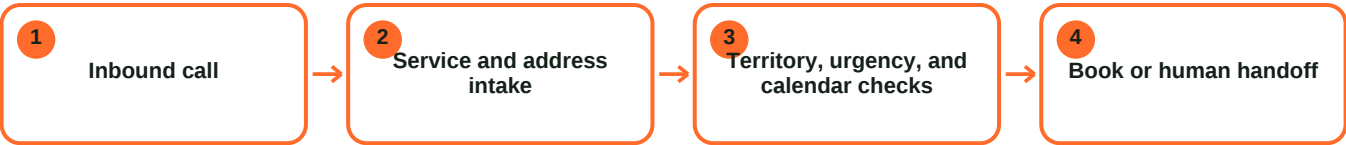


Home Service AI Receptionist Setup Workbook

Define services, territory, intake, scheduling, emergency boundaries, and human handoffs before live calls.



Define your operating rules

Accepted and excluded services	
Service-area source of truth	
Calendar or field-service system	
Emergency category owner	
Primary and backup handoff roles	
AI disclosure and caller opt-out	

Decision notes

Readiness checklist

Attach a written rule, owner, or test result to every checked line. A blank answer is a reason to keep that path out of the first launch.

- ☐ List the services accepted, excluded, restricted, and subject to office review.
- ☐ Define ZIP codes, territories, travel limits, hours, after-hours rules, and blackout dates.
- ☐ Record durations, buffers, crew skills, capacity rules, and jobs that cannot be booked automatically.
- ☐ Choose the source of truth for availability and the required customer, address, and job fields.
- ☐ Write the exact questions used to identify service type, location, access, and immediate safety concerns.
- ☐ Define objective emergency categories without allowing the assistant to diagnose a condition.
- ☐ Assign primary, backup, timeout, and final fallback rules for every human escalation.
- ☐ Approve the AI disclosure and give callers a clear way to request a person.
- ☐ Test out-of-area, unsupported, urgent, unavailable, reschedule, and human-request calls.
- ☐ Assign a review owner and cadence for services, territory, contacts, and live-call exceptions.

Test scenarios

☐ Normal booking Result / owner: _____	☐ Out of area Result / owner: _____	☐ Unsupported service Result / owner: _____
☐ Emergency trigger Result / owner: _____	☐ No availability Result / owner: _____	☐ Caller asks for staff Result / owner: _____

Ready to scope the workflow? Book a meeting at <https://humcrew.com/contact>. We will review the operating rules first, then discuss scope and pricing.