



Employee Training Manual: Gaining Access to Housecall Pro

Objective

To guide new employees through the process of gaining secure access to Housecall Pro, the platform used for managing appointments, communicating with customers, and logging job details.



Core Principles

- Access to Housecall Pro is restricted to authorized employees only.
- Login credentials should never be shared or reused across other platforms.
- All activity in the app is tracked—use it responsibly and professionally.
- If you lose access or forget your password, report it immediately to your manager.



Step-by-Step: Getting Access to Housecall Pro

Receive Invitation from Manager

You will receive an email invitation from Housecall Pro once your account is created by your manager.

Open the Email and Click the Link

The invitation email will include a secure link. Click the link to set up your account.

Set Your Password

Choose a strong password that is not used elsewhere. Confirm the password to continue.

Download the App

Download the Housecall Pro app from the App Store (iOS) or Google Play Store (Android). You can also access it via a web browser.

Log In

Use the email and password you just set up to log in.

Confirm Your Profile

Once logged in, check that your name, phone number, and other contact details are correct.



Notify Your Manager

Let your manager know once you've successfully logged in so they can begin assigning jobs to you.

✨ Pro Tip to Elevate the Experience

Bookmark the login page or pin the app to your home screen for quick access. Always keep your app updated for best performance.

✅ Housecall Pro Access Checklist

- Received invitation email from manager
- Successfully created password and logged in
- Downloaded and tested the mobile app
- Profile information verified
- Manager notified of successful access





Employee Training Manual: Booking Jobs in Housecall Pro

Objective

To teach employees how to correctly book jobs using Housecall Pro—ensuring accurate scheduling, clear customer expectations, and efficient assignment of staff and services.



Core Principles

- Always confirm service details and availability with the customer before booking.
- Make sure to select the correct service type, team member, and duration.
- Use notes to record any special instructions or requests.
- Double-check customer contact information and address for accuracy.



Step-by-Step: Booking a Job in Housecall Pro

Log In to Housecall Pro

Use your staff credentials to access the desktop or mobile version of Housecall Pro.

Click 'New Job' or 'Book Job'

Start a new job by clicking the booking button on the dashboard.

Search for the Customer

Use the customer's name or phone number. If they're new, click 'Add New Customer' and enter their info.

Enter Job Details

Fill out the service address, contact number, and preferred service window.

Choose Services

Select the correct service from the dropdown menu and confirm the duration, rate, and quantity.

Assign a Team Member

Choose yourself or another staff member, based on who is available for the date and time.

Add Notes or Instructions

Include pet info, gate codes, or requests in the job notes section.



Review and Confirm

Double-check all details before clicking 'Schedule Job'. Confirm with the customer once it's booked.

✨ Pro Tip to Elevate the Experience

Use the repeat customer feature to save time for future bookings—this keeps history, preferences, and notes organized in one place.

✅ Job Booking Checklist

- Customer profile confirmed or created
- Correct services selected with clear pricing
- Staff assignment matches availability
- All notes, codes, or pet info included
- Customer received booking confirmation





Employee Training Manual: Collecting Payment with Housecall Pro

Objective

To guide employees through the correct and professional use of Housecall Pro to collect payments from customers at the time of service, ensuring fast, secure, and documented transactions.



Core Principles

- Never assume the customer hasn't paid—check the system first.
- We prefer customers pay via credit card in the app, but also accept cash, checks, and Venmo when logged appropriately.
- Never ask for a tip, but you may accept one if offered.
- Always confirm the total with the customer before charging or logging a payment.
- Record all payments in Housecall Pro before leaving the job site.



Step-by-Step: Collecting Payment Using Housecall Pro

Complete the Job

Only collect payment after the customer confirms they are satisfied with the work.

Check the Job Summary

Open the Housecall Pro app, go to the job, and review the invoice to confirm it matches the agreed price.

Ask Politely About Payment

Say: 'Would you like to take care of payment now, or have you already paid online?'

Tap 'Collect Payment'

Select 'Collect Payment' on the job screen.

Choose the Payment Method

Options include: credit/debit card (preferred), cash, check, or Venmo. Select the method the customer wants.



Process or Record the Payment

- For credit card: Hand your device to the customer or enter details securely.
- For cash or check: Mark it as received in the app.
- For Venmo: Select 'Other' and note it in the payment description.

Email or Text Receipt

Offer to email or text the receipt to the customer after processing.

Mark the Job Complete

Once payment is collected and confirmed, mark the job as 'Complete' in the app.

✨ Pro Tip to Elevate the Experience

Be calm and confident when collecting payment—present it as a normal part of service, not a sales pitch or awkward moment.

✅ Payment Collection Checklist

- Job completed and reviewed with customer
- Payment confirmed or politely requested
- Correct payment method selected and logged
- Receipt offered and sent
- Job marked complete in Housecall Pro

