THE VOICE AI AGENT

ANSWERS. QUALIFIES. BOOKS.



MICHAEL REIMER

HIGHLEVEL GUIDES · VOLUME 02 · AI

BUILD A VOICE AI AGENT **THAT ANSWERS AND BOOKS.**

This build puts a Voice AI agent on one of your HighLevel phone numbers. It answers inbound calls, answers common questions from your Knowledge Base and books appointments on your calendar while the caller is still on the line. By the end you will have a tested agent, a live number pointed at it and a schedule that controls when it picks up.

6	41	60 min
PARTS	STEPS	TO BUILD

Michael Reimer, Founder of CRM Pros · HighLevel Commander and Certified Admin

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WHAT YOU ARE BUILDING

WHAT YOU ARE BUILDING **AND WHY IT MATTERS.**

A caller dials your business number. The Voice AI agent answers, greets them, answers questions using the information you approved and offers real open times from your booking calendar. It collects the details it needs, confirms the appointment and the booking lands on your calendar with a transcript and summary saved to the contact. You decide whether the agent answers every call or only steps in as a backup, and you decide the hours it works.

- ✓ A custom Voice AI agent with a name, voice, prompt and welcome message
- ✓ A Knowledge Base attached so the agent answers questions with your approved information
- ✓ An Appointment Booking action that books real slots on your HighLevel calendar
- ✓ A live phone number routed to the agent with a Call Routing mode you chose
- ✓ Working Hours that control when the agent answers

BEFORE YOU START

BEFORE YOU START, **HAVE THESE READY.**

Gather these first so you do not stop halfway through the build.

- A subaccount with Voice AI and a role that includes View & Manage Voice AI Agents permission
- A clear use case for the agent, such as appointment booking, lead qualification or basic support
- Approved business information for the prompt and Knowledge Base
- At least one HighLevel booking calendar with availability, duration, buffers and booking rules set
- A HighLevel phone number or Number Pool in the subaccount, or the ability to buy one
- A modern browser with microphone access for Web Call testing

Build in this order: **agent**, then **Knowledge Base**, then **Appointment Booking**, then **test**, then **Deploy**, then the number's **Call Forwarding**. Testing before deployment keeps bad answers off a live line.

PART 01 OF 06

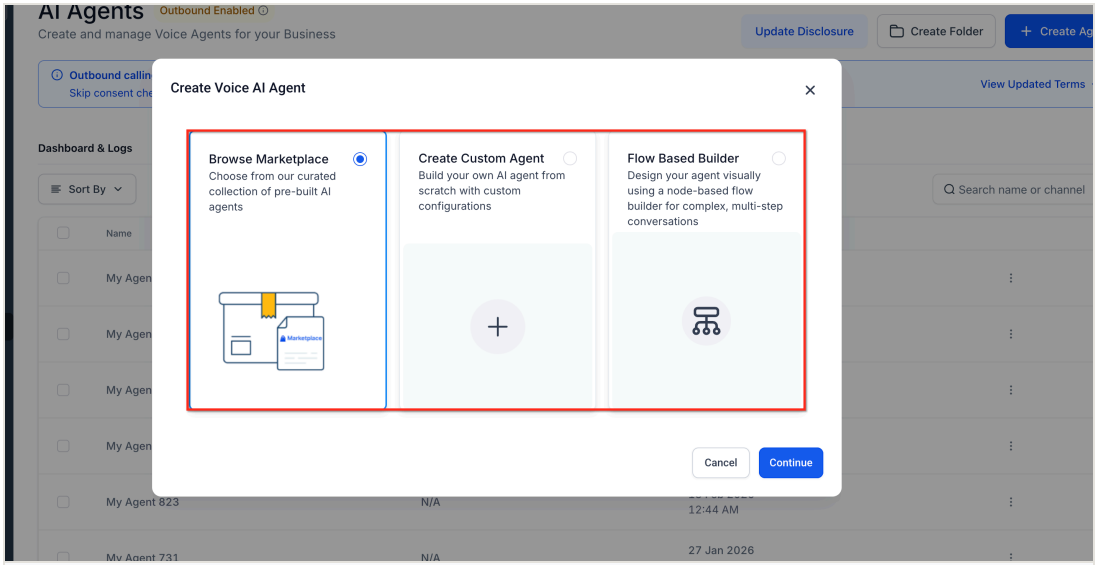
01 CREATE THE AGENT **AND GIVE IT A VOICE.**

Everything starts with a custom agent. This part names it, picks its voice and language, and writes the prompt and greeting that shape every call.

01 Log in to the subaccount and go to **AI Agents**, then **Voice AI**.

02 Open the **Agent List** tab and click **+ Create Agent**.

03 Select **Create Custom Agent** and click **Continue**.



The three ways to create an agent. Custom Agent is the one this guide follows.

04 Enter a clear **Agent Name** .

05 Select the agent's **Voice** , then select the **Model** and **Language** .

06 Set the **Timezone** using the clock icon.

07 Write the agent prompt. State the agent's role, the information it should collect and the actions it can take.

08 Set the **Welcome Message** for inbound calls, choose whether the agent or the caller speaks first, set the pause before the agent speaks, and click **Save** .

i Use **Create Custom Agent** for standard call handling. **Browse Marketplace** fits when a prebuilt agent matches your use case, and **Flow Based Builder** fits structured, multipath conversations.

PART 02 OF 06

02 ATTACH A KNOWLEDGE BASE **SO IT ANSWERS CORRECTLY.**

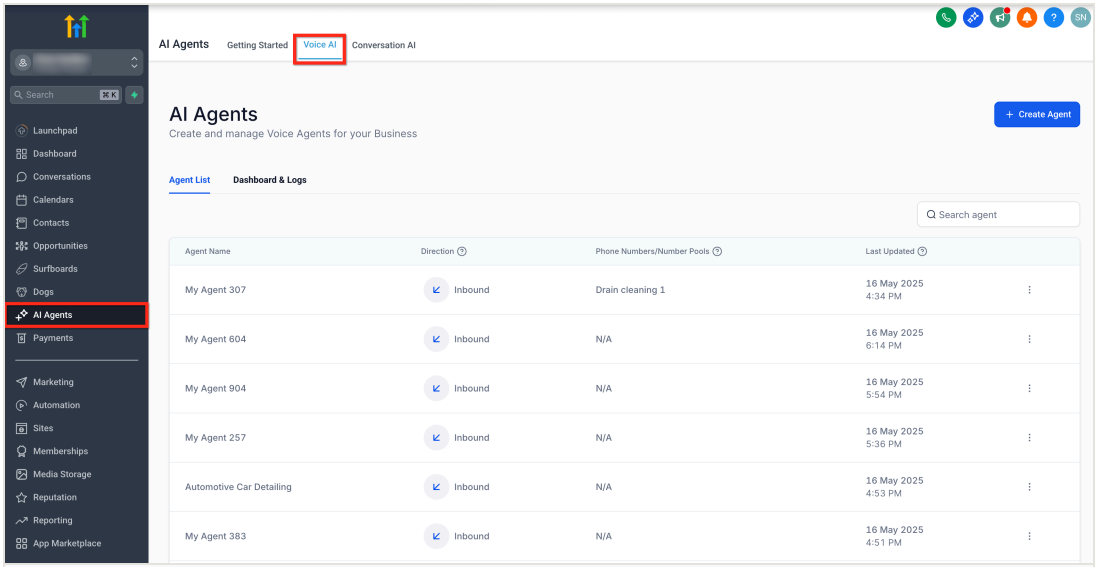
A Voice AI agent without a Knowledge Base gives generic answers. Attaching one lets it pull the exact information a caller needs, and the trigger prompt tells it when to look.

01 In the agent editor, go to the **Agent Goals** tab.

02 Under **Select Knowledge Base** , choose an existing base or click **Create New** .

03 Add or update the sources the agent should draw from.

04 In the **When to use this Knowledge Base** field, write a detailed trigger prompt that describes the questions that should send the agent to the base.



The Knowledge Base selector and trigger prompt under Agent Goals.

05 Click **Save** .

i Each agent links to one Knowledge Base at a time, and it only works with HighLevel's built in Knowledge Bases. If a caller's question does not match the trigger prompt, the agent follows its default behavior instead.

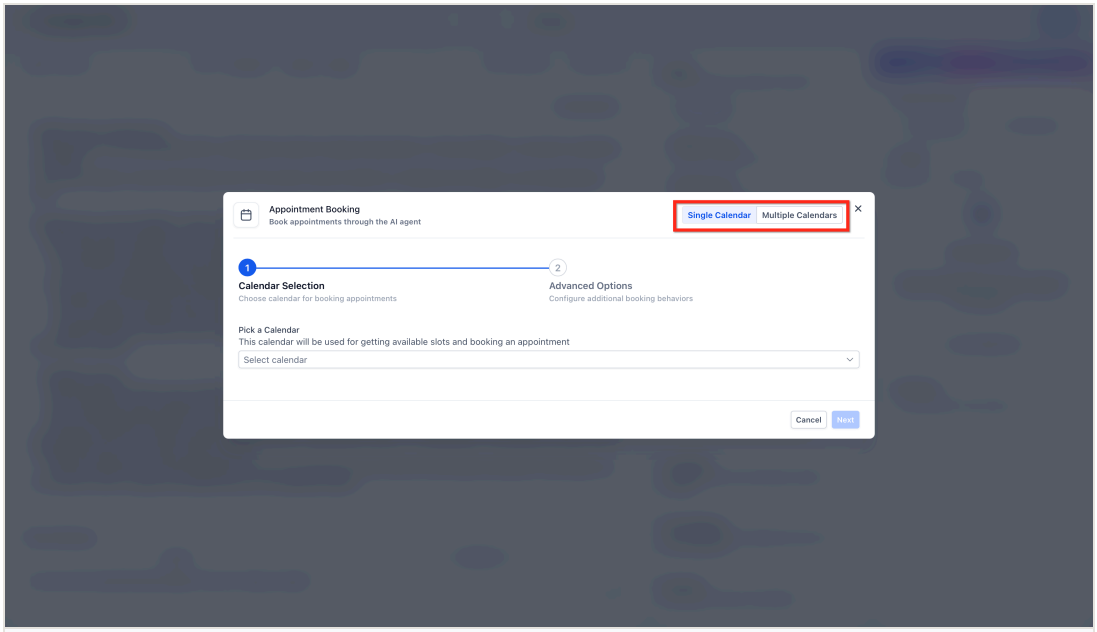
PART 03 OF 06

03 ADD APPOINTMENT BOOKING **ON YOUR CALENDAR.**

This is the action that turns a conversation into a booking. The agent offers real slots, collects a missing email if needed and confirms the appointment without sending the caller to a link.

01 In the **Actions** section on the right panel, click **+ New Action**.

02 Select **Appointment Booking**.



Single Calendar booking with Offering Days and Hours between slots.

03 Choose **Single Calendar** and select the booking calendar every request should go to.

04 Configure **Offering Days** to set how many future days the agent offers.

05 Configure **Hours between slots** to set the spacing between offered times.

06 Enter a clear action name and define the condition that should trigger the booking.

07 Save the action, then click **Save** on the agent.

Start with **Single Calendar** to get the flow right. Switch to **Multiple Calendars** later and add descriptions and routing cues for each calendar once the basics hold up. Services is not available in the Voice AI booking setup at this time.

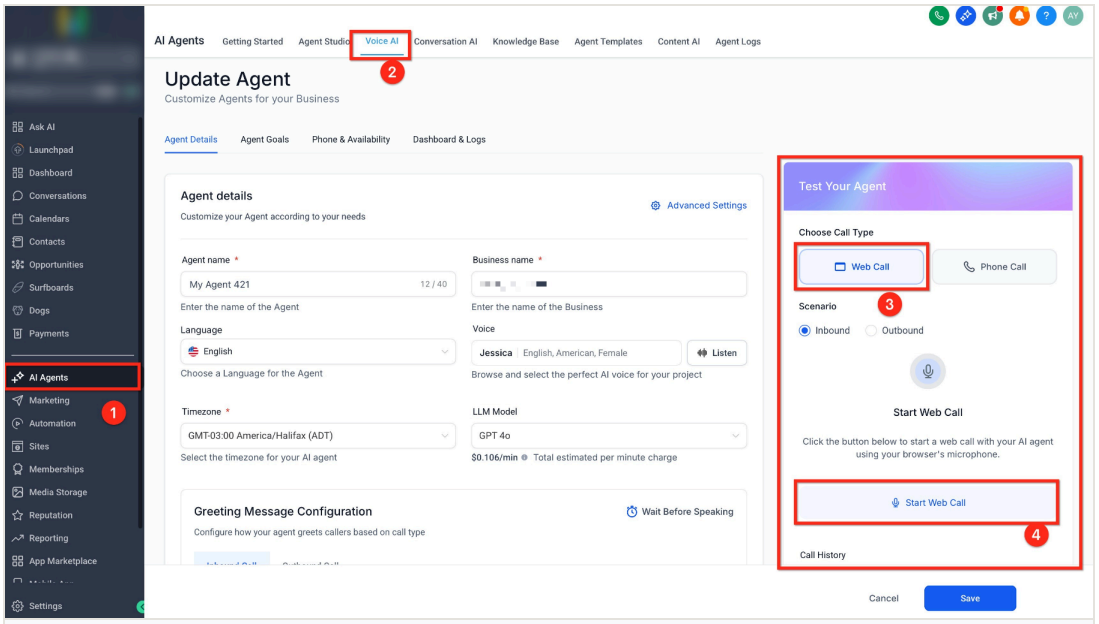
PART 04 OF 06

04 TEST IT AGAINST REAL SCENARIOS.

Do not put an untested agent on a live line. Web Call tests prompts, Knowledge Base answers and booking from your browser. Phone Call tests caller ID, routing and transfers through your telephony.

01 Click **Save** so the latest configuration is what you test.

02 Locate the **Test Your Agent** panel and select **Web Call**.



The Test Your Agent panel. Web Call first, Phone Call second.

03 Choose the **Inbound** scenario and click **Start Web Call**.

04 Allow microphone access, then speak as a real caller: ask a Knowledge Base question and ask to book an appointment.

05 Adjust the prompt, Knowledge Base, actions or settings based on what you heard, save, and repeat until the behavior is consistent.

06 Select **Phone Call**, choose the **Inbound** scenario, select the **Caller ID**, enter your mobile number and click **Call me**.

07 Answer the call and run the same booking scenario on a real phone.

08 Go to **AI Agents**, then **Voice AI**, then **Dashboard & Logs**, set the **Live/Test** filter to Test, and review the transcript, recording, summary and action results.

i Call Transfer does not run during a Web Call test. Validate transfers with a Phone Call test or by calling the deployed number. Test calls are excluded from dashboard analytics.

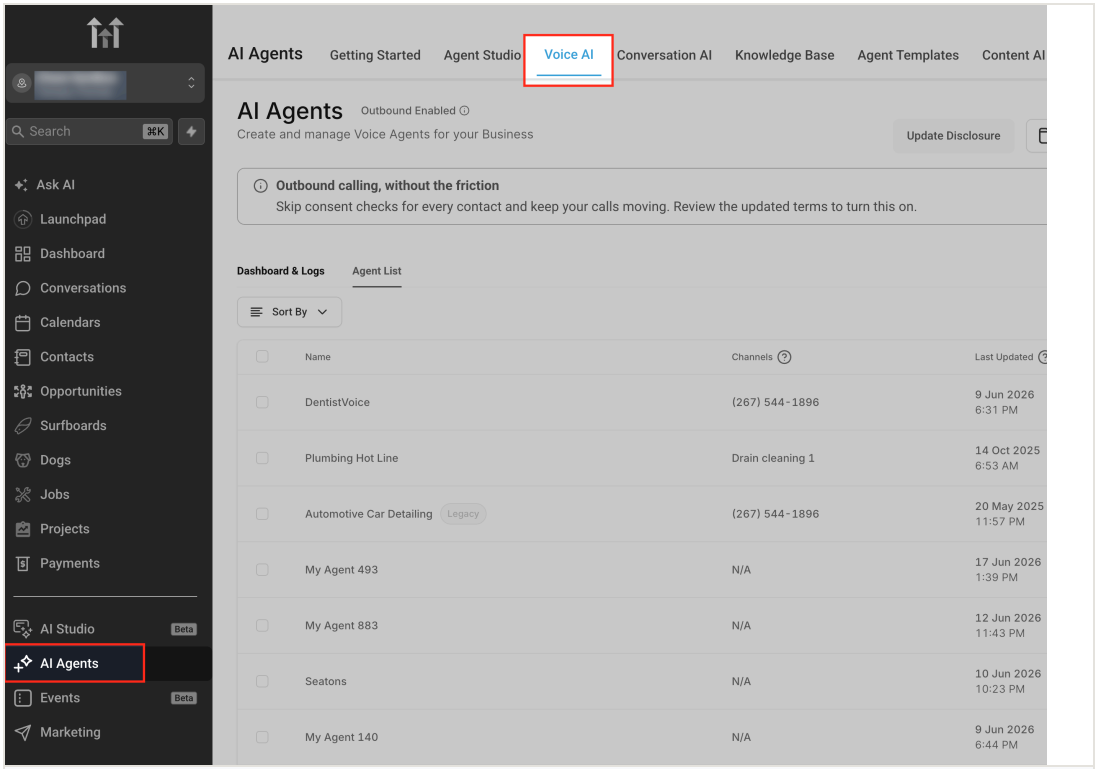
PART 05 OF 06

05 DEPLOY IT TO A LIVE NUMBER WITH HOURS.

The Deploy tab is where the agent meets the phone system. You pick the number, decide whether it answers directly or as a backup, and set the hours it works.

01 Open the agent's **Deploy** tab.

02 In the **Phone** section, select an eligible phone number or Number Pool. If you need one, click **Buy new number**, complete the purchase and assign it.



Number, routing mode and working hours all live on the Deploy tab.

03 Choose the **Call Routing** mode: **Answer Calls Directly** or **Use as Backup**.

04 Under **Working Hours**, select **All Hours** or **Custom Schedule**.

05 If you chose **Custom Schedule**, use the day chips to pick active days and set the start and end time for each day.

06 Use the copy option to apply the same hours to other days, and use the bin icon to remove a day.

07 Click **Save**.

i Working Hours do not update themselves. When your schedule changes, come back to the Deploy tab and edit it.

PART 06 OF 06

06 POINT THE NUMBER **AT VOICE AI.**

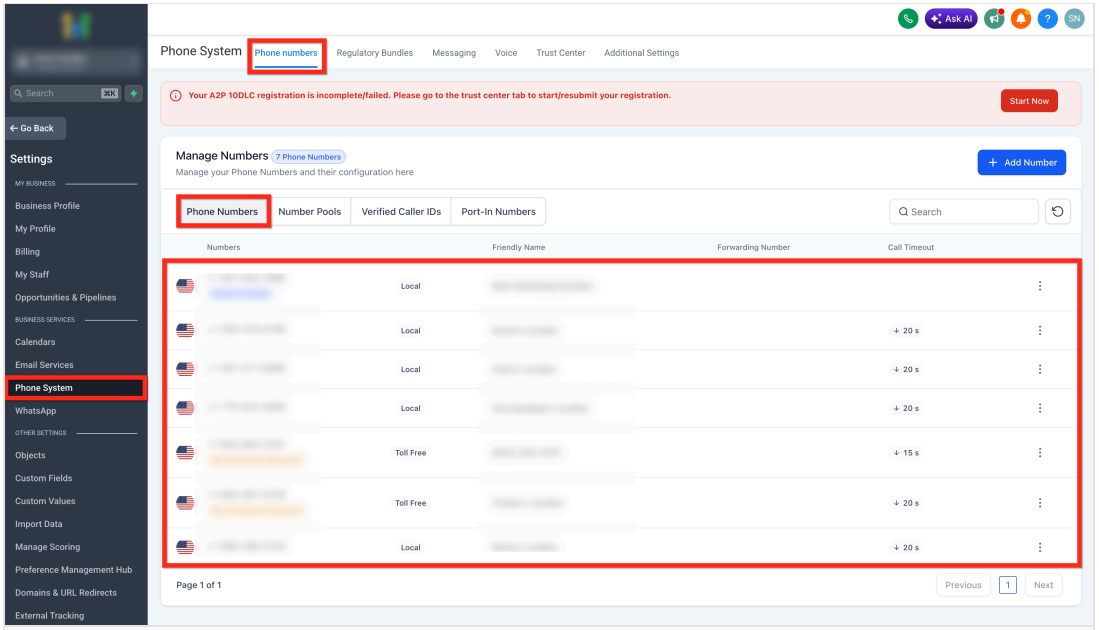
Assigning a number is not the whole job. The number's own call flow has to send inbound calls to Voice AI, and the timeout has to be short enough that callers reach the agent before voicemail.

01 Go to **Settings** , then **Phone System** , then the **Manage Numbers** tab.

02 Click the three dots beside the number and select **Edit Configuration** .

03 Open the **Call Forwarding** tab.

04 Under call routing, select **Voice AI** .



Voice AI selected under Call Forwarding for the number.

05 Locate the **Timeout** setting and reduce it to a low value, such as 0 to 3 seconds.

06 Save your changes.

i If a caller reaches local voicemail first, HighLevel marks the call as completed and the agent never answers. The short timeout prevents that.

TEST IT

TEST THE LIVE LINE **BEFORE CALLERS FIND IT.**

Call the deployed number from a phone that is not in the subaccount and run the full flow.

01	Call the assigned number during Working Hours. The agent should answer with your inbound Welcome Message.
02	Ask a question covered by your Knowledge Base. The agent should answer with your approved information, not a generic reply.
03	Ask to book an appointment. The agent should offer open slots that match your calendar rules and ask for any missing details such as an email.
04	Confirm a slot. Open the calendar and verify the appointment appears on the right calendar at the right time.
05	Open the contact record. The call summary should be saved to the notes if PostCall is set to save it.
06	Call the number outside Working Hours. The agent should not answer, and the call should follow the number's fallback path.
07	Go to **Dashboard & Logs**, set the **Live/Test** filter to Live, and review the transcript, recording and action results for the call.

WHEN A STEP FAILS

WHEN IT DOES NOT WORK, **CHECK THESE FIRST.**

Most Voice AI problems are routing problems, not prompt problems.

Voice AI does not appear under AI Agents

Your role is missing the View & Manage Voice AI Agents permission. Ask a subaccount administrator to adjust it.

The agent does not answer the assigned number

Confirm the number is assigned to the correct agent on the Deploy tab and that Call Forwarding on the number shows Voice AI. Then review Working Hours, the Call Routing mode, forwarding, timeout, voicemail and the number's call flow.

Calls go to voicemail before the agent picks up

Lower the Timeout on the number's Call Forwarding tab to a value between 0 and 3 seconds. Once a call hits local voicemail, HighLevel marks it completed and the agent will not answer.

Call Transfer fails during a Web Call test

Call Transfer is not supported in Web Call tests. Use a Phone Call test or call the deployed number to validate the transfer.

A test call is missing from Dashboard & Logs

Check the selected agent, the date range and the Live/Test filter. Confirm the call completed and give the details time to finish processing.

The agent answers from general knowledge instead of the Knowledge Base

The caller's question did not match the trigger prompt. Rewrite the When to use this Knowledge Base prompt so it clearly covers that type of question. Changes apply immediately.

FROM THE FIELD

MICHAEL'S **TAKE.**



Michael Reimer

FOUNDER OF CRM PROS · HIGHLEVEL COMMANDER

The first thing I would get right is the booking action, and I would start with a single calendar. Get the agent offering real slots that match your calendar rules before you add a second calendar or a transfer. Most of the value in this build is a caller hanging up with a confirmed appointment, so prove that part on a Web Call before you touch the phone system.

Where people go wrong is the number. They assign it on the Deploy tab, hear nothing, and start rewriting the prompt. The prompt was fine. The number's Call Forwarding was still pointed somewhere else, or the timeout was long enough that voicemail grabbed the call first. Check Deploy, check Call Forwarding, drop the timeout, then test again during and outside your Working Hours.

This build pays off when you have a steady stream of repetitive calls, like appointment requests and basic questions, that a person does not need to take. If your call volume is low or every call is personal, keep a human on the line and use the agent as a backup. A well scoped agent with a precise Knowledge Base trigger prompt is easier to maintain than a broad one, so keep its job narrow.

GO DEEPER

THE FEATURES **BEHIND THIS BUILD.**

Every feature this guide touches has its own page in the library, with the settings, limits and Michael's notes.

AI EMPLOYEE

How to Create Voice AI Agents

AI EMPLOYEE

Voice AI: How to Configure Inbound Call Flow

AI EMPLOYEE

How to test Voice AI Agents in HighLevel

AI EMPLOYEE

How to Set Working Hours for Voice AI Agents in HighLevel

AI EMPLOYEE

Appointment Booking in Voice AI for HighLevel

AI EMPLOYEE

Knowledge Base integration for Voice AI Agents in HighLevel

AI EMPLOYEE

How to Assign Twilio Numbers to Voice AI Agents