

Voice AI Setup Sheet

A few questions about how you'd like your phone answered. Skip anything that doesn't apply - we already pull your hours, menu and contact details from your website, and we go over the rest together.

Business

Your name

Best number or email for you

01 The Basics

The few details a website does not tell us.

1

How the business name is pronounced (if callers get it wrong)

What the AI should call your team ("our team", "the kitchen", real names)

2

How do you describe parking or the entrance to a first-timer?

02 Last Orders

The time you stop taking orders is usually earlier than the time you close.

1

Last call, by day (leave blank where it is simply closing time)

	Mon - Thu	Friday	Saturday	Sunday
Last pickup / phone order				
Last seating				
Last delivery order				

03 Your Phone Line

Your number stays your number - calls forward to the AI line.

1

Which calls should the AI answer?
☐ Every call ☐ Only calls no one picks up ☐ Only after hours / when closed ☐ Overflow during a rush

2

A short keypad menu before the AI ("press one for orders...")?
☐ No - the AI just answers ☐ Yes - options: _____

3

Phone provider or system, if you know it

04 Greeting & Voice

How the phone is answered and how it sounds.

- 1 How should the phone be answered, word for word? Our standard: "Thank you for calling [name], calls recorded. How may I help you?"

- 2 Voice
☐ Female, warm and calm ☐ Female, upbeat and quick ☐ Male
- 3 Tone
☐ Polished and professional ☐ Friendly neighborhood ☐ Playful / on-brand
- 4 Languages your callers use besides English
☐ Spanish ☐ Polish ☐ Italian ☐ Other: _____
- 5 Words or phrases you never want used on your line

05 Reservations

How bookings should work - or what to say if you do not take them.

- 1 Reservation system
☐ OpenTable ☐ Resy ☐ SevenRooms ☐ Toast Tables ☐ None - book through you ☐ Walk-in only
☐ Other: _____
- 2 Largest party the AI may book on its own _____ Bigger groups: transfer, or take details for a callback?

- 3 Last seating time _____ How far ahead can someone book? _____ Same-day bookings OK?

- 4 Deposits or card holds for any party size or date?
☐ Yes ☐ No _____
- 5 Occasions the AI should ask about and note (birthdays, anniversaries)?

06 Wait Times

"How long is the wait?" on a busy night.

- 1 When someone asks about the wait
☐ Give a typical range: _____ ☐ Transfer to the host stand
☐ Say "come on in - first come, first served"
- 2 Call-ahead seating
☐ Yes ☐ No

07 Phone Orders

What the AI may sell over the phone and what it promises about timing.

- 1 Pickup orders by phone
☐ Yes - the AI takes the full order ☐ The AI texts an online-ordering link ☐ No phone orders
- 2 Pickup time to quote (minutes) Longer on Friday / Saturday or for big orders?

- 3 Items that should never be sold over the phone (market price, alcohol, family-style, specials)

- 4 Payment
☐ Pay at pickup ☐ Card link by text ☐ Either - caller's choice
- 5 Substitutions
☐ Freely ☐ Only the menu's options ☐ None
- 6 Curbside: where to park, what to do Order ahead for later or another day?

08 Delivery

What the AI says when a caller asks "do you deliver?"

- 1 Delivery
☐ Own drivers ☐ Third-party apps only ☐ No delivery
- 2 App to steer people to (DoorDash, Uber Eats, Grubhub, your own site) Radius, minimum or fee, if in-house

09 Catering & Private Events

Your highest-value calls - no inquiry should be lost.

- 1 What you offer
☐ Drop-off trays ☐ Full service ☐ Private dining room ☐ Full buyout ☐ Off-site events
- 2 Minimum notice Minimum party size or spend Deposit?

- 3 Who handles these calls (name / number) Who is alerted when a lead comes in (cell / email)

- 4 May the AI quote prices?
☐ No - leave numbers to your event contact ☐ Starting prices only ☐ Yes, from the catering menu

10 Menu & Specials

Where the current menu lives and how changes reach us.

- 1 The most accurate menu is
☐ POS (Toast, Square, Clover...) ☐ Website ☐ Online-ordering page ☐ Printed / PDF
- 2 Daily specials and sold-out items reach us by
☐ Text ☐ Email ☐ The POS marks them ☐ Not needed
- 3 House favorites the AI should recommend when asked "what's good?"

- 4 Market-price or seasonal items where the AI must never state a price

11 Allergies

What the AI may say - and when it hands off to your kitchen.

- 1 Allergen answers
☐ General only - always hand off for specifics ☐ Item-level, from notes you give us
☐ Item-level, and the AI may transfer to the kitchen
- 2 The AI may confirm, when the menu says so
☐ Gluten-free ☐ Vegan / vegetarian ☐ Nut-free ☐ Dairy-free ☐ Halal ☐ Kosher
- 3 A shared fryer or cross-contact you want mentioned every time?
☐ Yes ☐ No

12 Bar & Happy Hour

Alcohol is never sold by phone; happy hour is quoted exactly as you give it.

- 1 Happy hour days, times and deals (if not on your website) Full bar / beer & wine / none

- 2 Alcohol to go (where legal)
☐ Never ☐ Sealed beer or wine with a food order ☐ Cocktails to go

13 Entertainment & Events

"Is the game on?" "Who is playing tonight?"

- 1 Where we can pull your event calendar from (website, Facebook, Instagram) TVs & sports: which leagues, sound on?

- 2 Standing weekly things not on your website (trivia night, live music, karaoke)

14 Gift Cards & Promotions

Offers the AI should bring up - or never mention.

1 Current promotions the AI may mention, and any it must never mention

2 Gift cards: in person, online, or both

Loyalty program (name, how to join)

15 Common Questions

Quick answers the line should give the same way every time.

1 Parking: where, free or paid

Wheelchair accessible?

2 Dress code

Kids? High chairs?

Dogs on the patio?

3 BYOB / corkage

Outside cake or dessert fee

Automatic gratuity (party size, %)

4 Split checks: up to how many?

Card minimum, cash discount, cards not taken

5 Outdoor seating: covered? heated? reservable?

Lost & found: how callers get items back

16 Changes & "Where Is My Order?"

Calls about something already in motion.

1 "Is my order ready?"

☐ Transfer to the counter ☐ Take a message, text the team ☐ Give the quoted time only

2 Changing or cancelling an order already placed

☐ Transfer ☐ Take the change and text the kitchen ☐ Not allowed

3 Reservation changes and cancellations

☐ The AI may change or cancel ☐ Cancel only ☐ Everything goes to your team

4 Late-arrival grace period

No-show policy

Refunds or comps: who decides

17 Texts the AI May Send

Links and confirmations, one text per request, never marketing.

1 Links the AI may text

☐ Menu ☐ Online ordering ☐ Reservations ☐ Directions ☐ Gift cards ☐ Catering
☐ Job application ☐ Events

- 2 A recap text after the call
☐ Every caller ☐ Only when something was ordered or booked ☐ No

18 Reaching a Person

When the AI hands a call to your team, and which phone rings.

- 1 Always reach a person for
☐ Caller asks for one ☐ Large parties ☐ Complaints ☐ Catering / events ☐ Press
☐ Pay-at-pickup orders ☐ Questions about an existing order

2	Number	Who / where it rings	Hours it is answered
Transfer calls to			
If no answer, try			

- 3 If nobody answers
☐ The AI takes a message and texts your team ☐ Voicemail on that line
- 4 Rush windows when nobody should be interrupted (the AI takes a message instead)

19 Upset Callers

The AI stays calm and never argues; you decide where the call goes.

- 1 A heated call should
☐ Transfer right away ☐ Take details and promise a callback ☐ Transfer during service, callback otherwise
- 2 Transfer to (number) _____ Who is alerted, and how fast will you call back? _____
- 3 May the AI offer a remake, refund or comp?
☐ Never mention money ☐ Remake only ☐ "A manager will make it right"

20 Alerts to Your Team

Who hears about what, the moment it happens.

- 1 Tick what each person receives

Name	Role	Cell	Email	Resv.	Cater.	Compl.	Msgs

- 2 Quiet hours: no phone buzzes after _____ Daily call summary by email? To whom? _____

21 Vendors, Sales Calls & Job Seekers

The calls you do not want during a rush.

- 1 Salespeople and vendors
 - ☐ End the call politely
 - ☐ Take a message for the owner
 - ☐ Send to an email: _____
- 2 Suppliers and callers who should always get through

- 3 Job applicants
 - ☐ Website / careers link
 - ☐ Email a resume to: _____
 - ☐ Apply in person: _____

22 After Hours

The line answers around the clock - what it does while you are closed.

- 1 While closed, the AI should
 - ☐ Answer what it can (hours, directions, menu)
 - ☐ Take reservation requests
 - ☐ Take catering leads
 - ☐ Take orders for the next open day
- 2 Is anything urgent enough to ring someone after hours? What, and whose number?

23 Other Locations

This line speaks for this location only unless you say otherwise.

- 1 Other locations? (names)
 - ☐ Yes
 - ☐ No
- 2 Should this line mention or transfer to them?
 - ☐ Never
 - ☐ Give their number when a caller clearly wants it
 - ☐ Transfer

24 Regulars & Problem Callers

Who your team should hear about right away.

- 1 VIPs or regulars your team should hear about the moment they call

- 2 Known prank, scam or harassing numbers

25 Anything Else

- 1 The one thing that must never happen on a call

2 Anything about how you operate that a great host would just know

26 Going Live

1 Day-to-day contact

Cell

Email

2 Send us changes by (text / email / portal)

Target go-live date