— FOR BUSINESSES THAT QUOTE AFTER A SITE VISIT

Quotes waiting until the evening?

Let AI turn your site notes into a priced quote, from your own past jobs.

You'd check it before it goes.

Under 100 AED a month

SITE NOTES

Villa 14, Springs. 4 split units. Majlis dripping inside, drain blocked? Bedroom 2 not cooling.

→

Quote — Draft in Zoho Books

AC service × 4	**AED 600**
Drain unblocking	**AED 120**
Gas top-up, after leak test	**AED 250**
Total with VAT	**AED 1,018.50**

Not included: leak repair, parts

— WHY IT MATTERS

Where quotes go wrong today.

1. **It goes out two days later**
   By then the customer has other prices in hand.

2. **The same job gets a different price**
   It depends on who wrote it and what they remembered.

3. **Nothing says what isn't included**
   So the argument about the extra work starts after the job.

Your prices and past quotes are already in your accounting app. The assistant prices from them, so each quote matches the last one.

— WHAT YOU NEED

About 73 AED a month.

Claude Pro, with the Small Business plugin
USD 20 a month, in the Claude desktop app — **~73 AED**

Zoho Books, with its Claude connector
Free plan under AED 200,000 revenue a year — **Free**

Your price list and past quotes
As items in Zoho Books, or a spreadsheet — **Yours**

Notes and photos from the visit
Typed on your phone, or a voice memo — **Free**

Bigger than AED 200,000? Zoho Standard is AED 60 a month

— HOW IT WORKS

From site notes to a draft quote in Zoho Books.

1. **You send your notes and photos** You
   Straight after the visit, while it's fresh.
2. **It asks about anything missing**
   Unit sizes, quantities, access, or it writes in an assumption.
3. **It prices each line from your past jobs**
   And shows you which jobs it compared against.
4. **It writes the quote, plus a private note**
   Scope, VAT, terms, what's not included, and risks for you.
5. **You check it, then it's saved** You
   As a draft quote in Zoho Books. You send it by email or WhatsApp.

— A MADE-UP EXAMPLE

Four AC units in a Springs villa.

THE NOTES FROM SITE

4 split units, 3 at 1.5 ton and the majlis at 2.5 ton. Majlis dripping water inside. Bedroom 2 not cooling, maybe low gas.

LINE	AED
Split AC service, per unit × 4 Filters, coil and drain	600
Drain line unblocking, majlis	120
Gas top-up, bedroom 2 Subject to a leak test	250
VAT at 5%	48.50
Total	**1,018.50**

The private note: “Low gas” is a guess, and gas doesn’t run low without a leak, so the top-up waits for a leak test.

— THE PROMPT

Paste this, then your notes.

CLAUDE, WITH THE SMALL BUSINESS PLUGIN

Put together a quote for this job using the proposal builder. Price it from my items and past quotes in Zoho Books, and leave a line blank if there's no match. Ask me about anything you'd have to guess. Include the scope, VAT, my terms and a "not included" section, and tell me privately what worries you. Don't save anything in Zoho Books until I say yes, and never send it to the customer.

Full prompt in the guide

— SUGGESTED GUARDRAILS

What it never does, and what stays with you.

It never

- Makes up a price it can't find in your history
- Sends a quote to a customer
- Saves to Zoho Books before your yes

You check

- The total and the lines first, then the scope
- Anything it marked as a guess

On Wafeq, Naqood or QuickBooks?

Ask for a PDF and a list of lines, and type them into your app. Intuit's Claude connector only works in the US for now.

— YOUR TURN

How long does a quote take you after a site visit?

Same day, next day, or whenever you get a quiet evening?

Next week: a restock planner.

Full guide in the first comment. Follow for more.