10 free Claude prompts for small business admin

From The Monday Routine · smallbizwithai.com · Fill in the [brackets], paste into Claude.

1. Tidy a folder of receipts

Rename a messy folder of receipts and get a spreadsheet of them.

```
Rename every file in [folder] on my Desktop to YYYY-MM-DD Vendor Amount.pdf, using the date, vendor and total printed on each receipt. Then create Receipts.xlsx inside that same folder with one row per receipt (date, vendor, what was bought, amount) and a total at the bottom.
```

Tip: Describe the finished result, not the steps. Check three files by hand before you trust the rest.

2. Write a quote from your price list

Turn your price list into a customer-ready quote.

```
[Customer] wants [what they ordered] for [date]. Using [price list file] in [folder] on my Desktop, write them a quote as a Word document called Quote - [customer].docx in that same folder. Apply our terms and write it in our house style.
```

Tip: Put your terms, deposit rules and house style inside the price list once. Every quote then follows them.

3. Build a cash-flow spreadsheet with real formulas

Build a cash-flow spreadsheet with formulas that keep working.

```
From the invoices in [folder] on my Desktop, build Cashflow.xlsx in that same folder. One row per invoice: number, customer, invoice date, due date, total, and whether it's paid. Underneath, add a total for each month and the amount still outstanding, using real formulas so they update when I change a row. Add a chart of invoiced amounts by month.
```

Tip: Say 'real formulas'. Otherwise you may get typed-in numbers that go stale the moment you edit a row.

4. Draft replies to customer emails

Draft replies to a pile of customer emails, with judgment calls flagged.

```
Read the customer emails in [folder] on my Desktop and draft a reply to each one,
saved as a text file named Reply - (the email's subject).txt in that same folder.
Use the prices and house style in [price list]. If an email needs my decision
before anyone replies, don't promise anything: flag it and tell me why.
```

Tip: The last sentence matters most. Refunds, allergies and discounts are your decisions, not Claude's.

5. Tell Claude about your business once

Tell Claude about your business once, for every chat.

```
I run [business], a [size] [type] in [town]. When you write for customers, use our
house style: [tone rules], and sign off as "[sign-off]". Quote prices in [currency]
and add [tax, if any]. Always ask before deleting any file.
```

Tip: Keep instructions short and specific. Three good rules beat a page of vague ones.

6. Set rules for a folder

Give one folder its own standing rules.

```
Save these as standing instructions for the [folder] folder on my Desktop, so you
follow them every time you work there: 1. Invoices are numbered in sequence, and
the next one is [number]. 2. Name every new file starting with today's date as
YYYY-MM-DD, then a short description. 3. Never delete anything: move old files into
an Archive folder instead.
```

Tip: Folder rules travel with the work: numbering, file names, what never to delete.

7. Chase overdue invoices

Draft overdue-invoice reminders that fit each customer.

```
Who owes us money? Use [QuickBooks / Xero], and check the customer emails in
[folder] on my Desktop before you draft anything. Draft a reminder for each overdue
invoice and show the drafts here. Don't send or save any email.
```

Tip: Have Claude read the inbox first. A customer who says they've paid needs a question, not a demand.

8. Run a month-end close check

Run a month-end check before you trust the numbers.

```
Let's close [month] in [QuickBooks / Xero]. Our [month] receipts are in [folder] on my Desktop: check them against the books and give me the close checklist with anything that needs attention.
```

Tip: Missing expenses make a month look better than it was. Fix what the checklist flags, then run it again.

9. Follow up every open deal

Give every open deal a follow-up email and a task.

```
Go through our open deals in [HubSpot / your CRM]. For each one, draft a short follow-up email here and create a follow-up task due before the close date. Don't send anything.
```

Tip: Tasks are safe to create automatically. Emails stay drafts until you've read them.

10. Schedule a weekly report

Set up a job that runs every week on its own.

```
Set up a scheduled task: every Monday at 8am, summarize the previous week's invoices and receipts in [folder] on my Desktop into a one-page PDF, and save it in [folder]/Reports named with the date.
```

Tip: Tasks that use files on your Mac need the Mac on and Claude open at that time.

Watch every prompt run, step by step: The Monday Routine, a 26-lesson video course. smallbizwithai.com

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