Setup and scripts

Forward your calls, write the greeting, and set the texts and rules. Each step shows a filled-in example for a sample HVAC company, then a box for yours.

Step 1 · Forward your calls

Most businesses start with "forward when nobody answers", so the app only takes the calls you'd miss.

1. In the app, find the number your calls will forward to.
2. Choose when it answers: after hours only, when nobody picks up, or every call.
3. Turn on forwarding with your phone provider. Search your provider's help pages for "conditional call forwarding" or "forward when busy or no answer".
4. Call your number from another phone and let it ring, to check the app picks up.

WHEN IT ANSWERS

When nobody picks up after 4 rings, and all calls after 6 p.m. and on Sundays.

WHEN YOURS ANSWERS

Step 2 · The greeting

Keep it short, say it's an AI, and say what it can do.

GREETING

"Thanks for calling Brightline Heating & Air. I'm the automated assistant: I can answer questions, take your details or book a tune-up. If you smell gas, hang up and call 911. How can I help?"

YOUR GREETING (INCLUDE THAT IT'S AN AI ASSISTANT, AND THE RECORDING NOTICE IF YOU RECORD)

Step 3 · Missed-call and after-hours texts

These go out within a minute of a missed call. Each one says it's from your automated assistant and includes a way to opt out.

MISSED-CALL TEXT

"Hi, it's Brightline Heating & Air's automated assistant. Sorry we missed your call! Reply with what's going on and we'll text back within 15 minutes, or book at brightlinehvac.example. Reply STOP to opt out."

AFTER-HOURS TEXT

"Hi, it's Brightline Heating & Air's automated assistant. We're closed until 7 a.m. For no heat or no cooling, reply URGENT and our on-call tech will call you within 30 minutes ($189 after-hours fee, waived with the repair). Reply STOP to opt out."

YOUR MISSED-CALL TEXT

YOUR AFTER-HOURS TEXT

Step 4 · What it knows, and when it hands off

If you have a Business Brain, paste sections 1 to 4 from it.

URGENT, IN YOUR WORDS

No heat when it's below 40°F outside, no cooling above 90°F, water leaking from the unit, any alarm going off.

PASS TO A PERSON WHEN

The caller asks for one, is upset, mentions a bill or a warranty claim, or anything about gas or smoke.

IT MUST NEVER SAY

Exact arrival times, new-system prices, or that financing is approved.

SUMMARIES GO TO

Maria by text, the on-call tech by text after 6 p.m.

URGENT, IN YOUR WORDS

PASS TO A PERSON WHEN

IT MUST NEVER SAY

SUMMARIES GO TO

NUMBER TO PASS CALLS TO · HOURS A PERSON CAN TAKE THEM

Before you forward real calls

- [ ] Forwarding tested from another phone, during and after hours.
- [ ] The greeting says it's an AI assistant (and mentions recording, if you record).
- [ ] Both texts include a way to opt out ("Reply STOP").
- [ ] Business texting registration approved, if your app needs it.
- [ ] All 20 calls on the test-call log made and marked.