PIPEBEACON / OFFICE WORKFLOW CHECKLIST

Is your website inquiry ready for the first reply?

A practical check for plumbing business owners and office teams.
Review your current form and inbox. No new software required.

- [ ] **Gather useful contact details**
  Ask for a name, a reply method and a short description of the request. Collect only what your office needs.

- [ ] **Check the service area**
  Include a ZIP code or job location so the office can assess whether the request fits.

- [ ] **Explain what happens next**
  State who reviews requests and when. Use a response expectation your office can actually meet.

- [ ] **Set an urgent-request boundary**
  Explain whether the form is monitored for urgent requests. Use company-approved wording for another contact route.

- [ ] **Verify the office email alert**
  Submit a clearly labeled test on your own website. Check the right inbox receives the details, including Spam.

- [ ] **Keep replies under human control**
  Have a person confirm service fit, pricing and availability before sending. Review any AI draft.

- [ ] **Check the experience on a phone**
  Make sure labels are clear, required fields are obvious and the confirmation message is easy to read.

Want help organizing existing website inquiries?
Office email alerts + AI reply drafts for human review and sending.
Explore a scoped pilot: pipebeacon.net/pilot.html

Compatibility checked first. Written scope and quote agreed before setup.
pipebeacon@gmail.com | pipebeacon.net | General workflow guidance, not emergency advice.