NEVER MISS A LEAD · HANDOFF PACK

Every missed call answered, and texted back.

Built for Brightline Heating & Air. Missed calls are answered and texted back inside an answering app you own, using your own prices and rules.

01 Your setup at a glance
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Brightline Heating & Air

Prepared by Open Arm Solutions · Delivered October 2026

SAMPLE · FICTIONAL BUSINESS

01 · YOUR SETUP AT A GLANCE

Missed calls now get an answer, day and night.

Missed calls are answered and texted back inside an answering app you own, using your own prices and rules.

24/7	< 1 min	4	95%
Calls answered	Missed-call text back	Call types handled	Test calls passed first time

Where it's set up

TOOL	WHO USES IT	WHAT IT DOES	STATUS	LAST UPDATED
Answering app	Callers	Answers when the office can't, takes job details, books tune-ups	Live	Nov 3, 2026
Missed-call text back	Callers	Texts every missed caller within a minute	Live	Nov 3, 2026
Owner alerts	Owner, on-call tech	Texts urgent and safety calls at once	Live	Nov 3, 2026
Call log	Office team	Summaries of every call, ready to call back	Live	Nov 3, 2026

Call scripts and rules last updated Nov 3, 2026.

How it connects

Never Miss a Lead
Set up once, in your accounts

→

- **Answering app**
- **Missed-call text back**
- **Owner alerts**
- **Call log**

Start using it today

1. Read the call log
Open the app's Calls page.

2. Change your hours
Text us the new hours and from when.

3. Pause answering for a day
Use the app's 'Pause' switch.

02 · HOW CALLS ARE HANDLED

What callers hear, and what happens next.

Each case says what the answering app does, the words it uses, and when it passes the call to a person.

Missed call during business hours

WHAT HAPPENS

Rings the office 4 times, then the app answers. It answers from your price list and booking rules, and texts a booking link.

WHAT THE APP SAYS

> *"Thanks for calling Brightline. Everyone's with a customer right now. I can answer questions or get you booked. What's going on with your system?"*

PASSED TO A PERSON WHEN

The caller asks for a person, or it's a complaint.

NEVER SAY

That a technician is on the way, or a repair price.

After-hours no-cooling call

WHAT HAPPENS

Takes the address and problem, explains the $189 after-hours fee (waived if the repair goes ahead), and texts the on-call tech.

WHAT THE APP SAYS

> *"I can have our on-call technician call you back within about 30 minutes. There's a $189 after-hours fee, and it's waived if you go ahead with the repair."*

PASSED TO A PERSON WHEN

Always: the on-call tech gets a text with the details at once.

NEVER SAY

A callback faster than 30 minutes, or that the $189 fee is waived before the repair is approved.

Also inside: Gas smell, smoke or sparks, Wrong numbers and sales calls, Existing customer checking an appointment.

03 · TEST REPORT

We made 20 test calls before going live.

Calls covered your top questions, after-hours emergencies, wrong numbers and urgent safety cases. 19 passed on the first run; the call that missed was fixed and re-tested.

20	19	1	95%
Test calls made	Passed first time	Fixed & re-tested	First-run pass rate

TEST CALL	WHAT HAPPENED	SCENARIO	RESULT
Sunday: wants a tune-up	First run offered Sunday. Now: emergencies only on Sunday; booked Monday 8-12.	Hours policy	Fixed
Weekday 10 a.m.: "How much is a tune-up?"	Answered $129, offered Thursday morning, texted the booking link.	Price list	Pass
Weekday 2 p.m.: wants a same-day visit	Explained same-day before 11 a.m.; booked tomorrow 8-12.	Booking rules	Pass
Comfort plan question	Explained $19 a month and what's included; texted the sign-up link.	Comfort plan	Pass
Duct cleaning price	Answered $399 per system up to 12 vents.	Price list	Pass
Second system on the same visit	Answered $99 for the second system.	Price list	Pass
New system quote	Booked a free in-home estimate.	Price list	Pass

Showing 7 of 20, misses first. Every row is in your test report and your portal.

Results by topic



04 · OWNERSHIP & ACCESS

Your accounts and files are yours: each one, who owns it, and where it lives.

Every account is in your name. We have helper access only, and you can remove it any time without breaking anything.

WHAT	ACCOUNT OWNER	OUR ACCESS	WHERE TO FIND IT
Answering app account	Brightline, billed to your card	Admin, removable	App dashboard › Assistant
Business phone number	Brightline, with your carrier	None	Carrier account
Business texting registration	Brightline (in your name)	None	App dashboard › Texting
Call scripts and rules	Brightline (Google Drive)	Editor, removable	Drive › Brightline AI › Calls
Call log and recordings	Brightline, in the app	Viewer, removable	App dashboard › Calls
Editable copies (Word, Google Docs)	Brightline	None	Portal › Files

Every file we handed over

FILE	FORMAT	WHERE IT IS
Call scripts and rules	Word + Google Docs	Drive › Brightline AI › Calls
Test call recordings (20)	MP3	App dashboard › Calls

Also yours: the handoff pack, the test report, this sheet and the 30-day results report, each as a PDF and an editable Word file, in your portal.

If you ever leave

Everything keeps working. Remove our access where it says "removable". We delete your portal within 30 days of your request or plan ending.

Who to contact

hello@openarmsolutions.com or text (954) 821-2598. We usually reply the same business day.

05 · 30-DAY RESULTS

Your first month with Never Miss a Lead.

Illustrative numbers for a sample business. Your real report is built from your own logs 30 days after launch.

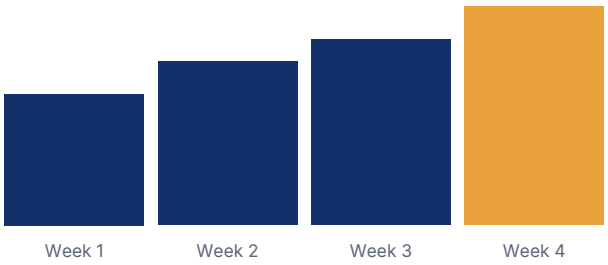
64
Calls answered by the app

37
Missed callers texted back

14
Jobs booked from those

9
After-hours calls handled

Calls answered per week



Why people called

Tune-up price and booking	21
No cooling or heating	16
New system estimate	9
Rescheduling	7

28%

Industry figure, not a result from this report. "On average, 28% of business calls go unanswered." Source: CallRail press release (CallRail call data), July 2026. https://www.prnewswire.com/news-releases/callrail-opens-voice-assist-to-every-business-now-with-

What we changed & next month's plan

Added
An answer for 'do you do gas line work?', asked 4 times.

Updated
Saturday hours changed to 8-1 in the app the same day.

Next
Text a reminder the day before each booked visit.

06 · KEEPING IT CURRENT

When something changes, it changes everywhere.

When prices, hours, services or policies change, these three steps keep every answer right.

KEEP IT RUNNING

Active · renews Dec 2

Price and policy updates, fixes, and a monthly check with a short report. Text or email any change.

To request a change

1. **Text or email us** at (954) 821-2598 or hello@openarmsolutions.com: what changed and from when.
2. **We update it once** and every tool gets the new answer. On Keep It Running, small changes are included.
3. **We confirm** by reply, with the test calls we re-ran.

How-to guides

Read the call log · 2 min

1. Open the app's Calls page. 2. Each call has a summary and the caller's details. 3. Call back anyone marked 'needs a person'.

Change your hours · 1 min

1. Text us the new hours and from when. 2. We update the app and the after-hours rules. 3. We confirm with a test call.

Pause answering for a day · 1 min

1. Use the app's 'Pause' switch. 2. Calls ring the office as before. 3. Switch it back on, or text us.

Where things stand

STEP	DETAIL	STATUS
Setup questionnaire	Received Sep 24	Done
Answering app set up & tested	Tested before handoff	Done
Calls forwarding	Live Oct 2	Done
30-day results report	Sent Nov 3	Done