CallRail's Voice Assist feature allows you to create an automated assistant to answer your phone calls. By providing information about your business, Voice Assist's artificial intelligence (AI) can answer questions from leads, gather callback information, and send you a summary of the missed call.

Getting Started

To begin Voice Assist setup, please reach out to voiceassist@callrail.com. In this email, provide the information listed in the **What to provide CallRail** section below. Our team will enable the feature with the information you provide. Once it is ready, you will receive an email, and the feature will be available in your CallRail app!
Please note: Voice Assist is configured at the company level. If you are an Account Center user, each of your companies will need a separate setup.

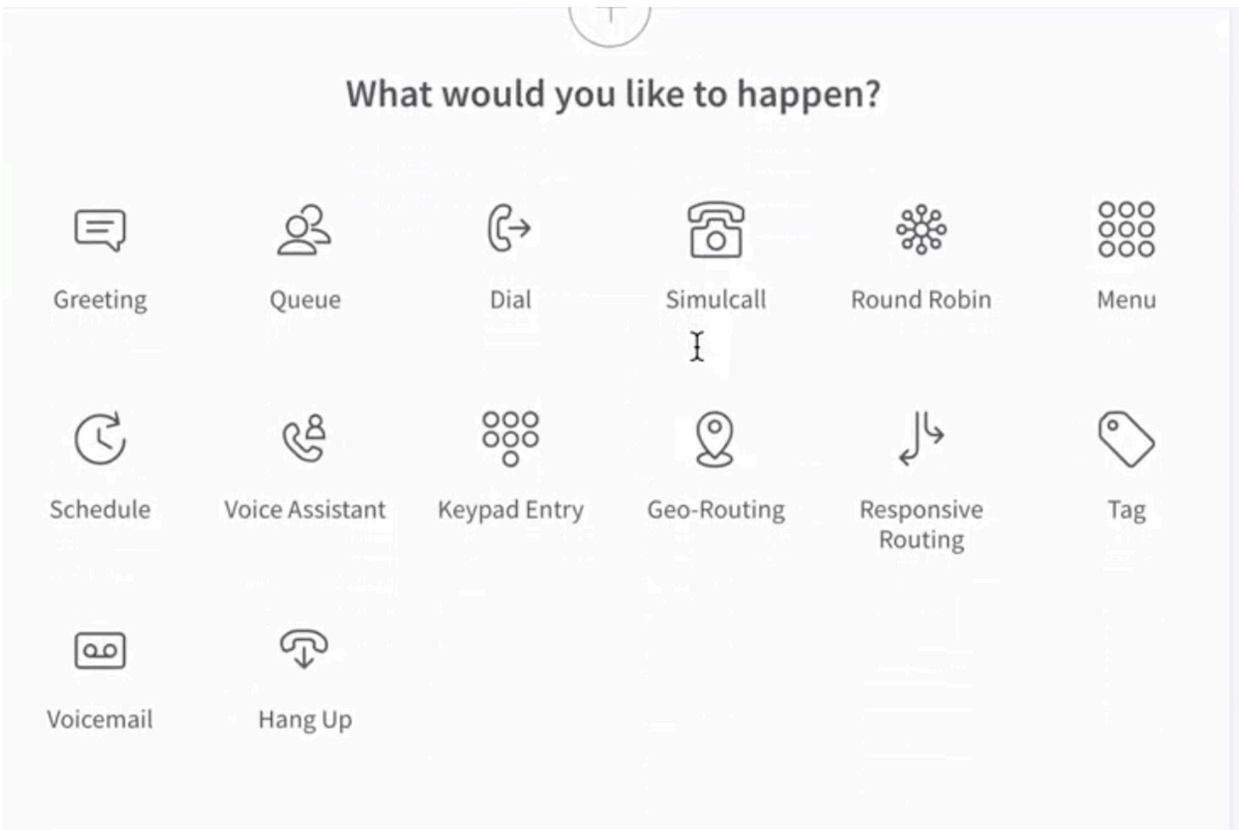
What to provide CallRail

- Company name
  - How you want Voice Assist to refer to you in a call
- Company greeting
  - How you want Voice Assist to answer a call. We recommend having your agent identify itself as AI in this step.
- Company information
  - This will be information you want Voice Assist to consider when speaking with a caller. Examples include your office address, the types of jobs your company works on, or other details a caller might want to know. We recommend submitting this information in the third person, avoiding "I" or "Me" statements.
- What optional questions you want Voice Assist to ask a caller. Voice Assist will always ask for a name and a reason for calling. Your options include:
  - Caller's email
  - Caller's company name (for B2B customers)
  - Caller's company website URL
  - Specific product or services the caller is interested in
  - How did the caller hear about the business?
  - Preferred day and time (typically for an appointment or call back)
  - Level of caller urgency

How to use Voice Assist in CallRail

Once your company's Voice Assist has been set up, it can be added to your Call Flows as a new step.

1. Navigate to your **Settings** page.
2. Select **Workflows**.
3. Select **Call Flows**.
4. Choose to **edit** an existing call flow or **create** a new one.
5. Set up the flow as desired. You will notice an icon labeled **Voice Assistant**.



6. Selecting this step will trigger your Voice Assist at the desired time in the call flow
7. Continue editing as needed, and **Save** your call flow when it is finished.

Where to view Voice Assist data in CallRail

Once a conversation involving Voice Assist has concluded, the conversation will appear in the customer's activity timeline as a form capture. The form capture will contain any information taken by Voice Assist during the call. From here, you can tag the call, qualify the lead, and attach value, just like any other conversation in CalRail.

Frequently Asked Questions

- Can it handle multiple calls at once?
  - Yes, Voice Assist can handle as many concurrent calls as your CallRail supports.
- Does it support multiple languages?
  - At this time, Voice Assist is optimized for English language calls. The agent can handle other common languages, but has not been extensively tested in other languages.
- How do I update or change the responses?
  - Please contact voiceassist@callrail.com to make any changes to your Voice Assist content and responses.
- What happens if the system goes down?
  - If Voice Assist is unavailable, callers will be sent to your voicemail inbox.