PARTNER ONBOARDING GUIDE

AutoReception Partner Program

A practical guide to adding clients, managing billing, completing onboarding, testing the AI receptionist and taking customers live.

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PARTNER MODEL

How the Partner Model Works

A simple, repeatable process that lets you add AI receptionist services to your clients while AutoReception handles the build, configuration and ongoing AI support.

01

Add the Client

Open Manage Clients in your partner portal and add the business. Enter the basic client details, primary contact information and any phone-line details you already have so the deployment request can be created under your partner account.

02

Select the Chosen Plan

Select the AutoReception partner plan that best suits the client. The selected plan confirms the service level and usage allowance, and the setup fee plus first month are paid as part of creating the deployment.

03

Send the Client Their Onboarding Form

AutoReception prepares the client-specific onboarding form and publishes the link inside the client record in your portal. Copy the link and send it to your client. You bill the client separately at this stage using your own retail pricing, margin or bundled service arrangement.

04

We Configure the Receptionist

Once the onboarding form is completed, AutoReception builds and configures the AI receptionist, including the call handling, routing and receptionist behaviour. We also activate the client portal and prepare everything for testing.

05

Client Tests & Requests Go-Live

The client tests the receptionist through their portal and can request any required changes. AutoReception makes the AI-side changes and, once the client is happy, they click Request Go-Live from their portal.

06

Partner Activates Call Forwarding

The partner portal notifies your team when the client is ready to go live and shows the required forwarding setup. Your team enables CF, CFNA, busy/no-answer or the agreed forwarding method and marks the task complete.

07

Client Goes Live

Once call forwarding is confirmed, the client is marked Live and receives confirmation. AutoReception continues to manage the AI receptionist, including support, receptionist changes, training and ongoing optimisation.

PARTNER ROLE

Add the client, choose the plan, bill the client and activate call forwarding.

AUTORECEPTION ROLE Build, configure, test, support and optimise the AI receptionist.

BILLING & SUPPORT

Billing, Support & Ongoing Management

The commercial model stays simple: you own the client relationship and retail pricing, while AutoReception supplies and supports the underlying AI receptionist service.

Partner Billing

AutoReception bills the partner for the selected partner plan. The setup fee and first month are paid when the client deployment is created, followed by the ongoing monthly partner charge while the client remains active.

Your Client Pricing

You decide what you charge the end client. AutoReception does not need visibility into your retail price, margin or bundled agreement. Bill separately or include the service inside a broader communications package.

Ongoing AI Support

AutoReception handles receptionist changes, training, prompt updates, call-flow adjustments and AI-related troubleshooting. Your team does not need to become first-line support for the AI layer.

Telephony Responsibility

The partner remains responsible for the client phone system and forwarding configuration. When the client requests go-live, your team receives the required CF / CFNA / busy-no-answer instructions.

Custom Requests

For higher call volumes, bespoke integrations, multiple locations or custom automation, AutoReception can scope the requirement with the partner and client and agree a separate commercial arrangement.

Client Visibility

The partner portal shows each client's current onboarding stage, onboarding link, testing status, next action and timeline history so your team can see progress at any time.

At a Glance

1 **Add client + choose plan**

2 **Pay AutoReception setup + first month**

3 **Send onboarding form + bill client**

4 **AutoReception configures + supports**

5 **Client requests go-live**

6 **Partner enables forwarding**

Designed to be repeatable.

Add the client, send onboarding, enable forwarding when requested - AutoReception handles the AI build and support in between.