RESTORATION INTEL • FIELD REFERENCE CARD

Yelp Agent Quick Card: What to Hand Yelp's AI Agent (Post 1799)

Current version — Nov 1, 2026. Update history:
https://restorationintel.com/what-do-you-hand-yelps-ai-agent/
Operational Reference • Smart Lead Reply Qualification Layer

THE FOUNDATION: WHAT YELP SMART LEAD REPLY ACTUALLY IS

Announced Oct 20, 2026 (Fall Release, $30/mo). Answers Request a Quote leads instantly in-thread, asks questions, gathers details, and qualifies before sharing your booking link. Integrates with ServiceTitan, Housecall Pro, Jobber, and Workiz. Yelp reports ~10% of Q2 quotes came through Yelp Assistant. **Restoration is unconfirmed at launch** — prep your qualification kit now so you configure in an afternoon instead of improvising when category eligibility opens.

THE 7 CORE FACTS TO HAND THE AGENT

Fact 1 Your Real Service Area

- **Exact Boundaries:** Name specific towns, ZIP codes, or maximum rolling radius.
- **Explicit "Won't Go" List:** List border towns and bridges you refuse to roll to.
- **The 40-Minute Credibility Trap:** An agent qualifying a lead 40 minutes out hasn't saved time; it spent your brand's credibility.

Fact 2 5 Triage Questions (Not Assessments)

1. **Is water still coming in?** (Active burst vs. stopped flow).
2. **Has the source been shut off?** (Immediate mitigation step).
3. **Where is the standing water?** (Basement, crawlspace, living area).
4. **Is sewage involved?** (Category 3 biohazard indicator).
5. **How long has it been wet?** (Urgency / microbial progression).

Fact 3 Defensible Pricing Guidance

- **Inspection / Dispatch Cost:** Quote exact emergency visit fee, or "Free" if that is your genuine field practice.
- **Never Price Work Sight-Unseen:** The restoration work itself must never be quoted in chat.
- **Hold Published Ranges:** Only feed ranges you strictly honor on-site.

Fact 4 Live Promos Only

- **Offers Live Today:** Feed only active promos you honor from a stranger.
- **The Screenshot Trap:** A dead promo in an AI's reply becomes a customer screenshot in a dispute.
- **No AI Apology:** The agent won't apologize for an expired coupon; you pay for it.

Fact 5 Inspection-Only Booking Link

- **Books Visit, Not Job:** Qualified lead books an on-site inspection window.
- **Prevent Unwinding:** Any job-level schedule commitment creates crew chaos.
- **System Sync:** Connects to ServiceTitan, Housecall Pro, or calendar.

Fact 6 The "No" List (Services You Don't Do)

- **Explicit Exclusions:** Reconstruction, pack-out, mold testing, asbestos, duct cleaning.
- **Clean Declines:** Agent declines cleanly or routes honestly.
- **Zero Fumbles:** Eliminates cold handoffs for work you cannot take.

FACT 7: THE 5 NON-NEGOTIABLE HANDOFF TRIGGERS

Trigger Condition	Why The Agent Must Stop Selling Instantly	Mandatory Human Action
1. Sewage or Contamination	Category 3 biohazard liability; requires PPE, specialty protocols, and licensed protocols.	Senior technician calls lead immediately.
2. Injury or Structural Danger	Physical safety hazard; high liability risk; requires site safety evaluation.	Emergency dispatch & safety advisory.
3. Insurance Claim Already Filed	Policy coverage boundaries, claim numbers, and carrier authorization protocols apply.	Intake coordinator reviews carrier details.
4. Commercial Property > Shop Size	Exceeds standard residential capacity; requires commercial drying equipment calculations.	Commercial ops lead takes thread.
5. Adjuster or Attorney Mentioned	Formal dispute, legal liability, or complex scope negotiation underway.	Owner or claims manager handles directly.

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Yelp Agent Quick Card: Operational Guardrails & Human Boundaries

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https://restorationintel.com/what-do-you-hand-yelps-ai-agent/
Operational Reference • Human-Only Boundaries & Rollout Watch

WHAT STAYS STRICTLY HUMAN (THE 4 NON-NEGOTIABLE BOUNDARIES)

1. The Assessment Stays Human

- **Meters & Scope:** Moisture readings, IICRC Category & Class of water, psychrometric targets, and tear-out vs. dry-in-place decisions.
- **Chat Diagnosis Trap:** The moment agent questions sound like diagnosis, it practices your trade without a license, moisture meter, or insurer knowledge.
- **Intake Only:** Agent gathers location and status; human performs assessment.

2. Coverage Conversations Stay Human

- **The Policy Guess Trap:** Most dangerous sentence an agent can type is guessing what insurance covers.
- **Exclusions & Deductibles:** Deductibles, sudden vs gradual exclusions, and coverage determinations belong strictly to human staff.
- **No AI Promises:** An agent characterizing coverage makes promises in your name that you end up paying to keep.

3. Adjuster Interactions Stay Human

- **Documentation & Supplements:** Scope disputes, line-item justification, dry logs, and carrier negotiations run on records, judgment, and accountability.
- **Customer Trust:** Customers judge your shop when your invoice meets the carrier's number — an AI cannot defend your scope.
- **Strict Boundary:** Never permit AI to discuss claim numbers or line items.

4. Job Pricing Stays Human

- **Visit vs. Job:** Agent quotes inspection fee or dispatch policy only. The job price is built on-site.
- **On-Site Walk:** Job total requires walking the loss, reading moisture meters, and standing behind the estimate.
- **Liability Line:** That boundary is not a software limitation — it is the line between a qualification agent and a liability generator.

THE PREP IS THE PRODUCT: INTAKE PROCESS WRITTEN DOWN

WHY WRITTEN PREP PROTECTS EVERY CHANNEL

Service area, triage questions, defensible pricing, live promos, booking links, no lists, and handoff triggers are **not just AI config files** — they are your shop's intake process written down. A process not written down gets improvised by an answering service on a bad night, by a new hire on day three, and by an AI at machine speed. As documented in *AI Won't Fix a Broken Process*, writing this kit takes an afternoon and improves every intake channel today.

WHAT TO WATCH IN NOVEMBER: ROLLOUT READINESS CHECKLIST

Area to Watch	Operational Reality & Risk	Action Required
1. Yelp Business Account	Check Yelp Business Owner Account directly. Toggle will appear under Request a Quote if restoration categories open.	Check account weekly; ignore unofficial headlines.
2. AI Message Disclosure	Neither release nor blog confirms if replies are labeled AI. Homeowners discovering an AI agent judge the shop.	Assume discovery happens; ensure all answers sound professional and defensible.
3. Missed-Call Economics	Restorers pay heavily for dead leads (see *Don't Pay for Missed Calls*). Instant reply wins leads only if accurate.	Deploy booking link only with verified service area & no-services exclusions.
4. Software Integrations	Direct booking available via ServiceTitan & Housecall Pro; CRM sync via Jobber & Workiz.	Verify calendar availability windows match crew reality.