SNAPSHOT SETUP GUIDE · HOME SERVICES

Home Services Starter

Setup Guide

Everything you need to turn the Home Services Starter into a live, branded system for service calls, estimates, maintenance plans, booking and reviews.

10	7	14	2
website pages	workflows	email templates	AI agents

Setup time	Inside	Updated
3 to 4 hours	Quick Start + full guide	November 2026

LEADBUILDLIVE

leadbuildlive.com

HOME SERVICES STARTER · QUICK START

The short path to live

Eight steps, about 3 to 4 hours in all. Do them in order. The full guide has the details for each one.

20 MIN

1 Fix what the install leaves behind

Set Home as the home page, publish the 4 forms, remove any "(Import)", re-pick the two stage triggers, and check the site code.

Guide: Step 0

15 MIN

2 Profile and brand

Workspace profile, logo, colors and fonts, and a workspace slug for review links.

Guide: Step 1

90 MIN

3 Replace the sample content

Swap Rainshadow for your business on every page: services, service area, prices, Comfort Club plan, photos. Remove the sample reviews. Fill in Privacy and Terms.

Guide: Step 2

15 MIN

4 Launch the site

Connect the domain, publish all 10 pages, and click every link on a phone and a computer.

Guide: Step 3

20 MIN

5 Calendars and booking

Set hours and team for the 3 calendars, connect Google or Outlook, turn off built-in emails, and re-link the Book Online buttons.

Guide: Step 4

45 MIN

6 Emails and workflows

Replace the Rainshadow name, number and links in all 14 emails, set the sender, then turn on all 7 workflows and test each form and a booking.

Guide: Step 6

20 MIN + WAIT

7 Phone, texts and reviews

Get a number, register for A2P with the Contact page wording, add your Google profile, and leave gating off.

Guide: Steps 7 and 8

30 MIN

8 AI chat and receptionist

Add credits, replace the Rainshadow facts and details, point chat booking at your calendar, then Publish the widget.

Guide: Step 9

Start this today. Start A2P text registration on day one. Carrier approval can take 1 to 3 weeks, and texts stay blocked until it clears.

What you're setting up

The Home Services Starter gives an HVAC or home service company a working system for service requests, replacement estimates, maintenance plan members, online booking and review requests, with a 10-page website. Every workflow arrives turned off, so nothing reaches a real customer until you say so.

Area	What you get	Notes
Website	10 pages: Home, Request Service, Free Replacement Estimate, Comfort Club, Book Online, Free Winterization Checklist, Winterization Checklist (download page), Contact, Privacy Policy, Terms of Service	Built around the sample brand Rainshadow Heating & Air
Forms	Request Service (with an emergency option), Free Replacement Estimate, Comfort Club Signup, Winterization Checklist Download	Already placed on their pages
Calendars	Service Call, Tune-Up, Free Replacement Estimate	Linked from the Book Online page
Pipelines	Service Calls, Estimates, Maintenance Plans	Stages listed in Step 5
Tags	Service Request, Emergency, Estimate Request, Comfort Club Member, Checklist Download, Appointment Booked	Workflows also add Past Customer
Email templates	14: service request received, estimate request received, 3 estimate follow-ups, appointment confirmation and reminder, Comfort Club welcome and renewal, winterization checklist, thank you and review request, team alert, plus spring AC and fall furnace tune-up campaigns	Written as Rainshadow samples
Workflows	7: service request, estimate request, estimate follow-up, Comfort Club signup, checklist delivery, booking confirmation and reminder, job completed review request	Installed turned off on purpose
AI agents	Website Chat (books Service Calls in the chat) and Phone Receptionist (answers, triages and takes a message)	Off until you add AI credits
Brand	Deep slate and pine green with a warm white background	Change in Settings > Branding

Before you start

Plan on 3 to 4 hours for setup, plus 1 to 3 weeks for text message registration (A2P) to clear. Gather these first:

- Logo (PNG, transparent background) and two or three brand colors
- Legal business name, license number, street address, main phone and email
- Service area: cities or ZIP codes you cover
- Business hours and your after-hours or emergency policy
- Services you offer and the brands you install
- Your maintenance plan: name, price, what's included and member perks
- Current tune-up and seasonal offers
- Photos of your team, trucks and real jobs
- Your Google Business Profile review link
- Real customer reviews you have permission to use

> **Who does what.** The agency installs the snapshot and connects the domain, phone number and sending domain. The business supplies the content above and approves the copy.

Step 0. Right after install

Install from Snapshots > My Snapshots > Install, and pick the workspace there. (Picking a snapshot in the Create Workspace dialog can leave the new workspace empty.) Then work in order from here. Each step builds on the one before, and the workflows stay off until Step 6 so nothing sends with sample content in it. Check these first:

1. **Set the home page.** The install marks Book Online as the home page. In Sites > your website > Pages, set Home as the home page.
2. **Publish the 4 forms.** Forms can arrive as drafts, so pages show "This form is not published" where the form should be. Open Forms and publish each one.
3. **Rename the workflows.** If any name ends in "(Import)", remove it.
4. **Re-pick the stage triggers.** The Estimate follow-up workflow (card moved to Estimate sent) and the Job completed workflow (card moved to Completed) lose their pipeline and stage on install. Open each trigger and pick them again.
5. **Check the site code.** Sites > your website > Settings > Code. Head should hold the "Site styling" script (it styles the phone menu and buttons). If it's empty, paste in the script from the appendix. Footer holds Rainshadow's chat loader: delete it. You'll attach your own chat in Step 9.
6. **Site and pages.** The site and pages may arrive unpublished. Publish them in Step 3, after you replace the sample content.

Step 1. Profile and brand

1. Settings > Workspace Profile: legal name, address, phone, email and time zone.
2. Settings > Branding: upload the logo and set your colors and fonts. The emails and chat widget use the brand colors.
3. Settings > Workspace Profile: set a workspace slug. Reputation needs it to build your main review link.

Step 2. Replace the sample website content

1. Sites > Rainshadow Heating & Air. The website comes filled in as **Rainshadow Heating & Air**, a fictional company in Portland, OR, so the demo looks finished. On every page, replace the name, phone number, service area, services, prices, Comfort Club details, offers and photos with your own, including the header, the footer and the license line. Rename the website in General, too.
2. Reviews on the site are labeled "Sample". Replace them with real reviews you have permission to use, or delete that section. Never publish invented reviews.
3. Comfort Club: set your plan name, price, what's included and member perks. Keep it matching the Comfort Club welcome and renewal emails.
4. Winterization Checklist: edit the checklist for your climate, or swap in your own lead magnet and rename both pages.
5. Book Online: the booking buttons point to the sample calendars. After Step 4, re-link each button to your own Service Call, Tune-Up and Estimate booking pages.
6. Publish each page after editing.

Privacy Policy and Terms of Service. Both pages are linked in every footer and already include the text-message terms carriers look for. Fill in your business name, address and state, and have both reviewed by a qualified professional before launch.

Step 3. Domain and launch the site

1. Sites > your website > Domain: connect the business's domain.
2. Visit every page on the live domain in a private window, on a phone and a computer. Click every header, footer and booking link.

Step 4. Calendars and booking

1. Calendars: open Service Call, Tune-Up and Free Replacement Estimate. Set the team member, working hours, visit length and buffer time, and connect Google or Outlook so busy times block off.
2. Turn off the built-in calendar confirmation and reminder emails. The booking workflow sends branded ones, and customers shouldn't get two.

3. Set each calendar Active with public booking on, then copy each booking link into the Book Online page (Step 2).
4. Booking pages don't ask for the service address by default. Add an address question, or confirm the address when you call.

Step 5. Forms and pipelines

1. Forms: check the dropdown choices fit your work, like system types, urgency, and the systems a Comfort Club plan covers.
2. Edit the success messages if your call-back times differ.
3. Pipelines arrive with these stages. Rename to fit, but keep Estimate sent and Completed (won) if you use the two stage workflows.

Pipeline descriptions don't copy over in a snapshot. Paste these back into each pipeline's settings:

Service Calls: Repair and service requests, from first call to completed job.

Estimates: Replacement and install estimates, from request to signed job.

Maintenance Plans: Maintenance plan members, from signup through renewal.

Pipeline	Stages
Service Calls	New request, Scheduled, Tech on the way, Job in progress, Needs follow-up, Completed (won), Cancelled (lost)
Estimates	Estimate requested, Visit scheduled, Estimate sent, Following up, Won, Lost
Maintenance Plans	Interested, Active member, Tune-up due, Renewal due, Renewed (won), Lapsed (lost)

Step 6. Emails, then turn on workflows

1. Email > Templates: all 14 emails are written as Rainshadow samples. In each one, replace the name Rainshadow Heating & Air, the phone number (971) 588-2156 and every link to rainshadow.flourishstack.com with your own name, number and domain. Then set the sender and send yourself a test of each.
2. The spring AC and fall furnace tune-up emails are campaigns. Update the offer and send them from Email > Campaigns when the season comes.
3. Make sure each contact gets an owner (Settings > Users, then assign). Call-back and scheduling tasks go to the contact owner.
4. Open each workflow and click Publish and turn on. Then submit each form once on the live site, book one test appointment, and confirm the card, the email and the task appear.
5. Test the two stage workflows by moving a test card to Estimate sent, then another to Completed (won).

Workflow	Starts when	What it does
Service request	Request Service form	Tags Service Request, sends the reply, adds a Service Calls card at New request, creates a call-back task. Emergencies get the Emergency tag and an urgent task
Estimate request	Free Replacement Estimate form	Tags Estimate Request, sends the reply, adds an Estimates card, creates a scheduling task
Estimate follow-up	Card moved to Estimate sent	Follow-up emails on days 2, 5 and 10, then a call task. Stops if the contact is tagged Job Won
Comfort Club signup	Comfort Club form	Tags the member, adds a Maintenance Plans card at Active member, sends the welcome, creates a first tune-up task, sends a renewal reminder at 11 months
Checklist delivery	Checklist form	Sends the checklist, then a tune-up offer 4 days later unless they've booked
Booking	Any booking	Tags Appointment Booked, sends the confirmation and a reminder 24 hours before
Job completed	Card moved to Completed (won)	Tags Past Customer, waits 2 hours, sends the thank-you with a review request

Edit email text with care. Each email's header bar and button color are written into its HTML. The visual email editor can drop those colors when it saves, which leaves white text on white. After you edit an email, open Preview and check the header bar and button still show.

Address and sender name. The platform adds a footer to every email: a mailing address and an unsubscribe link. Fill in the business street, city, state and ZIP in Settings > Workspace Profile, or emails fall back to the agency's address. US law requires a valid mailing address on every marketing email. Also set the from-name to the business name.

What to expect when you test. Workflows start about 90 seconds after a form is submitted, so wait two minutes before checking. Emails from a new sending domain often land in Gmail's Promotions tab at first.

Step 7. Phone and texts

1. Fund the wallet, then Phone > Numbers & routing > Get a Number. Put the new number on the website, in the emails and in both AI agents.
2. Complete A2P registration (Phone > Register). Texts stay blocked until it clears, which can take 1 to 3 weeks. Start this on day one.
3. Write your text templates after approval. Start every text with the business name and end with "Reply STOP to opt out."

Text opt-in and A2P registration. The Request Service, Free Replacement Estimate and Comfort Club forms each have two optional, unchecked consent boxes: one for service texts (replies, confirmations, reminders, arrival updates) and one for marketing texts (tune-up reminders and offers). They save to the SMS Non-Marketing Consent and SMS Marketing Consent fields. The Contact page holds the same boxes on its own, for carrier review. Before you send any text:

- Replace "Rainshadow Heating & Air" and the Rainshadow web addresses in every box with the name and domain you register under.
- Register your A2P 10DLC brand and campaign. In "How do contacts opt in," quote the box wording word for word, give the Contact page address, and link the Privacy Policy and Terms pages.
- Don't change the opt-in page or box wording after approval. Carriers check that it still matches.
- Only send service texts to contacts with the service box checked, and marketing texts to contacts with the marketing box checked.

Step 8. Review requests

1. Reputation > Setup > Platforms: add your Google Business Profile and set it as primary.
2. Reputation > Setup > Templates: set the SMS and email review request defaults. They don't copy over in a snapshot.
3. Leave review gating off. Gating screens out unhappy customers before they reach Google, which Google's review policy prohibits. Read and answer private feedback in Reputation instead.

Step 9. AI website chat and phone receptionist

1. AI Supercenter > Settings: add usage credits. The agents can't reply without them.
2. Website Chat > Knowledge: replace the Rainshadow facts with your own: services, service area, hours, emergency policy, Comfort Club details and how booking works. Blocks can't be edited, only added and deleted. Add yours, then delete the sample.
3. Read both agents' instructions and change every Rainshadow detail (name, phone number, web address, service area) to yours. Keep the safety line: if a caller smells gas, they leave the house and call the gas company from outside.
4. Website Chat: point its booking action at your own Service Call calendar. In Chat widget > Identity, change the name, first message and colors. Turn the agent on, attach it at Sites > your website > General > Chat Widget, then click Publish widget in Test & deploy.
5. Phone Receptionist: in Voice & speech, turn on Voice enabled and check these settings, which may not copy over. Assign your number in Call handling, set Who picks up first, and turn it on. Call it yourself and test a repair call, an estimate request and an after-hours emergency.
6. The phone agent takes a message and sends callers to your Book Online page. Leave hand-off to a person off unless someone is ready to take transfers.
7. Both agents say they're virtual assistants when asked. Leave that in.

Launch checklist

- [ ] No "Rainshadow", (971) 588-2156 or rainshadow.flourishstack.com left anywhere: search each page, email, form consent box and AI agent
- [ ] No "Sample" reviews left on the site
- [ ] Logo, colors and business name show on the site, emails and chat widget
- [ ] Every page is published and every link works on the live domain, including all three booking buttons
- [ ] One test submission of each form, and one test booking, create the right card, email and task
- [ ] All 7 workflows published and turned on; stage triggers re-picked
- [ ] Built-in calendar emails turned off
- [ ] Phone number active and A2P approved before any text goes out
- [ ] Google review link added and set as primary; review gating off

- [ ] AI credits added; both agents tested and turned on
- [ ] Test contacts and test cards deleted

Known quirks

- **Things a snapshot doesn't copy:** pipeline descriptions, review request defaults, the phone agent's transfer number, some agent voice and widget settings, and sometimes site code. Steps 0, 5, 8 and 9 cover each one. The AI agents also arrive turned off until you review them.
- **Stage triggers:** workflows that start when a card moves stage need their pipeline and stage re-picked after install (Step 0).
- **Builder Save publishes:** clicking Save in the page builder on a page that's already published puts the change live right away.
- **Form preview looks dark:** in the app's dark mode, the form preview shows dark input fields. The live site shows them light.
- **Phone agent model:** keep the receptionist's model on Auto or an OpenAI model. Other models can't stream on phone calls and sound choppy.

Appendix: site styling script

Paste this into Sites > your website > Settings > Code > Head only if Head is empty after install. It styles the phone menu and the header button. (The sample site also adds a gentle scroll animation; this short version leaves that out.) To match your brand, change #1E3D4C (menu background) and #3D7A6D (buttons).

```
<script>
/* Site styling (injected by script because head code sits in a consent template) */
(function(){
var s=document.createElement("style");
s.textContent="div[style*='object-fit:contain'] > img{object-fit:contain!important;width:100%!important;h
eight:100%!important}"
+"div[style*='object-position:left center'] > img{object-position:left center!important}"
+"@media (max-width:767px){"
+"section:has(.gt-canonical-header) .builder-section-container,section:has(.gt-canonical-header) div:not
(header div){padding:0!important}"
+".gt-canonical-header{width:100%!important;box-sizing:border-box!important;padding:14px 20px!important}"
+".gt-canonical-header__brand img{object-position:left center!important}"
+".gt-canonical-header__toggle-button,.gt-canonical-header__mobile-close{background:transparent!importan
t;color:#ffffff!important;border:1.5px solid rgba(255,255,255,0.45)!important;border-radius:10px!importan
t}"
+".gt-canonical-header__mobile-menu,.gt-canonical-header__mobile-menu-bar{background-color:#1E3D4C!import
ant}"
+".gt-canonical-header__mobile-link{color:#ffffff!important}"
+".gt-canonical-header__mobile-cta{background:#3D7A6D!important;color:#ffffff!important;border-radius:10p
x!important;margin:12px 16px!important;width:auto!important;justify-content:center!important}}"
+".gt-canonical-header__desktop-cta{background:#3D7A6D!important;color:#ffffff!important;border-color:#3D
7A6D!important}";
document.head.appendChild(s);
})();
</script>
```

Questions or stuck on a step?
Email hello@leadbuildlive.com and include your workspace name.

LEADBUILDLIVE