

Always Open Desk

AI Receptionist Customer Quick Start Guide

Keep your digital front desk open.

Train your receptionist, test it, publish it, and review every lead from one private dashboard.

Before You Begin

You should have received a secure dashboard invitation from Always Open Desk. The email contains a time-limited link to choose or reset your WordPress password. Never share your password or API information with website visitors.

You will need	Where to find it
Business login	https://alwaysopendesk.com/business-login/
Private dashboard	https://alwaysopendesk.com/business-dashboard/
Support	help@alwaysopendesk.com
Business facts	Hours, service area, services, exclusions, pricing rules, FAQs

The receptionist is an intake assistant. A person must confirm final pricing, availability, scheduling, safety, service eligibility, professional advice, and every binding decision.

Set Up Your Receptionist

1

Sign in securely

Open the Business Login page, enter the email connected to your customer profile, and use the password you created from the invitation. Your dashboard is private and only displays information for your business.

2

Complete structured training

Open the Training tab. Add accurate business facts: service areas, weekly hours, holiday notes, services, unsupported work, pricing boundaries, booking rules, required disclosures, and approved FAQs. Use direct language and state when a human must take over.

3

Review your public profile

Open the Profile tab. Confirm the business name, public description, website, phone number, notification email, logo, and brand colors. The hosted business page uses this information.

4

Test ordinary and difficult questions

Use the hosted page or preview widget. Test normal requests, exact-price questions, after-hours questions, unsupported work, safety-sensitive requests, out-of-area visitors, and questions that require a person. Correct the training whenever a response is incomplete or too confident.

5

Confirm lead delivery

Complete a test conversation and submit the contact form with fictional information. Verify that the lead appears under Leads, the full conversation appears under Conversations, and the notification email reaches the correct inbox.

Do not train the receptionist with secrets.

Do not include passwords, payment-card data, Social Security numbers, private medical details, government identification numbers, or information that is not necessary for visitor intake.

Publish, Monitor, and Improve

6 Choose how visitors will access it

The Install tab provides three options: share the hosted business page, paste the inline iframe into a page, or add the floating chat-button code. Use only the code connected to your own business profile.

7 Install the inline version

In WordPress, add a Custom HTML block or Elementor HTML widget and paste the complete inline embed code. Other website builders usually provide an Embed or Code element. Publish, then test desktop and mobile.

8 Install the floating button

Paste the complete floating-button code into an approved sitewide custom-code area. Test that it opens, closes, fits on mobile, and does not cover important navigation or accessibility controls.

9 Review every real inquiry

Use Leads and Conversations to review contact information, the transcript, the AI-assisted summary, and the suggested next step. Change the lead status as your team follows up. The AI quality label is organizational guidance, not a final decision.

10 Improve training from real questions

Look for repeated visitor questions, unclear boundaries, and requests the receptionist cannot answer. Update the approved business facts, retest, and keep the information current whenever hours, services, pricing rules, or policies change.

Recommended Launch Test

1. Desktop and mobile layout	2. Normal request and human follow-up
3. Exact-price and availability boundaries	4. Unsupported, hazardous, or out-of-area request
5. Lead email, transcript, summary, and dashboard record	6. Hosted page, inline embed, and floating embed

Need help? Email help@alwaysopendesk.com and include your business name, the page or feature involved, what you expected, and what happened. Do not email passwords or secret API keys.