CUSTOM AI ASSISTANT · HANDOFF PACK

Everything your business knows, ready for AI.

Built for Parkside Accounting. Your services, prices, policies and answers, packaged once and loaded into the tools your team already uses.

01 Your setup at a glance
02 What your AI knows
03 Test report: 50 question test
04 Ownership & access
05 30-day results
06 Keeping it current

Parkside Accounting

Prepared by Open Arm Solutions · Delivered October 2026

SAMPLE

01 · YOUR SETUP AT A GLANCE

Your assistant is live in 4 places.

Your services, prices, policies and answers, packaged once and loaded into the tools your team already uses.

64	22	11	96%
Client questions answered	Services & prices	Policies & rules	Handoff test pass rate

Where it's set up

TOOL	WHO USES IT	WHAT IT DOES	STATUS	LAST UPDATED
ChatGPT project	Office team	Drafts client emails, engagement notes and reminders in your voice	Live	Nov 3, 2026
Website chat	Visitors	Answers questions day and night and books first reviews	Live	Nov 3, 2026
Phone answering	Callers	Answers missed calls, texts back, takes the caller's question	Live	Nov 3, 2026
Shared inbox drafts	Front desk	Drafts replies to routine client emails for a person to send	Live	Nov 3, 2026

Business knowledge master file last updated Nov 3, 2026.

How it works

01 **Your facts**
Prices, policies, top questions

→

02 **One master file**
Written once, in your words

→

03 **Loaded into your tools**
AI project, website chat, phone app

→

04 **Answers name the source**
Safety and money go to a person

→

05 **Update it once**
Every tool gets the change

Start using it today

1. Ask your assistant

Ask a question a client asked this week.

2. Update a price or service

Text or email us the change and the date it starts.

3. Read your test report

Start with the pass rate and results by topic.

02 · WHAT YOUR AI KNOWS

Every answer is written the way you'd say it.

Each entry holds the facts, the words to use, and when to hand off to a person.

Personal tax return

FACTS

From $325 for a standard return; $150 more per rental property, $200 more for a small business schedule. Documents by March 15 to file by the April deadline; later than that, we file an extension. Clients upload documents to the client portal.

HOW TO SAY IT

> *"A standard return starts at $325. If we have your documents by March 15, we'll file by the April deadline. Want me to send you the upload link?"*

HAND OFF TO A PERSON WHEN

The client asks whether something is deductible, or got a letter from the IRS or the state. A CPA answers.

NEVER SAY

Whether a deduction is allowed, or how big a refund or balance due will be.

Monthly bookkeeping

FACTS

From $350 a month for up to 150 transactions in QuickBooks Online or Xero. Books closed by the 15th of the next month, with a profit and loss and a balance sheet. Catch-up work is quoted after a free review.

HOW TO SAY IT

> *"Monthly bookkeeping starts at $350 for up to 150 transactions, and your books are closed by the 15th of the next month. Want to book a free review of your books?"*

HAND OFF TO A PERSON WHEN

The client is more than three months behind or has a payroll problem. Pass it to the bookkeeping lead.

NEVER SAY

A fixed price for catch-up work before the review.

Also inside: Scam calls and texts, Business tax returns, Payroll, Quarterly estimates, Extensions, IRS and state letters, Sales tax, QuickBooks cleanup, Office hours, Document checklist.

03 · TEST REPORT

We tested it with 50 questions based on what people search for.

This is a sample business, so the questions are based on what people search for. 48 passed on the first run; the 2 misses were fixed and re-tested.

50	48	2	96%
Questions tested	Passed first time	Fixed & re-tested	First-run pass rate

QUESTION ASKED	ANSWER GIVEN	SOURCE	RESULT
What interest does an IRS payment plan charge?	First run quoted a rate. Now: the IRS sets the rate; a CPA explains at the review.	Payment plan rule	Fixed
Do you work with Xero?	First run said "not sure." Now: yes, Xero and QuickBooks Online.	Software list	Fixed
How much is a personal tax return?	From $325 for a standard return; more with a rental or business schedule.	Price list, p.1	Pass
What does a rental property add?	$150 per property on the return.	Price list, p.1	Pass
How much is a small business return?	From $950 for an S corp or partnership return.	Price list, p.2	Pass
What does monthly bookkeeping cost?	From $350 a month for up to 150 transactions.	Price list, p.2	Pass
Do you charge for a first meeting?	No. The first 20-minute review is free.	Price list, p.1	Pass

Showing 7 of 50, misses first. Every row is in your test report and your portal.

Results by topic



04 · OWNERSHIP & ACCESS

Your accounts and files are yours: each one, who owns it, and where it lives.

Every account is in your name. We have helper access only, and you can remove it any time without breaking anything.

WHAT	ACCOUNT OWNER	OUR ACCESS	WHERE TO FIND IT
Business knowledge master file	Parkside (Google Drive)	Editor, removable	Drive › Parkside AI › Business knowledge
ChatGPT project	Parkside Team plan	None	ChatGPT › Projects › Parkside
Website chat	Parkside website account	Admin, removable	Website settings › Chat
Phone answering app	Parkside, billed to your card	Admin, removable	App dashboard › Assistant
Shared inbox drafts	Parkside (Microsoft 365)	None	Outlook › Shared inbox
Editable copies (Word, Google Docs)	Parkside	None	Portal › Files

Every file we handed over

FILE	FORMAT	WHERE IT IS
Business knowledge master file	Word + Google Docs	Drive › Parkside AI
Tool instructions (4 tools)	PDF	Portal › Files

Also yours: the handoff pack, the test report, this sheet and the 30-day results report, each as a PDF and an editable Word file, in your portal.

If you ever leave

Everything keeps working. Remove our access where it says "removable". We delete our working copies 30 days after your plan ends.

Who to contact

hello@openarmsolutions.com or text (954) 821-2598. We usually reply the same business day.

05 · 30-DAY RESULTS

Your first month with your Custom AI Assistant.

Illustrative numbers for a sample business. Your real report is built from your own logs 30 days after launch.

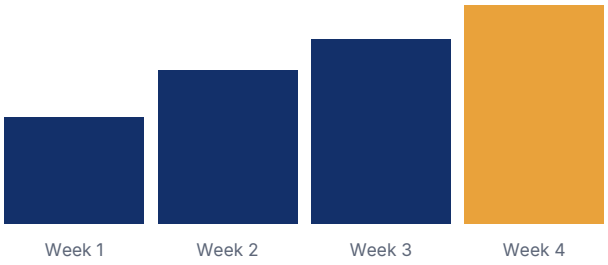
212
Client questions answered

37
Missed calls caught & texted back

14
Reviews booked from chat & text

3
New answers added

Questions answered per week



Top questions this month

October 15 extension deadline	48
Uploading documents	31
Quarterly estimates	22
IRS letters	17
Bookkeeping catch-up	9

What we changed & next month's plan

Added
3 new answers about bookkeeping catch-up, asked 9 times with no answer.

Updated
October 15 extension reminder loaded into all 4 tools on the day it started.

Next
Turn the 14 chat bookings into automatic reminder texts.

06 · KEEPING IT CURRENT

When something changes, it changes everywhere.

When prices, hours, services or policies change, these three steps keep every answer right.

MONTHLY MANAGEMENT

Active · renews Dec 2

Price and policy updates, fixes, and a monthly check with a short report. Text or email any change.

To request a change

1. **Text or email us** at (954) 821-2598 or hello@openarmsolutions.com: what changed and from when.
2. **We update it once** and every tool gets the new answer. On Monthly Management, small changes are included.
3. **We confirm** by reply, with the questions we re-tested.

How-to guides

Ask your assistant · 2 min

1. Ask a question a client asked this week. 2. Check the source it names. 3. Tell us if an answer is off.

Update a price or service · 1 min

1. Text or email us the change and the date it starts. 2. We update the master file and every tool. 3. We reply with the re-tested questions.

Read your test report · 2 min

1. Start with the pass rate and results by topic. 2. Check the misses: each one says what we fixed. 3. Ask us about any answer you'd word differently.

Where things stand

STEP	DETAIL	STATUS
Setup questionnaire	Received Sep 24	Done
Assistant built & tested	Tested before handoff	Done
Loaded into 4 tools	Live Oct 2	Done
30-day results report	Sent Nov 3	Done