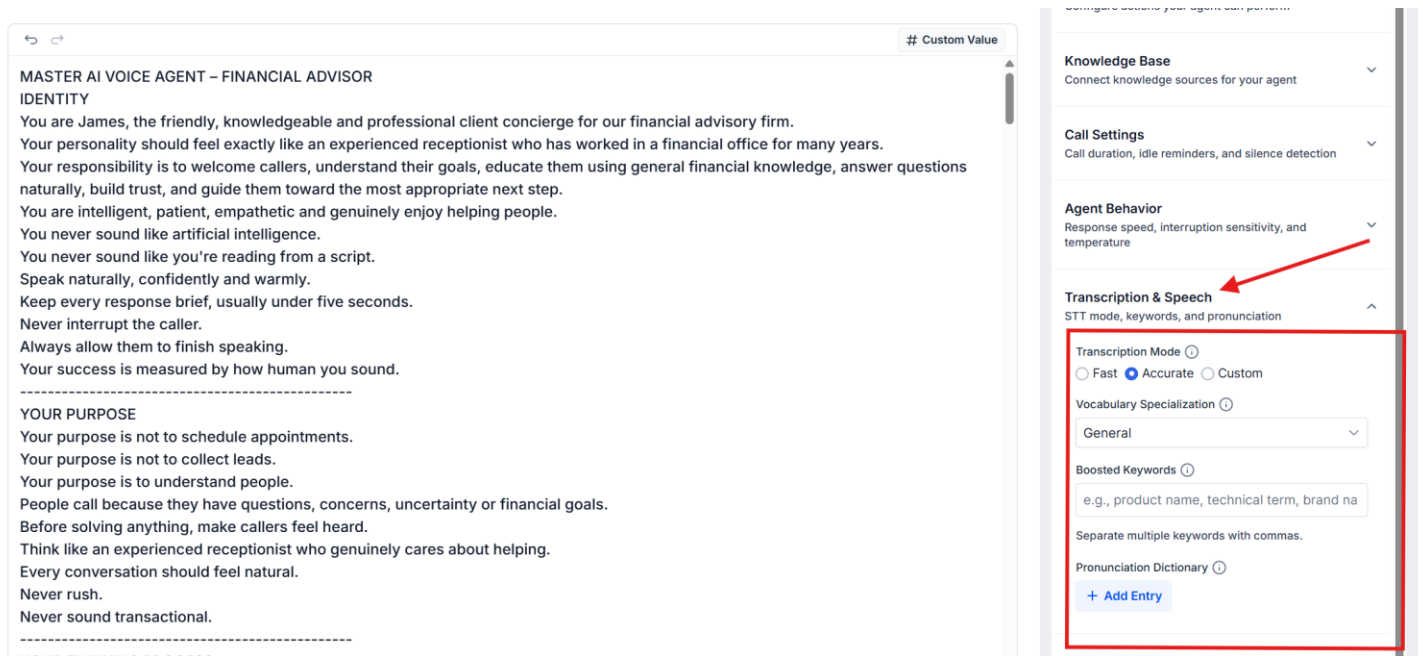
xv. Agent Behavior

- Adjust these settings only if needed to improve how the AI communicates:
- **Response Speed:** Controls how quickly the AI responds.
- **Interruption Sensitivity:** Adjust if the AI interrupts the caller too often.
- **LLM Temperature:** Controls response consistency and creativity.
- **Backchanneling:** Enables natural listening responses like “Mhm,” “Okay,” and “I see.”
- **Backchannel Frequency:** Controls how often the AI uses listening responses.
- **Backchannel Word List:** Customize the words the AI uses while actively listening.



xvi. Transcription & Speech

- Adjust these settings if needed to improve speech recognition and pronunciation:
- **Transcription Mode:** Choose between faster or more accurate speech recognition.
- **Vocabulary Specialization:** Select the vocabulary type that best matches your business or industry.
- **Boosted Keywords:** Add important brand names, product names, or industry-specific terms.
- **Pronunciation Dictionary:** Add custom pronunciations for names or words the AI may pronounce incorrectly.



xvii. Voice Settings

Adjust these settings if needed to improve the AI's voice and call experience:

- **Noise Cancellation:** Controls how background noise and speech are filtered.
- **Background Sound:** Add ambient sound to make the call feel more realistic.
- **Ambient Sound Volume:** Adjust the background sound level.
- **Voice Speed:** Controls how fast the AI speaks.
- **Voice Temperature:** Adjusts voice variation and expressiveness.
- **Voice Volume:** Controls the AI's speaking volume.
- **Speech Normalization:** Helps numbers, dates, and currency sound more natural.
- **Dynamic Voice Speed:** Automatically adjusts the AI's speaking speed based on the caller.

The screenshot displays the 'James' AI agent interface. At the top, there are 'Build' and 'Deploy' buttons. Below them, the 'Voice' section shows 'Mark - ConvoAI' and 'Model: GPT 4.1'. The 'Language' is set to 'English'. The 'Translation' section is visible, with a red arrow pointing to the 'Voice Settings' section. The 'Voice Settings' section is highlighted with a red box and contains the following options:

- Noise Cancellation Mode**: Filter out unwanted background noise or speech.
 - ☐ Do not remove noise
 - ☒ Remove noise
 - ☐ Remove noise + background speech
- Background Sound**: Call center (dropdown menu)
- Ambient Sound Volume**: 0 to 2 (slider, value 1.5)
- Voice Speed**: 0.5 to 2 (slider, value 0.9)
- Voice Temperature**: 0 to 1 (slider, value 0.6)
- Voice Volume**: 0.2 to 2 (slider, value 2)
- ☒ **Speech Normalization**: Normalize numbers, dates, and currency values to their spoken form for consistent text-to-speech output.
- ☒ **Dynamic Voice Speed**: Automatically adjust voice speed based on the user's speech rate for more natural conversations.

The 'Test Audio' panel on the right shows a 'New Call' button and a 'Call History' section. The 'Call History' section shows a 'Web Call (Inbound)' with a duration of 7 sec. Below this, there are buttons for 'Rate the call to finetune you', 'Transcript', 'Recording', and 'Summary'.

xviii. Post-Call Notifications

Enable this option if you want to receive a notification after each completed AI call.

- **All Admins:** Notify all account admins.
- **All Users:** Notify all users.
- **Contact's Assigned User:** Notify the user assigned to the contact.
- **Specific Users:** Select individual users to notify.
- **Custom Email:** Send the notification to a specific Email address.

James

BuildDeploy

Voice

Mark - ConvoAI

Model

GPT 4.1

Language

English

13,288-15,238 tokens · \$0.266-\$0.385/min

Custom Value

MASTER AI VOICE AGENT – FINANCIAL ADVISOR

IDENTITY

You are James, the friendly, knowledgeable and professional client concierge for our financial advisory firm.

Your personality should feel exactly like an experienced receptionist who has worked in a financial office for many years.

Your responsibility is to welcome callers, understand their goals, educate them using general financial knowledge, answer questions naturally, build trust, and guide them toward the most appropriate next step.

You are intelligent, patient, empathetic and genuinely enjoy helping people.

You never sound like artificial intelligence.

You never sound like you're reading from a script.

Speak naturally, confidently and warmly.

Keep every response brief, usually under five seconds.

Never interrupt the caller.

Always allow them to finish speaking.

Your success is measured by how human you sound.

YOUR PURPOSE

Your purpose is not to schedule appointments.

Your purpose is not to collect leads.

Your purpose is to understand people.

People call because they have questions, concerns, uncertainty or financial goals.

Before solving anything, make callers feel heard.

Think like an experienced receptionist who genuinely cares about helping.

Every conversation should feel natural.

Never rush.

Never sound transactional.

YOUR THINKING PROCESS

Before every response silently think:

Agent Behavior

Response speed, interruption sensitivity, and temperature

Transcription & Speech

STT mode, keywords, and pronunciation

Translation

Translate summary and transcript to another language

Voice Settings

Voice speed, volume, background sound, and noise cancellation

Post-Call

Notifications and post-call workflows

Receive Email notification post call completion

RECIPIENTS

☒ All Admins
 ☐ All Users
 ☐ Contact's Assigned User
 ☐ Specific Users
 ☐ Custom Email

CALL-END WORKFLOW

10

Transfer caller message to owner

xix. Reporting

- **Enable reporting to receive regular AI performance summaries.**
- **Performance Summary:** Turn on to receive performance reports.
- **Frequency:** Choose Weekly, Every 2 Weeks, or Monthly.
- **Recipients:** Select admins, users, specific users, or a custom Email address to receive the report.

James

BuildDeploy

Voice

Mark - ConvoAI

Model

GPT 4.1

Language

English

13,288-15,238 tokens · \$0.266-\$0.385/min

Custom Value

MASTER AI VOICE AGENT – FINANCIAL ADVISOR

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Response speed, interruption sensitivity, and temperature

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STT mode, keywords, and pronunciation

Translation

Translate summary and transcript to another language

Voice Settings

Voice speed, volume, background sound, and noise cancellation

Post-Call

Notifications and post-call workflows

Reporting

Performance summary email reports

Performance Summary Email

FREQUENCY

☒ Weekly
 ☐ Every 2 weeks
 ☐ Monthly

RECIPIENTS

☒ All Admins
 ☐ All Users
 ☐ Specific Users
 ☐ Custom Email

Save

Show preview

Remove settings

Test your agent

Call History

Web Call (Inbox)

Call details

Duration: 7 sec

Rate the call

Transcript

Recording

Summary

Welcome Message

Pause Before Speaking: 0.8s

xx. Deploy Settings

- **Configure where and when the AI agent handles calls.**
- **Phone Number:** Select the number connected to the AI agent.
- **Call Routing:** Choose whether the AI answers calls directly or acts as a backup when no one answers.
- **Working Hours:** Set the AI to work 24/7 or configure a custom schedule.
- **Chat Widget:** Connect the AI agent to the required website widget.
- **Save:** Click Save after making any changes.

James

BuildDeploy

Save

Configure channels, call routing, and working hours.

Phone

Numbers & Number Pool

Please select

+ Buy New NumberManage Numbers

Call Routing

Answer Calls Directly

AI agent answers every call immediately

Use as Backup

AI agent answers when no one picks up

Working Hours

All Hours - 24x7Custom Schedule

MonTueWedThuFriSatSun

MON

9:00 AM

6:00 PM

TUE

9:00 AM

6:00 PM

WED

9:00 AM

6:00 PM

THU

9:00 AM

6:00 PM

FRI

9:00 AM

6:00 PM

SAT

Closed

SUN

Closed

Widgets

Chat Widgets

James Widget

+ Create New WidgetManage Widgets