

PREPARED FOR WREN & HEARTH

Your AI assistant: *getting started*

How your workspace is set up, how to keep it up to date, and the three tasks we practised together.

Workspace

Wren & Hearth assistant

Tool

One agreed tool (Claude or ChatGPT)

Your follow-up call

Within 14 days of your session

01 · YOUR WORKSPACE

How your workspace is organised

Everything lives in one project in your own account, called **Wren & Hearth assistant**. Start every business chat inside it, so the assistant can use what's below.

1 Instructions

A short brief that tells the assistant who you are, how you write and what it should never do. It applies to every chat in the project. You'll find the full text on page 5.

2 Business files

- **shop-info**: about the shop, Áine, opening hours
- **price-list**: products, prices, gift sets
- **policies**: exchanges, gift wrapping, collection, delivery
- **faqs**: the questions customers ask most

3 Your three tasks

- Reply to a customer message
- Turn photos and notes into a post
- Draft customer information

The prompts are on page 4. Copy them into a new chat whenever you need them.

4 Your chats

Each job gets its own chat inside the project. Give it a clear name, like "Ciara exchange" or "Mugs post, Nov", so you can find it again.

5 Your checks

Before anything goes out, run through the checklist on page 6. The assistant prepares drafts; you decide what's sent.

02 · KEEPING IT CURRENT

How to update your business information

The assistant only knows what's in your files and instructions. When something changes in the shop, change it here too.

File	What's in it	When to update
price-list	Every product, its price and the three gift sets	When a price changes or a new product arrives
shop-info	About the shop, opening hours, December late openings	Before each season, and for any one-off closures
policies	Exchanges, credit notes, gift wrapping, collection and delivery	Whenever a policy changes
faqs	Questions customers ask, with your approved answers	When the same new question comes up twice

Replacing a file

- 1

Edit the file on your computer and save it with the same name.
- 2

In the project, remove the old version and add the new one.
- 3

Start a new chat. Older chats may still use the old information.
- 4

Ask a quick test question, like "What does the Night In gift set cost?"

Keep personal details out. Don't add customers' phone numbers, addresses or payment details to your files. When you're working on a real message, you can leave out names or change them.

03 · YOUR THREE TASKS

The tasks we practised

Copy a prompt into a new chat in your project, then fill in the highlighted parts.

1 Reply to a customer message

PROMPT

A customer has sent this message: [paste message]. Draft a reply in our tone that follows our policies file. If the policies don't cover it, say so instead of guessing.

Good result: short, warm, signed "Áine", and the policy detail matches the policies file.

2 Turn photos and notes into a post

PROMPT

Here are my notes: [rough notes]. I'm attaching [number] photos. Write an Instagram caption and suggest the photo order. Use prices from the price list. List anything in my notes you're unsure about.

Good result: one clear caption, the right price, and a short list of things to confirm.

3 Draft customer information

PROMPT

Draft [a counter sign / an email / a website notice] about [topic]. Use only shop-info, policies and the price list. Keep it under [number] words.

Good result: every date, time and price can be found in your files.

You don't need perfect prompts. If a draft isn't quite right, reply in the same chat with what to change, like "shorter", "mention gift wrapping" or "less formal".

04 · YOUR INSTRUCTIONS

The instructions in your project

This is the brief we wrote together. You can edit it any time in your project settings.

- 1 You help Áine, who owns Wren & Hearth, an independent homeware and gift shop in Kerry.
- 2 Use the files in this project for prices, hours and policies. If something isn't in the files, say you don't know and ask.
- 3 Write in a warm, friendly, plain way. Short sentences. Irish English. At most one exclamation mark. Sign customer replies "Áine".
- 4 Never promise discounts, delivery dates or stock that aren't in the files.
- 5 Everything you write is a draft for Áine to check before it's sent or posted.

- 1 **Who you are.** Saves explaining the shop in every chat.
- 2 **Where facts come from.** Points it at your files, and asks it to admit gaps.
- 3 **How you sound.** Taken from the messages you shared with us.
- 4 **What it mustn't do.** The promises only you can make.
- 5 **You're in charge.** Nothing goes out without your check.

AI tools can still get things wrong, even with good instructions. That's why the checks on the next page matter.

05 · BEFORE ANYTHING GOES OUT

How to check AI-generated content

A quick read with these in mind takes a minute or two.

- ☐ **Prices** match the price list, including gift sets.

- ☐ **Dates and times** match shop-info, especially December hours.

- ☐ **Policies** are described correctly: exchanges, credit notes, wrapping, delivery.

- ☐ **No new promises:** no discounts, stock or delivery dates you haven't agreed.

- ☐ **Names and details** are right, and nothing private is included.

- ☐ **It sounds like you.** If not, tell it what to change: "shorter", "less formal", "no exclamation marks".

A check in practice

DRAFT SAID

"The Night In gift set is €49, and we can post it anywhere in Ireland before Christmas."

AFTER CHECKING

"The Night In gift set is €52. Order by 17 December for delivery in Ireland."

Price from price-list. Date from policies.

If you spot a mistake

Tell the assistant in the same chat ("The Night In set is €52, please correct it"). If the mistake came from an out-of-date file, update the file too, so it doesn't happen again.

06 · TROUBLESHOOTING AND NEXT STEPS

When something isn't right

Answers sound generic

Check you're chatting inside the Wren & Hearth project, not a new chat outside it.

A price or time is wrong

Correct it in the chat, then update the file it came from.

It fills gaps with guesses

Add "If it's not in the files, ask me" to your message, or remind it of instruction 2.

The draft is too long

Ask for a word limit, or "half the length".

You hit a usage limit

Limits depend on your plan with the AI provider. Wait for it to reset, or check your plan.

Next steps

This week

Use each of your three tasks at least once on real work, and note anything that felt awkward.

Your follow-up call

Bring your notes to the 20-minute call, within 14 days of your session. Email hello@thedigitalengine.ie to arrange a time.

Further training, or setting up automations that send messages for you, can be quoted separately. They aren't part of this package.