

AI receptionist rules and procedures starter sheet

Fill-in templates for the part of an AI receptionist that decides how it sounds: rules, a procedure, transfers and your caller questions. Shaped like the examples in the tool's own docs.

WHAT THIS ADDS

The docs' own advice: use Strict rules sparingly, keep each rule to one instruction, put multi-step flows in procedures, write triggers from the caller's point of view, and test after every change. The blanks below follow that shape. The wording in brackets is yours to change.

1. Your top ten caller questions

Write the answer in one sentence each. These go in your knowledge base or FAQ.

#	Question callers ask	Your one-sentence answer
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

2. Three Strict rules (one instruction each)

The docs: use Strict for hard requirements such as pricing, legal and safety. Title is only visible to you; the description is the instruction the receptionist follows.

Title	Description (one instruction)
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Docs example: No medical advice	Never provide medical advice. Always recommend the caller schedule an appointment with a specialist.
Prices	Only quote prices from [our price list]. If a price is not on it, take a message.
[Your rule]	[One instruction]
[Your rule]	[One instruction]

The "Prices" row is a template written for this sheet, not an example from the docs.

3. One procedure for your most urgent call

Write the trigger from the caller's point of view. Steps are plain instructions.

Docs example trigger: When the caller reports a water leak.

1. Ask whether water is actively leaking right now.
2. If it is, tell them to shut off the main water valve, then take an urgent message for a callback.
3. If it is not, collect the address and offer the next available inspection slot.

Your trigger: When the caller [describes your most urgent situation].

1. Ask [the first question you need answered].
2. If [urgent], [what to tell them], then [take an urgent message / transfer].
3. If not, [collect details] and [offer the next available slot].

4. Transfer rules

Each rule has a label, a phone number and a plain-English "When to transfer". The docs' examples are Owner, Billing, Emergency and a specific person.

Label	When to transfer	Phone number
Owner	Caller asks to speak with the owner or manager	[]
Billing	Caller has questions about billing, payments, or invoices	[]
Emergency	Caller describes an emergency	[]
[]	[]	[]

Transfers work on phone calls only, and are available for US businesses or businesses using only their own Twilio or SIP numbers.

5. Greeting (under about 15 words)

Thanks for calling [Business Name]. What can I do for you today?

If your greeting must include a disclosure, turn on "Always finish the first message". Check what you must tell callers where you operate; this is not legal advice.

6. Test list, from a real phone

- Greeting sounds natural and includes your business name
- Appointment booking offers the right services and times
- Each procedure runs its steps in order on a realistic request
- Answers about hours, location and pricing match your business
- An out-of-scope request ends in a message or a transfer
- Each transfer rule reaches the right number
- Afterwards, read the transcript under Conversations

DO THIS

Fill the blanks, paste them into your receptionist's settings, then test from a real phone and read the conversation afterwards.

What Fynl.io is

One portal a small business runs itself on, instead of five subscriptions that do not talk to each other.

- A CRM and pipeline that shows every lead and where it stopped
- A calendar clients can book straight into
- Quotes, contracts and invoices, with deposits taken up front
- A website and form builder, so the enquiry lands in the same place
- Your Gmail connected, so the whole thread sits on the contact
- Automations for the follow-up you keep forgetting to send

The AI runs on **your own Claude or ChatGPT API key** — no markup on it. No SMS or phone calls yet. \$49/month per business, \$149 Agency, and we move your contacts over for you.

Fynl.io is for the rest of the job: one portal for your contacts, calendar, quotes, invoices and email, with AI that runs on your own key. Fynl does not answer phone calls yet, so an AI receptionist like this would sit alongside it, not inside it.

Sources

- Reception.ai docs: Rules and procedures — <https://elevenlabs.io/docs/reception-ai/receptionist/rules-and-procedures>
- Reception.ai docs: Call handling — <https://elevenlabs.io/docs/reception-ai/receptionist/call-handling>
- Reception.ai docs: Testing your receptionist — <https://elevenlabs.io/docs/reception-ai/receptionist/testing>