AI EMPLOYEE · BUILT AROUND YOUR BUSINESS

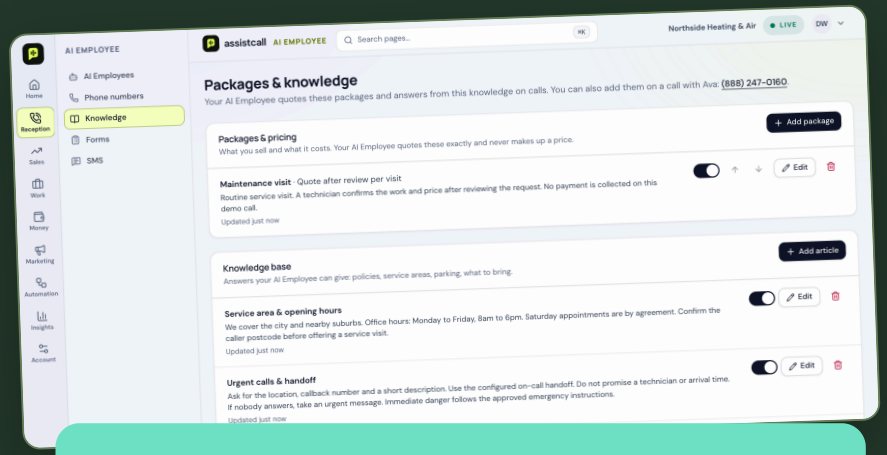
Clear answers. A calmer front desk.

An AI Employee for general office enquiries, with a carefully limited launch scope.

Real product screens | Industry workflows | Setup & integrations

UK edition · GBP proposals
6 November 2026 · Version 1.0

SHARED ASSISTCALL WORKSPACE · FICTIONAL DEMO



Help visitors find the right next step.

Approved opening hours, directions and contact routes. Patient conversations stay with your practice.

Screens show the product interface, not customer results. Enabled features and delivery scope are confirmed for each account.

01 · YOUR INDUSTRY

Ava fits the way your team works.

Current launch: general office information only. Do not collect patient details, symptoms, medical records or insurance information. No clinical triage, EHR connection or patient booking is included.

Opening hours

A caller checks whether the office is open on a bank holiday. Ava uses the approved hours and directs them to the practice if the answer is unknown.

Finding the practice

A visitor asks about parking, public transport or the entrance. Ava explains only the access information you have supplied.

Reaching the right team

Someone needs the appointment desk. Ava provides the approved contact route without asking for symptoms or patient identifiers.

01 **Ask**
Understand the general office question.

→

02 **Check**
Use the practice-approved information.

→

03 **Answer**
Keep the response brief and non-clinical.

→

04 **Redirect**
Use the approved practice contact route.

→

05 **Review**
Check general enquiry patterns.

Read this guide: examples → dashboard → daily workflow → integrations → guardrails → owner controls → setup. Every example uses fictional people and business details.

02 · A WORKED EXAMPLE

A short conversation. A clear next step.

Illustrative dialogue showing the intended workflow. Actual wording varies with the caller and your approved instructions.

CALLER
Where should I park for your main entrance?

AVA
The visitor spaces are beside the main entrance on Oak Street.

CALLER
Is there step-free access?

AVA
The approved office information says the main entrance has step-free access.

CALLER
I also need to discuss my prescription.

AVA
Please speak with the practice team using their usual contact route. I cannot handle prescription or patient information here.

What the team needs to know

Enquiry	General parking and access question
Source	Approved office information
Answer	Visitor parking and step-free entrance
Next step	Practice contact route provided
Patient data	Not requested or included

Illustrative office enquiry, not a patient record. Do not use public demonstrations for health information.

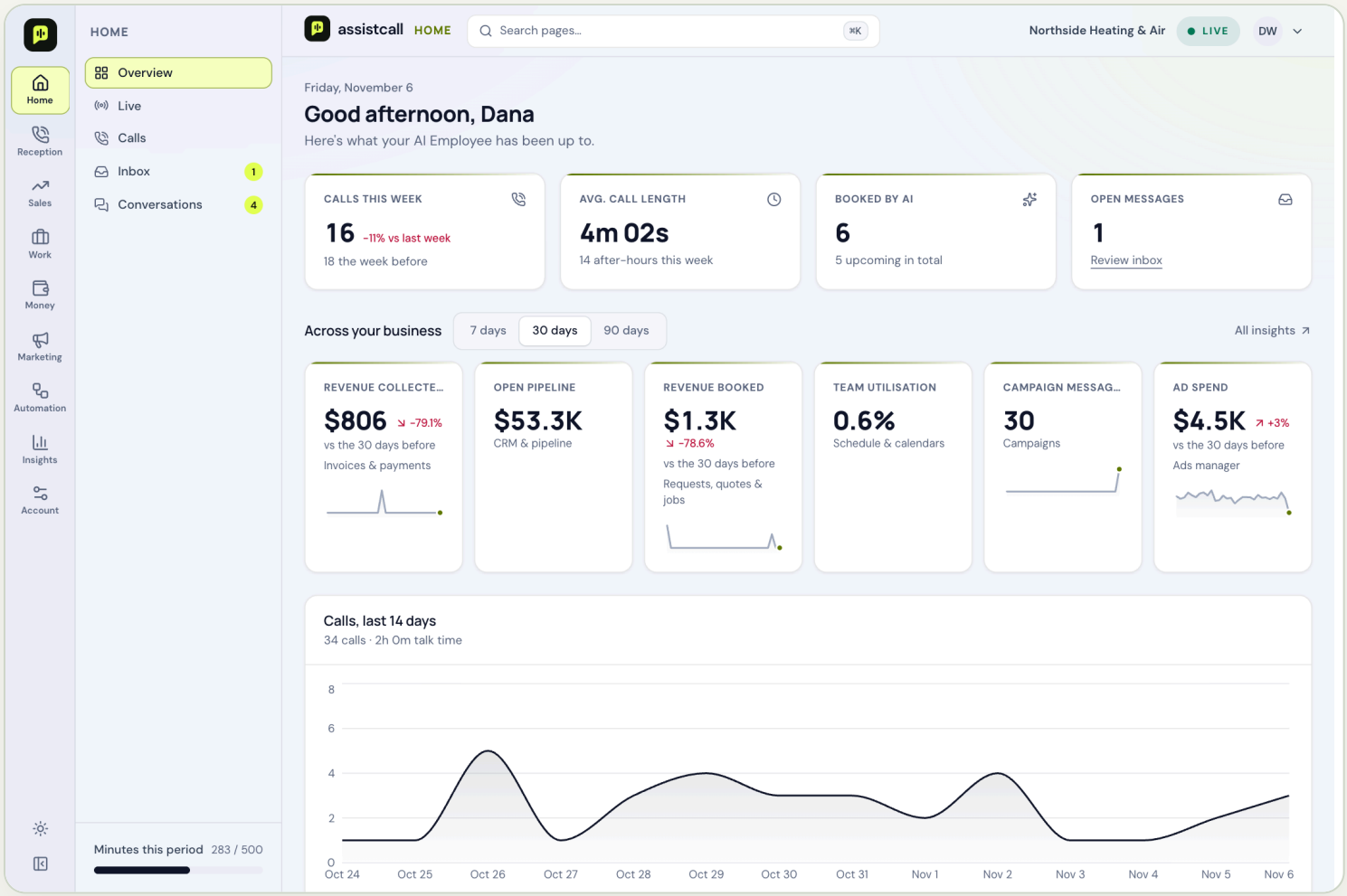
Dynamic, within your rules

Ava uses the caller's latest answer, asks for missing details and reads back important information. It does not need to repeat a rigid questionnaire when the caller has already supplied the answer.

03 · THE DASHBOARD

See the office enquiry workload.

The shared AssistCall dashboard shows call activity and follow-up work. This launch is limited to non-clinical office information.



Real AssistCall interface · fictional demo data. Optional modules and display currency vary by account. Screenshot values are not UK prices or performance claims.

1

Call activity

See when callers need help and which approved office questions recur.

2

Team review

Use the call record to improve information about access, opening hours and contact routes.

3

A limited workspace

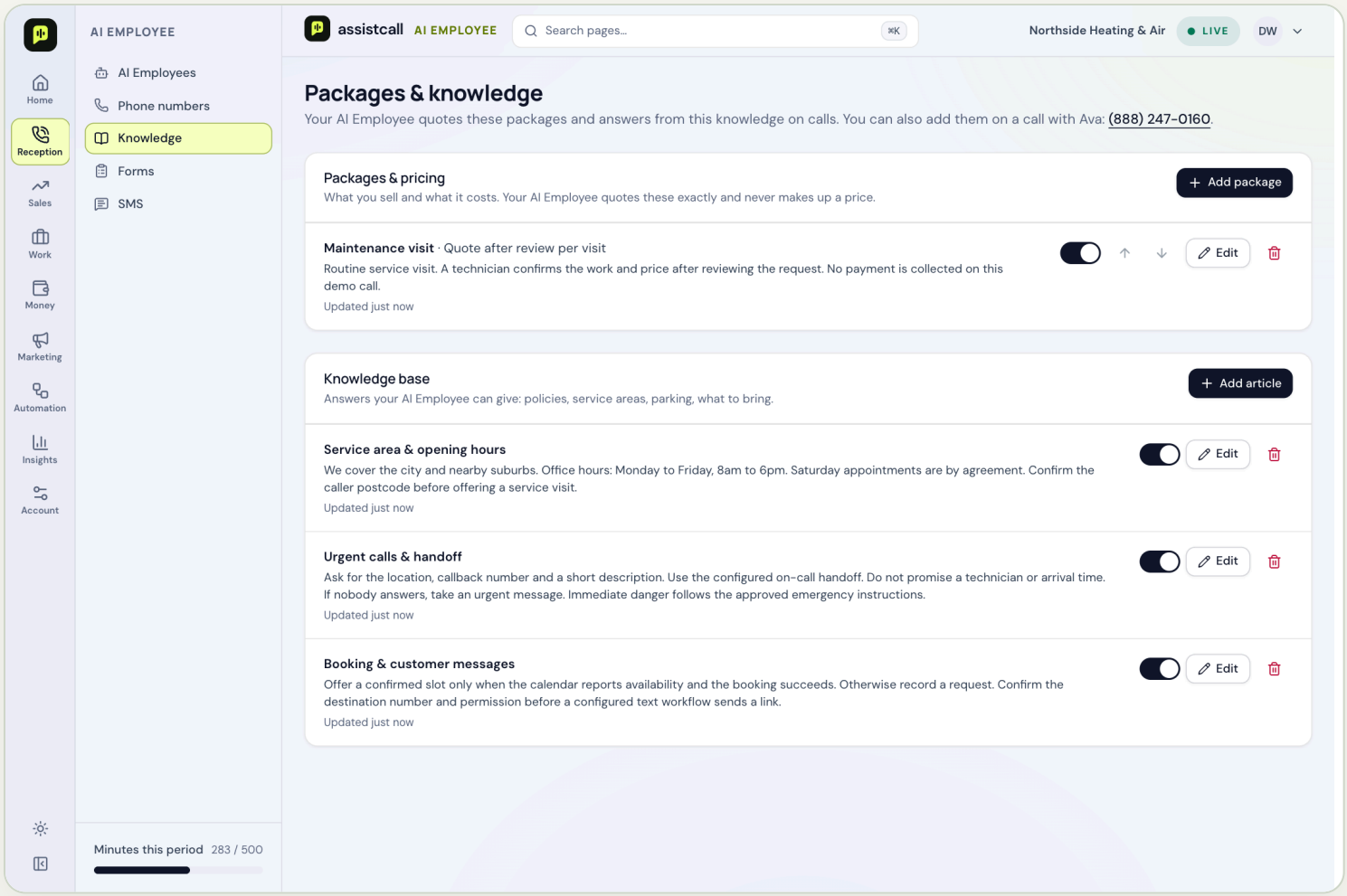
Patient CRM, clinical booking and EHR workflows are outside this launch.

Shared platform example. Clinical booking, patient intake and EHR access are not part of the medical launch.

04 · INFORMATION & FOLLOW-UP

One approved source for office answers.

Keep public information current in Packages & knowledge. The screen shows the shared product using a fictional service business.



Real AssistCall interface · fictional demo data. Optional modules and display currency vary by account. Screenshot values are not UK prices or performance claims.

1

Add an article

Use a clear title such as “Parking and step-free access”. Include the exact answer staff approve.

2

Keep it non-clinical

Hours, location and public contact information belong here. Patient records and medical advice do not.

3

Review updates

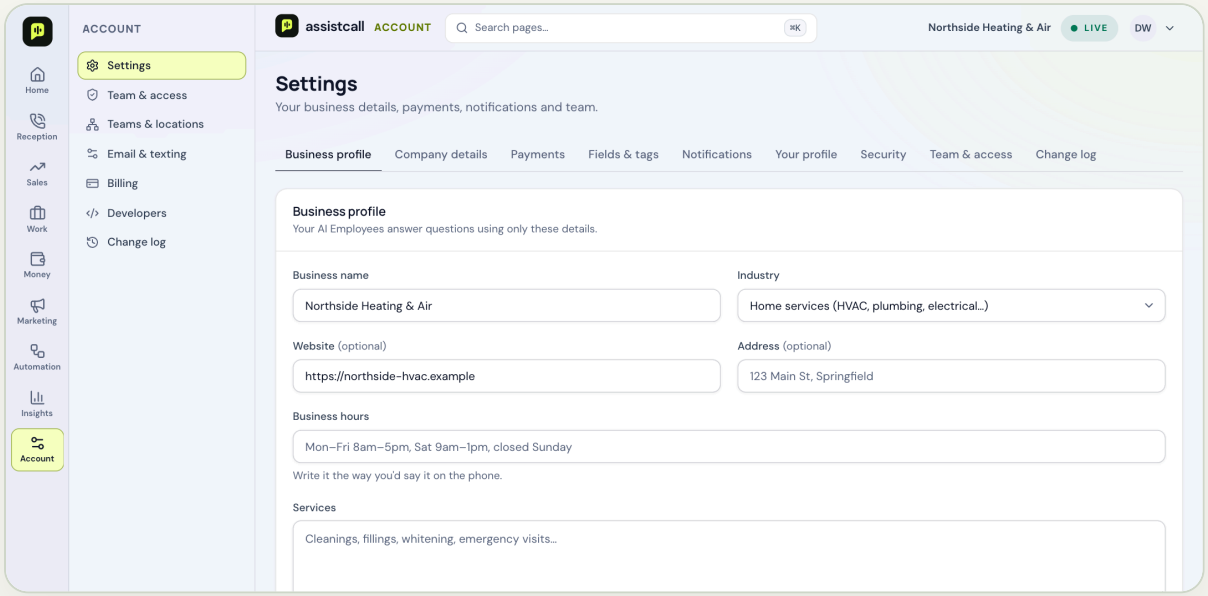
Test the answer after a change. Remove outdated instructions instead of leaving conflicting versions.

Screens use a fictional service business to demonstrate the shared interface.

05 · BOOKINGS & REQUESTS

Appointments stay with the practice.

Ava can explain the approved route to the appointment team. Patient booking is not enabled in this medical launch.



Real AssistCall interface · fictional demo data. Optional modules and display currency vary by account. Screenshot values are not UK prices or performance claims. Business settings shown; no patient booking is demonstrated.

> If patient workflows are needed later, first assess the intended data, contracts, permissions, security and clinical responsibilities. AssistCall does not currently sign US BAAs; UK requirements need their own assessment.

1 Recognise the request

The caller asks to book, change or cancel a clinical appointment.

2 Avoid patient intake

Do not request a date of birth, symptoms, medication or appointment history.

3 Use the practice route

Give the approved contact instructions; a configured transfer requires a separately agreed routing setup.

4 Keep the boundary

Do not say an appointment is booked or changed. The practice confirms it in its own system.

06 · MESSAGES & HUMAN HANDOFF

The right boundary is part of the experience.

The caller should know what happened—and what still needs a person.

1 · Recognise the next step

For a question outside approved office information, direct the caller to the practice. A staff transfer is a separately configured route; an emergency needs the practice-approved emergency instruction, not a promise of help from Ava.

2 · Send the right link

An approved directions or general contact link may be considered in a separately enabled messaging workflow. Do not send patient, prescription or clinical appointment details in this launch.

3 · Handle no answer

If the question cannot be answered from approved public information, say so and give the practice contact route. Do not collect a patient message as a workaround.

01
Confirm
Read back the important details.

→

02
Attempt
Use an approved action or destination.

→

03
Check
Wait for the actual result.

→

04
Explain
Say what completed and what did not.

A different number for the text?

Ask which number should receive this specific message. Read it back digit by digit, confirm permission and use that destination in the enabled messaging workflow. A new text number does not automatically replace the person's primary number.

A voice number is not automatically an SMS number

UK texts need a supported sender, an enabled workflow and appropriate permission. If texting is unavailable or fails, explain that and offer the approved alternative. Do not say a message was delivered without a result.

07 · YOUR SYSTEMS

Connect the workflow you already use.

Begin with an approved office knowledge set. The systems below illustrate the wider practice environment, not live medical integrations.

assistcall

Your AI Employee
Approved facts · actions · call record

Authorised connection

↔

or approved link / staff handoff

Cliniko
Future practice-system assessment

Microsoft 365
General office knowledge source

Google Calendar
Non-clinical office coordination only

NHS GP Connect
Governed programme; outside launch

SYSTEM / ROUTE	SCOPE	WHAT MUST BE AGREED
Office information	Current configuration	Approved public facts entered into AssistCall. No access to patient systems.
Cliniko / practice management	Future assessment	Requires a separate patient-data and technical review before any connector is offered.
NHS GP Connect	Outside launch	Not a plug-in activated from this account. Eligibility, governance and onboarding are separate.

Official references: Cliniko · API reference · NHS England · How GP Connect works

Example systems, not a list of installed connectors. Account access, permissions, commercial terms and successful testing determine what can be connected. Vendor marks remain the property of their owners.

08 · CUSTOM CONFIGURATION

A safe first configuration.

A simple office-information setup is useful without connecting a clinical system.

FROM THE CONVERSATION	DESTINATION	RULE
“When are you open?”	Office hours article	Read the practice-approved schedule.
“Where do I park?”	Directions article	Use the exact location and entrance instructions.
“Who do I call?”	Public contact route	Provide the correct department contact.
Patient-specific question	Outside-scope rule	Redirect without requesting clinical details.

If a lookup or write fails: keep the result unconfirmed, preserve the appropriate AssistCall record and flag the item for staff review. A custom connection is accepted only after its failure path is tested.

A focused first scope

- A branded greeting for one practice.
- Approved hours, directions and contact routes.
- A non-clinical test script and staff review.

24-hour setup service
The 24-hour setup service applies to an agreed, supported configuration or integration after the complete brief, approved content, working credentials and permissions are available. Your proposal confirms eligibility and timing. Carrier verification, vendor approval, restricted APIs and larger builds are scheduled separately.

Acceptance checks

- A normal request produces the correct result.
- Missing or corrected data is handled clearly.
- A repeated event does not create duplicates.
- Denied access and failed writes reach the fallback.

09 · GUARDRAILS & LANGUAGES

Flexible conversation. Clear boundaries.

Your business chooses the facts, permitted actions and moments that need a person.

Ava should

- Use only reviewed office information.
- Stop patient-specific questions at the boundary.
- Use approved urgent and emergency instructions.
- Keep practice staff responsible for clinical decisions.

Ava must not

- Diagnose, triage or suggest treatment.
- Read or write patient records.
- Collect symptoms, medical history or insurance details.
- Confirm clinical appointments or prescription changes.

Speak in the caller's language

A visitor asks in French for the entrance and parking directions. Ava can answer in French using the same approved office facts.

Examples of supported conversations include English, Spanish, French, Arabic, Bangla and Mandarin. Test the languages, names and dialects your customers use before launch.

Adapt without changing your policy

Ava can use the caller's responses, approved business knowledge and available authorised context. It asks when information is unclear. It does not independently rewrite your prices, policies or access rules.

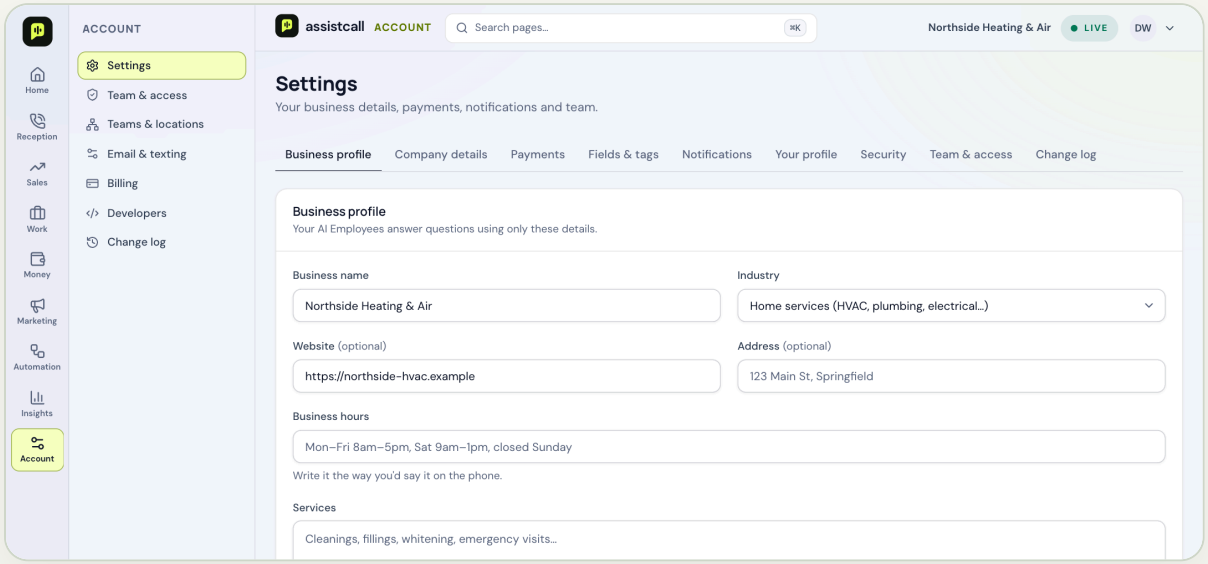
Internal notes are generally stored in English. Confirm the language and wording of any customer-facing message separately.

Urgent business routing is not an emergency service. Follow the approved local emergency instructions when there is immediate danger. Never promise a successful transfer, dispatch or professional response before it is accepted.

OWNER CONTROL

Make changes without a support ticket.

Use the dashboard for direct control. On supported owner-support routes, you can also tell Ava what to update.



Real Settings → Business profile screen, with fictional demo details. Review the "Update AI Employees' instructions" option before saving: it can replace custom instructions.

1 Open the correct section

Settings → Business profile for hours and services. Packages & knowledge for FAQs, packages and policies.

2 Make and save the change

Use exact facts. Review whether instructions should be regenerated, then save and run a test call.

3 Or speak to Ava

Use the AssistCall owner-support route supplied for your account and call from your verified owner number. Complete any requested verification. UK phone access is confirmed at activation; the dashboard remains the direct self-service route.

Owner says

"Ava, change our public office hours to Monday to Friday, 8am to 6pm."

Ava reads it back

"Monday to Friday, 8am to 6pm. Shall I save those office hours?"

You confirm before the change is saved.

GET STARTED

A simple setup. A testable result.

Self-service covers everyday business settings. A custom setup maps your particular workflow and systems.

1 Tell us how the business works

Open the UK product site and send your setup enquiry. Your scope and GBP proposal are confirmed before activation.

2 Complete the account setup

Verify the owner, review the business profile and add approved knowledge. Number activation may require carrier checks.

3 Choose the actions

Select booking, messages, handoff and any supported connection. Give Ava only the actions needed for this workflow.

4 Test, then route calls

Test normal calls, unknown answers, alternate numbers and no-answer handoffs. Forward or route calls after acceptance.

Bring these four things

- Public opening hours, location, access and parking.
- Approved practice and emergency contact instructions.
- The exact topics Ava must redirect.
- Named reviewer and a test caller.

Keep control after launch

Review early calls, update approved knowledge and check failed or incomplete actions. Use team permissions for who can view or change the account.

CUSTOM SETUP & SUPPORTED INTEGRATIONS

Your agreed workflow, targeted for 24 hours.

The 24-hour setup service applies to an agreed, supported configuration or integration after the complete brief, approved content, working credentials and permissions are available. Your proposal confirms eligibility and timing. Carrier verification, vendor approval, restricted APIs and larger builds are scheduled separately.

NEXT STEPS & RESEARCH

A clear scope before you connect anything.

Choose the outcome first. We will map the account, the system access and the tests needed to make it reliable.

Your UK proposal

Pricing is quoted in GBP for your agreed package. The written proposal should identify the recurring plan, included usage, any setup work, overages, messaging, third-party fees and VAT treatment.

No fixed UK tariff is implied by demo dashboard values. Optional CRM, scheduling, messaging and operations modules depend on your account.

What this guide shows

Screens are captured from the real AssistCall interface using fictional local demo data. Dialogues, records and field mappings are illustrative examples, not customer testimonials or completed vendor integrations.

Vendor logos identify example systems. They do not imply partnership, endorsement or a native connector.

Research & implementation references · checked 6 November 2026

Cliniko · API reference ↗

Practice-system access is sensitive and permissioned. This is a future assessment example, outside the medical launch.

docs.api.cliniko.com

NHS England · How GP Connect works ↗

GP Connect is a governed health-system programme, not an instant self-service connector.

digital.nhs.uk

ICO · Special category data ↗

Health information needs additional data-protection consideration before any patient workflow is proposed.

ico.org.uk

Show us one real workflow.

Tell us the call, the system and the result you need. We will confirm scope, access and a GBP proposal.

Explore Medical offices ↗