

VOICE AGENT INSTALLATION PLAYBOOK

AI Setup Pros — Service Delivery Guide

SERVICE 4 OF 6

AISetupPros Internal Use Only · Version 1.0

SERVICE OVERVIEW

AI-powered phone agent that answers calls, greets callers, qualifies leads, books appointments, and transfers to the right person — 24/7, no breaks, no hold music.

Time to Deploy	3-5 days
Service Tier	Professional / Enterprise
Stack	Vapi + GoHighLevel + Twilio / VoIP number
Who Installs	Builder (with Vapi + GHL access)

PHASE 1 — DISCOVERY & SETUP

Step 1: Confirm Service Requirements

- **Phone Number** — Does client want to port existing number, or get a new VoIP number?
- **Call Volume** — How many calls per day/week expected?
- **Use Case** — Lead qualification, appointment booking, customer support, info hotline?
- **Escalation** — Should calls transfer to a human? Who?

- **Greeting Script** — What should the agent say when answering?

Step 2: Set Up Vapi Account

1. Go to **app.vapi.ai** → Create new workspace or use agency workspace
2. Go to **Phone Numbers** → **Provision Number**
3. Select area code or port existing number
4. Note the **Voice Agent ID** once created

Step 3: Build the Voice Agent

1. In Vapi, create a new **Voice Agent**
2. Set the AI model: GPT-4o or similar
3. Write the **system prompt** (the agent's personality + instructions):
 - "You are [Client Name]'s AI receptionist. You answer professionally..."
 - Include: business name, services offered, hours, what to say when transferring
4. Set **voice** — pick from available voices (or use ElevenLabs)
5. Set **first message** — the greeting the agent says on answer
6. Configure **end call phrases** — when to wrap up

PHASE 2 — CONNECTIONS

Step 4: Connect to GHL

1. In Vapi, go to **Integrations** → **GoHighLevel**
2. Authorize with GHL API key
3. Map the GHL Location ID
4. Set: Incoming call → Create/Update GHL Contact
5. Set: Appointment booked → Update GHL pipeline stage

Step 5: Configure Escalation (Transfer to Human)

1. In Vapi, set up **transfer destination**
2. Enter the phone number to transfer to (client's direct line or staff)
3. Set **transfer trigger**: when caller says "agent", "human", or after X minutes
4. Set **voicemail fallback**: if no one answers, let caller leave a voicemail

Step 6: Set Up Voicemail & After-Hours

1. Record voicemail greeting or use AI-generated voice

2. Set **business hours** in Vapi dashboard
3. Configure **after-hours message**: "Thanks for calling, our office is currently closed..."
4. Set after-hours voicemail to save to GHM

PHASE 3 — TESTING

Voice Agent Testing Checklist

- Call the agent — does it answer within 3 seconds?
- Does the greeting sound clear and professional?
- Ask a question — does it respond correctly?
- Say "I want to book an appointment" — does it offer scheduling?
- Ask to speak to a human — does it transfer correctly?
- Leave a voicemail (after hours or transfer fail) — does it save to GHM?
- Verify call appears in GHM after call ends
- Test SMS confirmation (if appointment booked)
- Test after-hours greeting after business hours

COMMON ISSUES & FIXES

Symptom	Fix
Agent doesn't answer	Check phone number is active in Vapi; verify credits loaded
Agent gives wrong info	Update system prompt with correct business info
Transfer doesn't work	Verify transfer number format (+1XXXXXXXXXX); check Vapi balance
Voicemail not saving to GHM	Check GHM integration is active; verify Location ID correct
Call cuts off after a few minutes	Check Vapi call timeout settings; upgrade plan if needed
Wrong voice or accent	Change voice in Vapi agent settings; consider ElevenLabs custom voice

PREREQUISITES CHECKLIST

Item	Status
Vapi account created (agency or client)	<input type="checkbox"/>
Phone number provisioned or port request started	<input type="checkbox"/>
Business info document (name, hours, services, FAQs)	<input type="checkbox"/>
GHL Location ID	<input type="checkbox"/>
Transfer destination phone number	<input type="checkbox"/>
Business hours confirmed	<input type="checkbox"/>

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