

WEWILLCODE

AI Receptionist Customer Quick Start

How to supply your business facts, test the hosted receptionist, add the embed code, and verify lead delivery.

Hosted for you
No customer plugin
required

Human reviewed
No automatic exact quotes

Lead focused
Email plus dashboard
storage

Version 1.0 | Setup and onboarding guide

1. What the receptionist does

The hosted AI receptionist helps a service business capture a useful website inquiry when the owner or team cannot answer immediately.

Visitor submits	The system prepares	The business receives
Requested service, job details, area, timing, name, email, and phone.	A short visitor reply, lead-quality label, internal summary, and suggested next step.	An email notification plus a saved WordPress lead record.

Important operating rule

The receptionist is an intake assistant. It must not promise exact prices, confirm a booking, guarantee availability, or make a safety decision. A person reviews every final service decision.

Privacy by design

The plugin stores contact information in WordPress. It is designed to exclude the visitor name, email address, and phone number from the text sent to OpenAI. Only the service request, job description, area or ZIP, and timing are used for the AI summary.

- Never ask visitors to submit Social Security numbers, card data, passwords, medical records, or government ID numbers.
- Use a reliable SMTP provider so lead emails reach the configured inbox.
- Keep WordPress, PHP, themes, and plugins updated.
- Review the first real leads and improve the approved business facts when needed.

The first goal is not a perfect chatbot. The first goal is a clear, safe, repeatable lead-intake workflow.

2. Information to provide during onboarding

The quality of the receptionist depends on the accuracy of the business information supplied. Use complete sentences and clear rules instead of vague marketing language.

Required business facts

- Business name: The customer-facing name.
- Website and phone: The public website and best callback number.
- Service area: Cities, counties, ZIP codes, radius limits, and excluded locations.
- Hours: Normal hours, weekend rules, holiday rules, and after-hours expectations.
- Services: One service per line with any important distinctions.
- Exclusions: Unsupported jobs, hazardous items, restricted materials, and anything requiring special approval.
- Pricing rules: What affects pricing and what the receptionist may say. Exact pricing should remain human-confirmed unless a written fixed-price rule is intentionally approved.
- FAQs: Real customer questions and the exact answers the business approves.

Strong FAQ example

Question: Can you come today?

Approved answer: Same-day service may be available, but a team member must confirm the schedule before a booking is final.

Weak FAQ example

Question: Are you fast?

Weak answer: We are always the fastest and can come immediately.

This wording is risky because it makes a guarantee and does not define a real scheduling rule.

Before activation

- Test a normal in-area request.
- Test an out-of-area request.
- Test an exact-price question.
- Test a hazardous or excluded item.
- Test a vague request with missing details.

3. Add the hosted widget to a website

The customer receives one iframe embed snippet. The customer does not need to install the WeWillCode plugin or create an OpenAI account.

WordPress or Elementor

- Edit the page where the receptionist should appear.
- Add a Custom HTML block or Elementor HTML widget.
- Paste the complete iframe and resize script supplied by WeWillCode.
- Publish or update the page.
- Test the widget on desktop and mobile.

Wix, Squarespace, Shopify, or another builder

- Use the platform HTML, embed, code, or custom-liquid element.
- Paste the complete snippet and publish.
- If the builder strips the resize script, keep the iframe and set a fixed height between 820 and 950 pixels.

Embed example

```
<iframe src="https://wewillcode.com/ai-receptionist-embed/CUSTOMER_TOKEN/" style="width:100%;min-height:820px;border:0"></iframe>
```

Verify lead delivery

- Submit a test request from the customer's live page.
- Confirm the visitor sees a helpful response.
- Confirm the notification email arrives.
- Confirm the lead appears in the hosted WordPress lead dashboard.
- Confirm the business can call or email the sample lead.

Do not consider installation complete until all five checks pass.

4. Example lead and ongoing checklist

A saved lead should give the business enough information to take the next human action without rereading a long conversation.

Lead quality	Hot
Requested service	Garage cleanout
Area	93635
Timing	This week
Customer details	Sofa, boxes, and yard debris. Ground-floor access. Complete contact information supplied.
Suggested next step	Call to confirm the load, access, accepted items, availability, and final pricing.

Weekly customer checklist

- Review New leads and update each to Contacted, Won, Lost, or Spam.
- Confirm the notification inbox is still receiving messages.
- Check repeated questions and add approved FAQ answers.
- Update hours, service area, exclusions, and seasonal rules.
- Notify WeWillCode before changing the business domain or notification email.

Safety and accuracy checklist

- No exact quote unless an approved fixed rule exists.
- No booking confirmation without a human or connected booking system.
- No emergency, medical, legal, credit, employment, or high-impact decision use.
- No sensitive personal information in the form.
- A person makes every final service and safety decision.

Support

For setup changes, provide the business name, website URL, the exact answer that should change, and one example visitor question. This makes the update faster and easier to test.