

# ServiceM8 Phone Agent

## FAQ Knowledge Base Template

What does your AI agent need to know?

Complete all 7 questions below to build your Phone Agent's knowledge base. Examples are shown for a heating business — adapt each answer to your own trade and services.

|                                   |                                   |                                           |                                              |
|-----------------------------------|-----------------------------------|-------------------------------------------|----------------------------------------------|
| <b>7</b><br>questions to complete | <b>~20</b><br>minutes to complete | <b>100%</b><br>manually written by<br>you | <b>1×</b><br>entry per FAQ into<br>ServiceM8 |
|-----------------------------------|-----------------------------------|-------------------------------------------|----------------------------------------------|

### IMPORTANT

The ServiceM8 Phone Agent does not access your website, live job data, client records, or any external source. Every answer it gives to callers comes purely from what you write in these 7 FAQs. A well-written knowledge base is the difference between an AI agent that impresses your customers and one that frustrates them.

### How to use this template

1. Read the examples for each question — they show what 'good' looks like for a heating business. 2. Write your own answer in the lined space provided for each question. 3. Once complete, add each Q&A into ServiceM8 → Account → Add-ons → ServiceM8 Phone → Phone Agent → FAQ Management → Add FAQ. 4. Use the Test Call feature in ServiceM8 to check the agent answers correctly before going live.

| 01               | What services do you offer?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| WHY THIS MATTERS | Drives: Service Information calls, New Booking calls, and Services Not Provided calls. The more specific you are, the more accurately the AI handles real enquiries.                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| EXAMPLES         | <p>✓ We install, service and repair all domestic gas boilers and central heating systems, including underfloor heating, radiators, and thermostats. We carry out annual boiler services and issue Gas Safety Certificates (CP12) for landlords. We also install and maintain heat pumps and unvented hot water cylinders.</p> <p>✓ We are Worcester Bosch Accredited Installers and work with all major boiler brands including Vaillant, Baxi, Ideal, and Viessmann.</p> <p>✗ <b>Avoid:</b> We offer a full range of heating and plumbing services. (Too vague — gives the AI nothing useful to say.)</p> |

| 02               | What counts as an emergency?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| WHY THIS MATTERS | The most critical FAQ. The AI uses this to decide whether to escalate a call to your On-Call engineer after hours, or take a message until morning. A vague definition means either everything gets escalated (you're up all night) or nothing does (a customer with a burst pipe waits until 9am).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| EXAMPLES         | <p>✓ A heating or plumbing emergency is any of the following: a suspected gas leak, a burst pipe or major water leak causing damage, complete loss of heating and hot water in cold weather (below 10°C), a boiler making loud banging or hissing noises, a carbon monoxide alarm activating, a property with no hot water where vulnerable people are present, or a total loss of water supply.</p> <p>✓ The following are NOT emergencies and will be booked for the next available appointment: a single radiator not working, a dripping tap, a boiler making minor noises while still heating correctly, or a thermostat not responding.</p> <p>✗ <b>Avoid:</b> Emergencies are repairs, safety hazards, and service failures. (The ServiceM8 default — too vague for the AI to make a real decision.)</p> <p><b>Tip:</b> Gas leak: always tell the AI to advise callers to ring the National Gas Emergency Service on 0800 111 999 immediately if they suspect a gas leak — before you can respond.</p> |

| 03               | What areas do you cover?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| WHY THIS MATTERS | Prevents the AI from booking a job or raising expectations for a caller who is outside your service area. With Custom setup you can also have the AI actively check the caller's address against a radius.                                                                                                                                                                                                                                                                                                                                                                                               |
| EXAMPLES         | <ul style="list-style-type: none"> <li>✓ We cover all of Hampshire and the surrounding area, including Southampton, Winchester, Eastleigh, Chandler's Ford, Romsey, Fareham, Gosport, and Petersfield. We generally work within 25 miles of our base in Eastleigh. If you're unsure whether we cover your area, please mention your postcode when booking.</li> <li>✓ We do not regularly travel to Portsmouth, Basingstoke, or Salisbury, but may consider these for larger jobs — please ask.</li> <li>✗ <b>Avoid:</b> We cover a wide local area. (Useless to the AI — and to the caller.)</li> </ul> |

| 04               | How much do your services cost?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| WHY THIS MATTERS | Pricing is one of the most common inbound call topics. If the AI can't answer this, it either transfers every call (costing you time) or says 'I don't know' (unprofessional). Real numbers — even ranges — are far better than nothing.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| EXAMPLES         | <ul style="list-style-type: none"> <li>✓ Our standard callout charge is £85 + VAT, which includes the first hour of labour. After that, labour is charged at £60 + VAT per hour. Emergency out-of-hours callouts start from £150 + VAT. Annual boiler services start from £95 + VAT. New boiler installations start from £1,800 + VAT depending on the model and complexity. All work is quoted before we begin.</li> <li>✓ We don't charge for quotes on new boiler installations — one of our engineers will visit to assess the job and provide a written quote at no cost or obligation.</li> <li>✗ <b>Avoid:</b> Pricing depends on the job — please contact us for a quote. (A caller at 8pm will move on to a competitor who answers the question.)</li> </ul> |

| 05               | What are your business hours?                                                                                                                                                                                                                                                                   |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| WHY THIS MATTERS | The AI references this constantly — when callers ask when you're available, whether you're open, or whether you can come today. ServiceM8 uses your Operating Hours setting to trigger which Agent mode fires, but the AI also needs this in FAQs so it can speak naturally about availability. |
| EXAMPLES         | <ul style="list-style-type: none"> <li>✓ Our office is open Monday to Friday, 8am to 5:30pm. We do not have a Saturday or Sunday office, but we offer emergency cover 7 days a week including</li> </ul>                                                                                        |

bank holidays. If you call outside office hours and it's not an emergency, please leave your details and we'll call back the next working morning.

✓ During the winter months (October to March) we operate extended hours Monday to Friday until 7pm due to high demand for heating repairs.

**X Avoid:** We're open during normal business hours. (Vague — callers and the AI both need actual times.)

## 06

### What services do you NOT offer?

#### WHY THIS MATTERS

Without this, the AI will either say 'I'm not sure' (unhelpful) or worse, imply you can do work you can't. Clear exclusions save you from booking jobs you have to turn down and protect you from misunderstandings.

#### EXAMPLES

✓ We do not carry out commercial or industrial heating work. We do not service or repair oil boilers or solid fuel systems — only gas and LPG. We do not install solar thermal panels or biomass boilers. We do not carry out general plumbing such as bathroom fitting, drain clearance, or roofing work. If you need any of these, we are happy to recommend a local specialist.

✓ We do not currently work on new-build developments or construction sites. We work exclusively in domestic residential properties.

**X Avoid:** We focus on heating and plumbing. (Doesn't tell the AI or the caller what you won't do.)

## 07

### How can customers pay?

#### WHY THIS MATTERS

Payment questions come up constantly — from new customers checking before booking, and from existing customers querying invoices. If the AI can answer this, it saves a transfer every time.

#### EXAMPLES

✓ We accept payment by debit or credit card (Visa, Mastercard, and Amex), bank transfer (BACS), and cash. We do not accept cheques. For standard repair and service visits, payment is due on the day. For new installations and larger projects, we require a 25% deposit on booking with the balance due on completion. All invoices are sent electronically via ServiceM8.

✓ We offer 0% interest-free finance on new boiler installations through our finance partner. Ask when booking for details.

**X Avoid:** We accept most payment methods. (Doesn't answer the question — callers want to know if they can pay by card on the day.)

## Before You Go Live

|                          |                                                                                                                                               |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <b>All 7 FAQs entered into ServiceM8</b><br>Account → Add-ons → ServiceM8 Phone → Phone Agent → FAQ Management                                |
| <input type="checkbox"/> | <b>Operating Hours set correctly</b><br>Settings → Preferences → Company Information → Operating Hours                                        |
| <input type="checkbox"/> | <b>Agent name and personality chosen</b><br>Phone Agent → Agent Profile. Options: Friendly & casual or Professional & succinct                |
| <input type="checkbox"/> | <b>On-Call staff member set</b><br>Phone → On Call. Required for emergency transfers in After Hours and Voicemail modes                       |
| <input type="checkbox"/> | <b>Simple Online Enquiry form enabled</b><br>Settings → Online Booking. The AI cannot submit bookings without this being active               |
| <input type="checkbox"/> | <b>Each mode configured (Business Hours / After Hours / Voicemail)</b><br>Start with After Hours, test, then add the others                   |
| <input type="checkbox"/> | <b>Test calls completed for every scenario</b><br>Use the Test Call button on each mode. Test: booking, emergency, FAQ answer, spam, fallback |
| <input type="checkbox"/> | <b>Plan confirmed (Connect Plus or Unlimited required)</b><br>Existing ServiceM8 Phone customers get After Hours mode free                    |

Further help: [support.servicem8.com/help-center/servicem8-add-ons/servicem8-phone-agent](https://support.servicem8.com/help-center/servicem8-add-ons/servicem8-phone-agent)

Need help with your ServiceM8 setup? Book a discovery call at [hazelwhicher.co.uk](https://hazelwhicher.co.uk)