



INDUSTRY PACK

AI Knowledge Base Starter Pack

HVAC Edition — copy, paste, and customize

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AI Voice Assistant + AI SMS for small businesses

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PepperSend AI Knowledge Base Starter Pack

HVAC Edition

A copy-paste-and-customize starter kit so your AI assistant sounds like it's been dispatching jobs at your shop for years — ready before the next heat wave hits.

Source file: Markdown source for the HVAC KB Template Pack PDF lead magnet. Convert to PDF (Canva) and place at `client/public/Lead-magnets/kb-pack-hvac.pdf` .

What's Inside

1. **A complete starter Knowledge Base** for HVAC — heating, cooling, ductwork, IAQ
2. **3 AI greeting scripts** in different tones (professional, friendly, dispatcher-direct)
3. **15 ready-made HVAC FAQs** with sample answers
4. **5 conversation handoff rules** for emergencies and overflow
5. **An emergency-detection keyword list** tuned for no-AC heat waves and no-heat cold snaps
6. **A complete sample conversation transcript** (no-AC during heat wave)
7. **A 1-page printable cheat sheet** for your dispatch desk

Section 1 — Your Starter Knowledge Base

Paste this into PepperSend's Knowledge Base editor and replace bracketed `[fields]` with your real info.

BUSINESS NAME: [Acme Heating & Air]

LICENSE: [State HVAC license number, e.g. "Utah HVAC License #12345"]

INSURANCE: [Brief – e.g. "Fully insured: \$1M general liability + workers comp"]

EPA CERTIFICATION: [Section 608 Universal – required for refrigerant work]

WHAT WE DO:

We are a [residential / commercial / both] HVAC service serving [city/region].
Specialties: [AC repair & replacement, furnace repair & replacement, heat pumps, ductwork, indoor air quality, mini-splits, commercial RTUs, maintenance plans – pick what applies].

SERVICE AREA:

We cover [list cities, counties, or radius from your shop].

Outside this area we [refer out / charge a trip fee / handle for emergencies only].

HOURS:

Standard: [Mon-Fri 8am-5pm]

Saturday: [hours, or "by appointment"]

Sunday: [hours, or "emergency only"]

Emergency 24/7: [yes/no – most HVAC pros say "Yes, with after-hours surcharge"]

PRICING (give the AI ranges, not exact quotes):

Service call / dispatch fee: [\$ amount, often \$89-\$129]

Diagnostic fee: [\$ amount, often "free with repair" or "\$X waived if you book the repair"]

AC tune-up: [\$ range, typically \$89-\$179]

Furnace tune-up: [\$ range]

Refrigerant recharge (R-410A): [\$ range, mention price varies by lbs needed]

Capacitor replacement: [\$ range, common no-AC fix]

Compressor replacement: [\$ range]

Full AC system replacement (3-4 ton): [\$ range, e.g. \$5,500-\$10,000]

Full furnace replacement (80k BTU): [\$ range]

Heat pump system: [\$ range]

Ductwork repair/cleaning: [\$ range]

Hourly labor (after diagnosis): [\$ amount]

ESTIMATES:

Free [in-person / over-phone] estimates for full system replacements

Most repairs require an in-person diagnostic before a firm quote

Diagnostic fee: [waived with repair / \$X if no repair done]

PAYMENT:

Accepted: [cash, check, all major cards, financing through GreenSky / Wells Fargo / Synchrony]

Financing approval typically 60 seconds via [provider]

[X% deposit / payment in full] required at job start

EMERGENCY POLICY:

Emergency = [no AC during heat advisory, no heat below freezing, gas smell, furnace smoke, water leak from system, high-CO alarm – define yours]

Emergency response time: [we can be on-site within X hours]

Emergency surcharge: [\$ amount, or "no surcharge during business hours"]

SEASONAL CAPACITY:

During [June-September / December-February] we book up fast. Same-day repair is typically possible but may be late afternoon. New installs scheduled within

[X days] during peak season, [Y days] off-season.

WARRANTY:

Workmanship: [1 year / 2 years / 5 years]

Parts: [manufacturer warranty – typically 5-10 years on AC/furnace parts, 10 years on compressors with registration]

[Optional: lifetime workmanship on full system installs]

WHAT WE DON'T DO:

[Plumbing, electrical beyond HVAC circuits, geothermal drilling, oil furnace, chimney work – list anything you should refer out]

MAINTENANCE PLANS:

[Yes/no, plan name, monthly/annual price, what's included – e.g. "\$15/mo includes 2 tune-ups, priority scheduling, 15% off repairs, no overtime fees"]

SCHEDULING:

Customers can book online at [URL] or by texting/calling.

Typical lead time non-emergency: [next-day / 2-3 days]

Peak season lead time: [X days]

KEY TEAM:

Owner/Operator: [Name]

Lead techs: [Names if you want the AI to mention them]

CITIES SERVED (alphabetical, helps AI answer "do you cover X?"):

[Aurora, Bountiful, Centerville, Draper, ...]

EQUIPMENT BRANDS WE SERVICE:

[Trane, Carrier, Lennox, Goodman, Bryant, Rheem, Daikin, Mitsubishi mini-splits, ...]

EQUIPMENT BRANDS WE INSTALL:

[Your preferred brand and any tier options – e.g. "Trane (premium), Goodman (value)"]

Section 2 — Three Greeting Scripts (Pick One)

PepperSend appends the required compliance footer ("Reply STOP to opt out...") automatically.

Greeting A — Professional

Hi! This is the AI assistant for [Business Name]. We just missed your call. To get a tech to you as fast as possible, what's going on with your heating or cooling? (For no-AC during a heat advisory or no-heat in a freeze, just type "EMERGENCY".)

Greeting B — Friendly

Hey there — sorry we missed you! This is [Business Name]. Heating or cooling issue? Drop me a quick note about what's happening and I'll get a tech rolling (or get you a quote in a few minutes).

Greeting C — Dispatcher Direct

[Business Name] here. Techs are on calls and missed yours. What's the issue — no AC, no heat, weird sound, water? If it's an emergency (heat advisory, no heat in freeze, gas smell), just say so and I'll dispatch.

Section 3 — 15 Ready-Made HVAC FAQs

Add these to the bottom of your Knowledge Base.

Q: My AC isn't blowing cold. What could it be?

A: Most common causes: low refrigerant (often a leak), a failed capacitor, a frozen evaporator coil from low airflow, or a tripped breaker. Capacitor replacement is the cheapest fix (\$[X]-\$[Y]). Refrigerant requires finding the leak first (\$[X] for leak detection + repair). Want a tech to diagnose? Same-day usually possible right now.

Q: How fast can you come out for no AC?

A: Same day during business hours. We prioritize "no AC" calls during heat advisories. Lead time today is roughly [X] hours. Want me to lock in a window for you?

Q: My furnace isn't lighting / no heat.

A: Could be a dirty flame sensor (cheap fix, \$[X]), bad ignitor, gas valve issue, or thermostat problem. We diagnose for \$[X] (waived if you book the repair). If it's below freezing tonight, this counts as an emergency – let's get someone there today.

Q: How much is a service call?

A: \$[X] for the trip and diagnostic. If we do the repair, the fee gets [waived / applied to the repair].

Q: Do you offer free estimates?

A: Yes – for full system replacement. For repairs, we need to see the equipment to give you an accurate quote, which is the diagnostic call (\$[X], waived with repair).

Q: How much does a new AC system cost?

A: For a typical 3-ton residential AC system, full installation runs \$[X]-\$[Y] depending on brand, SEER rating, and any ductwork or electrical upgrades. Heat pumps are \$[X]-\$[Y]. Tankless or geothermal? Different ballpark – happy to walk you through.

Q: Do you finance?

A: Yes – through [provider]. Approval usually takes 60 seconds. Most homeowners qualify for terms that keep monthly payments under \$[X] on a typical system replacement.

Q: Do you do maintenance plans?

A: Yes – \$[X]/month includes [2 tune-ups per year, priority scheduling, no overtime fees, and 15% off repairs]. Pays for itself the first time you need a service call after hours.

Q: My power bill jumped and I think it's the AC.

A: Could be a few things: low refrigerant making the unit run constantly, a failing compressor, dirty coils reducing efficiency, or undersized ductwork. We do a full efficiency check for \$[X]. Worth it for a \$200+ power bill spike.

Q: How often should I change my filter?

A: Every 1-3 months depending on filter type, pets, and how dusty your home gets. Cheap MERV 8 = monthly. Pleated MERV 11+ = every 3 months. If you can't remember the last time you changed it, that's probably your problem.

Q: Do you do duct cleaning?

A: [Yes – \$[X]-\$[Y] depending on home size / No, we refer to specialists].

Note: duct cleaning isn't usually a quick fix for poor airflow – most "low airflow" calls are blower or filter issues, not dirty ducts.

Q: I smell gas near my furnace.

A: Stop – this is an emergency. Step 1: Don't touch anything electrical.

Step 2: Get out of the house. Step 3: Call your gas company FIRST (they'll shut off the gas), then call us. Want me to dispatch a tech the moment the gas company clears the home? What's your address?

Q: My thermostat says one temperature but it feels different.

A: Common – could be a placement issue (thermostat in a sunny spot), a bad sensor, or your home's airflow is uneven. We diagnose and recommend a fix. Sometimes it's just a \$[X] thermostat replacement; sometimes it's a zoning issue.

Q: Do you handle commercial buildings / RTUs?

A: [Yes – restaurants, retail, small office. Mention size limits if any. / No, residential only.]

Q: Where are you located? Do you cover [city]?

A: We're based in [city] and cover [list of cities]. [X] is in our service area – what's going on with your system?

Section 4 — Handoff Rules

Configure these in PepperSend's AI Behavior settings:

1. **Emergency keywords** — see Section 5. Auto-escalates with "Dispatching a tech now" and SMS notification to dispatch.
2. **Customer asks for a human** — "can someone call me," "I want to talk to a person."
3. **AI confidence below 50%** — outside-KB questions go to a human.
4. **Lead captured** — name + phone + service request collected = hot lead, notify owner.
5. **Quote request over \$5K** — system replacement consultations always get a human callback for closing.

Section 5 — Emergency Keyword List

Add these to AI Behavior → Emergency Keywords:

no ac, no air conditioning, no cooling, no heat, no heating, freezing,
heat advisory, gas smell, smell gas, gas leak, smoke, smoking, smoldering,
water leak, water leaking, ceiling leak, condensation flood, carbon monoxide,
co alarm, co detector, hot, dangerously hot, can't sleep, baby, elderly,
medical, asthma, breathing, ice on, frozen coil, breaker tripped repeatedly,
emergency, urgent, asap, right now, can't wait

Section 6 — Sample Full Conversation

[Missed call from (385) 555-0188 at 1:14 PM, July 15, 100°F outside]

[1:14 PM] AI:

Hi! This is the AI assistant for Acme Heating & Air. We just missed your call. To get a tech to you as fast as possible – what's going on with your heating or cooling? (For no-AC during a heat advisory or no-heat in a freeze, just type "EMERGENCY".)

Reply STOP to opt out. Msg & data rates may apply.

[1:14 PM] Customer:

no ac at all, started this morning. it's 87 inside

[1:14 PM] AI:

That's miserable on a day like today – flagging this as urgent. Quick diagnostic questions:

1. Is the outside unit running (the big square box) or completely silent?
2. Is the inside unit blowing air at all (warm or otherwise)?
3. Do you hear a clicking or buzzing from the outside unit?
4. Have you tried the breaker yet?

[1:15 PM] Customer:

outside is silent, inside is blowing room temp air, breaker hasn't tripped

[1:15 PM] AI:

That sounds like a bad capacitor in the outside unit – extremely common in heat waves, and the cheapest possible fix (\$[X]-\$[Y] including the part). About 70% of "outside unit not running" calls turn out to be this. Worth getting a tech out today.

I have [Tech Name] available between 3-5 PM today. Address?

[1:16 PM] Customer:

1234 oak st centerville UT 84014. how long does the fix take?

[1:16 PM] AI:

Usually 30-45 minutes start to finish if it's just the capacitor. If something else is going on (compressor, contactor, refrigerant), tech will diagnose first and quote before doing more work – no surprise charges.

Locked in: today 3-5 PM at 1234 Oak St, Centerville. Best phone (this one)?

In the meantime: turn the thermostat OFF (not just to "fan") to prevent the indoor coil from freezing if it tries to cycle. Crack a couple windows on the shaded side of the house and pull a fan or two to push air around. We'll get you cooled down today.

[1:17 PM] Customer:

yes this number. and yeah we have an elderly parent here

[1:17 PM] AI:

Thanks for telling me – bumping you to the front of [Tech Name]'s queue. He should be there closer to 3 than 5. I'll text you again when he's 15 min out.

In the meantime, if anyone in the home shows signs of heat illness (dizziness, confusion, stops sweating), call 911 first.

Owner has been notified.

[1:17 PM] Owner notification SMS:

🚨 PRIORITY – No AC w/ elderly, 1234 Oak St Centerville, indoor 87°F. Likely capacitor. Booked [Tech] today 3 PM, bumped to front. Caller (385) 555-0188.

Section 7 — Printable 1-Page Cheat Sheet

PEPPERSEND CHEAT SHEET – [BUSINESS NAME]

WHEN A CUSTOMER CALLS AND WE MISS IT:

- AI texts them within 5 seconds
- AI triages: heat / cool / no AC / no heat / leak / gas smell
- AI books a service window OR escalates to dispatch

WHEN YOU GET A 🚨 PRIORITY NOTIFICATION:

- Open the SMS link → see full conversation → dispatch the next tech

WHEN AI ANSWERS A QUESTION YOU WISH IT ANSWERED BETTER:

- PepperSend → Knowledge Base → Gaps → write better answer

WHEN A CUSTOMER OPTS OUT (STOP):

- Auto-handled. Do not text them again.

ELDERLY/MEDICAL/INFANT FLAG:

- Bumps to front of queue automatically
- Owner gets priority notification

GAS SMELL / CO ALARM PROTOCOL:

- AI tells customer to call gas company FIRST
- Then notifies us to dispatch after gas company clears

PEAK SEASON DISPATCH RULES:

- No-AC heat advisory: same day, surcharge waived
- No-heat below 32°F: same day, surcharge waived
- Routine: schedule next available

SUPPORT:

cameron@peppersend.com

Other Industry Packs

- Plumbing
- Dental
- Legal
- Real Estate

Get them at peppersend.com/tools or reply to this email.