

# HVAC After-Hours Domination System

Complete Setup Guide — Never Lose Another Call

## Welcome

This guide will walk you through setting up a complete after-hours call capture system for your HVAC business. By the end, you'll have:

- Professional AI or live answering for every after-hours call
- Automated appointment booking while you sleep
- Emergency dispatch notifications to your on-call tech
- A system that pays for itself on the first captured call

**Expected Result:** Most contractors recover \$2,000-5,000+ per month in previously lost calls within the first 30 days.

# Module 1: Choosing Your Answering Service

There are three main approaches to after-hours answering. Choose based on your budget and preferences:

## Option A: AI-First Answering (Recommended)

Best for: Contractors who want 24/7 coverage at the lowest cost.

Service	Monthly Cost	Setup Time	Best Feature
<b>Goodcall</b> ★	\$59+	Same day	Built for trades, books appointments
OpenPhone	\$15+	1 hour	Budget-friendly, voicemail transcription
Grasshopper	\$14+	1 hour	Simple call routing

## Option B: Human + AI Hybrid

Best for: Contractors who want a human touch for complex calls.

Service	Monthly Cost	Setup Time	Best Feature
<b>Smith.ai</b> ★	\$140+	1 day	Live receptionists + AI backup
Ruby	\$230+	1-2 days	Premium live answering
AnswerForce	\$139+	1-2 days	24/7 live + dispatch

## Option C: Enhanced Voicemail (Budget)

Best for: Contractors who want to start immediately with minimal cost.

Use your existing phone system with:

- Voicemail transcription (texts you every voicemail)
- Professional greeting script (included in this system)
- Frequent checking schedule

**Our Recommendation:** Start with Goodcall if budget allows (\$59/mo). If not, start with enhanced voicemail and upgrade once you see the ROI.

## Module 2: Goodcall Setup (Step-by-Step)

Goodcall is our top pick for HVAC contractors. Here's exactly how to set it up:

### 1 Create Your Account

1. Go to `goodcall.com`
2. Click "Get Started" or "Free Trial"
3. Enter your business information:
  - Business name (exactly as customers know it)
  - Service area zip codes
  - Your phone number (will forward here)
4. Select "Home Services" → "HVAC" as your industry

### 2 Configure Business Hours

1. Go to Settings → Business Hours
2. Set your regular hours (e.g., Mon-Fri 8am-5pm)
3. For after-hours: Select "Transfer to Goodcall AI"
4. Enable "Emergency handling" for HVAC-specific scenarios

**Important:** Make sure your time zone is set correctly. Wrong timezone = calls routing to AI during business hours.

### 3 Input Your Scripts

Use the scripts from Module 2 of this system (see "12 Done-For-You Scripts" document).

1. Go to Settings → Call Scripts
2. Copy/paste the "Initial Greeting" script
3. Set up the "Emergency Qualifier" as a decision branch
4. Configure emergency vs. non-emergency pathways

## 4 Connect Your Calendar

1. Go to Integrations → Calendar
2. Connect Google Calendar, Outlook, or your scheduling software
3. Set available appointment slots
4. Enable "Auto-book appointments" for non-emergency calls

## 5 Set Up Notifications

1. Go to Settings → Notifications
2. Enable text notifications for:
  - All calls (recommended)
  - Emergency calls (critical — set to HIGH priority)
  - Booked appointments
3. Add your on-call technician's phone number for emergency alerts

## 6 Test Your Setup

### Testing Checklist:

- Call your business number after hours
- Verify the AI greeting sounds professional
- Test the emergency pathway — say "I have no AC"
- Test the non-emergency pathway — say "I need to schedule service"
- Verify you received text/email notifications
- Verify appointments appear in your calendar

## Module 3: Smith.ai Setup (Step-by-Step)

Smith.ai combines live human receptionists with AI backup. Great for contractors who want a personal touch.

### 1 Create Your Account

1. Go to `smith.ai`
2. Click "Get Started" → Select "Virtual Receptionist"
3. Choose your plan (Starter: 30 calls/mo at \$140)
4. Enter business details and service area

### 2 Complete Your Intake Form

Smith.ai sends an intake form. Be thorough — this is how they train their receptionists.

- **Business description:** "We provide residential and commercial HVAC services including installation, repair, and maintenance."
- **Service area:** List all zip codes or city/county names
- **Emergency criteria:** "No heat, no AC, gas smell, carbon monoxide alarm, water leaking from unit"
- **Non-emergency examples:** "Maintenance requests, tune-up scheduling, pricing questions"

### 3 Configure Call Handling

In your Smith.ai dashboard:

1. Go to Call Handling → Create Handling Instructions
2. Set up two pathways:
  - **Emergency:** "Collect name, phone, address, issue description. Tell caller a technician will call back within 15 minutes. Immediately notify [your phone] via text AND call."
  - **Non-Emergency:** "Offer to schedule an appointment. If scheduling not available, collect callback information for next business day."

### 4 Set Up Call Forwarding

1. Smith.ai provides you a dedicated phone number

2. Set your main business line to forward to this number after hours
3. Most phone systems: \*72 + Smith.ai number to enable, \*73 to disable
4. Or set up time-based routing in your phone system

## 5 Connect Integrations

- **Calendar:** Google Calendar, Calendly, or your scheduling software
- **CRM:** ServiceTitan, Housecall Pro, Jobber (if applicable)
- **Notifications:** Slack, email, SMS

## Module 4: OpenPhone Setup (Budget Option)

OpenPhone is a great starting point at \$15/month. It provides voicemail transcription and basic AI features.

### 1 Create Your Account

1. Go to `openphone.com`
2. Sign up for a free trial
3. Choose a new phone number or port your existing number

### 2 Configure Voicemail

1. Go to Settings → Phone Number → Voicemail
2. Record your after-hours greeting (use script from "12 Scripts" document)
3. Enable "Voicemail transcription"
4. Set transcription delivery: Email + SMS

### 3 Set Up Auto-Replies

1. Go to Settings → Auto-replies
2. Create after-hours auto-reply:

"Thanks for calling [Business Name]. We received your message and will respond within [X] minutes for emergencies or by [time] tomorrow for non-urgent requests."

### 4 Enable Call Recording (Optional)

Useful for training and quality control. Go to Settings → Call Recording → Enable.

# Common Setup Mistakes to Avoid

## **Mistake #1: Wrong timezone setting**

Calls route to AI during business hours, frustrating customers who expect to reach you.

*Fix: Double-check timezone in settings before going live.*

## **Mistake #2: Scripts too long**

Customers hang up before the AI finishes talking.

*Fix: Keep initial greeting under 15 seconds. Get to the point.*

## **Mistake #3: No emergency escalation**

Real emergencies get treated like routine calls.

*Fix: Set up immediate text + call notification for emergency keywords.*

## **Mistake #4: Forgetting to test**

You assume it works, then lose calls to a misconfigured system.

*Fix: Test every pathway before going live. Test again weekly.*

## **Mistake #5: Not telling your team**

On-call tech doesn't know about the new system, ignores notifications.

*Fix: Brief your team. Show them what the notifications look like.*

## Go-Live Checklist

Before activating your after-hours system:

- Account created and configured
- Business hours set correctly
- Timezone verified
- Scripts inputted and tested
- Calendar connected
- Notifications enabled (text + email)
- On-call tech phone number added
- Emergency escalation configured
- Test call completed (after hours)
- Test appointment booked successfully
- Team briefed on new system

### You're Ready!

Once all items are checked, your system is live. Monitor closely for the first week and adjust scripts based on real calls.

## What's Next

Now that your answering system is set up, move on to:

- **12 Done-For-You Scripts** — Copy-paste scripts for every scenario
- **Automation Templates** — Connect your CRM and automate follow-ups
- **ROI Tracking Dashboard** — Measure what your system is generating
- **30-Day Implementation Calendar** — Optimize over the next month

