The Contractor Software Setup Playbook

Choose and set up job management software in one weekend

By the SmallBiz Marketing team
Contractor marketing specialists · 20+ years of marketing experience

smallbizmarketing.net

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Choose and set up job management software in one weekend.

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PART 1

The essentials

The core steps, in order. Start here.

SECTION 02

Do you need it yet?

Software pays off when admin work starts costing you jobs: late quotes, missed follow-ups, unpaid invoices. If that sounds familiar, set it up now.

SECTION 03

Your first 60 minutes

- Write down the steps from first call to final payment in your business today
- Circle the steps that get delayed or forgotten
- Start free trials of both Jobber and Housecall Pro

SECTION 04

Choosing between the two leaders

RECOMMENDED TOOL

Jobber

Strong at professional quotes and a client hub where homeowners approve quotes and pay online.

Visit Jobber at getjobber.com →

RECOMMENDED TOOL

Housecall Pro

Mobile-first, with more customer communication and marketing automation built in.

Visit Housecall Pro at housecallpro.com →

- Choose Jobber if your office side and quote presentation matter most
- Choose Housecall Pro if you run most of the business from your phone in the field
- Try both free trials with one real job before you decide

SECTION 05

Weekend setup plan

- Saturday morning: company details, logo, services and prices
- Saturday afternoon: quote template with your terms, deposit and warranty
- Sunday morning: connect payments and set up deposits
- Sunday afternoon: import clients and turn on reminders and review requests

SECTION 06

Quote template that wins high-end jobs

- Clear scope of work, room by room
- Materials and finish options
- Timeline with milestones

- Payment schedule with deposit
- Warranty and what happens if something changes
- Photos of similar past projects

SECTION 07

Automations to turn on

- [ ] Quote follow-up after 3 days
- [ ] Appointment reminders
- [ ] Invoice reminders
- [ ] Review request when a job closes

PART 2

Going deeper

The strategy behind each step, with frameworks and diagrams.

SECTION 09

Deep dive: getting your crew to actually use it

Software only works if everyone uses it. Start with the minimum: crew members need to see their schedule, job notes and photos. Show them on a real job, not in a meeting. Make the app the single place for job details so nobody relies on texts.

Give it two weeks before judging. The first week always feels slower. By week three, most teams notice fewer missed details and faster invoicing.

- Train on a real job, in the field
- Make the app the only source for schedules and job notes
- Ask crew to upload progress photos for each job
- Review after three weeks, not three days

SECTION 10

Deep dive: quotes that close

Your quote is a sales document. Clear scope, real photos and options make it easy for a homeowner to say yes. Send it fast, ideally within 48 hours of the consultation, while excitement is high.

Follow up automatically after three days. Many homeowners intend to sign but get busy. A friendly reminder brings many back. If they decline, ask what tipped the decision. The answer improves your next quote.

- Send within 48 hours
- Include options and photos of similar work
- Automatic follow-up after three days
- Ask for feedback on lost quotes

SECTION 11

Deep dive: cash flow and payments

Online payments speed up cash flow. Clients can pay deposits and invoices from their phone, and automatic reminders reduce chasing. Set up deposits and progress payments for longer projects so you are never funding materials out of pocket for weeks. Check your state's rules on deposits and keep your terms clear in writing.

- Take deposits online when quotes are approved
- Use progress payments on multi-week jobs
- Automate invoice reminders

SECTION 12

The big picture: software that saves you hours

Job management software takes the paperwork off your plate: quotes, schedules, invoices, payments and follow-ups. The goal is fewer missed details and faster payment.



A full job cycle running inside your software.

SECTION 13

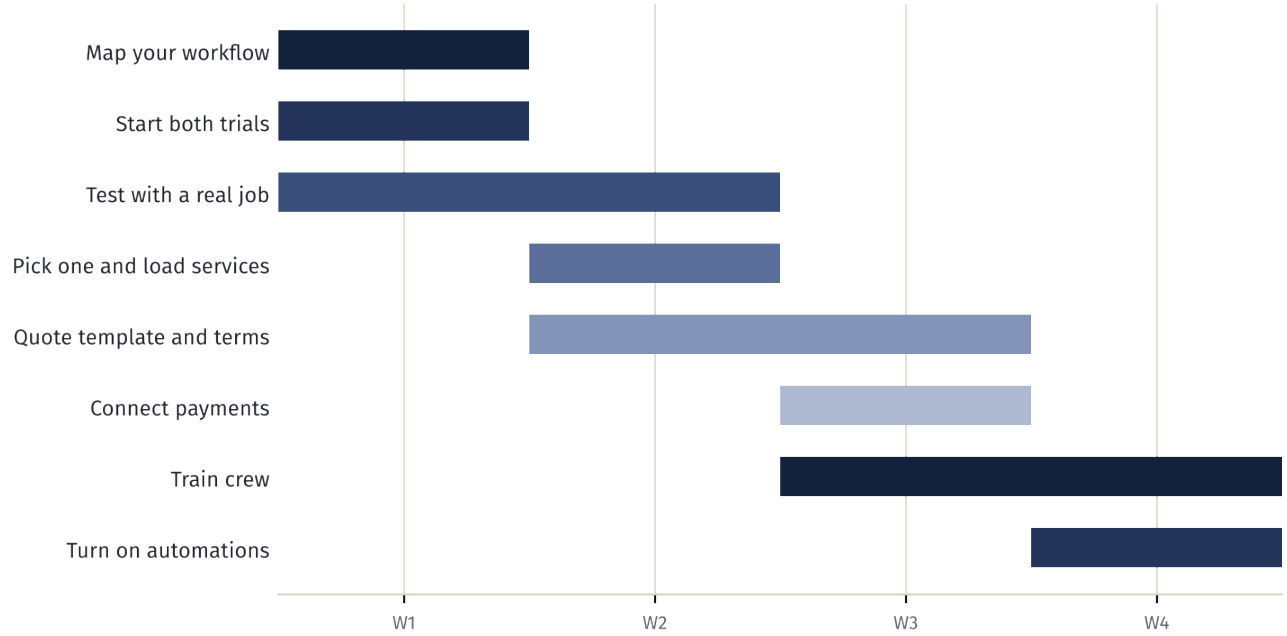
Jobber or Housecall Pro?



A quick way to see which tool matches how you work. Try both trials before deciding.

SECTION 14

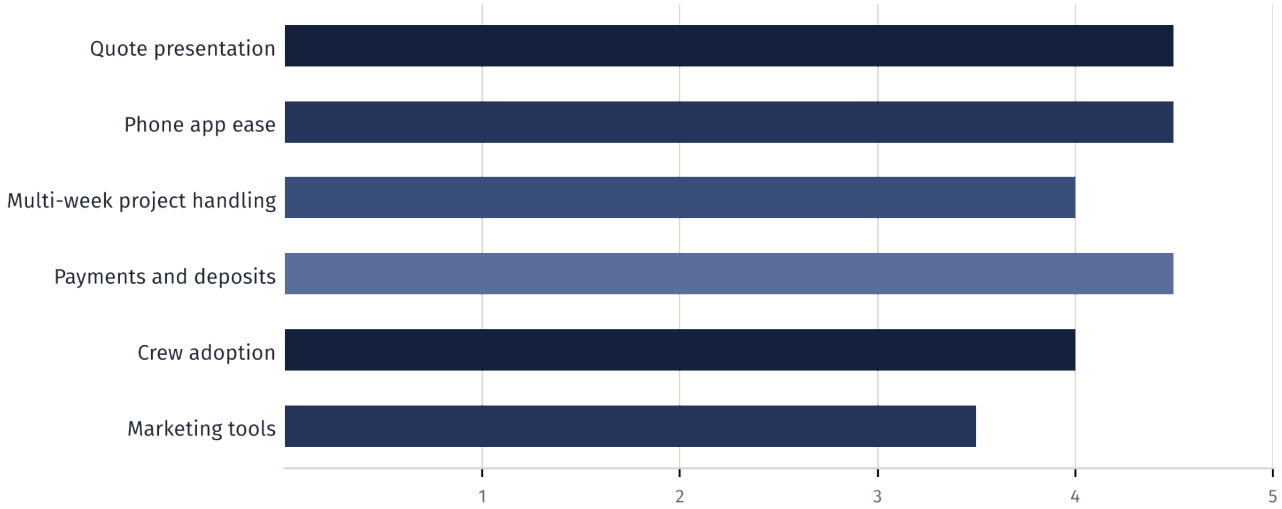
Your setup timeline



A month from choosing to fully running. W = week.

SECTION 15

Comparison scorecard



Example of how one remodeler might weight what matters, rated 1 to 5. Score each tool yourself during the trials.

SECTION 16

Real-world scenario: from paper to app (illustrative)

This is an illustrative example. Ray runs his remodeling business from a notebook, texts and spreadsheets. Quotes take a week, deposits get forgotten and invoices go out late.

Ray maps his job steps, tests Jobber and Housecall Pro with a real job, and picks the one his crew finds easiest. He loads his services, writes a branded quote template with good, better and best options, and turns on deposit collection and quote follow-ups.

Within a month, quotes go out within two days, deposits come in online, and reminders handle the chasing he used to do himself.

The lesson: software pays off when it fixes the specific steps that were slowing you down.

SECTION 17

Troubleshooting: software problems

Crew won't use the app	Train on a real job and make the app the only place for schedules and notes.
Quotes still go out slowly	Build quote templates for your most common projects.
Clients pay late	Collect deposits at approval and turn on automatic invoice reminders.
Too many features, too confusing	Turn off what you don't use and add features one at a time.

PART 3

Tools you can use today

Examples, templates, worksheets, calendars and trackers.

SECTION 19

Worked example: your job workflow

EXAMPLE

1. Lead comes in from website form → 2. Consultation scheduled → 3. Quote sent within 48 hours → 4. Quote approved and deposit paid → 5. Job scheduled → 6. Progress payment → 7. Final walkthrough and invoice → 8. Review request sent automatically.

SECTION 20

Worked example: deposit and payment terms

EXAMPLE

30% deposit to schedule, 40% at rough-in or tile start, 30% at final walkthrough. Adjust to your state's rules and your own policies.

SECTION 21

Worksheet: your setup

Services and default prices to load

Your quote terms and warranty language

Deposit and payment schedule

Automations to turn on first

Who on your team uses the app daily

SECTION 22

Comparison scorecard

Use this while you test both trials. Score each from 1 to 5.

- [ ] Ease of sending a quote from my phone
- [ ] How professional quotes look to clients
- [ ] Scheduling for multi-week projects
- [ ] Taking deposits and progress payments
- [ ] Ease of use for my crew

SECTION 23

Common mistakes to avoid

- Picking software before mapping your workflow
- Importing messy client data without cleaning it
- Turning on every feature at once
- Not training your crew or office manager

SECTION 24

FAQ

Can I switch later?
Yes, but moving clients and history takes time. Test with a real job before committing.

Will clients actually use the online portal?
Many homeowners prefer approving quotes and paying online. Mention it during the consultation.

30-DAY ACTION CALENDAR

30 days to running your business in software

Do one task a day. Tick the box in your head, or print this page and cross off each day as you go.

DAY 1 Write your job steps	**DAY 2** Circle the delays	**DAY 3** Start Jobber trial	**DAY 4** Start Housecall Pro trial	**DAY 5** Add a real job to each
DAY 6 Send yourself a quote	**DAY 7** Compare quotes	**DAY 8** Compare phone apps	**DAY 9** Score both	**DAY 10** Pick one
DAY 11 Add company info	**DAY 12** Add logo	**DAY 13** Load services	**DAY 14** Load prices	**DAY 15** Write quote terms
DAY 16 Write warranty text	**DAY 17** Set deposit rules	**DAY 18** Connect payments	**DAY 19** Import clients	**DAY 20** Clean client list
DAY 21 Add crew users	**DAY 22** Train crew on a job	**DAY 23** Turn on reminders	**DAY 24** Turn on quote follow-up	**DAY 25** Turn on review requests
DAY 26 Run a full job	**DAY 27** Fix issues	**DAY 28** Review invoices paid	**DAY 29** Ask crew for feedback	**DAY 30** Plan next month

SECTION 26

copy-ready templates

TEMPLATE · COPY AND CUSTOMIZE

Quote introduction

Thank you for inviting us into your home, [Name]. Below is your proposal for [project], including the scope, materials, timeline and payment schedule we discussed.

TEMPLATE · COPY AND CUSTOMIZE

Change order note

Change requested: [description]. Added cost: [amount]. Timeline impact: [days]. Please approve before we proceed.

TEMPLATE · COPY AND CUSTOMIZE

Payment reminder

Hi [Name], a friendly reminder that invoice [number] for [project] is due on [date]. You can pay securely online here: [link]. Thank you!

TRACKER

Trial scorecard

What to test	Jobber score (1-5)	Housecall Pro score (1-5)	Notes
Send a quote from phone			
Quote looks professional			
Schedule a multi-week job			
Take a deposit			
Progress payment			
Crew app ease			
Client texts and reminders			
Review requests			
Reports			
Overall feel			

SECTION 28

glossary

Field service software	Apps that run quotes, scheduling and payments for service businesses.
Client hub	An online portal where clients approve quotes and pay.
Change order	A written approval for work added after the original quote.
Progress payment	A payment due at a milestone during a project.

SECTION 29

Recommended tools

Every tool recommended in this playbook, in one place. Some links may be affiliate links; we only recommend tools we use or would set up for clients.

RECOMMENDED TOOL

Jobber

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RECOMMENDED TOOL

Housecall Pro

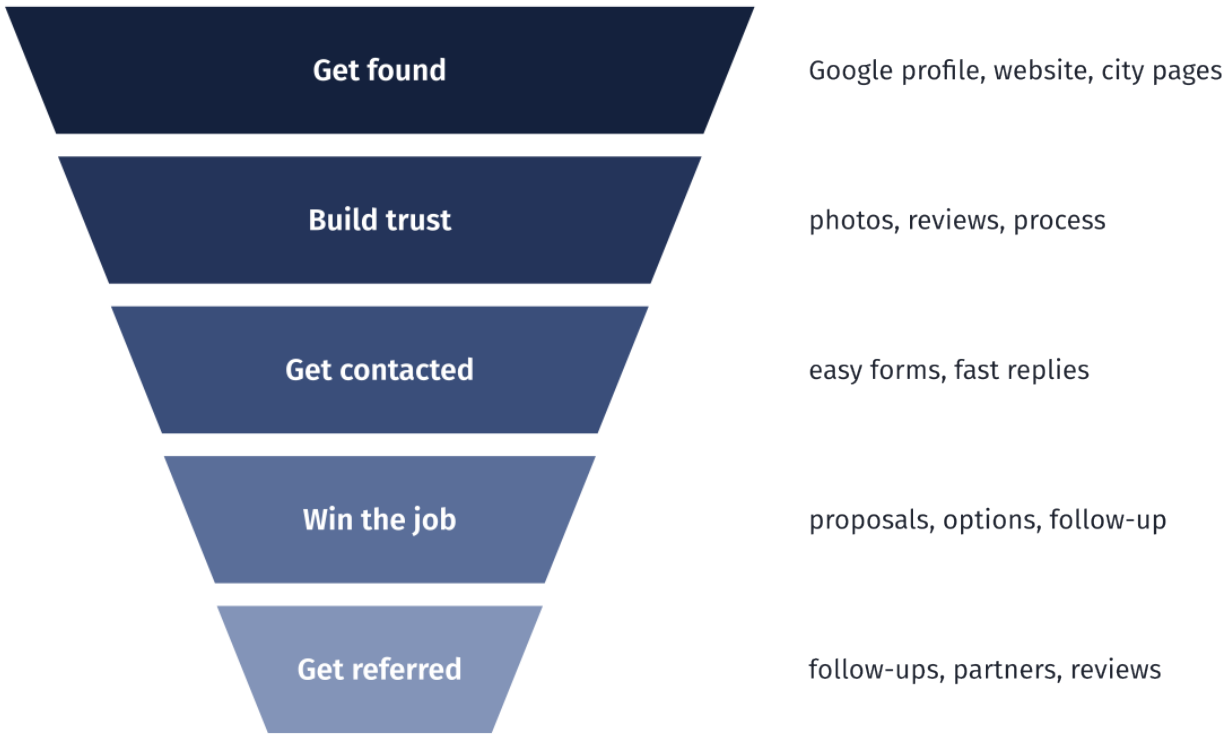
Mobile-first, with more customer communication and marketing automation built in.

Visit Housecall Pro at housecallpro.com →

SECTION 30

Bonus: the contractor marketing system on one page

Every playbook in this series fits into one simple system. Homeowners find you, trust you, contact you and refer others. Each part supports the next.



The five stages of contractor marketing and the tools for each.

SECTION 31

Bonus: your weekly marketing hour

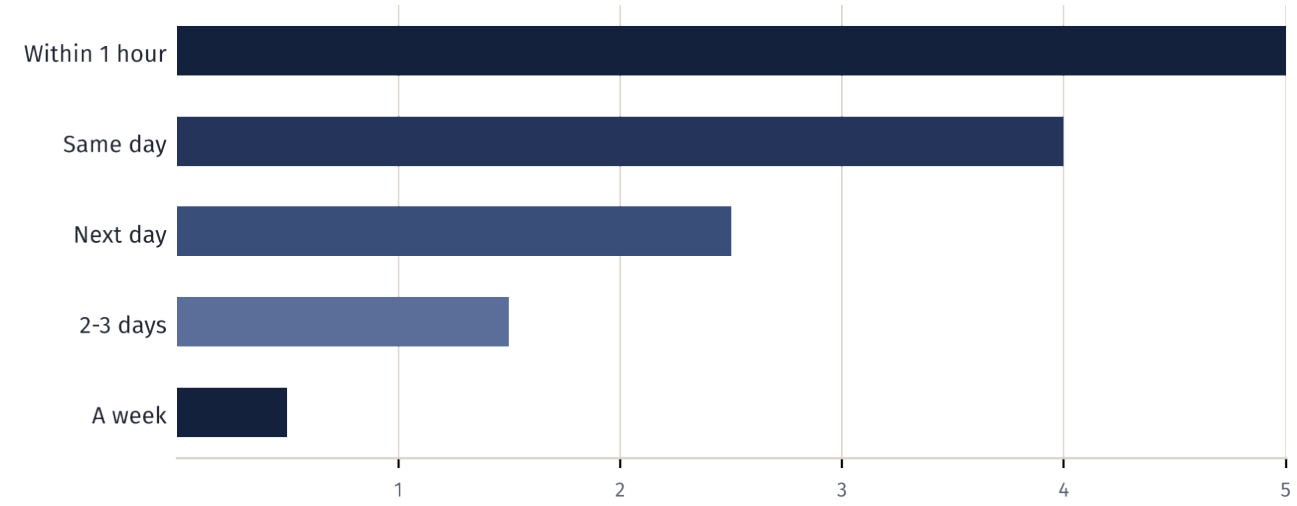
You don't need a marketing department. One focused hour a week, done consistently, beats occasional bursts of effort.

- First 15 minutes: answer every new lead and message
- Next 15 minutes: send review requests for finished jobs
- Next 15 minutes: upload new project photos to your website and Google
- Last 15 minutes: work on one improvement from your current playbook

SECTION 32

Bonus: how fast to reply to a lead

Homeowners often contact several contractors at once. The first professional reply makes a strong impression.



Our view of how reply speed affects your chances of winning the job, rated 1 to 5. Based on experience, not a study.

SECTION 33

Bonus: master checklist

- [ ] Website with a page for each main service
- [ ] Contact form on every page
- [ ] Google Business Profile complete and active
- [ ] Review request after every job
- [ ] Real project photos added monthly
- [ ] Pages for your top cities
- [ ] Job management software for quotes and payments
- [ ] Follow-up with past clients and partners
- [ ] One marketing hour every week

SECTION 34

Bonus: when to get help

Doing it yourself works if you have the time. If your calendar is full of jobs, it's often worth having a professional set up the foundation so you can focus on the work you do best. SmallBiz Marketing builds premium contractor websites and Google setups and can run your monthly marketing for you.

ABOUT SMALLBIZ MARKETING

SmallBiz Marketing builds premium websites and Google visibility for home-improvement contractors. Our team brings 20+ years of marketing experience, and every playbook is built from the same systems we use for client websites.

Rather have it done for you?

We build premium websites and Google setups for contractors, live in 5 days. Tell us about your business through the contact form at smallbizmarketing.net/contact.

Contact us →

Contractor website	$2,495
Website + Google setup	$3,495
Monthly growth plan	$995/mo

Some links in this playbook may be affiliate links. We only recommend tools we use or would set up for clients. Tool features and pricing change; check each company's site for current details.