



AI Agent Evaluation Form

Configure your intelligent voice agent — complete all sections and return to your channel manager or sales partner

1 General Information

BUSINESS NAME

CONTACT PERSON

EMAIL ADDRESS

PHONE NUMBER

INDUSTRY (select one)

Restaurant

Retail

Healthcare

Real Estate

Legal / Finance

Other

2 AI Agent Purpose & Software Integrations

WHAT SHOULD YOUR AI AGENT DO? (select all that apply)

Answer FAQs & general inquiries

Provide product / service info

Book / manage reservations & appointments

Schedule & manage cancellations or changes

Take food / service orders

Send booking & order confirmations

Route calls to the right team

Send / receive SMS messages

DO YOU REQUIRE IN-CALL PAYMENT PROCESSING? (select platform or leave blank if not needed)

Stripe

Square

Twilio Pay

Braintree

Authorize.net

Other:

Please continue to Page 2 — a required field is waiting for your input ›

SOFTWARE INTEGRATIONS

REQUIRED FIELD

This field must be completed before submission

List every platform and tool your AI will need to connect to in order to fulfill its purpose.

This information is required to accurately determine the capabilities AI will have with your platform.

Examples: Salesforce, HubSpot, OpenTable, Toast POS, Mindbody, Epic, Zendesk, ServiceTitan, Google Calendar...

SOFTWARE / PLATFORMS THE AI MUST INTEGRATE WITH

3 Call Handling

WHEN SHOULD THE AI HANDLE CALLS? (select all that apply)

All Incoming Calls

Overflow Calls

After Hours Calls

Outbound Calls

CURRENT PHONE SYSTEM (select one)

IPFone VoIP

Other VoIP

Traditional Landline

Mobile

4 Language Support

SELECT ALL LANGUAGES THE AI SHOULD SUPPORT

English

Spanish

French

Chinese (Mandarin)

German

Hindi

Japanese

Portuguese

OTHER LANGUAGES (list any not included above)

OTHER LANGUAGES

Next Steps

Once submitted, our team will review your requirements and prepare a tailored solution.
Return this form to your channel manager or sales partner | info@ipfone.com