

User's manual

Everything you need to set up your phone assistant, look after your calls and messages, and run your account — from the first time it calls you to your invoices.

Phone Call Desk is not open in the United States right now. This manual shows how it works; [register your interest](#) and we will write to you when we reopen.

US edition · September 27, 2026

Prices in this edition are in US dollars and exclude sales tax. They are the prices on your invoice, read from the system that bills you on the date above.

Questions? phonecalldesk.com/contact — we reply within one business day.

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How to use this manual

It is the help center, printed

Every page here is also on the web at phonecalldesk.com/help. The online help is updated first: if the two ever disagree, the online help is right.

Bold words are on your screen

A word in **bold** is the name of a button, a page or a setting, written exactly as it appears in your dashboard at app.phonecalldesk.com.

Cross-references give a page

When one section points to another, the page number follows in brackets. In the PDF every reference, and every line of the contents, can be clicked.

Start at the beginning

New to Phone Call Desk? Read Part 1, *Getting started*, in order. After that, dip in: each section stands on its own.

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Getting started

From hearing it call you to your first real calls.

How Phone Call Desk works

What happens when someone calls your number, and what you do in the dashboard.

Phone Call Desk gives your business a phone number answered by an AI assistant. It answers every call, day or night, and does what a good receptionist does: answers questions about your business, takes a message, books an appointment, arranges a callback, or puts the caller through to you.

What happens on a call

1. Someone calls your Phone Call Desk number — or your existing number, if you [forward it to us](#) (page 7).
2. The assistant answers with your greeting, in the voice you chose. The standard greeting says it is an AI assistant, and it never claims to be a person.
3. It answers questions from the [business information](#) (page 11) you gave it, and from nothing else. If it does not know, it says so and offers to take a message.
4. Depending on what the caller needs, it takes a message, [books an appointment](#) (page 14) in your calendar, arranges a [callback](#) (page 13), or [transfers the call](#) (page 12) to your phone.
5. When the call ends, the call appears in the dashboard with its transcript, and a [call report](#) (page 23) with a summary is emailed to you.

What each page of the dashboard is for

Page	What it is for
Overview	The last seven days at a glance, and a set-up checklist.
Calls	Every call, with its transcript and summary.
Messages & bookings	Messages to deal with, callbacks waiting, and upcoming appointments.
Assistant	What the assistant says, what it knows and what it may do.
Phone numbers	Your numbers, test calls, and keeping the number you already have.
Call forwarding	An add-on: ring your own phone instead of the assistant, number by number.
Usage	Minutes used this billing period, and what they will cost.
Billing	Your plan, add-ons, card and invoices.
Call tracking	Which advert, listing or location made the phone ring.
Integrations	Your calendar, for bookings.
Settings	Business details, call reports, your team and data requests.

The quickest route to your first real call

1. [Hear it call you](#) (page 4) — two minutes, no account needed.
2. [Create your account](#) (page 5) and [choose a plan](#) (page 32).
3. [Get a number](#) (page 6), or [forward the one you have](#) (page 7).
4. [Tell the assistant about your business](#) (page 11).
5. [Test it](#) (page 8), then work through [your first week](#) (page 8).

Hear it call you before you buy

Enter your number and email, click the link we send, and Sophie calls you within a minute. No account needed.

The quickest way to judge Phone Call Desk is to be a caller. Our demo assistant, Sophie, calls you and answers the way she would answer your customers.

Ask for the call

1. Open **Hear it call you** from any page of this website, or go to app.phonecalldesk.com/hear-it.
2. Enter your US or Canadian cell or landline, and your email address. Your name and business are optional.
3. Confirm you agree to be called, and select **Email me the link**.
4. Open the email from us and click the confirmation link.
5. Sophie calls you within a minute. Answer and talk to her as a caller would — ask a question, ask to book, or leave a message.

Good to know

- **Nothing is dialled until you click the link.** That is how we check the number and the email are really yours.
- The link works once and expires after 24 hours. If it has expired, ask for a new one.
- The demo call may be recorded or transcribed, so you can read the transcript afterwards.
- We never call premium-rate or service numbers. Enter your own cell or landline.
- **One number gets two demo calls in total.** After that, create an account and hear the assistant on your own number. There are also daily limits on how many demo calls one email address or connection can ask for.

NOTHING ARRIVED?

Check your spam folder first, then ask again with the right address.

When you are ready for your own

Your own assistant answers with your business name, your greeting and your business information. [Create your account](#) (page 5) to set it up — and once you have a number, you can [test it the same way](#) (page 8).

Create your account and workspace

Sign up, set up your business's workspace, and choose a plan.

Your account is your login. Your **workspace** is your business inside Phone Call Desk: its assistant, numbers, calls and billing. One account can have several workspaces — see [Run more than one business](#) (page 41).

1. Sign up

Go to app.phonecalldesk.com/sign-up and enter **Your name**, **Email** and a **Password**.

If you chose a plan on our [pricing page](#) (phonecalldesk.com/pricing) first, we remember it and take you to checkout once your workspace is ready. Nothing is charged until you confirm.

2. Create your workspace

Field	What to put
Business name	Your business as callers know it. The assistant says it in its greeting.
Timezone	Where your business is. Opening hours, bookings and callbacks all use it.
Country	Where your business is based. It decides your currency, and the format numbers are read in.
Call-recording rules that apply to you	Sets what the assistant tells callers if you turn recording on. Recording stays off until you turn it on — see Call recording (page 42).
Where should call summaries be emailed?	Who gets the email after every call. You can add more people later in Settings .

Select **Create workspace**. You are its **owner** — the person who can change the plan and card, add team members and make data requests.

3. Choose a plan

Your workspace needs a plan before it can have a phone number, and your assistant answers calls only while the workspace has one. You can set the assistant up and connect your calendar first, though. See [Choose a plan and pay](#) (page 32).

THERE IS NO FREE TRIAL

Instead, [hear it call you](#) (page 4) before you buy. Monthly plans can be canceled at any time.

What comes next

[Get a phone number](#) (page 6) or [forward the one you have](#) (page 7), then [teach the assistant about your business](#) (page 11).

Get a phone number for your assistant

Buy a number in a couple of clicks. It is answered by your assistant the moment you have it.

Your assistant answers the numbers in your workspace. You can buy a new one here, and keep the number you already have by [forwarding it](#) (page 7) to your new one.

Before you start: the workspace needs a [plan](#) (page 32), and you need to be its owner or an admin.

Buy a number

1. Open [Phone numbers](#) and find **Buy a new number**.
2. Choose the **Kind** of number and the **Country**.
3. To narrow the search, add an area code in **Area code or prefix (optional)** — for example **415**.
4. Select **Search**, then **Buy** next to the number you want.

The number is live straight away and answered by your assistant. It appears under **Your numbers**.

Which kind to choose

Kind	Good for
Local	Most businesses. A number with a local area code.
Toll-free (800/888/877...)	Advertising. It is free for the caller, so we pay for their call: each toll-free number is \$2.50 a month on top of any number charge, and every minute on it is 4¢ on top of your plan's minutes.

How many numbers your plan includes

Plan	Numbers included
Starter	1
Growth	2
Practice	3

Each number beyond those is \$6 a month. It is added to your bill when you buy the number and credited when you release it — there is nothing to switch on. See [Add-ons](#) (page 34).

Name it after where it appears

Give each number a name under **Used for** — “Google Ads”, “Website”, “Van livery”. [Call tracking](#) (page 25) then shows which one made the phone ring. See [Manage your numbers](#) (page 27).

KEEPING YOUR CURRENT NUMBER?

You do not have to change the number on your website or your van. [Forward it to your new number](#) (page 7) and it works the same afternoon, or [move it to us](#) (page 28) permanently.

Forward your existing number to the assistant

Keep your number with your current provider, and send its calls to your assistant. Works the same day.

Most businesses keep their existing number and forward it. Nothing changes for your callers, you keep your provider, and it works as soon as you set it up. You need a Phone Call Desk number first — see [Get a phone number](#) (page 6).

Choose when calls come to the assistant

- **Every call** — the assistant answers everything. Good if nobody picks up the phone at your end.
- **Only the calls you miss** — your phone rings first, and the assistant picks up if you do not. The most popular choice.

For the calls you miss, set **each** of these, because each is a separate setting on your phone line:

- **When you do not answer**
- **When the line is busy, or you decline the call**
- **When your mobile is off or has no signal** (mobiles only)

Set only the first, and busy or switched-off calls still go to your voicemail instead of the assistant.

Set it up

How you forward depends on your carrier. [Phone numbers](#) shows these codes with your number already filled in, under **Keep your existing number**. Replace *ten digits* with your Phone Call Desk number's ten digits, and *number* with it in `+1...` form.

When	Landline	AT&T or T-Mobile cell	Verizon cell
When you do not answer	*92 + ten digits	**61*number#	*71 + ten digits
When the line is busy	*90 + ten digits	**67*number#	included in *71
When your cell is off or has no signal	—	**62*number#	included in *71
Every call, without ringing you	*72 + ten digits	**21*number#	*72 + ten digits
Stop forwarding	*73 , *91 , *93	##002#	*73

Codes can differ by carrier and plan, some landline providers must switch call forwarding on for your account first, and business phone systems set forwarding in their own settings or app. If a code is refused, ask your carrier to forward the line to your Phone Call Desk number.

IPHONE: TURN OFF LIVE VOICEMAIL

Live Voicemail answers unanswered calls on the phone itself, so they never reach your assistant. Turn it off in Settings → Phone (or Settings → Apps → Phone) → Live Voicemail.

Check it works

Call your usual number from another phone. You should hear your assistant — straight away, or after the rings you chose. The call then appears under [Calls](#).

Good to know

- **Your provider may charge for the forwarded call**, at their usual rate. On our side it counts as minutes like any other call to your assistant.
- Forwarding only moves the calls. Your number, your contract and your outgoing calls stay as they are.
- To stop, dial the stop code, or ask your provider.
- Want the number with us for good? See [Move your number to us permanently](#) (page 28).

Test your assistant before callers do

Have the assistant call you, or call your own number, and hear exactly what a caller hears.

Hear your assistant before your customers do: once when you have set it up, and again whenever you change what it knows.

Have it call you

1. Open [Phone numbers](#) and find **Test the assistant**.
2. Enter **Your phone number** — a cell or landline in your workspace's country.
3. Select **Call me now**, and answer. The assistant calls from one of your numbers.

Each workspace has two test calls. The first 10 minutes of test calls are free; after that they count as minutes like any other call. Only the owner or an admin can place one.

USED BOTH TEST CALLS?

Call one of your own numbers from any phone. That is exactly what your callers get, and it is the better test anyway.

What to try

- Ask the questions your customers ask most: opening hours, prices, where you are, whether you do a particular job.
- Ask for something it cannot know. It should say so and offer to take a message, never guess.
- Leave a message, then check it arrives in [Messages & bookings](#) and in your email.
- Ask to book, if you have [connected a calendar](#) (page 14).
- Ask for a person, if you have set a [transfer number](#) (page 12).

Then read the transcript

Every test call is in [Calls](#), with the transcript and a summary. If the assistant got something wrong, the fix is almost always in the [business information](#) (page 11). Change it, save, and try again — a saved change applies to the next call.

Your first week: a go-live checklist

What to set up before your first real call, and what to check in the first few days.

The **Setup** box on the [Overview](#) marks off the essentials as you do them. Here is the whole list, in the order that works best.

Before the first real call

1. **A plan** — [choose one](#) (page 32). The assistant answers only while the workspace has one.
2. **A number** — [buy one](#) (page 6), and [forward your existing line](#) (page 7) to it if you are keeping it.
3. **Business information** — [what callers ask about](#) (page 11): services, prices, opening hours, address, parking.
4. **Greeting and name** — [how it answers](#) (page 10).
5. **Opening hours** — [used for bookings and callbacks](#) (page 12).
6. **Where call reports go** — in [Settings](#), under **Call reports**. See [Call report emails](#) (page 23).
7. **A calendar**, if you take bookings — see [Bookings](#) (page 14).
8. **A transfer number**, if callers should be able to reach a person — see [Transfer calls](#) (page 12).
9. **A test call** — [hear it yourself](#) (page 8).

In the first few days

- **Read the transcripts.** [Calls](#) shows every call. Where the assistant hesitated or had to take a message, add the answer to its business information.
- **Clear your inbox.** Mark messages **Done** in [Messages & bookings](#) once you have dealt with them.
- **Check your usage.** [Usage](#) shows minutes used against your allowance, and a projection for the month. See [Check your usage](#) (page 35).
- **Then send it more calls.** The assistant answers whenever a call reaches it. Many businesses start by [forwarding only the calls they do not answer](#) (page 7) — or only out of hours, if their phone system can do that — then forward every call once they have read a week of transcripts.

WANT A HAND?

Assisted onboarding (\$199, one-off, included on Practice) covers your script, calendar and transfer set-up, and test calls with your staff. See [Add-ons](#) (page 34).

Your assistant

What it says, what it knows, and what it can do for a caller.

Your assistant's name, greeting and voice

Choose what the assistant is called, how it answers, and how it sounds.

Everything about how the assistant answers is on the [Assistant](#) page. Only the workspace owner and admins can change it.

Identity & greeting

Field	What it does
Assistant name	What the assistant calls itself. New workspaces start with Sophie.
Language	The accent and spelling it speaks with: en-GB, en-US, en-AU or en-IE.
Greeting (inbound calls)	The first thing every caller hears. Keep it short, and say your business name.
Greeting when the assistant calls someone back	What it says when it returns a call (page 13). <code>{callerName}</code> is replaced with the caller's name when it knows it.
Voice	Choose from the voices listed. Each shows its accent.
AI disclosure line	What it says about being an AI where rules require it — “I’m an AI assistant.” by default.

The standard greeting is “*Thanks for calling (your business). This is Sophie, the AI assistant — how can I help you today?*” Saying up front that it is an AI is honest, and callers take it well. Whatever you write, the assistant never claims to be a person: if a caller asks, it says it is an AI assistant.

Save, and it is live

Select **Save as new version**. The change applies to the next call — there is nothing else to switch on. Every save is kept as a version, so you can go back to an earlier one at any time. See [Undo a change](#) (page 20).

Before you save a new greeting

- Read it aloud. If it takes more than a breath, it is too long.
- Put the business name early, so a caller knows at once they have the right number.
- Test it: [have the assistant call you](#) (page 8), or call your own number.

The rest of the page

- [Teach it about your business](#) (page 11) — **Instructions & knowledge**.
- [Opening hours](#) (page 12).
- [Bookings, transfers and callbacks](#) (page 12).
- [Details to collect and escalation rules](#) (page 18) — advanced.

Teach the assistant about your business

The business information is the only thing the assistant knows about you. Here is what to put in it.

The assistant answers questions from one place: **Business information**, on the [Assistant](#) page, under **Instructions & knowledge**. It never guesses. If the answer is not there, it says it does not know and offers to take a message — so the more your business information covers, the more calls end with the caller's question answered.

What to put in it

Write it the way you would brief a new receptionist. Plain sentences and short lists both work.

- **What you do** — services, and the ones you do not offer.
- **Prices** — or how you price (“free quotes”, “a fixed call-out charge”, “prices on request”), if you are happy for callers to hear them.
- **Opening hours** — including public holidays and closures.
- **Where you are** — address, parking, public transport, accessibility.
- **Areas you cover**, if you go to customers.
- **How to book**, and what to bring.
- **The questions you get every day** — with your answers.
- **Who is who** — names callers might ask for, and their roles.

Sun Valley Heating and Air – AC and furnace repair and installs, Phoenix metro. Open Monday to Friday 7am–6pm, Saturday 8am–noon. Emergency calls 24/7. Service call \$89, waived if you go ahead with the repair. Free estimates on new systems. We do not do plumbing or electrical work. Marcus and Dana are our technicians.

The box holds up to 20,000 characters.

EVERY QUESTION IT COULD NOT ANSWER IS A LINE TO ADD

Read your [call transcripts](#) (page 21) for the first week. Where the assistant had to take a message because it did not know something, add the answer here.

Instructions (system prompt)

Instructions (system prompt) sets the assistant's job and manner: greet warmly, answer from the business information only, take messages, offer a callback or a transfer when it cannot help, one question at a time, never invent prices or advice, never claim to be human. New workspaces start with sensible instructions, and most businesses never change them.

Change them to shape *how* it behaves — “always ask for the ZIP code”, “if someone mentions a leak, treat it as urgent”. Put facts in the business information, not here.

Words to help speech recognition

List names and words callers say that a stranger might mishear — staff names, services, street names, brand names — separated by commas, in **Words to help speech recognition**. Your business name and the assistant's name are there already.

Model and Creativity

Model is the AI model behind the assistant, and **Creativity (0–1)** is how much its wording varies. The defaults suit almost everyone. Lower creativity makes it more literal; higher makes it chattier, not cleverer. It never lets it make things up.

After you save

Select **Save as new version**. The next call uses it. If a change makes things worse, [make the previous version active again](#) (page 20).

Opening hours

What your opening hours change — and what they do not. The assistant answers around the clock either way.

Set your hours on the [Assistant](#) page, under **Opening hours**. Each day has an opening and closing time, or is marked **closed**. New workspaces start with Monday to Friday, 9am to 5pm.

What the hours are used for

- **Bookings.** The assistant offers appointments only inside your opening hours, and only in slots your calendar shows as free. See [Bookings](#) (page 14).
- **Callbacks.** A callback the caller asked for is dialled during opening hours. Ask for one at 9pm and it is made the next time you open. See [Callbacks](#) (page 13).

Hours are read in your workspace's timezone, which is set in [Settings](#). See [Business settings](#) (page 39).

What the hours do not change

The assistant answers every call that reaches it, open or closed. The hours do not stop it answering at night. That is usually the point: out-of-hours calls are the ones a business misses most.

If you only want it to answer at certain times, decide that with your phone forwarding — for example, [forward only the calls you do not answer](#) (page 7), or use your phone system's out-of-hours routing if it has one.

Tell callers your hours too

The opening hours here are for bookings and callbacks. For the assistant to *tell* callers when you are open, put your hours in the [business information](#) (page 11) as well — including public holidays and closures.

ONE OPENING TIME A DAY

Each day has one opening and one closing time. If you close for lunch, the assistant may still offer a slot at 1pm unless your calendar shows that hour as busy. Block it out in your calendar.

Transfer calls to a person

Let the assistant put callers through to your phone, with a whisper telling you who is calling and why.

When a caller needs a person — an emergency, a complaint, or someone who simply insists — the assistant can put them through to a number you choose.

Turn transfers on

1. Open [Assistant](#) and find **Bookings, transfers & callbacks**.
2. Enter a number in **Transfer calls to (phone number)** — your cell, your front desk, or whoever should take the call. National format is fine.
3. Select **Save as new version**.

Leave the box empty and transfers are off: a caller who asks for a person is offered a message or a callback instead.

What happens during a transfer

1. The assistant tells the caller it is transferring them, and they hear *“Please hold while I transfer you.”*
2. Your phone rings.
3. When you answer, you hear a short whisper the caller does not: *“(Business) assistant transferring a caller”*, and the reason — so you know who it is before you say hello.
4. The caller is connected to you.

If nobody answers within about 25 seconds, the caller hears *“Sorry, no one is available to take your call right now. Please try again later.”* and the call ends. It does not go back to the assistant, so point transfers at a number someone will answer — and if you often cannot, a [callback](#) (page 13) serves the caller better than a transfer.

When the assistant transfers

It transfers when the caller asks for a person, when it is an emergency, or when your [escalation rules](#) (page 18) say so. New workspaces start with one rule: transfer when the caller asks for a person. Use the rules to add situations — a burst pipe, a complaint — or to make it take a message instead.

Good to know

- **There is one transfer number.** Every transfer, whatever the reason, goes to it. If different people cover different times, point it at a number that rings all of them — many office phone systems can ring several phones at once.
- **Transferred calls count as minutes**, including the time you are talking to the caller after the transfer. See [Plans, minutes and what counts](#) (page 31).
- **Callbacks can go to the same number.** If you choose **Connect the caller to the transfer number** for callbacks, a returned call rings you and puts the caller through. See [Callbacks](#) (page 13).
- The call’s page in [Calls](#) shows **Transferred** as the outcome, with the transcript up to the transfer.

Callbacks

When a caller asks to be called back, the assistant does it during your opening hours — up to three tries.

If a caller would rather be called back — they are driving, or you are closed — the assistant can arrange it. It only ever calls people who asked it to, on that call.

How a callback is made

1. On the call, the caller asks to be called back, or accepts the assistant’s offer. The assistant takes their name, number, the reason and any time they prefer.

2. The callback waits in [Messages & bookings](#), under **Callbacks**.
3. It is dialled from one of your numbers, during your [opening hours](#) (page 12) and after the delay you set.
4. If nobody answers, or it reaches voicemail, it tries again later — **up to three attempts**. On voicemail it leaves a short message: *“Hello, this is (your business) returning your call. Sorry we missed you — we’ll try again later.”*

Choose who talks when they answer

On the [Assistant](#) page, under **Bookings, transfers & callbacks**:

Setting	What it does
Callbacks are handled by: The assistant	The assistant calls, starts with its Greeting when the assistant calls someone back , and picks up where the caller left off.
Callbacks are handled by: Connect the caller to the transfer number	When the caller answers, your transfer number (page 12) rings with a whisper: <i>“Returning a call for (name) about (reason).”</i> If nobody answers within 30 seconds, the caller is told the team is not available and it tries again later.
Dial callbacks after (minutes)	How long to wait before the first attempt, if you are open.

Keep an eye on them

In [Messages & bookings](#), each callback shows the caller, the reason, any preferred time, its status and how many attempts it has made. Select **Cancel** to stop one — for example, if you have already called them yourself. After three unanswered attempts it is marked as failed.

Good to know

- **Callbacks count as minutes**, like any call your assistant handles.
- We only call numbers in the countries we serve, and never premium-rate or service numbers.
- The assistant never makes calls nobody asked for: no sales calls, no campaigns.

Bookings: with your calendar, or without one

The assistant can book appointments while the caller is on the line — into Google Calendar or Microsoft 365 if you connect one, or into Phone Call Desk's own diary if you do not.

The assistant can book appointments during the call. It works out what is free, offers the caller two or three times, and books the one they choose. There are two places a booking can go:

- **Your own calendar.** Connect Google Calendar or Microsoft 365 and bookings go straight in, around everything already there.
- **Phone Call Desk's diary.** No calendar to connect? Phone Call Desk keeps a diary of its own. It is the same diary your website's booking form uses, so a visitor and a caller are never offered the same time.

Bookings and callbacks are part of the Growth plan and above. On Starter the assistant takes a message instead, and the team calls back to arrange a time — see [Choose a plan](#) (page 32).

Book without a calendar

1. Open [Settings](#) and find **Bookings on the call**.

2. Tick **Let the assistant book appointments on the call** and select **Save**.

That is all. From the next call, the assistant offers times inside your opening hours, of your appointment length, that nothing else has taken — including bookings made from your website ([Bookings on your website](#) (page 16) and [Booking form on any website](#) (page 17) use the same diary). The switch is off until you turn it on, so nothing changes until you decide it should.

If you later connect a calendar, the assistant books into that instead, and the switch no longer applies.

Connect your calendar

1. Open [Integrations](#).
2. Select **Connect Google Calendar** or **Connect Microsoft 365**, and sign in to the account that holds your bookings calendar.
3. Allow access. You come back to Integrations, which shows the calendar as connected.

You can connect one calendar at a time; connecting the other kind replaces the first. The assistant uses the account's main calendar. Your sign-in is stored encrypted and used only to check availability and add bookings. Only the owner and admins can connect or disconnect a calendar.

Set the rules

On the [Assistant](#) page:

Setting	What it does
Appointment length (minutes)	How long each booking is — from 5 minutes to 8 hours.
Book up to (days ahead)	How far ahead it may book — up to 90 days.
Opening hours	It only offers times inside them. See Opening hours (page 12).

The same rules apply whichever diary the booking goes into.

How a booking happens

1. The caller asks to book. The assistant asks for a preferred day or time.
2. It looks for free slots of your appointment length, inside your opening hours, that do not clash with anything already booked — in your calendar, or in Phone Call Desk's diary.
3. It offers two or three, and confirms the time, the caller's name and their phone number **before** it books.
4. With a calendar connected, the appointment goes in as "*Appointment — (caller's name)*", with their phone number and any notes. Without one, it is recorded in Phone Call Desk's diary.
5. Either way it appears in [Messages & bookings](#) under **Appointments**, and on the call's page in [Calls](#).

Canceling a booking

Mark cancelled in Messages & bookings does not tell the caller — let them know yourself. What it does to the diary depends on where the booking went:

- **Phone Call Desk's diary:** the time is free again straight away, and the assistant or your website can offer it to somebody else.
- **Your calendar:** the list in Phone Call Desk is updated, but the event stays in your calendar. Delete or move it there.

BLOCK OUT THE TIME YOU ARE NOT AVAILABLE

With a calendar connected, the assistant treats any time it shows as busy as unavailable — put lunch breaks, holidays and training days in your calendar and nobody is booked into them. Without one, your opening hours are the only rule, so close the days you are away.

Something not working? See [Bookings are not being made](#) (page 48).

Bookings: your WordPress site books into this diary

If your site runs our appointments plugin, its booking form offers the times the assistant offers, from the same diary, so a visitor and a caller are never given the same one.

If your website takes bookings with the **TKJ Appointments** plugin, the plugin can use this diary instead of keeping one of its own. A visitor is offered the times the assistant would offer a caller, and a booking made on the site is written here first — so the assistant will never offer a Tuesday your website has already given away, and your website will never offer one the assistant has.

Everything else the plugin does carries on: your list of appointments, confirmation emails and reminders, text messages, calendar files, and the link a customer uses to cancel or move their booking. It simply stops deciding what is free.

Connect it

1. In [Integrations](#), under **Your website books into this diary**, enter your website's address and select **Issue keys**. You are shown a **server key** once — copy it now.
2. In WordPress, go to **Appointments** → **Settings** → **Phone Call Desk**, paste the key, and save.
3. Select **Test connection**. It confirms the key and tells you the diary's timezone and appointment length.
4. If the site already has bookings, select **Send upcoming bookings**. They are copied into this diary once, so the assistant knows about them. It is safe to run again.

You need version 1.2.0 or later of the plugin.

What changes on the site

- **Free times come from this diary** — your opening hours, appointment length and buffers as set in Phone Call Desk. The plugin's own hours, minimum notice and booking horizon are not used while connected.
- **Each service keeps its own length**. A 45-minute service asks the diary for 45-minute slots.
- **No staff step, no approval step, no checkout hold**. The diary answers for the whole practice and a booking it accepts is confirmed. Taking a payment on the call is something Phone Call Desk will do itself.
- **Cancelling or moving a booking** — by the customer from their link, or by you from the site's dashboard — is done in this diary first. If the new time has just gone, the site says so.
- **Bookings the assistant takes** appear in this diary and are offered around on the site, but they do not appear in the plugin's own list; look for them in [Messages & bookings](#).

Lost or leaked key

Issue new keys on the [Integrations](#) page. The old server key stops working at once, on every site that carried it. Paste the new one into the plugin.

Stopping it

Tick **Disconnect** under **Settings** → **Phone Call Desk** in WordPress, or revoke the keys here. The plugin goes back to its own diary; bookings already made stay where they are, in both places.

Bookings: the form on any website

Put the booking form on any page — a website builder, a shop, a plain site — and it books straight into your diary.

Your website does not have to run WordPress to take bookings. Two lines on any page put a booking form there, and what it books goes into the same diary the assistant uses — so a visitor and a caller are never offered the same time.

Put it on a page

1. In [Integrations](#), under **Your website books into this diary**, enter the address of every website the form will appear on, starting `https://`, and select **Issue keys**.
2. Copy the two lines shown and paste them into your page where the form should appear. On most website builders that is an “embed” or “custom HTML” block.
3. That is all. The form loads your available times, the visitor picks one, gives a name and number, and it is booked.

The key in the snippet is meant to be public

Anyone who views the page can see it, and that is fine. It can only do what the form does — show your free times and take a booking — and it only works on the websites you named. Put the form on a site you did not list and it refuses, which is what stops somebody copying your key onto theirs.

What the visitor sees

The form works in your business’s timezone and shows times the way the assistant would say them. It asks for a name and a phone number, and optionally an email and a note. When the time they chose was taken while they were deciding, it says so and shows what is left rather than booking a time that has gone.

The form speaks your visitors’ language

It reads the language of the page it is on and speaks it. Twenty languages are built in — English, German, French, Dutch, Swedish, Finnish, Danish, Slovene, Spanish, Italian, Polish, Portuguese, Greek, Czech, Slovak, Hungarian, Romanian, Bulgarian, Croatian and Lithuanian — with dates and times written the way that language writes them. If your page’s language setting is wrong or missing, add `data-lang="de"` (or the two-letter code of any of those) to the script line. Anything else falls back to English.

Keeping bots out

The form carries the same traps a WordPress booking form does: a field nobody sees that must stay empty, and a check that the form was not filled in faster than a person could. Each connection may also only book a few times in a quarter of an hour. None of this is visible to a real visitor.

If your site runs WordPress

Use the TKJ Appointments plugin instead, with the **server key** shown when the keys were issued. It gives you the full wizard — services, staff, your site's own look — while booking into the same diary.

Stopping it

Revoke keys on the Integrations page. Every page still carrying the old key stops working at once. Issue new keys whenever you like; the old ones die with the new ones.

Text confirmations (coming to the US)

Texts confirming bookings and callbacks are not available in the US yet. Here is why, and what callers get instead.

Text confirmations are not available in the US yet.

US carriers only deliver business texts from numbers registered for business messaging (A2P 10DLC). Until our numbers are registered, a text could be blocked on its way to your caller, so we do not offer them. We will add them as soon as the registration is in place.

What callers get instead

- The assistant confirms the details out loud before it ends the call: the day and time of a booking, or when to expect a callback.
- Every booking goes straight into your calendar — see [Bookings](#) (page 14).
- You get a [call report](#) (page 23) by email after every call.

The assistant knows texts are not available on your line, so it never offers or promises one.

Details to collect and escalation rules

Tell the assistant exactly what to ask every caller, and when to transfer, take a message or end the call.

At the bottom of the [Assistant](#) page, **Details to collect & escalation rules** takes two short lists in JSON — a simple text format. Most businesses change them once, or not at all. If JSON is unfamiliar, copy the examples below and change the words.

Details to collect

Intake fields are the details the assistant gathers from callers. They appear on the call's page under **Details captured**. New workspaces collect the caller's name, the best number to call back, and the reason for the call.

```
json [ { "key": "callerName", "label": "Caller name", "type": "string", "required": true }, { "key": "callbackNumber", "label": "Best number to call back", "type": "phone" }, { "key": "reason", "label": "Reason for call", "type": "string", "required": true }, { "key": "zipCode", "label": "ZIP code", "type": "string", "required": true, "promptHint": "Ask for the five-digit ZIP code" }, { "key": "urgency", "label": "How urgent", "type": "enum", "options": ["Today", "This week", "No rush"] } ]
```

Part	What it means
key	A short name with no spaces, starting with a letter.
label	What the detail is called in your dashboard.
type	string (any text), phone, email, number, boolean (yes or no), date, or enum (one of a list).
options	For enum only: the answers to choose from.
required	true if the assistant should always ask for it.
promptHint	Optional: a nudge about how to ask.

A [vertical intake pack](#) (page 34) sets these up for your kind of business.

Escalation rules

Escalation rules tell the assistant when to stop and do something specific. New workspaces start with one: transfer when the caller asks for a person.

```
json [ { "when": { "intent": "human_requested" }, "then": { "action": "transfer" } }, { "when": { "keywords": ["burst pipe", "flooding", "no water"] }, "then": { "action": "transfer", "message": "That sounds urgent. I'll put you through to an engineer now." } }, { "when": { "intent": "complaint" }, "then": { "action": "take_message" } } ]
```

Part	What it means
when.intent	emergency, human_requested, complaint or out_of_scope (not something you do).
when.keywords	Words or phrases that trigger the rule if the caller says them.
then.action	transfer, take_message or end_call (politely).
then.message	Optional: what the assistant says as it does it.

transfer goes to your [transfer number](#) (page 12). If you have not set one, the assistant offers a message or a callback instead.

Saving

Select **Save as new version**. If the JSON has a mistake — a missing comma or bracket is the usual one — the page tells you and nothing is saved. If a change makes things worse, [go back to the previous version](#) (page 20).

Undo a change: assistant versions

Every save is kept. Make an earlier version active again in one click.

Each time you select **Save as new version** on the [Assistant](#) page, the new settings are saved as a numbered version and made active straight away. Earlier versions are kept, so a change is never a leap in the dark.

Go back to an earlier version

1. Open [Assistant](#) and scroll to **Versions**. It lists your last 20 versions, with the assistant's name in each and when it was saved. The active one is marked **active**.
2. Select **Make active** next to the version you want.

The next call uses it. Nothing is deleted: the version you moved away from stays in the list, and you can make it active again later.

Which version answered a call?

The top of each call's page in [Calls](#) shows the assistant's name and the version that answered — handy when you are checking whether a change made a difference.

Good to know

- The page above the list always shows the active version, and the next save builds on it.
- Only the owner and admins can save or switch versions.
- Versions cover everything on the Assistant page: greeting, instructions, business information, hours, transfers, callbacks and rules.

Calls and messages

Transcripts, messages, callbacks, appointments and reports.

Calls, transcripts and summaries

Find any call, read what was said, and see what the assistant did about it.

Every call your assistant handles is on the [Calls](#) page: calls in, and the calls it makes back. The [Overview](#) shows the most recent ones.

Find a call

Each row shows when it was, whether it came in or went out, the caller's number, which of your numbers it was on, the outcome, how long it lasted and the first line of its summary.

Use **Search by number** to find every call from one caller.

What the outcome means

Outcome	What happened
Appointment booked	The assistant booked the caller in.
Message taken	It took a message for you.
Callback requested	The caller asked to be called back.
Transferred	It put the caller through to your transfer number.
Information provided	It answered the caller's question, and nothing needed following up.
Caller hung up	The caller ended the call before anything was arranged.
Abandoned	The call ended before the caller said anything — or, on a forwarded number (page 29), nobody picked up.
Technical problem	Something went wrong on our side. Tell us (page 49) if you see this.
Unclear	The call ended without a clear result.

Open a call

Select a call to see:

- **Summary** — a few lines on what the caller wanted and what happened, with anything you need to do. It is written shortly after the call ends.
- **Transcript** — every word, marked **Caller** and **Assistant**, with the actions the assistant took shown in between.
- **Appointment**, **Callback requested**, or the **Message** — whatever the call produced.
- **Details captured** — the [details the assistant collected](#) (page 18), such as a name or ZIP code.

- **Timeline** — each step of the call and when it happened, including any transfer.

The top of the page shows the assistant's name and [the version](#) (page 20) that answered.

Recordings

Calls are transcribed, not recorded, unless you turn recording on. See [Call recording](#) (page 42).

How long calls are kept

Transcripts, summaries and messages are kept for the number of days you choose in [Settings](#); the call itself — when, how long, the outcome — stays for your records. See [How long calls and messages are kept](#) (page 43).

Working through Messages & bookings

The messages the assistant took, the callbacks it is making, and the appointments it booked — in one place.

[Messages & bookings](#) is your to-do list from the phone. Everyone on your [team](#) (page 40) can see it and work through it.

Messages

Taken by the assistant when it could not help directly. Each shows when it came in, the caller's name and number, and what they said. Urgent ones are marked.

When you have dealt with a message, select **Done**. It stays in the list, marked as done, so your colleagues can see it has been handled.

Callbacks

Callers who asked to be called back. The assistant calls them during your opening hours — up to three attempts. Each shows the reason, any time the caller prefers, how many attempts have been made and when the next one is due.

Select **Cancel** to stop one — for example, if you have already called them yourself. See [Callbacks](#) (page 13).

Appointments

Upcoming appointments, with the caller's name and number: the ones the assistant booked — into your calendar, or into Phone Call Desk's own diary if you have no calendar connected (see [Bookings](#) (page 14)) — and any made from your website's booking form.

Mark cancelled does not tell the caller — do that yourself. A booking in Phone Call Desk's diary is freed straight away; one in your calendar stays there until you delete the event.

The same things, by email

Every message, callback and appointment is also in the [call report](#) (page 23) emailed after the call, with a link back to it.

WHERE DID IT COME FROM?

Each message links to the call it came from, so you can read the whole conversation. Callbacks and appointments are on their calls' pages in [Calls](#) too.

Call report emails

After every call, the people you choose get an email with a summary, anything to do, and the transcript.

After every call, we email a report to the addresses in your call report list.

What a report contains

The subject says who called and what happened — for example “[Hartley Plumbing] Message taken — call from Jo ((415) 555-0142), Tue 15 Sept, 14:02”. Inside:

- **Summary** — what the caller wanted and what happened.
- **To do** — anything you need to follow up.
- The message, callback request or appointment, if there was one.
- **Details captured** — the details the assistant collected.
- The transcript.
- A link to the call in your dashboard.

Choose who gets them

1. Open [Settings](#) and find **Call reports**.
2. In **Email addresses**, list everyone who should get them, separated by commas.
3. Save.

Everyone listed gets the same report. To stop reports altogether, empty the box. The owner and admins can change the list.

The same people get the email when you reach 80% and 100% of your minutes — see [Check your usage](#) (page 35).

Not arriving?

- Check spam, and add our address to your contacts.
- Check the address in **Call reports** is right.
- Every report's contents are in your dashboard anyway: [Calls](#) has the call, and [Messages & bookings](#) has anything to deal with.

Call from the dashboard

Type a number, or press Call on a message or a call. We ring your phone and connect you — from your own number.

When a message or a missed call needs a person, **Call** does the dialling for you. Your phone rings first; answer it and we connect you to the customer, showing your Phone Call Desk number rather than your mobile.

Make a call

1. Open [Overview](#). **Call someone back** lists the last ten people who rang, left a message or asked for a callback — each of them once, newest first.
2. Select **Call** beside the person.
3. Answer your phone. You will hear “*Phone Call Desk. Connecting you now.*”, and then the customer’s phone rings.

The same **Call** button is on every row in [Messages & bookings](#) and [Calls](#), which is where to go for somebody further back than the last ten.

The phone we ring is your transfer number, the one on the [Assistant](#) page under **Bookings, transfers and callbacks**. Set one before you use this, and change it whenever the person on duty changes.

Or call from this page

Where **Call here** appears, the call happens in your browser: no phone rings, you talk through your computer. Your browser will ask to use the microphone the first time. A small panel shows the call, with **Mute** and **Hang up**.

It is the same call in every other way — your number is what the customer sees, and the minutes are the same. If your computer has no microphone, or you would rather use a handset, **Call** still rings your transfer number.

Call a number nobody has rung you from

Call someone back on [Overview](#) has a keypad. Type or paste a number — or press the keys — then **Call** to ring your phone first, or **Call here** to take it in the browser.

A number you type is held to a little more than one we already hold, because nothing vouches for it:

- **We do not call premium rate, revenue share or personal numbering ranges**, or countries we do not serve.
- **A number that costs several times an ordinary call is refused**, rather than dialled and charged on.
- **There is a daily budget** for calls started from the dashboard — £20 a workspace, which is around a full day of returning calls. When it is spent, ring from your phone and it resets the next day.
- **Up to 20 calls a day** can be started this way per workspace.

It cannot call 999

Phone Call Desk does not reach the emergency services, and neither does this keypad — it refuses 999, 112 and 911, and short codes such as 111 and 101. Use a phone: a mobile reaches the emergency services even when it has no signal of its own.

Who can do it

The owner and admins. Members see the same pages without the button.

What it costs

These are your plan’s minutes, like a [callback](#) (page 13). Both halves of the call — the leg to your phone and the leg to the customer — are one call on your bill, counted from when you answer until you hang up. They appear in [Calls](#) as outgoing, and in [Usage](#) with your other minutes.

Good to know

- **The customer sees your Phone Call Desk number**, so a return call comes back to the assistant rather than to a mobile nobody watches.
- **If your phone does not answer**, nothing is dialled: the call ends without ringing the customer.
- **The assistant is not on this call**. It does not listen, take notes or book anything — it is your call, on your phone.
- **Calls are not recorded**, even where recording is switched on for the assistant.

Call tracking: which advert made the phone ring

Give each advert or listing its own number, and see which one brings in the calls that lead somewhere.

If you advertise in more than one place, give each place its own number. [Call tracking](#) then shows how many calls each one produced, and how many of them led to a booking, a message, a callback or a transfer.

Set it up

1. [Get a number](#) (page 6) for each advert, listing or location — your website, Google Ads, a directory listing, the side of your van.
2. On [Phone numbers](#), name each number after where it appears, under **Used for**.
3. Put each number in its place.

Numbers without a name are listed as having no source yet, so you can spot them.

Read the report

Choose **7**, **30** or **90** days. For each number:

Column	What it counts
Calls and Share	Calls it received, and its part of the total.
Booked, Messages, Callbacks, Transferred	Calls that led somewhere, by what they led to.
Info only	The assistant answered a question, and nothing needed following up.
Lost	Hang-ups, abandoned calls and failures.
Conversion	The share of its calls that led somewhere.
Avg length	How long its calls last on average.
Last call	When it last rang.

Every call counts in exactly one of: led somewhere, info only, or lost. The totals at the top add up all your numbers.

Call tracking counts calls coming in only. Calls the assistant makes back are not counted.

Good to know

- Each extra number beyond your plan's is \$6 a month — see [Add-ons](#) (page 34). A number that has stopped earning its keep can be released on [Phone numbers](#).
- Numbers that forward to your own phone, with [call forwarding](#) (page 29), are tracked too.

Numbers and forwarding

Getting a number, keeping yours, and ringing your own phone.

Manage your numbers

Name your numbers, see what answers each one, and release the ones you no longer need.

Your numbers, at the top of [Phone numbers](#), lists every number in your workspace.

Column	What it shows
Number	The number, in international format.
Used for	A name you give it — where it is advertised, or which site it is for.
Kind	Local, national, mobile or free for the caller.
Answered by	Assistant ; Forwarded , if it rings your own phone; or Forwarding off .
Overseas callers	What this number does with callers from outside the US and Canada: Workspace follows Business settings (page 39); or set this number to Answer , Refuse politely or Refuse silently .
Country	Where the number is from.
Status	active when it is taking calls.

Name each number

Type a name under **Used for** — “Website”, “Google Ads”, “Leeds office” — and save it. [Call tracking](#) (page 25) and [Calls](#) use the name, so you can tell at a glance which number a call came in on. The owner and admins can change names.

Assistant or forwarding?

A number is either answered by your assistant or [forwarded to a phone you already have](#) (page 29) — never both. New numbers are answered by the assistant. To change one, use [Call forwarding](#).

Release a number

Only the owner can release a number. Select **Release** next to it.

RELEASE IS IMMEDIATE

There is no confirmation step. The number is handed back to the phone network at once, stops taking calls, and we cannot promise to get it back. If callers might still use it, forward it somewhere first, or keep it.

A released number stops being charged the same day: if it was one of your extra numbers, the unused part of the month is credited on your next bill. See [Add-ons](#) (page 34).

Numbers you are bringing to us

Transfers of your existing numbers appear under **Transfers in progress**, lower down the same page. See [Move your number to us permanently](#) (page 28).

Move your number to us permanently

Transfer your existing number to Phone Call Desk. It takes weeks, so forward it in the meantime.

Moving your number to us — “porting” it — means we hold it instead of your current provider, and your assistant answers it directly. It is permanent, and it is slow: allow weeks, not days. [Forwarding](#) (page 7) works the same afternoon and keeps working while a transfer goes through, so most businesses forward first.

You need a [plan](#) (page 32), and to be the owner or an admin.

1. Check the number can be moved

1. Open [Phone numbers](#) and find **Keep your existing number**.
2. Under **Or move it to us permanently**, enter your number and select **Check my number**.

What you see	What it means
This number can be moved to us	Usually one to three weeks once the paperwork is in.
This number can be moved, but not automatically	Your provider moves it by hand: typically two to six weeks.
You already hold this number with us	It is already in a Phone Call Desk account.
We cannot move this number	It cannot be transferred to us. Forwarding still works.

Checking changes nothing. Nothing moves until you ask us to start.

2. Ask us to start

If it can be moved, fill in:

- **Who provides the number now?** — for example AT&T, Verizon or Comcast.
- **Name on that account** — exactly as your provider has it.
- **Billing address on that account** — exactly as it appears on your bill. A mismatched address is the most common reason a transfer is refused.
- **Email for updates**.

Then select **Request the transfer**. We do not ask for your account number or PIN on this page. If your provider needs them, we ask when we submit the transfer, and they are not stored in your dashboard.

3. The paperwork

We email you for:

- a **letter of authority** signed by the account holder, allowing the transfer;
- a **recent bill** from your current provider, issued in the last three months.

The name and address on both must match your provider’s records exactly.

4. Follow its progress

The transfer appears under **Transfers in progress: Requested**, then **Submitted to carrier**, **In progress** once there is a date, and **Completed**. If it is **Rejected**, we tell you why and what to correct. You can **Cancel** a transfer while it is **Requested** or **Submitted to carrier**.

DO NOT CANCEL YOUR CURRENT SERVICE

Keep your line with your current provider until the transfer completes. A number whose service has been canceled cannot be moved — it is lost. Calls keep arriving on your old line until the day it moves.

When it completes

The number appears in **Your numbers**, answered by your assistant straight away. We email you and your call report addresses. If you were forwarding the number to us in the meantime, you can switch the forwarding off.

The number counts towards your plan's numbers like any other — see [Get a phone number](#) (page 6).

Call forwarding: ring your own phone

An add-on at your plan's level. A number that rings the phones you already have instead of the assistant, with its own minutes.

Call forwarding passes calls to a cell or landline you already have, instead of having the assistant answer. It is an add-on to your assistant plan, for a second number, a tracked advertising number, or a local number that rings your cell.

A number does one or the other. Give it a forwarding rule and the assistant stops answering it; stop forwarding and the assistant answers it again.

Plans

Forwarding is an add-on at your assistant plan's level, with its own minutes, separate from the assistant's. It uses your plan's numbers: it doesn't come with numbers of its own.

Forwarding plan	Added to	A month	Forwarded minutes	After that
Solo	Starter	\$16.99	200	8¢ a minute
Business	Growth	\$39.99	500	7¢ a minute
Team	Practice	\$84.99	1,100	7¢ a minute

Prices exclude sales tax. You need an assistant plan first — see [Choose a plan and pay](#) (page 32). Then, on [Billing](#) under **Call forwarding**, select **Add for Solo**, **Add for Business** or **Add for Team** — whichever matches your plan — and confirm. The owner can do this. Forwarding joins your subscription, so you keep one invoice and one renewal date.

- **Adding forwarding** starts straight away. The rest of this month is added to your next bill; on an annual plan, the rest of the year is invoiced at once. Its minutes apply from today.
- **Forwarding moves with your plan.** Upgrade from Starter to Growth and Solo becomes Business straight away; move down and it changes at renewal, with the plan.
- **Remove call forwarding** stops it straight away and credits the rest of the period. The numbers that forwarded are answered by your assistant, and their forwarding settings are kept in case you add it again.

If you cancel your assistant plan, forwarding ends with it.

Point a number at your phone

1. Open [Call forwarding](#). Each of your numbers is listed.
2. Under **Ring these numbers**, enter up to three phones, one per line.
3. Choose how long to **Ring for**, in seconds — up to 19.
4. Choose the extras:
 - **Tell me which number was rung before I answer** — a short announcement only you hear, so you know which of your numbers the call came in on.
 - **Ask me to press a key to take the call** — the reliable way to keep your voicemail from answering.
5. Select **Forward** (your number). We check what each phone costs to reach before saving.

To pause a number without losing its settings, turn off **Forwarding is on**. To go back to the assistant, select **Stop forwarding**. The owner and admins can change forwarding.

How a forwarded call works

- **All your phones ring at once.** The first to answer takes the call. It still uses one set of minutes, however many phones ring.
- **Ringling is free.** Minutes start when someone answers.
- **We stop before your voicemail does.** Voicemail usually picks up after about 20 seconds, so ringing stops before that — otherwise you would pay for every call your voicemail answered. If your cell is switched off or has no signal, though, voicemail can answer straight away and the call counts: turn on **Ask me to press a key to take the call** to stop that.
- **If nobody answers, the caller hears** *“Sorry, we could not reach anyone right now. Please try again later.”* There is no voicemail on a forwarded number, and it does not take messages: that is what the assistant is for. If you might miss calls on a number, switch it to the assistant — it is already on your plan.
- **You see the caller’s number.** Where a network would charge far more to show it, we show your Phone Call Desk number instead — and if the announcement is on, it reads the caller’s number out.

What we will not ring

Some numbers cost many times a normal call, or pay part of the charge to whoever holds the number. The **What we will not ring** box lists them in full:

- personal numbers (070), premium-rate (09) and revenue-share numbers (084, 087);
- satellite phones, and any number the phone network will not price;
- numbers outside Australia, the UK, Ireland, the US and Canada — ask us and we will price it.

A few cell ranges cost several times a normal cell to reach. We still ring them, but calls to them are charged separately from your plan minutes — the page tells you when you save one. **Re-check costs** asks the network again if prices change.

Calls to a toll-free number use your forwarding minutes as usual, and also cost 4¢ a minute, with \$2.50 a month for the number — see [Add-ons](#) (page 34).

Plans and billing

Minutes, add-ons, invoices and changing plan.

Plans, minutes and what counts

What each plan includes, which calls count as minutes, and how minutes are added up.

Every plan includes a number of minutes each month. Beyond them, calls are still answered — the extra minutes are simply added to your next bill.

The plans

	Starter	Growth	Practice
A month	\$59	\$139	\$309
Minutes included	200	500	1,100
Each minute after that	32¢	27¢	27¢
Numbers included	1	2	3
Calls answered at once	1	2	3

Prices exclude sales tax. Paying annually saves 15%, paid up front. **Enterprise / Compliance** — from \$829 a month on a 12-month agreement, with 3,000 minutes pooled across sites — is arranged with us directly.

The full comparison, including what each plan adds, is on our [pricing page](https://phonecalldesk.com/pricing) (phonecalldesk.com/pricing).

What counts as a minute

Counted:

- calls the assistant answers;
- time after a transfer, while you are talking to the caller;
- [callbacks](#) (page 13) the caller asked for;
- [test calls](#) (page 8), after the first 10 minutes.

Never counted:

- calls under 10 seconds — hang-ups and wrong numbers;
- calls we identify as spam or robocalls;
- calls the assistant could not take because something went wrong on our side.

Minutes on [forwarded numbers](#) (page 29) come out of your forwarding plan, not these.

How minutes are added up

Seconds are added up across the whole billing period and rounded up to a whole minute **once, at the end** — never call by call. A 30-second call costs 30 seconds, not a minute.

Going over

Nothing stops. Calls are answered as usual, and the extra minutes are added to your next invoice at your plan's rate, as one line — for example “*Additional minutes: 147 × 27¢*”.

We email your [call report](#) (page 23) addresses when you reach 80% and 100% of your minutes. If you go over two months running, [Usage](#) tells you whether a bigger plan would have cost less.

See [Check your usage](#) (page 35).

Choose a plan and pay

Pick a plan on the Billing page and pay on our payment provider's secure page. Your assistant starts answering as soon as the payment clears.

Your workspace needs a plan before it can have a phone number, and the assistant answers only while it has one. Only the workspace owner can choose a plan.

Choose a plan

1. Open [Billing](#). Under **Choose a plan**, pick **Monthly** or **Annual** — annual saves 15%, paid up front.
2. Select **Choose Starter**, **Choose Growth** or **Choose Practice**. Not sure which? See [Plans, minutes and what counts](#) (page 31).
3. Pay on our payment provider's page. Your card details are entered there and stored there — they never reach our servers.
4. You come back to Billing. It shows your plan as **Active** within a few seconds of the payment clearing.

If you leave the payment page without paying, nothing is charged, and you can choose again whenever you like.

If you chose a plan on our [pricing page](#) (phonecalldesk.com/pricing) before signing up, we take you straight to it once your workspace is ready.

Adding a card first

You can save a card before choosing a plan: under **Payment method** on the Billing page, select **Add a card**. It is optional — the payment page asks for one anyway. To change the card later, select **Replace card**.

What happens next

Once the plan is active you can [get a number](#) (page 6) and your assistant starts answering. Your plan renews on the same date each month (or year), and the Billing page shows the date.

Call forwarding

[Call forwarding](#) (page 29) is an add-on at your plan's level: Solo for Starter, Business for Growth, Team for Practice. Once your plan is active, select **Add for** (your forwarding plan) under **Call forwarding**, further down the same page. It cannot be bought without an assistant plan.

Something bigger?

For pooled minutes across sites, a signed data processing agreement or a service-level agreement, **Enterprise / Compliance** is arranged with us directly — from \$829 a month on a 12-month agreement. [Contact us](#) (page 49).

NO FREE TRIAL

There is no free trial. [Hear it call you](#) (page 4) before you buy — and monthly plans can be canceled at any time.

Change or cancel your plan

Upgrades start straight away; moving to a smaller plan starts at renewal. Cancel through Manage billing.

Only the workspace owner can change or cancel the plan. Both happen on the subscription you already have, so you are never billed twice.

Move to a bigger plan

1. Open [Billing](#) and find **Change plan**.
2. Select **Upgrade to** (plan). The confirmation says exactly what will happen.
3. Select **Confirm upgrade to** (plan).

An upgrade takes effect now, and the new plan's minutes start today.

- **Monthly plans:** the difference for the rest of the month goes on your next bill.
- **Annual plans:** the difference for the rest of your year is charged to your card straight away, because your next bill is a year off.

Payment is taken automatically — your card on file is charged without a further checkout. Anything the new plan includes that you were paying extra for, such as the intake pack on Practice, stops being charged.

Move to a smaller plan

1. Select **Move to** (plan), then **Move to** (plan) **at renewal**.
2. You keep your current plan until your next billing date. The smaller plan starts then, at its price and with its minutes.

Add-ons the smaller plan does not offer — extra lines on Starter, for example — stop at the same time. Changed your mind? Select **Keep** (your plan) before the renewal date.

Call forwarding moves with your plan

[Call forwarding](#) (page 29) is an add-on at your plan's level, so it changes when your plan does: Solo goes with Starter, Business with Growth, Team with Practice. On an upgrade it moves straight away, prorated like the plan; on a move to a smaller plan it changes at renewal, with the plan. The confirmation says what it will cost.

A few rules

- You stay on monthly or annual billing when you change plan. To switch between them, [contact us](#) (page 49).
- Plans can be changed between Starter, Growth and Practice here. Enterprise is arranged with us.
- You cannot change plan while a payment is outstanding, or while your plan is set to end.

Cancel

1. Open [Billing](#) and select **Manage billing**.
2. Cancel the subscription on our payment provider's billing page.

A monthly plan ends at the end of the month you have paid for, and an annual plan at renewal. Until then everything carries on as normal, and Billing shows the date it ends. Part-periods are not refunded — but if we charged you for something that was our mistake, we refund it. See our [terms](#) (phonecalldesk.com/terms).

After your plan ends

- The assistant stops answering, and calls to your numbers are not taken.
- You can still sign in and read your calls, messages and transcripts, which are kept for the period in your [retention settings](#) (page 43). To delete everything now, see [Export or erase data](#) (page 43).
- Want to take a number to another provider? [Contact us](#) (page 49) before your plan ends.

To come back, choose a plan again on the Billing page.

Add-ons

Extra numbers, extra lines, an intake pack for your sector, longer retention, and help setting up.

Add-ons are on [Billing](#), under **Add-ons**, once your workspace has a plan. Only the owner can add or remove them.

PAYMENT IS TAKEN AUTOMATICALLY

Adding an add-on changes your subscription straight away and charges your card on file: the rest of this month goes on your next bill, and the full monthly price every month after. Removing one credits the unused part on the same bill.

The add-ons

Add-on	Price	Available on
Additional phone number	\$6 a month each	Every plan
Toll-free number	\$2.50 a month each, plus 4¢ a minute	Every plan
Additional concurrent call	\$13 a month per line	Growth and Practice
Vertical intake pack	\$64 a month	Growth; included in Practice
Extended retention	\$13 a month	Practice
Assisted onboarding	\$199 once	Starter and Growth; included in Practice

Additional phone numbers

Your plan includes some numbers — 1 on Starter, 2 on Growth, 3 on Practice. Each one beyond that is charged automatically when you [buy it](#) (page 6) and credited when you [release it](#) (page 27). There is nothing to switch on.

Toll-free numbers

Your callers ring a toll-free number for free, so we pay for their call — several times what a local minute costs us, and a higher monthly rental. So a toll-free number carries two charges of its own:

- **\$2.50 a month** for each one, on top of the additional-number charge — including when it is one of the numbers your plan includes.
- **4¢ a minute** for calls to it, on top of the minutes they use from your plan (or your call forwarding plan). Minutes are added up across the month and rounded up once, like all your minutes, and calls under ten seconds are free.

Both are charged automatically: the monthly charge when you [buy the number](#) (page 6), the minutes on your next bill. Toll-free numbers are sold in your own country.

Additional concurrent calls

Your plan answers a set number of calls at once — 1 on Starter, 2 on Growth, 3 on Practice. A caller who rings while every line is busy is asked to try again shortly. Choose how many **Extra lines** you want and select **Update**. See [Callers are asked to try again](#) (page 48).

Vertical intake pack

Questions, prompts and wording for your kind of business, so the assistant collects what your sector needs and says what your sector should say. Included in Practice.

Extended retention

Keep transcripts and messages for longer than a year. Without it, they can be kept for up to 365 days — see [How long calls and messages are kept](#) (page 43).

Assisted onboarding

We set your assistant up with you: writing the script, connecting your calendar and transfers, and test calls with your staff. A one-off charge on your next bill. Included in Practice.

Check your usage

Minutes used this billing period, where the month is heading, and exactly how each call was counted.

[Usage](#) shows the minutes used in your current billing period and what they will cost. Everyone on your team can see it.

The top of the page

- **Minutes used** against your plan's allowance, as a bar and a percentage.
- **Projected by period end** — where you will be if calls carry on at the same rate.
- **Estimated extra** — what the minutes over your allowance would cost, at your plan's rate.

- **Free test minutes left** — out of 10, for [test calls](#) (page 8).

If you have [call forwarding](#) (page 29), its minutes have their own bar.

Calls this period and before

The 50 most recent calls, each with its kind — **Inbound**, **Callback**, **Test call** or **Forwarded** — how long it was connected, and how much of it counted. Calls that did not count say why:

- **Under 10 seconds — free**
- **Spam — free**
- **Assistant unavailable — free**
- **Free test minutes**

Past the allowance?

“You are past the included minutes. Nothing has stopped — calls are still being answered, and the extra minutes are added to your next invoice at the rate above.” We also email your [call report](#) (page 23) addresses at 80% and 100%.

If you have gone over two months running, the page works out whether a bigger plan would have covered the same calls for less, and by how much. See [Change your plan](#) (page 33).

Closed periods

What each past billing period came to: minutes used, minutes included, minutes over, and the extra charged.

WHY THE NUMBERS ARE EXACT

Seconds are added up across the whole period and rounded to a minute once, at the end. The page shows each call in minutes and seconds, so what you see is what you pay for. See [Plans, minutes and what counts](#) (page 31).

Payments, invoices and tax

Your card, where to find invoices, what each invoice includes, and how tax is charged.

Payments are handled by our payment provider. You enter your card on their secure page, and it is stored there — card details never reach our servers. Only the workspace owner can change the card or see invoices.

Your card

[Billing](#) shows the card on file under **Payment method**: its type, last four digits and expiry. To change it, select **Replace card**.

Invoices and receipts

Select **Manage billing** on the Billing page. Our payment provider’s billing page lists every invoice, with receipts to download.

What an invoice includes

- **Your plan**, for the month or year ahead — plans are paid in advance.
- **Your add-ons**, for the same period.
- **Extra minutes** from the period that has just ended, if you went over — one line, for example *“Additional minutes: 147 × 27¢”*.
- **Forwarded minutes** over your forwarding plan’s allowance, if you have [call forwarding](#) (page 29).
- **Freephone minutes** on your toll-free numbers in that period, if you have any — one line, for example *“Freephone minutes, 1 Sep – 1 Oct 2026: 40 × 4¢”*.
- Any part-month charge or credit from a change of plan or add-on.

Tax

Prices are shown without sales tax. Where sales tax applies to our service in your state, it is added on the invoice.

US workspaces are billed in dollars.

Something wrong with a bill?

If we charged you for something that was our mistake — minutes for a call the service failed to handle, for example — [tell us](#) (page 49) and we will refund it. See [If a payment fails](#) (page 37) for card problems.

If a payment fails

Nothing stops at first. You have 14 days to update your card before the assistant switches to taking messages only.

We never cut you off without warning. Here is what happens if a payment does not go through.

Days 1 to 14: everything keeps working

[Billing](#) shows **Payment failed**, and the dashboard shows *“We could not take your last payment”*. Calls are answered, bookings are made, and nothing changes for your callers. We retry your card over the following days and email you.

Fix it now: the owner opens [Billing](#) and selects **Replace card**, or **Manage billing**. Once the payment clears, the warning goes.

[Billing](#) tells you how many days are left before anything changes.

After 14 days: messages only

If the payment still has not cleared, [Billing](#) shows **Messages only**, and the assistant:

- still answers every call, and takes a message with the caller’s name, number and reason;
- no longer books appointments, transfers callers or arranges callbacks.

Your callers are not told why — they simply leave a message. Messages arrive in [Messages & bookings](#) and in your [call reports](#) (page 23) as usual.

Settling the invoice restores everything immediately.

While a payment is outstanding

- You cannot change plan, or buy or transfer new numbers. Your existing numbers keep working.
- You can still change the assistant, read your calls and work through your messages.

Why a payment fails

Usually an expired card, a new card number after a loss, or the bank asking you to approve the payment.

If your bank flags payments to us, approve them in your banking app and ask us to retry — [contact us](#) (page 49).

Your account and team

Business settings, the people who can sign in, and more than one business.

Business settings

Your business name, timezone and country, and the recording and retention choices that sit beside them.

Open [Settings](#). The **Business** box holds the details the rest of the service works from. The owner and admins can change them.

Setting	What it changes
Business name	The name on your dashboard and on call reports. The assistant says the name written in its greeting (page 10), so change that too.
Timezone	The time used for opening hours (page 12), bookings, callbacks, and every time shown in the dashboard.
Country (ISO code)	Two letters — US is <code>US</code> . It sets how phone numbers you type are read, which country's numbers test calls may ring, and the currency you are billed in.
Calls from outside the US and Canada	Whether the assistant takes them. See below.
Recording rules	The call-recording rules that apply to you. Noted with each consent the assistant records. See Call recording (page 42).
Record calls	Off unless you turn it on. When it is on, the assistant plays your recording announcement at the start of every call.
Keep recordings (days) and Keep transcripts & messages (days)	How long they are kept before being deleted. See How long calls and messages are kept (page 43).

Select **Save settings**.

Calls from abroad

Most businesses answer everyone, which is what a new workspace does. If overseas calls are only ever nuisance calls for you, you can turn them away:

Choice	What the caller gets	What it costs you
Answer them	The assistant, as usual	Your plan's minutes, like any other call
Refuse politely	One line — “this number does not take calls from outside the US and Canada” — then we hang up	Nothing from your minutes
Refuse silently	The call never connects	Nothing from your minutes

- **Canada does not count as overseas for a US business. The US and Canada share the +1 code with several Caribbean countries, so calls from those are treated as home too.**
- **Callers who withhold their number are always answered.** We cannot tell where they are, and turning them away would lose real customers.
- **One number can differ from the rest.** Set it on [Phone numbers](#) — a sales line can stay open to the world while a local number does not.
- **It applies to forwarded numbers too**, so an overseas call never rings your own phone either.

Changing country

Your country decides your currency. Once your workspace is paying, you cannot change to a country billed in a different currency here — that needs a new subscription, so [contact us](#) (page 49) and we will move it for you.

Also in Settings

- [Text confirmations](#) (page 18), if you have them.
- [Call reports](#) (page 23) — who gets the email after every call.
- [Team](#) (page 40) — who can sign in.
- [Data requests](#) (page 43) — exporting or erasing a caller's data.

Team members and roles

Give colleagues their own login, as an admin or a member, and see who can do what.

Everyone who uses the dashboard should have their own login. The **Team** box in [Settings](#) lists who can sign in to this workspace, and their role.

Add someone

1. Ask them to [create an account](#) with their own email address. They do not need to set up a business.
2. The owner opens [Settings](#), and under **Team** enters their address in **Email of an existing account**.
3. Choose a **Role** — **Member** or **Admin** — and select **Add**.

They see your workspace the next time they sign in. If they belong to several businesses, they switch between them with the **Business** menu at the top of the dashboard.

To change someone's role, add their address again with the new role. To take someone off, the owner selects **Remove** next to them.

Who can do what

	Owner	Admin	Member
See calls, transcripts, usage and billing	✓	✓	✓
Mark messages done, cancel callbacks and appointments	✓	✓	✓
Change the assistant, and switch versions	✓	✓	
Buy, name and test numbers; set up forwarding; transfer numbers in	✓	✓	

	Owner	Admin	Member
Connect a calendar	✓	✓	
Change business settings, texts and call reports	✓	✓	
Choose or change the plan, add-ons and card	✓		
Release numbers	✓		
Add and remove team members	✓		
Export or erase data	✓		

The person who created the workspace is its owner. Each workspace has one.

SHARED LOGINS

Do not share one login between several people. Separate logins mean you can take one person off without changing everyone's password.

Run more than one business

One login can hold several businesses, each with its own assistant, numbers and plan.

Each business is a separate **workspace**: its own assistant, numbers, calls, team and plan. One login can own or belong to as many as you need.

Add a business

Select **Add another business**, under the **Business** menu at the top of the dashboard, and fill in its details — see [Create your account and workspace](#) (page 5). You are the owner of every workspace you create.

Switch between them

Choose the business from the **Business** menu. Every page then shows that business. A link from a call report opens the right business for you.

Each business is billed separately

Every workspace has its own plan, card and invoices. If you run several sites of one business and want their minutes pooled into one allowance, that is **Enterprise / Compliance** — [talk to us](#) (page 49).

One number, one business

A number belongs to one workspace. To use a number for a different business, [release it](#) (page 27) from one and get another for the other — or ask us, if you want to keep the number itself.

Privacy and data

Recording, how long things are kept, data requests, and where data is held.

Call recording and what callers are told

Calls are transcribed, not kept as audio. Here is what the assistant tells callers, and how to add a recording announcement.

What is kept from a call

Every call is **transcribed**: the dashboard keeps a written record of what was said, with a summary. That transcript is the record of the call. Phone Call Desk does not keep audio recordings of calls.

What callers hear at the start

- **That they are talking to an AI.** The standard greeting says so — *“This is Sophie, the AI assistant”* — and whatever your greeting says, the assistant never claims to be a person. If a caller asks, it says it is an AI assistant.
- **A recording announcement, if you turn it on.** See below.

Turn on the recording announcement

1. In [Settings](#), under **Business**, turn on **Record calls (the disclosure is spoken first)**, and select **Save settings**.
2. On the [Assistant](#) page, check the wording in **Recording disclosure**. It was set from the recording rules you chose when you created your workspace:

“This call may be recorded or transcribed for quality and record-keeping purposes.”

From then on, the assistant plays it before the greeting on every call, and the call’s **Timeline** notes that it was played, with the words and the time. If **Recording disclosure** is empty, nothing is played — so do not leave it blank.

Recording rules in Settings is kept with each record of consent; changing it later does not change the wording. Edit **Recording disclosure** for that.

Which should you use?

This is not legal advice — your obligations depend on your business and your callers.

- **Some states require everyone on a call to agree before it is recorded** — California and several others. An AI transcribing a call can count. In those states, turn the announcement on so every caller hears it before anything else.
- New US workspaces start with the two-party consent wording shown above. If you are in a one-party consent state, the announcement is still a good habit.
- Your privacy notice should mention that calls are answered by an AI assistant and transcribed.

Related

- [How long calls and messages are kept](#) (page 43)
- [Export or erase a caller's data](#) (page 43)
- [Where your data is held](#) (page 45)

How long calls and messages are kept

You choose how many days transcripts and messages are kept. After that, they are deleted automatically.

You decide how long we keep what callers said. Set it in [Settings](#), under **Business**. The owner and admins can change it.

Setting	New workspaces	Can be set to
Keep transcripts & messages (days)	90 days	1 to 365 days — longer with Extended retention (page 34)
Keep recordings (days)	30 days	1 to 3,650 days

Calls are transcribed rather than recorded, so for most workspaces only the first setting matters. See [Call recording](#) (page 42).

What is deleted, and what stays

When a call is older than your setting, its **transcript**, **summary** and **details captured** are deleted, along with the **messages**, **callback requests** and **appointment records** from that time. A deletion runs every day.

The call itself stays: when it was, how long it lasted, which of your numbers it was on and its outcome. That is what your [usage](#) (page 35) and invoices are worked out from.

How long should you keep them?

Long enough to follow up and to answer questions about a call; no longer than you need. What suits you depends on your business and what you have told your callers — it is your decision, and you can change it at any time. A shorter setting applies to older calls at the next daily run.

Need more than a year — for example, for professional records? Add [Extended retention](#) (page 34) on the Practice plan.

After a plan ends

A canceled workspace keeps everything to the same settings, so you can still sign in and read it. To delete it all sooner, see [Export or erase data](#) (page 43).

Export or erase a caller's data

Answer a caller's request for their data, or to be forgotten — or delete your whole workspace.

If a caller asks what you hold about them, or asks you to delete it, you can do it from [Settings](#), under **Data requests**. Only the workspace owner can make a request.

Make a request

1. Choose the **Request**:
 - **Export (subject access)** — everything held about them, in one file.
 - **Erase (right to be forgotten)** — delete it.
2. Choose the **Scope**: **One caller's phone number**, or **This whole workspace**.
3. For one caller, enter the **Caller's phone number**.
4. Select **Submit request**.

Requests run in the background, usually within a few minutes. The list below the form shows each one's status and result.

Getting an export

When an export shows **completed**, the **Result** column gives a reference for the file. [Contact us](#) (page 49) from the owner's email address with that reference, and we will send you the file securely. It includes the caller's calls, transcripts, messages, callbacks, appointments and any texts.

What erasing one caller does

For every call with that number:

- the transcript, summary and details captured are deleted;
- any recording is deleted, including at our telephone provider;
- their messages, callback requests and appointments are deleted;
- their number is masked on the call records that remain, which keep only the time, length and outcome for your usage and invoices;

Erasing cannot be undone.

Deleting your whole workspace

This whole workspace with **Erase** deletes everything: calls, transcripts, messages, your assistant, your team's access, and every number, which is released and cannot be got back. To confirm, type the workspace's name in the box.

CANCEL YOUR PLAN FIRST

Erasing a workspace does not cancel its subscription. [Cancel your plan](#) (page 33) under **Manage billing** first, and take any number you want to keep elsewhere before you erase.

Related

- [How long calls and messages are kept](#) (page 43) — deletion that happens by itself.
- [Where your data is held](#) (page 45).

Where your data is held

Your workspace lives in one region and never leaves it. Here is where, who processes calls, and how it is protected.

One region, and it stays there

Workspaces created on phonecalldesk.com are held in our **San Jose, California** region, for businesses in the US. Calls are handled on our servers in California, and your data is stored there.

A workspace stays in the region it was created in. There is no copy, backup or tool that reads across regions. The bottom of your dashboard shows your region: *Data region: United States · San Jose, California*.

Who processes a call

To answer a call, the assistant uses services for the phone line, turning speech into text, understanding and replying, and speaking. Each of them, and the data each one sees, is listed on our [Trust page](#) (phonecalldesk.com/trust). Where a service offers a regional option, we use it.

How it is protected

- Everything travels encrypted, and is stored encrypted by our hosting provider.
- Your calendar sign-in is encrypted again inside the app, and used only for availability and bookings.
- Card details are held by our payment provider and never reach our servers.
- We keep what callers said for as long as you choose, and delete it after — see [How long calls and messages are kept](#) (page 43).

Your own records

- Each sign-in records the device's IP address and browser, for account security. It is deleted when you sign out, or within a day of the session expiring.
- [Export or erase a caller's data](#) (page 43) when a caller asks.
- Our [privacy policy](#) (phonecalldesk.com/privacy-policy) and [terms](#) (phonecalldesk.com/terms) have the details.

Troubleshooting

When something is not working the way you expect.

Calls are not reaching the assistant

Work through these checks in order. Most problems are the plan, the number, or the forwarding from your old line.

1. Is the workspace on a plan?

Open [Billing](#).

What it shows	What callers get
Active	The assistant answers. Go to step 2.
Payment failed	The assistant still answers. Update your card (page 37).
Messages only	The assistant answers and takes messages only. Settle the payment (page 37).
No plan or Cancelled	Your numbers do not answer. Choose a plan (page 32).

2. Is the number active, and answered by the assistant?

On [Phone numbers](#), check the number's **Status** is **active**, and **Answered by** says **Assistant**. If it says **Forwarded**, calls ring your own phone instead — change it on [Call forwarding](#).

3. Call the Phone Call Desk number itself

From any phone, call the number shown on the Phone numbers page — not your old number.

- **The assistant answers:** your Phone Call Desk number is fine, so the problem is the forwarding from your old line. Go to step 4.
- **It does not:** go to step 6.

4. Check the forwarding from your old line

- **Dial the code again**, from the phone being forwarded, with your Phone Call Desk number in full — see [Forward your existing number](#) (page 7).
- **Forwarding only when you do not answer?** Let it ring out: the assistant picks up only after your own phone has rung.
- **Some lines cannot use codes.** Business phone systems, and some providers, set forwarding in an app or online account, or will only do it for you. Ask your provider.
- **Did something change on your line?** A new contract, handset or phone system can switch forwarding off.

5. Are callers hearing “try again in a few minutes”?

That means every line is busy — see [Callers are asked to try again](#) (page 48).

6. Still stuck?

[Contact us](#) (page 49) with the number that was called, the number called from, and the time of the call. We can see what happened to it at our end.

The assistant gave a wrong or unhelpful answer

Nearly always, the answer is missing from its business information — or two parts of its set-up disagree.

1. Read what was said

Open the call in [Calls](#) and read the **Transcript**. Find the moment it went wrong: what did the caller ask, and what did the assistant have to go on?

2. Find the cause

What happened	Usually because	Fix
It said it did not know, and took a message	The answer is not in its business information.	Add it — see Teach the assistant about your business (page 11).
It gave out-of-date information	The business information still says the old thing.	Update it, including prices and hours.
It said two different things	Two parts of the set-up disagree — for example, hours in the business information and in Opening hours .	Make them match.
It misheard a name or word	Speech recognition has not heard it before.	Add it to Words to help speech recognition .
It would not book	No calendar is connected, or there was no free slot.	See Bookings are not appearing (page 48).
It would not put the caller through	No transfer number is set.	See Transfer calls (page 12).
It sounded wrong after a change	The last saved version made it worse.	Make the previous version active (page 20).

3. Save and test

Select **Save as new version** on the [Assistant](#) page. The next call uses it. Then [test it](#) (page 8) with the same question.

Did it make something up?

The assistant is told to answer only from your business information, and never to invent prices, availability or advice. If a transcript shows it stating something that is not in your set-up, [tell us](#) (page 49) with the call's date and time. We want to see it.

Callers are asked to try again later

When every line is busy, the next caller is asked to try again in a few minutes. Add lines if it happens often.

Your plan answers a set number of calls at the same time:

Plan	Calls at once
Starter	1
Growth	2
Practice	3

If a call arrives while every line is taken, the caller hears:

“Thank you for calling (your business). Everyone is on another call at the moment — please try again in a few minutes, and we will be glad to help.”

They are never told anything about plans or billing.

If it happens often

- **Add lines.** On Growth and Practice, the owner can add extra lines at \$13 a month each — [Billing](#), under **Add-ons, Extra lines**. See [Add-ons](#) (page 34).
- **Move up a plan.** Growth answers 2 at once, Practice 3. See [Change your plan](#) (page 33).
- **Keep calls short. Max call length (seconds)** on the [Assistant](#) page limits how long any one call can hold a line.

Is it really every line?

Check [Calls](#) at the time a caller says they got the message. If several calls overlap, it was the lines. If not, [contact us](#) (page 49) with the time and the number they called.

Bookings are not being made, or not appearing in my calendar

Check that booking is switched on for your plan, then the connection, then the rules that decide which slots the assistant can offer.

1. Is booking switched on?

The assistant books in one of two ways — see [Bookings: with your calendar, or without one](#) (page 14).

- **No calendar connected?** Open [Settings](#) → **Bookings on the call**. The box **Let the assistant book appointments on the call** must be ticked. Until it is, the assistant takes a message instead.
- **On the Starter plan?** Booking is part of Growth and above. Settings says so under *Bookings on the call*; [change your plan](#) to add it.

2. Is the calendar connected?

If you use a calendar, open [Integrations](#). It should say **connected**.

- **Not connected, or a “Last error”?** Connect it again. Only the owner and admins can.

- **Google says it did not return a refresh token?** Remove Phone Call Desk from your Google account's permissions at myaccount.google.com/permissions, then connect again.
- **Connected the other kind of calendar?** You can have one at a time. Connecting Microsoft 365 replaces Google, and the other way round.

3. Are you looking in the right place?

With a calendar connected, the assistant books into the main calendar of the account you connected. If you signed in with a different account from the one you use day to day, bookings land there. Connect the account whose calendar you use.

Without a calendar, bookings do not go into any calendar: they are in [Messages & bookings](#) under **Appointments**.

4. Is it offering any times at all?

Read a call's transcript in [Calls](#). If the assistant said it could not find a free time, check:

- **Opening hours** on the [Assistant](#) page — it only offers times inside them, and a closed day has none.
- **Book up to (days ahead)** — too few days, and there may be nothing free.
- **Appointment length (minutes)** — a long appointment needs a long gap.
- **Your calendar** — the assistant treats anything shown as busy as unavailable. All-day events often show you as free, so they only block the day if they are set to busy.
- **Timezone** in [Settings](#) — if it is wrong, times are offered at the wrong hours.

5. Did the call end before the booking?

The assistant confirms the time, name and number **before** it books. If the caller hung up before confirming, nothing was booked — the transcript shows where it stopped.

Canceled bookings still in your calendar?

Mark cancelled in [Messages & bookings](#) updates Phone Call Desk only. Delete the event in your calendar yourself. (A booking in Phone Call Desk's own diary is freed the moment you mark it canceled.)

Still not working? [Contact us](#) (page 49) with the date and time of a call where the booking should have happened.

Contact us

Send us a message and we reply within one business day. Here is what to include so we can help first time.

Use the form on our [contact page](https://phonecalldesk.com/contact) (phonecalldesk.com/contact). We reply within one business day, by email. Practice customers get priority support, and Enterprise / Compliance customers a named contact.

Help us help you first time

Tell us:

- **Your business name**, as it is in your dashboard, and your email address.
- **What happened, and what you expected** to happen.

- For a problem with a call: **the number that was called, the number called from, and the date and time**. We can find the call from those.
- For a billing question: the invoice date, or what you see on the [Billing](#) page.

Please do not send card details, passwords, or callers' personal details beyond what we need to find the call.

Before you write

The answer may already be here:

- [Calls are not reaching the assistant](#) (page 46)
- [The assistant gave a wrong answer](#) (page 47)
- [Bookings are not appearing in my calendar](#) (page 48)
- [If a payment fails](#) (page 37)