WEBINAR REFERENCE GUIDE

ServiceM8 Phone Agent
Call Routing & Setup Decisions

A complete visual guide for trade businesses (plumber/HVAC/electrician) — business hours 9am–5pm with emergency cover

Transfer to human · Book job / online form · SMS booking link · Take message → Inbox · End / filter spam · Emergency transfer · Answer from FAQ · Business decision required

STEP 1 — EVERY CALL STARTS HERE

Incoming Call

Customer dials your ServiceM8 Phone number (or your existing number diverted to it)

DECISION 1 **Which Agent modes will you enable?**

You can run one, two, or all three modes simultaneously. ServiceM8 recommends starting with **After Hours only**, testing it, then adding others. Each mode uses the same shared knowledge base (FAQs) but has its own routing rules.

Time-of-Day Check

ServiceM8 reads your **Operating Hours** (Settings → Preferences → Company Information). All three modes activate based on this.

STEP 2 — THREE AGENT MODES

Business Hours Mode
Mon–Fri 9am–5pm

WHEN IT FIRES

Call arrives during opening hours

Key choice: AI screens *before* the call rings to staff — staff only get calls the AI can't resolve.

DECISION 2 Does AI answer first, or do staff ring first? Business Hours mode means AI answers *before* the phone rings to staff. If you prefer staff to ring first and AI to catch overflow, use Voicemail mode instead.

NEW JOB New booking request

1. AI collects: **name, contact, address, job type**
2. Submits **Simple Online Enquiry form** → job card in Inbox

Job booked

OR: SMS booking link to caller

INFO Pricing / services / area

1. AI answers using your **FAQ knowledge base**

Answered from FAQs

EXISTING Change / cancel / query on a job

1. AI cannot access live job data → **transfer to staff**

DECISION 3 Transfer to **Business Hours call group**, a **specific named person**, or a **specific number**?

Transfer to staff

ISSUE Complaint or unhappy customer

1. AI recognises negative tone → **immediate transfer** to named manager/owner

Transfer to manager

SPAM Sales / cold calls

1. AI identifies sales/spam → **politely ends** without bothering staff

Call filtered & ended

After Hours Mode
Before 9am & after 5pm + weekends

WHEN IT FIRES

Call arrives outside opening hours

Recommended starting point. Lower risk to test first — no impact on daytime call handling.

DECISION 4 Do you offer emergency/out-of-hours callouts? If YES → define what qualifies and set the On-Call destination. If NO → all after-hours calls → message only.

EMERGENCY Urgent — burst pipe / no heat

1. AI uses your **emergency criteria** from FAQs to assess urgency
2. Qualifies → **transfers to On-Call staff** or after-hours number
3. Optionally: AI submits booking **flagged as Urgent + On-Call**

DECISION 5 On-Call destination: **single mobile**, **After Hours call group**, or **external number**?

Transfer to On-Call

NEW JOB Non-urgent booking request

1. AI collects details → **submits booking** → Inbox for morning review

DECISION 6 Book directly (AI submits form) **OR** SMS a booking link for customer to self-complete?

Booked for morning

INFO Pricing / hours question

1. AI answers from **FAQ knowledge base** — no human needed

Answered from FAQs

MESSAGE Everything else / callback request

1. AI takes full message → **ServiceM8 Inbox** with recording & transcript

Message → Inbox

Voicemail Mode
Catches calls staff couldn't take

WHEN IT FIRES

Staff didn't answer (busy / on-site)

Replaces standard voicemail. Works at ANY time of day — fires when a call would otherwise go to voicemail.

DECISION 7 Use Voicemail mode instead of or alongside Business Hours? If you want calls to ring staff first → use Voicemail only, skip Business Hours mode.

NEW JOB Caller wants to book

1. AI collects details → **submits online booking** or sends SMS link

Job booked

EMERGENCY Urgent issue during hours

1. AI identifies urgency → **re-attempts transfer** to On-Call / specific staff

Re-transfer attempted

MESSAGE General messages & info

1. Structured message taken → **Inbox** with transcript + recording

Message → Inbox

SPAM Sales calls

1. AI identifies and **ends call** — never reaches voicemail or Inbox

Filtered & ended

EVERY POSSIBLE CALL OUTCOME

Job Booked (AI)
AI collects details & submits Simple Online Enquiry form → job card in Inbox

SMS Booking Link
Caller receives text with link to your online booking form — self-completes later

Transferred to Human
Call transferred to: call group, named staff member, or specific phone number

Emergency Transfer
Urgency confirmed → transferred to On-Call staff member or after-hours number

Message → Inbox
Full message, summary, transcript & recording saved to ServiceM8 Inbox

Answered from FAQs
AI responds using your knowledge base — no human or system action needed

Spam Filtered
Sales/cold calls identified and politely ended — saves you time

Everything logged
Every single call: summary + transcript + recording stored in ServiceM8

ALL AGENT ACTIONS — STRUCTURED VS CUSTOM SETUP

Decision 8 — Setup method: Use **Structured** (guided, form-based, recommended for beginners) or **Custom** (free-text, unlocks extra actions). You can mix — e.g. Structured for Business Hours, Custom for After Hours.

Create Online Booking
Collects all client details, submits Simple Online Enquiry form. Optional: flag as Urgent + allocate to On-Call.

SMS Link to Online Booking
Texts caller a booking link. Optional: flag as Urgent if they proceed to submit.

Transfer to Business Hours / On-Call
Routes to Business Hours call group (daytime) or On-Call staff member (evenings/weekends).

Transfer to Staff Member
Transfers to a specific named person. Their number must be in ServiceM8.

Transfer to Phone Number
Transfers to any phone number listed against a staff member in ServiceM8.

Record Message
Takes full message → saves to ServiceM8 Inbox with call recording attached.

Provide Info from FAQs
Answers caller using your FAQ knowledge base. Doesn't access live job/account data.

Transfer to Call Group — CUSTOM ONLY
Default, Business Hours, Business Hours Secondary, After Hours, After Hours Secondary.

Transfer to Requested Staff Member — CUSTOM ONLY
If caller asks for "John", AI transfers directly to John.

Check Address / Service Area — CUSTOM ONLY
Verifies caller's location against your service radius. Auto-declines if out of area.

STEP 3 — BUILD THE KNOWLEDGE BASE (FAQS)

DECISION 9 — WHAT GOES IN YOUR FAQ KNOWLEDGE BASE?

- **Services offered:** Be specific — e.g. "We install, service and repair all domestic boilers, central heating systems, underfloor heating, and carry out gas safety inspections."
- **Emergency definition:** Define clearly what qualifies as an emergency vs. routine — this is what the AI uses to decide whether to transfer or take a message after hours.
- **Service area:** List all towns/postcodes covered. With Custom setup, AI can also check caller's address against a radius.
- **Pricing guidance:** Give ranges or callout fees — e.g. "Emergency callout from £150, standard visits from £90 + parts." Don't say "contact us for pricing" — it's unhelpful.
- **Business hours:** State them clearly — AI uses this in calls as well as ServiceM8's Operating Hours setting.
- **What you don't cover:** Prevents AI from promising work you can't do (e.g. "We do not carry out commercial or new-build work").
- **Payment methods:** Card, BACS, cash — state clearly.

PRE-LAUNCH SETUP CHECKLIST

Complete before going live

- [ ] **Operating Hours set in ServiceM8**
  Settings → Preferences → Company Information → Operating Hours. This controls when each Agent mode fires.
- [ ] **Agent profile created (name + personality)**
  Account → Settings → ServiceM8 Phone → Phone Agent → Settings. Choose "Friendly & casual" or "Professional & succinct".
- [ ] **FAQ knowledge base completed**
  At minimum: services, emergency definition, service area, pricing, hours, payments. The AI only knows what you tell it here.
- [ ] **On-Call staff member set**
  ServiceM8 Phone → On Call. Required for emergency transfers in After Hours and Voicemail modes. Set the correct mobile number.
- [ ] **Simple Online Enquiry form enabled**
  Required for AI to submit bookings. Settings → Online Booking. The AI cannot book jobs without this being active.
- [ ] **Each mode configured (Structured or Custom)**
  Go into each mode (Business Hours / After Hours / Voicemail) and set scenario routing. Start with After Hours, test, then add others.
- [ ] **Test calls completed before go-live**
  Use the ServiceM8 test feature. Call your number from a mobile and walk through each scenario: booking, emergency, spam, info. Refine FAQs and instructions based on results.
- [ ] **Plan + availability confirmed**
  Phone Agent requires *Connect Plus* or *Unlimited* plan (Sept 2025). Existing Phone customers get After Hours mode free.

RECOMMENDED ROLLOUT ORDER (WEBINAR TALKING POINT)

1 — Start: After Hours
Lowest risk. No impact on daytime calls. Test emergency routing & booking flow. Go live when happy.

2 — Add: Voicemail Mode
Catches calls staff miss during the day. Works alongside normal call ringing. Low-friction upgrade.

3 — Finally: Business Hours
AI screens ALL daytime calls before staff. Highest impact — but most complex to configure. Only add when After Hours is running smoothly.