

GOHIGHLEVEL

# AI PHONE SYSTEM

## MASTER SOP

Complete Build Guide: Voice AI IVR + Missed Call AI Agent Sequence

System 1	System 2	Combined Result
AI IVR — Voice Routing ~\$11/Month	Missed Call AI Agent 5- Workflow SMS Sequence	24/7 AI Phone System Voice + SMS Covered

This document is a full implementation guide combining two production systems built and deployed in GoHighLevel. It is intended for GHL operators, agency owners, and technical implementors. No code required.



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### PART 1

## AI IVR SYSTEM

Voice Routing Agent · ~\$11/Month · GoHighLevel Voice AI

This system answers every inbound call with an AI voice agent, presents an IVR menu, checks live business hours, and routes the caller to a human or after-hours AI — automatically.



## §1 — System Overview

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The AI IVR replaces a traditional phone tree with a GoHighLevel Voice AI agent. It answers every inbound call, greets the caller, presents a menu, verifies the time against business hours, and routes the call — with no human involvement.

### 1.1 Capabilities

Capability	Description
<b>24/7 Call Answering</b>	AI picks up every inbound call — no missed calls, no voicemail jail.
<b>IVR Menu</b>	Presents callers with options (e.g., say sales, say support).
<b>Business Hours Logic</b>	Checks live day/time before every transfer decision.
<b>Human Transfer</b>	During business hours: transfers live call to a human agent's phone.
<b>After-Hours AI</b>	Outside business hours: routes to after-hours AI agent or voicemail.

### 1.2 Cost Breakdown

Item	Cost	Notes
GHL Phone Number	~\$1.15/mo	US local number
Voice AI Calls (est. 100–200/mo)	~\$8–10/mo	~\$0.05–0.08/call
<b>Total</b>	<b>~\$11/mo</b>	Zero dev cost



## §2 — Phone Number Setup

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### Step-by-Step

1. Navigate to Settings → Phone System → Manage → Buy Number.
2. Select country, number type (Local), and choose an area code matching your client's market.
3. Complete the purchase. A success screen will confirm the number.
4. A2P Registration prompt: required only for SMS/MMS. For voice-only IVR, skip this step.

*Do NOT configure call forwarding on this number. The Voice AI agent handles all routing. Just purchase and proceed.*



## §3 — Create the Voice AI Agent

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Navigate to: AI Agents → Voice AI → Agent List → + Create Agent

### 3.1 Agent Details Tab — Field Reference

Field	Recommended Value	Notes
<b>Agent Name</b>	IVR	Internal label only — callers never hear this.
<b>Business Name</b>	Client's business name	Used in agent prompt context.
<b>Language</b>	English (or client's market)	
<b>Voice</b>	Mark – ConvoAI (American Male)	Preview with Listen button first.
<b>Voice Model</b>	Auto (Turbo V2)	Best speed/quality balance.
<b>LLM Model</b>	GPT-5	Best reasoning for hour-checking logic.

<b>Timezone</b>	Client's local timezone (e.g., GMT-04:00 EDT)	CRITICAL — drives all business hours logic.
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### 3.2 Agent's Initial Message

Example:  
 "Thanks for calling [Business Name].  
 For sales, say sales.  
 For support, say support."

Rule: Keep under 190 characters. No filler. Get straight to the menu.



## §4 — Agent Goals: The IVR Prompt

The Agent Goals tab contains the system prompt. This is the brain of the IVR. Copy the template below and replace all bracketed placeholders.

*The variables `{{right_now.day}}` and `{{right_now.time_ampm}}` are injected by GHL at runtime — they give the AI the current day and time on every call. Do not modify them.*

### 4.1 Full Prompt Template

```
# [BUSINESS NAME] IVR + BUSINESS HOURS LOGIC

### Objective
Your name is "[AGENT FIRST NAME]."
You automatically handle inbound calls for [BUSINESS NAME] by simulating an IVR
menu, checking business hours, and routing calls accordingly between the Human
Agent and the Robot Agent – triggering transferhuman or transferagent.

# 1. BUSINESS HOURS VERIFICATION
- Current Day = {{right_now.day}}
- Current Time = {{right_now.time_ampm}}

Business Hours: [DAY RANGE] | [START TIME] - [END TIME] [TIMEZONE]

Run transferhuman ONLY if:
- Day is [DAY RANGE] AND Time is between [START TIME] and [END TIME]

Run transferagent if:
- Day is [OFF DAYS]
OR Time is before [START TIME] or after [END TIME] on business days

# 2. CALL ROUTING

## Option 1 (Sales/[KEYWORD 1])
During hours → 'Great! Connecting you with a specialist now.' → transferhuman
After hours → 'I'll connect you with our assistant to gather your info.' →
transferagent

## Option 2 (Support/[KEYWORD 2])
During hours → 'Connecting you with support now.' → transferhuman
After hours → 'I'll connect you with our assistant.' → transferagent

Dynamic variables:
- Current Time: {{right_now.hour_ampm}}
- Current Day: {{right_now.day}}
```

### 4.2 Placeholder Reference

Placeholder	Replace With	Example
[BUSINESS NAME]	Client's business name	Acme Roofing
[AGENT FIRST NAME]	AI greeting name	John / Alex
[DAY RANGE]	Active business days	Monday–Friday

[START/END TIME]	Open/close times	9:00 AM / 5:00 PM
[TIMEZONE]	Client's timezone	EST / CST / PST
[OFF DAYS]	Days business is closed	Saturday and Sunday
[KEYWORD 1/2]	Spoken trigger words	sales, support, billing



## §5 — Call Transfer Actions

In Agent Goals → Setup Your Actions → During The Call → + New Action → Call Transfer. Create TWO actions.

### 5.1 transferhuman — Business Hours → Live Agent

Field	Value
<b>Action Name</b>	transferhuman ← exact spelling, case-sensitive
<b>Phone Number</b>	Human agent's phone number (E.164 format: +1XXXXXXXXXX)
<b>Trigger Condition</b>	only run this function if the time and day is [START TIME] to [END TIME] between [DAY RANGE]
<b>Say Before Transfer</b>	"Please hold while I connect you."
<b>Whisper Message</b>	<input checked="" type="checkbox"/> Enabled — human agent hears an AI summary before the call connects.

### 5.2 transferagent — After-Hours → AI Agent

Field	Value
<b>Action Name</b>	transferagent ← exact spelling, case-sensitive
<b>Phone Number</b>	After-hours AI agent / voicemail capture number
<b>Trigger Condition</b>	RUN THIS FUNCTION From [DAY RANGE] [END TIME] to [START TIME], and on [OFF DAYS] both days run this function.
<b>Say Before Transfer</b>	"Our team is currently unavailable. Connecting you with our assistant."
<b>Whisper Message</b>	<input type="checkbox"/> Disabled for fully automated after-hours agents.

*The action names in this panel MUST exactly match what appears in the prompt ('transferhuman', 'transferagent'). A single character difference = transfer never fires.*



## §6 — Phone & Availability

Navigate to Agent Details → Phone & Availability tab.

Setting	Configuration
<b>Phone Number(s)</b>	Select the number purchased in §2. Max 5 numbers on Basic Plan.
<b>Enable AI Agent as Backup</b>	OFF — AI should answer all calls directly, not as a backup.
<b>Set Working Hours</b>	OFF — hours logic lives in the prompt, not here. Agent stays live 24/7.



## §7 — Testing & QA

### Web Call Test

5. Agent Details → right panel → Test Your Agent → Web Call → Start Web Call.
6. Speak the option keywords and verify correct routing response.

7. Check: Does it present the menu? Does it attempt the right transfer?

## QA Checklist

#	Test Case	Pass/Fail
1	Agent answers within 2 rings	
2	Initial greeting plays with correct business name	
3	Option 1 keyword triggers correct branch	
4	Option 2 keyword triggers correct branch	
5	During hours: call transfers to human agent number	
6	After hours: call transfers to after-hours line	
7	Whisper message plays for human agent on transfer	
8	Call logs appear in Dashboard & Logs	
9	Actions Triggered count matches expectations	
10	Sentiment shows as Positive in dashboard	



## PART 2

# MISSED CALL AI AGENT

"John" SMS Sequence · 5-Workflow Automation · GoHighLevel Workflows

This system intercepts every missed inbound call, immediately engages the caller via SMS, qualifies their intent, extracts their name, and routes them to the right team — all without human intervention.



## §8 — Missed Call System Overview

The Missed Call AI Agent is a chained 5-workflow automation that converts every missed inbound call into a qualified lead with contact info captured — all via SMS.

### 8.1 The 5-Workflow Architecture

#	Workflow Name	Status	Purpose
1	<b>Start Here. Missed call Text back Agent</b>	Published (37)	Entry point. Missed call detection → first AI SMS.
2	<b>Replied to Agent</b>	Published (11)	Confirms callback number after agent hand off.
3	<b>Missed Call Contact Update</b>	Draft	Extracts name from reply → updates CRM. (Parallel)
4	<b>Final - Replied to Miss Call Agent</b>	Published (6)	Business-hours-aware callback confirmation close.
5	<b>Agent hand off</b>	Published (20)	Agent Studio invocation → smart SMS → name saved.

### 8.2 System Flow

```
MISSED CALL → WF1 (Conversation AI sends first SMS)
├─ Customer replies → WF5 (Agent Studio → smart SMS + name saved)
├─ Customer replies → WF2 (AI confirms callback number)
└─ Customer replies → WF4 (Final closing message)
```

WF3 (parallel, draft): also fires on WF1 reply → extracts name only

### 8.3 AI Models Used

Task	Model	Reason
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Conversation AI bot (WF1)	GHL Managed	Multi-turn SMS — GHL handles context automatically.
Final handoff message (WF4)	GPT-5 Nano (Fastest)	Speed-optimized. Simple conditional SMS output.
SMS dispatcher (WF5 Step 3)	GPT-5 Nano (Fastest)	Just dispatches Agent Studio output — no reasoning.
Name extraction + CRM update	GPT-5.2 (Low thinking)	Deterministic extraction. Cost-efficient.
Agent Studio after-hours agent	Configured in Agent Studio	Full KB-aware agent for complex routing decisions.



## §9 — WF1: Start Here. Missed Call Text Back Agent

### WF1 Start Here. Missed call Text back Agent

#### Trigger

- Trigger Type: Call Details
- Call Status: Contains any of — busy, no-answer, canceled, failed
- Call Direction: Incoming

#### Workflow Steps

Step	Action	Notes
1	Slight Delay	Randomized delay so first SMS doesn't feel automated.
2	Add Tag	Tag: 'missed call' — enables tracking and reporting.
3	Internal Notification	Alerts team that AI has been activated on a missed call.
4	Conversation AI Bot	Main AI SMS agent. Sends opening message and collects caller info.

### Conversation AI Bot — Full Configuration

#### Personality

You are [AGENT NAME], a friendly assistant for {{location.name}}.  
 You respond only via SMS. Keep every message concise — 1-3 sentences max.  
 Never use emojis unless the contact uses them first.  
 Tone: warm, helpful, and professional.  
 Never claim to be a human if asked directly.

#### Additional Instructions

Your job is to:

1. Acknowledge the missed call and reassure the contact someone will follow up.
2. Collect minimum info: contact name + what they're looking for (describe in terms of the service or reason for call).
3. Qualify intent — why they called, urgency level.
4. Confirm receipt and set a clear callback expectation.
5. Route or flag the conversation for the right rep/team.

#### Opening Question

Hey, sorry we missed your call! I'm [AGENT NAME] from {{location.name}}  
 Can I grab a few quick details — your name and what you were reaching out about today? Just so the right person can get back to you.  
 Can you describe what you're looking for?

#### Bot Settings

Setting	Value
Advanced Bot Configurations	ON — required to access Personality and Additional Instructions.
Channel	SMS

<b>Time Out</b>	1 Hour — bot waits up to 1 hour before closing the branch.
<b>Skip If Answered</b>	OFF — always runs on a missed call.
<b>Bot Responses Limit</b>	5 — max replies before branch exits, preventing infinite loops.



## §10 — WF5: Agent Hand Off

### WF5 Agent hand off

*WF5 fires when a customer replies to WF1. It routes the reply through Agent Studio, generates a smart response, dispatches the SMS, and saves the caller's name to CRM.*

### Trigger

- Trigger Type: Customer Replied
- Replied to Workflow: Start Here. Missed call Text back Agent (WF1)
- Reply Channel: SMS

### Workflow Steps

Step	Action	Notes
1	<b>Invoke Agent in Agent Studio</b>	Agent: 'after hours / missed call agent'. Input: <code>{{message.body}}</code> . Output stored as <code>{{agent_studio_execution.1.response}}</code> .
2	<b>Internal Notification</b>	Team alert: reply received, Agent Studio invoked.
3	<b>AI Agent #1 — SMS Dispatcher</b>	Instruction: 'send detailed sms response generated here: <code>{{agent_studio_execution.1.response}}</code> '. Model: GPT-5 Nano. Tool: Send SMS.
4	<b>Wait 2 mins</b>	Buffer between SMS send and CRM update.
5	<b>AI Agent #4 — Name Extractor</b>	Reads <code>{{message.body}}</code> , extracts caller name, updates GHL contact record. Model: GPT-5.2 Low thinking. Tool: Update Contact field.
6	<b>Create/Update Opportunity</b>	Creates pipeline opportunity for the contact.
7	<b>Wait 5 mins → END</b>	Final buffer.

### AI Agent #4 — Name Extraction Prompt

You are an AI agent tasked with updating a contact record with the contact's name based on a reply message. Contact phone: `{{contact.phone}}`

1. Extract the contact name from the reply: `'{{message.body}}'`
2. Update the contact record to set their name to the extracted value.

Model: GPT-5.2 (Low thinking) | Tool: Update Contact field



## §11 — WF2: Replied to Agent

### WF2 Replied to Agent

### Trigger

- Trigger Type: Customer Replied
- Replied to Workflow: Agent hand off (WF5)
- Reply Channel: SMS

## Workflow Steps

Step	Action	Notes
1	Wait 2 mins	Buffer — prevents instant-bot feel.
2	AI Agent John	Generates one SMS asking to confirm callback number.
3	Wait 1 min	Short pause after phone confirm SMS.
4	Internal Notification	Team alert: phone confirm sent.
5	Create/Update Opportunity	Updates pipeline opportunity.

### AI Agent John — Phone Confirm Prompt

You are an AI agent generating a single SMS response to a customer's reply in the 'missed call' workflow. The SMS should confirm contact information.

1. Receive the customer's reply: `{{message.body}}`
2. Generate ONE SMS asking: "And is `{{contact.phone}}` the best number to reach you, or is there a better one?"
3. Send the SMS.

Guidelines: Polite and professional. Under 160 characters.



## §12 — WF4: Final — Replied to Miss Call Agent

### WF4 Final - Replied to Miss Call Agent

#### Trigger

- Trigger Type: Customer Replied
- Replied to Workflow: Replied to Agent (WF2)
- Reply Channel: SMS

## Workflow Steps

Step	Action	Notes
1	Wait 2 mins	Standard delay.
2	AI Agent #2 — Final Handoff	Business-hours-aware closing message. Model: GPT-5 Nano.
3	Internal Notification	Team alert: loop closed.
4	Create/Update Opportunity	Pipeline update.
5	Wait 48 hours	48-hour gap before final stage update.
6	Create/Update Opportunity → END	Final pipeline close.

### AI Agent #2 — Final Handoff Prompt

You are an AI agent managing the handoff message in the missed call workflow. Customer replied to confirm their number. Their message: `{{message.body}}`

Task: Send a closing confirmation SMS using these rules:

DURING business hours:

'Perfect. I've passed this to our team and someone will be in touch shortly.'

AFTER business hours:

'Perfect — our team will give you a call first thing at [opening time].  
You won't miss us.'

URGENT after hours:  
'Understood - I've flagged this as priority. Someone will reach out as soon as we're back at [opening time].'

Use the business hours knowledge base for the accurate callback time.

**CRITICAL:** A knowledge base with this client's exact business hours and timezone must be attached to this AI Agent. Without it, the during/after-hours conditional logic cannot function.



## §13 — WF3: Missed Call Contact Update (Parallel)

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### WF3 Missed Call Contact Update

Currently in Draft status. Runs in parallel with WF5 — both fire on a WF1 reply. WF3 focuses exclusively on name extraction. Publish only after the primary sequence is stable.

### Trigger

- Trigger Type: Customer Replied
- Replied to Workflow: Start Here. Missed call Text back Agent (WF1)
- Reply Channel: SMS

### Steps: Wait → AI Agent #1 (Name Extract + Update Contact)

You are an AI agent tasked with updating a contact's name based on a reply.  
Contact phone: {{contact.phone}}

1. Extract the contact name from: {{message.body}}
2. Update the contact record: set name = extracted value.

Model: GPT-5.2 (Low thinking) | Tool: Update Contact field



## §14 — Complete Prompt Reference

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All prompts in one place, ready to copy. Replace all placeholders in brackets before deploying.

### 14.1 Conversation AI Personality (WF1)

You are [AGENT NAME], a friendly assistant for {{location.name}}.  
You respond only via SMS. Keep every message concise - 1-3 sentences max.  
Never use emojis unless the contact uses them first.  
Tone: warm, helpful, and professional.  
Never claim to be a human if asked directly.

### 14.2 Additional Instructions (WF1)

1. Acknowledge the missed call - reassure someone will follow up.
2. Collect: name + what they're looking for (service/product/reason).
3. Qualify: why they called, urgency.
4. Set callback expectation.
5. Route/flag for right rep based on response.

### 14.3 Opening Question (WF1)

Hey, sorry we missed your call! I'm [NAME] from {{location.name}}  
Can I grab your name and what you were reaching out about today?  
Just so the right person can get back to you -  
can you describe what you're looking for?

## 14.4 Phone Confirm SMS (WF2)

Generate one SMS: 'And is {{contact.phone}} the best number to reach you, or is there a better one?'  
Under 160 characters. Professional tone.

## 14.5 Final Handoff (WF4 — Business Hours Aware)

DURING hours: 'Perfect. I've passed this to our team.  
Someone will be in touch shortly.'  
AFTER hours: 'Perfect — our team will call first thing at [opening time].  
You won't miss us.'  
URGENT: 'Flagged as priority. Reaching out as soon as we're back at [time].'  
Use knowledge base for accurate hours.

## 14.6 SMS Dispatcher (WF5 Step 3)

send detailed sms response generated here: {{agent\_studio\_execution.1.response}}  
Model: GPT-5 Nano | Tool: Send SMS

## 14.7 Name Extractor (WF5 Step 5 / WF3)

Extract the contact name from: '{{message.body}}'  
Update contact record: set name = extracted value.  
Model: GPT-5.2 Low thinking | Tool: Update Contact field



# §15 — Build & Publish Order

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Build in this exact order. Triggers reference earlier workflows — those must exist first.

Order	Build This	Why This Order
1st	<b>WF1 — Start Here</b>	WF5 and WF3 must reference WF1 as reply trigger.
2nd	<b>WF5 — Agent hand off</b>	WF2 must reference WF5 as reply trigger.
3rd	<b>WF2 — Replied to Agent</b>	WF4 must reference WF2 as reply trigger.
4th	<b>WF4 — Final</b>	Final in chain. No downstream dependencies.
5th	<b>WF3 — Contact Update</b>	Parallel. Publish last, after primary sequence confirmed.



# §16 — Testing & Troubleshooting

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## Live Test Protocol

8. Call the client's GHL phone number from a test mobile — let it miss.
9. Within 30 seconds, confirm an SMS is received from the GHL number.
10. Reply with a test name and service description.
11. Verify WF5 fires in Execution Logs → Agent hand off.
12. Confirm a smart SMS reply is received within 2–3 minutes.
13. Reply again. Verify WF2 fires and phone confirm SMS is sent.
14. Reply to confirm number. Verify WF4 fires and closing SMS is sent.
15. Check contact record — name should be populated.
16. Check Opportunities — pipeline card should exist.

## Troubleshooting Quick Reference



Problem	Likely Cause	Fix
WF1 doesn't fire	Trigger conditions wrong	Confirm: Call Status = busy/no-answer/canceled/failed AND Direction = Incoming.
No SMS after missed call	A2P not registered or SMS disabled	Verify phone number has SMS + A2P registration complete.
Agent Studio invocation fails	Agent not promoted to Production	Set agent Trigger Type = Workflow and republish in Agent Studio.
Name not saving in CRM	'Update Contact field' tool not mapped	Verify tool maps to First Name field in the AI Agent config.
WF4 sends wrong hours message	Knowledge base missing or wrong hours	Attach KB with exact business hours + timezone to WF4 AI Agent.
Wrong workflow fires on reply	Reply trigger pointing to wrong WF	Double-check each WF's trigger filter — 'Replied to Workflow' must reference the correct upstream WF.
Contact enrolled in multiple WFs	Re-enrollment rules too permissive	Set each WF to allow once per contact. Check Settings tab in each workflow.



## §17 — Expert Implementation & Setup

### Need This Built For You?

This document outlines the standard architecture.  
*For custom API integrations, complex prompt engineering, or specific CRM orchestration —*  
**I am available to handle the full technical setup tailored to your specific budget.**

Contact	What I Can Build For You
 <b>Email</b> paul.ekpo9@gmail.com  <b>Upwork Profile</b> <a href="https://www.upwork.com/freelancers/~01366acc3b78aaab4">upwork.com/freelancers/~01366acc3b78aaab4</a>	<ul style="list-style-type: none"> <li>• Custom AI Voice IVR (any business type)</li> <li>• Missed Call SMS Automation</li> <li>• Multi-workflow AI sequences</li> <li>• CRM data enrichment pipelines</li> <li>• Agent Studio + Knowledge Base setup</li> <li>• GoHighLevel → API integrations</li> <li>• Prompt engineering &amp; optimization</li> </ul>

GoHighLevel Certified · 4+ Years on Upwork · Marketing Automation Specialist

GoHighLevel AI Phone System Master SOP — AI IVR + Missed Call AI Agent

*This document is provided as a free educational resource. All workflow logic, prompts, and system architecture are original configurations.*

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