



AI Receptionist

Demo Guide

A complete walkthrough with live demo scripts for demonstrating the AI-powered phone receptionist for Equity Insurance Inc. — Honolulu, Hawaii.

Client	Equity Insurance Inc.
Location	Honolulu, HI
Main Line	+1 (808) 593-7746
Tech Stack	VAPI.ai + n8n + ElevenLabs + Google Sheets
Version	Production Pilot

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1. Getting Started

- 1 Open the Demo App**
Navigate to the AI Receptionist web app in **Google Chrome** (recommended). The app can also be opened locally by double-clicking **vapi-web-test.html**.
- 2 Allow Microphone Access**
When prompted by the browser, click **Allow**. The AI cannot hear you without microphone permission.
- 3 Wait for SDK to Load**
Look for "**VAPI SDK loaded successfully**" in the System Logs panel (bottom-right). This takes 1-2 seconds.
- 4 Choose Mode**
Select **Business Hours** or **After Hours** using the toggle in the top-left corner.
- 5 Start the Call**
Click the large **white phone button** at the bottom of the left panel. Wait for the AI greeting.
- 6 End the Call**
Click the **red phone button** to end the call. Press the **refresh icon** to reset everything.

Requirements: Chrome browser, microphone, speakers/headphones, stable internet connection.

2. Dashboard Layout

The dashboard has three panels plus a top navigation bar.

Top Navigation Bar

- **Logo & Branding** — Equity Insurance shield with "AI RECEPTIONIST" label
- **Environment Badge** — Shows "Production" indicator
- **Connection Status** — Disconnected / Connecting / Connected / AI Speaking / Listening

Left Panel — Call Controls

- **Mode Toggle** — Switch between Business Hours and After Hours
- **Avatar Circle** — Animated audio visualizer with pulsing rings
- **Timer** — Live call duration (MM:SS)
- **Controls** — Start/End Call, Mute/Unmute, Reset

Center Panel — Live Transcript

- **AI Messages** — Left-aligned, dark background
- **Your Messages** — Right-aligned, blue background
- **Typing Indicator** — Animated dots when AI is speaking

Right Panel — Data & Intelligence

- **Call Flow** — 5-stage progress (Idle → Collecting → Evaluating → Routing → Done)
- **Status Badges** — Call type, disqualifier result, hot lead result
- **Extracted Data** — Real-time table of collected fields (shows X / 8)
- **System Logs** — Timestamped technical events with color coding

3. Demo 1 — New Customer Wanting Auto Insurance

DEMO 1: New Customer — Auto Insurance

Mode: Business Hours

This is the full intake flow. It demonstrates data collection, validation, disqualifier check, hot lead check, and closing.

After clicking the phone button, wait for the AI greeting:

AI: "Hello, thank you for calling Equity Insurance. I am your AI receptionist..."

YOU: "Hi, I'm looking for auto insurance."

AI: "I would be happy to help you with that. Can I get your full name..."

YOU: "My name is John Smith. J-O-H-N, S-M-I-T-H."

■ *Watch: "caller_name: John Smith" appears in the Extracted Data panel. Call Flow moves to "Collecting."*

AI asks for phone number.

YOU: "808-555-1234"

AI reads it back for confirmation.

YOU: "Yes, that's correct."

AI asks for email.

YOU: "john.smith@gmail.com"

AI asks for mailing address.

YOU: "123 Ala Moana Blvd, Honolulu, Hawaii 96813"

AI asks for date of birth.

YOU: "January 15, 1990"

AI asks for occupation.

YOU: "I'm a teacher at Punahou School."

AI confirms auto insurance, asks how you heard about them.

YOU: "My friend Val told me about you."

■ *Watch: All 8 fields now show in Extracted Data. Counter shows "8 / 8".*

AI asks about your vehicle.

YOU: "I drive a 2023 Honda Civic. I don't have the VIN on me. It's financed through Honda Financial. Clean driving record, no tickets or accidents. I'm the only driver."

AI asks about claims history.

YOU: "No claims at all."

■ *Watch: Call Flow moves to "Evaluating." Disqualifier badge shows "Evaluating..." then turns green "Qualified."*

AI asks when you need coverage.

YOU: "I need it by next month."

AI asks what you're currently paying.

YOU: "I'm paying about \$150 a month with GEICO."

■ *Watch: Hot Lead badge shows "Evaluating..." then turns green "Standard Lead."*

AI offers cross-sell (renters/homeowners).

YOU: "Actually yeah, I could use renters insurance too."

AI reads back all your info for confirmation.

YOU: "Yes, that's all correct."

■ *Watch: AI delivers closing. Call Flow reaches "Done."*

Click the red phone button to end the call.

4. Demo 2 — Existing Customer

DEMO 2: Existing Customer

Mode: Business Hours

Demonstrates the existing customer routing path — AI takes a message and notifies Val.

AI says the greeting.

YOU: "Hi, I'm an existing customer. I need to make a change to my policy."

AI asks for your name.

YOU: "Sarah Lee."

AI asks for phone number.

YOU: "808-555-6789"

AI asks what type of policy.

YOU: "Auto insurance."

AI asks what you need specifically.

YOU: "I just bought a new car and I need to add it to my policy. It's a 2025 Tesla Model 3."

■ *Watch: Call Type badge shows purple "Existing Customer." Call Flow jumps to "Routing." System log: "ROUTE: Existing customer → Ticket + Val notification."*

AI confirms a ticket was created and Val will follow up.

YOU: "Great, thank you."

End the call.

5. Demo 3 — Filing a Claim

DEMO 3: Filing a Claim

Mode: Business Hours

Demonstrates the claims routing path — AI collects claim details and routes to claims agent.

AI says the greeting.

YOU: "I need to file a claim. I was in an accident."

AI: "I'm sorry to hear that..."

AI asks for your name.

YOU: "David Kim."

AI asks for phone.

YOU: "808-555-3333"

AI asks for policy number.

YOU: "I think it's EQ-2024-5500."

AI asks what type of claim.

YOU: "Auto."

AI asks what happened.

YOU: "Someone ran a red light and hit the side of my car on Kapiolani Boulevard. There's major damage to the driver's side door and fender."

■ Watch: Call Type badge turns red "Claim Filed." System log: "ROUTE: Claim filed → Priority notification sent." Call Flow jumps to "Routing."

AI says it filed the claim and is transferring you to an agent.

End the call (the transfer will attempt to connect to Val's number).

6. Demo 4 — Hot Lead (High-Value Property)

DEMO 4: Hot Lead — \$3M Property

Mode: Business Hours

Triggers the hot lead detection — property value over \$2M triggers immediate transfer to Davin.

AI says the greeting.

YOU: "I'm looking for homeowners insurance."

Follow the standard data collection (name, phone, email, address, DOB, occupation, referral). When the AI asks about the property:

AI: "What is the estimated value of the property?"

YOU: "It's a house in Kahala. Worth about 3 million dollars."

■ Watch: Hot Lead badge turns orange "HOT LEAD — Transfer." System log shows high-value detection. Call Flow moves to "Routing." Email sent to Davin + Val.

AI: "With a property of this value, I would like to connect you directly with one of our experienced agents..."

End the call.

7. Demo 5 — Disqualified Caller

DEMO 5: Disqualified Caller — Too Many Claims

Mode: Business Hours

Triggers the disqualifier rule — 3+ claims in a single year results in a polite redirect.

Go through standard data collection. When claims history comes up:

AI: "Have you had any claims in the past 5 years?"

YOU: "Yes, I've had quite a few. A water damage claim in 2022, a fire claim in 2023, a mold claim also in 2023, and another water damage claim this year."

■ Watch: Disqualifier badge turns red "Disqualified." System log shows disqualifier triggered.

AI: "I appreciate your time. Based on the information you have shared, we may not be the best fit for your needs right now..."

End the call.

8. Demo 6 — After Hours Call

DEMO 6: After Hours Call

Mode: After Hours

Important: Switch to **After Hours** mode BEFORE starting the call.

AI: "You have reached Equity Insurance outside of our regular office hours..."

YOU: "Hi, I'd like to leave a message about getting an insurance quote."

AI asks for name.

YOU: "Mike Johnson."

AI asks for phone.

YOU: "808-555-4444"

AI asks the reason for calling.

YOU: "I need auto insurance for a new car I'm picking up next week."

AI: "Thank you for calling. A member of our team will follow up on the next business day."

End the call.

9. What to Watch For During Demos

Panel	What You'll See
Call Flow (top-right)	Progress bar: Idle → Collecting → Evaluating → Routing → Done
Status Badges (below flow)	Color badges: Qualified/Disqualified, Standard/Hot Lead, Call Type
Extracted Data (middle-right)	Each field appears in real-time as the AI saves it
Live Transcript (center)	Blue bubbles = You speaking, Dark bubbles = AI speaking
System Logs (bottom-right)	Blue=SAVE, Amber=RULE CHECK, Purple=ROUTE, Green=PASS, Red=FAIL
Timer (center-left)	Live call duration counter (MM:SS)
Connection Status (top-right header)	Disconnected → Connecting → Connected → Speaking

10. Business Rules Reference

Data Collection Fields (in order)

#	Field	AI Behavior
1	Full Name	Asks caller to spell it out
2	Phone Number	Repeats back and asks for confirmation
3	Email Address	For sending the quote
4	Mailing Address	Double-checks spelling
5	Date of Birth	Standard verification
6	Occupation	Qualifies for P&C credits
7	Insurance Type	Auto, Property, Renters, Business, etc.
8	Referral Source	How they heard about Equity Insurance

Disqualifier Rules

Rule	Threshold	Action
Claims History	3+ claims in a single year	Polite redirect
Urgency (Property)	Coverage needed within 72 hours	Polite redirect

Hot Lead Detection

Policy Type	Value Threshold	Action
Property	\$2,000,000+	Immediate transfer to Davin
Auto	\$180,000+	Immediate transfer to Davin

Safety Guardrails

The AI will NEVER:

- Give coverage advice or quote prices
- Bind policies, sign documents, or underwrite
- Guarantee coverage or make promises
- Claim affiliation with Equity Insurance in Tulsa, Oklahoma

All AI-collected data is flagged with **VAPI_AI_COLLECTED** for audit trail.

11. Tips & Troubleshooting

Tips for Best Results

- **Speak clearly** — the AI uses speech-to-text, so enunciate names and numbers
- **Pause after speaking** — give the AI 1-2 seconds to process before speaking again
- **Spell names** when asked — this dramatically improves accuracy
- **Confirm phone numbers** when the AI reads them back — say "Yes" or "Correct"
- **Press #** on your phone keypad at any time to request a live agent transfer
- If the AI misunderstands, correct it naturally: *"No, I said Smith, S-M-I-T-H"*
- If the call doesn't connect, click the **refresh button** and try again

Troubleshooting

Issue	Solution
AI can't hear me	Check microphone permission. Click Reset and retry. Check OS mic settings.
No audio from AI	Check speakers/headphones. Try Chrome (recommended browser).
"Connection Failed"	Check internet. Wait 30 seconds and retry.
Call ends immediately	Refresh page and retry. Browser may have blocked audio context.
Transcript not updating	End call and start a new one.
Mode toggle not working	Mode can only be changed when no call is active.
Audio echo / feedback	Use headphones. Echo cancellation is built in but headphones are best.

Support Contacts

Name	Email	Notes
Davin Char (CEO)	davin@equityinsurance.services	Life/Medicare + high-value leads
Val Char (P&C Agent)	val@equityinsurance.services	+1 (808) 780-0473