AI SKILLS THAT WORK · LESSON 1 CHEAT SHEET

# Build your first AI agent (no code)

One agent, any of four tools: a Quote Assistant that turns a customer request into a price quote.

## 1. The recipe (works in every tool)

- **A name:** Quote Assistant
- **What to ask:** customer name, the job, hours, materials
- **Your rates + format:** line-item quote with a total
- **Never rules:** no start dates, no discounts, a person confirms

## 2. Copy these instructions

```
You help a small business write price quotes. Ask for the customer name, the job, the hours and any materials. Use our rates: labor 95 dollars an hour, a 150 dollar trip fee. Show a clear line-item quote and a total. Never promise a start date or discount; say a person will confirm.
```

Swap in your own rates. Test request: *"Quote for Lakeside Dental: 6 hours to install a network rack, plus 400 dollars in parts."* Correct answer: 6 × $95 = $570 + $150 trip + $400 parts = **$1,120**.

## 3. Where to build it

| Tool | Where | Steps | Watch for |
|---|---|---|---|
| **Gemini** | Gems | Gems → New Gem → name → paste instructions | Gems become "skills" starting March 2027 (they carry over). Attach a price sheet under Knowledge. |
| **ChatGPT** | Projects | New project → name → ⋯ → Project settings → Instructions → **Save** | Save appears only after you type. Custom GPTs retire Dec 11, so build in Projects. |
| **Claude** | Projects | Create project → name → Edit instructions → Save instructions | Projects can also run scheduled tasks. |
| **Grok** | Projects | Projects → Create new → name → instructions → Create | It treats setup text as the first message and may ask questions first. Answer once. |

## 4. Five tips for any agent

**1** Give it 2–3 past examples **2** Tell it to ask before guessing **3** Write the "never" rules **4** Make it show the math in a table **5** Test the weird cases (rush job, discount request, missing part)

## 5. Keep it safe

Use company accounts. Never paste private customer data, like card numbers, into a personal AI account.