AI Voice Calling Agent — User Guide

Module: AI Voice Calling Agent (Business Central Extension) **Version**: 2.1 **Last Updated**: 2026-05-21

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1. Overview

The **AI Voice Calling Agent** is a Business Central extension that integrates with Peakflo's AI-powered voice calling service. It enables your team to initiate automated outbound phone calls to customers regarding outstanding invoices, capture call transcripts and payment commitments, and track all interaction history — directly from within Business Central.

How It Works

1. Your team flags specific open invoices for AI calling using **Include in AI Call** on the Customer Ledger Entries page.
2. A Job Queue entry runs on a schedule, picks up flagged invoices, and triggers outbound AI calls for the relevant customers.
3. Alternatively, your team can click **Make AI Assistant Call** on a Customer Card to trigger a call immediately.
4. Business Central sends the customer's outstanding invoice data to Peakflo's AI service.
5. Peakflo's AI agent makes an outbound voice call to the customer, discusses the outstanding balance, and records any payment commitments.
6. When the call ends, Peakflo sends the results (transcript, commitments, email) back to Business Central via webhook.
7. The call outcome is stored and displayed on the Customer Card factbox for immediate review.
8. Calls that remain "In Progress" past the configured idle timeout are automatically marked as **Auto Completed** by the Job Queue.

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2. Prerequisites

Before using the AI Voice Calling Agent, ensure the following are in place:

- **Business Central** with the AI Voice Calling Agent extension installed and published.
- An active **Peakflo account** with API access credentials.
- The **AIVoiceCallingAgent** permission set assigned to all users who will use the feature.
- A valid **Webhook URL** configured and accessible by Peakflo (your Business Central environment must be publicly reachable or use a configured relay).
- Customer records must have a valid **phone number** or **email address** for the AI to contact them.

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3. Initial Setup

The AI Flow Setup page stores the credentials and endpoints required to communicate with Peakflo's AI service. This is a one-time configuration performed by an administrator.

Steps

1. Use the **Tell Me** search bar (Alt+Q) and search for **AI Calling Agent Setup**.
2. Click **Initialize Default Setup** in the action bar. This populates the default Peakflo endpoint values.
3. Enter or verify the following fields:

Field	Description
API Key	Your Peakflo API key (displayed as masked). Obtain this from your Peakflo account portal.
Workflow API URL	The Peakflo API endpoint URL. Pre-populated by Initialize.
Tenant ID	Your Peakflo tenant identifier. Pre-populated by Initialize.
Default Workflow ID	The default AI workflow to use when making calls.
Webhook URL	The URL where Peakflo will POST call results back to Business Central. Must be publicly accessible.
Minimum Call Amount	Invoices with a remaining amount below this value cannot be flagged for AI calling. Set to 0 to disable.
Call Idle Timeout (Mins)	Minutes after which an "In Progress" call with no webhook response is automatically marked as "Auto Completed". Default is 5 minutes.

4. Save the record (Business Central auto-saves on navigate).

> **Note:** The API Key and OAuth secrets are masked for security. Once entered, they cannot be read back in plain text.

Assisted Setup

Alternatively, open **Assisted Setup** (search via Tell Me), locate the **AI Voice Calling Agent** entry, and follow the guided wizard to complete configuration.

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4. Configuring Customers for AI Calls

Each customer must be individually enabled for AI voice calling. This gives explicit per-customer consent control.

Steps

1. Open the relevant **Customer Card** (search for Customers, then open a record).
2. Locate the **AI Voice Calling** section in the General or Details tab area.
3. Configure the following fields:

Field	Description	Required
AI Call Consent	Checkbox — must be enabled before any AI call can be made.	Yes
AI Agent Name	The name the AI agent will introduce itself as during the call. Enabled only when AI Call Consent is checked.	Recommended
AI Voice	Voice preference for the AI agent: "Male" or "Female". Defaults to "Male".	Optional
AI Language	Language for the call (e.g., "English"). Defaults to "English".	Optional
Account Manager Phone	Phone number of the customer's account manager. Passed to the AI for context.	Optional
Account Manager Name	Name of the account manager. Passed to the AI for context.	Optional

4. Save the customer record.

> **Important:** The **AI Voice**, **AI Agent Name**, and **AI Language** fields are only editable when **AI Call Consent** is checked.

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5. Configuring Contacts for AI Calls

AI calls can also be initiated directly from a Contact Card, provided the contact is linked to a customer.

Steps

1. Open the relevant **Contact Card**.
2. Fill in the **Account Manager Phone** field (located after the Phone No. field) if applicable.
3. Ensure the contact is linked to a customer — the system uses five methods to find the customer:
    - Business Relation link
    - Company contact link
    - Primary Contact relationship
    - Company name match

- Phone/email match

> **Tip:** If a contact is not linked to a customer, the AI call cannot be initiated from the Contact Card. Link the contact to a customer first via the Business Relations setup.

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6. Flagging Invoices for AI Calls

Individual open invoices can be flagged to be included in the next AI call cycle. This allows precise control over which invoices are discussed during the call.

How to Access

Open **Customer Ledger Entries** (from the Customer Card, navigate to Ledger Entries, or search via Tell Me).

Fields Added to Customer Ledger Entries

Field	Description
Include in AI Call	Checkbox — flag this invoice to be included in the next AI call. Only open invoice-type entries can be flagged.
AI Call Trigger DateTime	Date and time when this entry was last picked up by the AI call job queue. Read-only.
AI Call Count	Number of times this entry has been included in an AI call. Read-only.

Flagging Rules

- Only **open** entries with **Document Type = Invoice** can be flagged.
- If a **Minimum Call Amount** is set in AI Calling Agent Setup, entries with a remaining amount below that threshold cannot be flagged — an error is shown.
- Closed or paid entries cannot be flagged.

Actions Available

Action	Description
Mark for AI Call	Flags all selected open invoice entries for AI calling (skips ineligible entries and reports counts).
Unmark for AI Call	Removes the AI call flag from all selected entries.

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7. Making an AI Call

From the Customer Card

1. Open the **Customer Card** for the customer you want to contact.
2. Ensure **AI Call Consent** is checked in the AI Voice Calling section.
3. Click the **Make AI Assistant Call** action in the action bar.

4. The system will:
   - Validate that no call is already in progress for this customer.
   - Build a payload with outstanding invoices, recent payments, and aging data.
   - Send the request to Peakflo's AI service.
   - Create a **Call Tracking** record with status "In Progress".
5. A confirmation message will appear on success.

From the Contact Card

1. Open the **Contact Card** for the contact you want to call.
2. Click the **Send to AI Agent** action in the AI Voice Calling Agent action group.
3. The system finds the related customer and initiates the call as described above.

Via Job Queue (Automated)

When invoices are flagged with **Include in AI Call**, the AI Call Job Queue codeunit processes them automatically on its configured schedule. No manual action is required — the job iterates flagged entries, triggers calls, and updates the **AI Call Trigger DateTime** and **AI Call Count** on each entry.

What Data Is Sent to the AI

The AI receives a comprehensive payload including:

- **Customer Information**: Name, phone number, email address.
- **Outstanding Invoices**: Invoice number, amount due, due date, and status (Overdue / Outstanding / Paid) for all open invoices.
- **Recent Payments**: Payments made in the last 3 months (invoice reference, amount, date).
- **Statement of Account**: Aging summary in buckets: 0–30 days, 31–60 days, 61–90 days, and 90+ days.
- **AI Preferences**: Voice type, language, agent name.
- **Account Manager Details**: Name and phone number.
- **Correlation ID**: A unique GUID to match the call result back to this record.
- **Webhook URL**: Where Peakflo should send the results after the call.

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8. Monitoring Calls — AI Call Tracking

The **AI Call Tracking** list provides a real-time view of all calls made by the AI Voice Calling Agent.

How to Access

Search for **AI Call Tracking** using the Tell Me bar.

Columns Displayed

Column	Description
Correlation ID	Unique identifier for the call (GUID format).
Customer No.	The customer that was called.
Customer Name	Derived from the Customer No.

Column	Description
Call Date	Date and time the call was initiated.
Call Status	Current status of the call (color-coded).
Workflow ID	The AI workflow used.
Response Received	Whether a webhook response has been received.
Response Date	Date and time of the webhook response.
Call Duration	Calculated as Response Date minus Call Date.

Saved Views

View	Description
Pending Calls	All calls that are not yet completed.
Completed Calls	All calls with "Completed" status.
Recent Calls	Calls created recently (within the current period).

Available Actions

Action	Description
View Customer	Opens the Customer Card for the selected record.
View Webhook Results	Opens the AI Webhook Results page filtered for this customer.
Retry Call	Re-initiates the AI call for the same customer (creates a new tracking record).
Mark Failed	Manually sets the status to "Failed".
Mark Canceled	Manually sets the status to "Cancelled".
Mark Completed	Manually sets the status to "Completed".

> **Note:** Manual status updates (Mark Failed, Mark Canceled, Mark Completed) are available for administrative correction when the automated webhook response is delayed or not received. Calls that remain "In Progress" past the **Call Idle Timeout** are automatically set to **Auto Completed** by the Job Queue — no manual intervention needed in normal operation.

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9. Viewing Call Results — AI Webhook Results

After an AI call completes, Peakflo sends the results to Business Central via webhook. These results are stored in the **AI Webhook Results** list.

How to Access

- Search for **AI Webhook Results** via the Tell Me bar.
- Or, from the **AI Call Tracking** list, select a record and click **View Webhook Results**.

- Or, from the **Customer Card factbox**, click **View All Call Results**.

Columns Displayed

Column	Description
Entry No.	Auto-incremented unique identifier.
Customer No.	Customer who was called.
Call Date	Date the call occurred.
Call Status	Outcome of the call.
Commitments	Payment commitments made by the customer during the call (shown as "Invoice ID: X | Promise to Pay Date: Y").
Comments	AI-generated summary of the call.
Email Provided	Email address captured during the call.
Requested Callback Date	Date the customer requested a callback, if applicable.
Requested Callback Time	Time the customer requested a callback, if applicable.
Call Outcome	High-level outcome classification returned by the AI.
Send SOA	Indicates whether the customer requested a Statement of Accounts to be sent.
Correlation ID	Links back to the original Call Tracking record.

Viewing the Full Transcript

1. Select a record in the **AI Webhook Results** list.
2. Click **View Full Transcript** in the action bar.
3. The complete call transcript is displayed, formatted as:

```
[Role]: [Content]
[Role]: [Content]
```

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10. Customer Card Factbox

The **Cust. AI Response Factbox** appears on the right-hand side of the Customer Card and provides an at-a-glance summary of the customer's AI call history without navigating away.

Latest AI Call Summary

Field	Description
Last Call Date	Date and time of the most recent AI call.
Call Status	Status of the most recent call (color-coded).
Customer Commitments	Payment commitments from the most recent call, displayed as "Invoice ID: X | Promise to Pay Date: Y" per commitment.
Call Summary	AI-generated commentary/summary of the most recent call. Multi-line display.
Email Provided	Email address captured during the most recent call.

Call Statistics

Field	Description
Total AI Calls	Total number of AI calls made to this customer.
Successful Calls	Number of calls with "Completed" status.
Last Successful Call	Date of the most recent completed call.

Factbox Actions

Action	Description
View All Call Results	Opens the AI Webhook Results page filtered for this customer.
Refresh	Refreshes the factbox data from the database.

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11. AI Call Activities (Role Center)

The **AI Call Activities** cue is available on the Business Manager Role Center and provides a quick overview of pending AI call work.

Cue	Description
Pending AI Calls	Number of Customer Ledger Entries currently flagged with "Include in AI Call" that have not yet been triggered. Click to drill down into the filtered Ledger Entries list.

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12. Understanding Call Statuses

The **Call Status** field uses a color-coded indicator across all pages.

Status	Meaning	Color
Not Started	The call record exists but has not been sent to Peakflo yet.	—
In Progress	The call request has been sent to Peakflo and is awaiting completion.	Blue
Completed	The call has ended and the webhook response has been received.	Green

Status	Meaning	Color
Failed	The call did not complete successfully (API error, network issue, etc.).	Red
Cancelled	The call was manually cancelled before completion.	—
Callback Scheduled	The customer requested a callback at a future date/time.	Amber
Payment Committed	The customer made a payment commitment during the call.	Green
Disputed	The customer disputed the invoice or balance during the call.	Red
No Answer	The call was placed but the customer did not answer.	Amber
Auto Completed	The call was automatically closed after the idle timeout elapsed with no webhook response.	—

When to Use Manual Status Updates

Manual status updates (Mark Failed, Mark Canceled, Mark Completed) should only be used in exceptional circumstances:

- The webhook response was never received due to a network issue.
- The call was cancelled at the Peakflo level but the status was not updated.
- Administrative cleanup of stale "In Progress" records.

> **Note:** In normal operation, stale "In Progress" calls are handled automatically via the **Call Idle Timeout** setting — no manual intervention is needed.

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13. Permissions & User Access

Access to the AI Voice Calling Agent features is controlled by the **AIVoiceCallingAgent** permission set.

What the Permission Set Grants

Resource	Access Level
AI Flow Setup	Read, Insert, Modify, Delete (full)
AI Call Tracking	Read, Insert, Modify, Delete (full)
AI Webhook Results	Read, Insert, Modify, Delete (full)
All AI Codeunits	Execute
All AI Pages	Execute (open and use)

Assigning the Permission Set

1. Search for **Permission Sets** in the Tell Me bar.
2. Open the **AIVoiceCallingAgent** permission set to verify its contents.

3. Navigate to **Users** and open the relevant user record.
4. In the **User Permission Sets** section, add **AIVoiceCallingAgent**.
5. Save the user record.

> **Note:** Users without this permission set will not see the AI actions on the Customer Card and will receive an access denied error if they attempt to open any AI-related pages directly.

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14. Troubleshooting

Call Does Not Initiate

Symptom	Likely Cause	Resolution
Action is greyed out or hidden	AI Call Consent not enabled	Check the AI Call Consent checkbox on the Customer Card
Error: "Setup not configured"	API Key or Workflow API URL is blank	Open AI Calling Agent Setup and complete all required fields
Error: "Call already in progress"	A previous call is still marked "In Progress"	Check AI Call Tracking; manually mark the stale record as Failed or Cancelled, or wait for the idle timeout to auto-complete it
Error: "No outstanding invoices"	Customer has no open invoices	Verify the customer's ledger entries include open items

Invoice Cannot Be Flagged for AI Call

Symptom	Likely Cause	Resolution
Error about document type	Entry is not an Invoice type	Only Invoice-type ledger entries can be flagged
Error about remaining amount below threshold	Minimum Call Amount is set and the invoice is below it	Raise the invoice amount threshold in AI Calling Agent Setup, or review the invoice
Error about closed entry	Invoice is already paid or closed	Only open entries can be flagged

Webhook Response Not Received

Symptom	Likely Cause	Resolution
Call status remains "In Progress" after extended time	Webhook URL not reachable by Peakflo, or idle timeout not configured	Verify the Webhook URL in AI Calling Agent Setup is publicly accessible; check that Call Idle Timeout is set
Webhook result record not created	Correlation ID mismatch	Check that the Correlation ID sent to Peakflo matches the one in Call Tracking

Symptom	Likely Cause	Resolution
Factbox shows no data	No webhook result exists yet	Wait for the call to complete, or check Peakflo's dashboard for call status

Contact Call Fails to Find Customer

Symptom	Likely Cause	Resolution
Error: "No customer found for contact"	Contact has no linked customer	Set up a Business Relation linking the contact to a customer
Wrong customer selected	Multiple customers with matching names	Link the contact directly via Business Relations to ensure accurate lookup

Data Display Issues

Symptom	Likely Cause	Resolution
Factbox shows outdated data	Cached data not refreshed	Click **Refresh** in the Cust. AI Response Factbox
Transcript shows blank	Transcript blob not received	Check the raw webhook payload; verify Peakflo is sending transcript data
Commitments field is empty	No commitments were captured in the call	This is expected when the customer made no commitments during the call
Commitments display as raw JSON	Unexpected format in webhook payload	Verify Peakflo is sending commitments as a JSON array with `invoiceId` and `p2pDate` fields

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End of User Guide