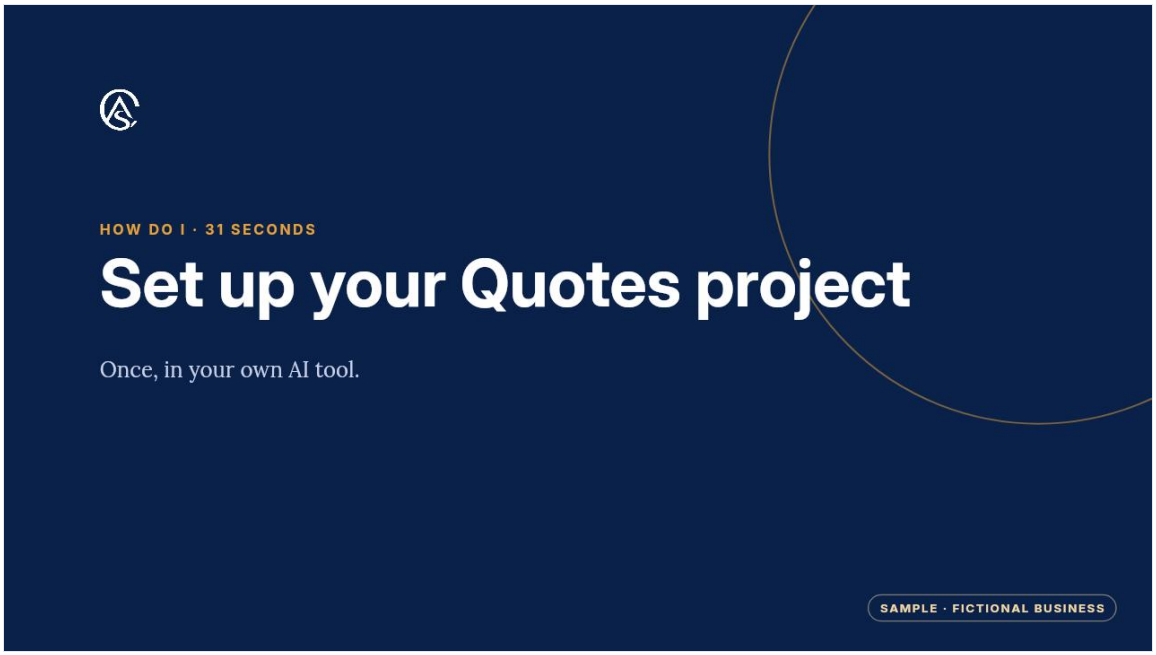
QUOTE & FOLLOW-UP ASSISTANT · HOW DO I

How do I set up my Quotes project?

One project with your price list, template and instructions.

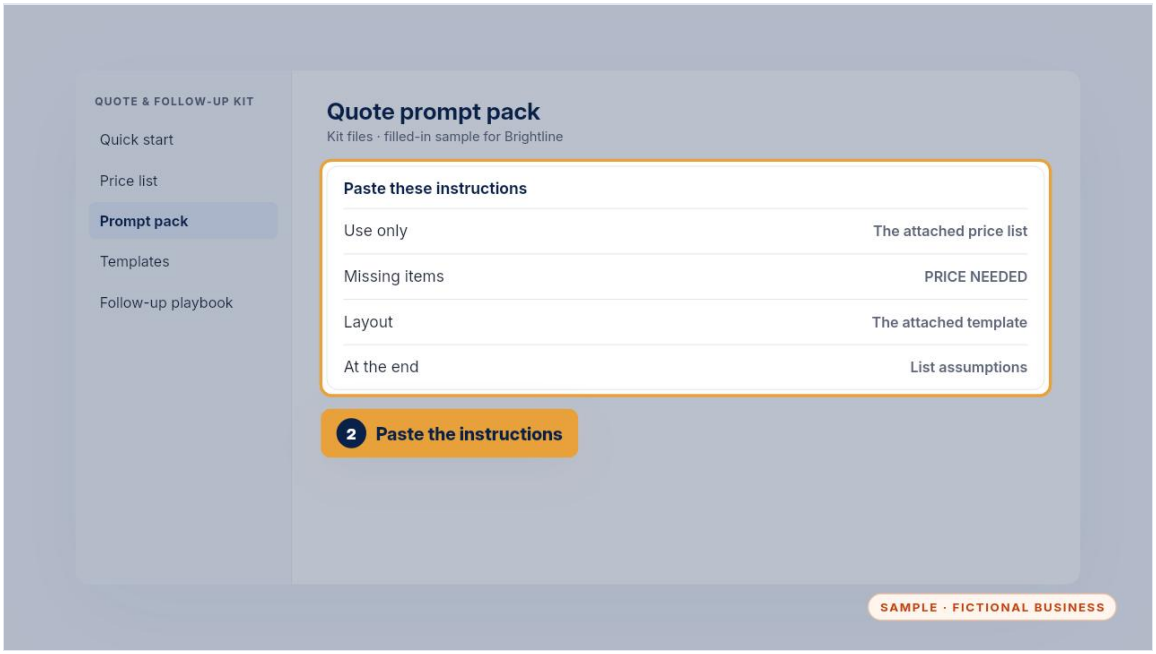
Watch the narrated video: https://openarmsolutions.com/guides/quote-follow-up/set-up-your-quotes-project



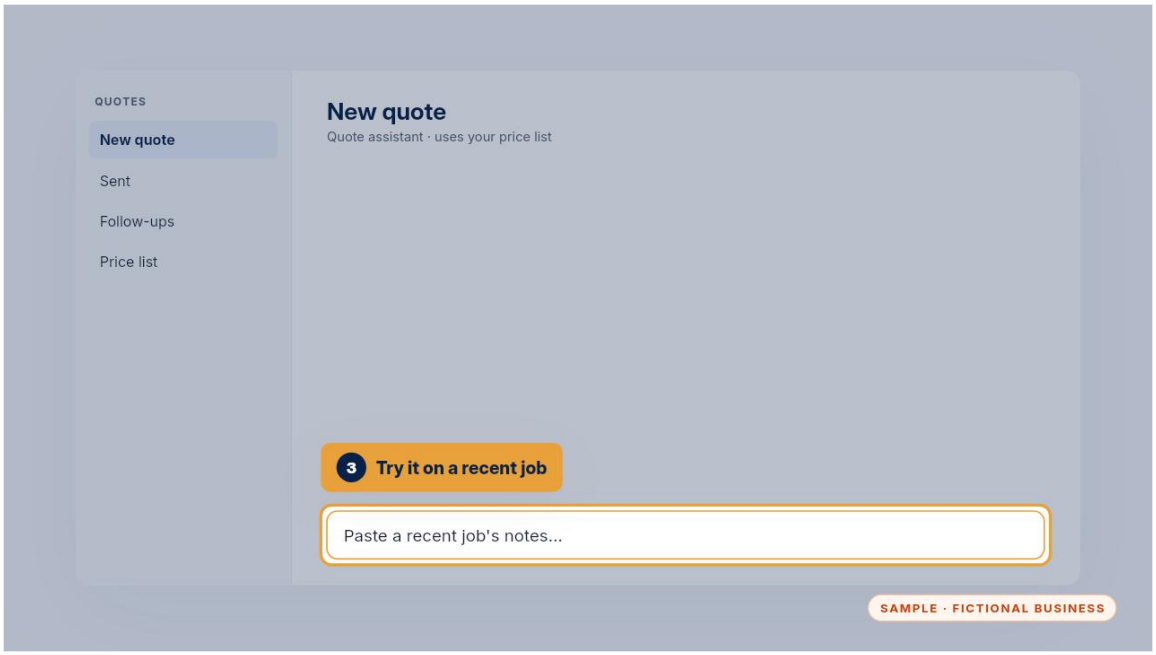
1. You set up the Quotes project once, in your own ChatGPT or Gemini business account.



2 Create a project called Quotes, or a Gem in Gemini. Add your price list and your quote template as files.



3 Paste the instructions from the prompt pack. They tell it to use only your prices, follow your template, and list its assumptions.



4 Then paste a recent job's notes and compare the draft with what you charged. That's your first check that the price list is right.