



04

FREE GUIDE

Your first AI automation, no code

Last checked: 25 September 2026 · 22 minute read · For owners, no tech needed

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The plan

1. Pick the one form where new enquiries reach you, and write down what a good first reply says.
2. Connect that form to a tool called Zapier. Add an AI step that writes the reply, and send every enquiry to one simple list.
3. For one week, the replies wait as drafts for you to read. After that, they send on their own.

Start here if you've never used AI

If you've never typed a question into ChatGPT, read this part first. It takes three minutes.

What an AI chatbot is. It's a website or app where you type a request in normal words, and it types an answer back. ChatGPT, Claude, Gemini and Microsoft Copilot are the best known. You can ask it to write an email, explain a confusing letter, or turn messy notes into a tidy list. It writes in full sentences, like a person would.

What it's good at. Writing first drafts. Rewording things politely. Summarising long text. Following clear instructions again and again without getting bored.

What it's bad at. Knowing facts about your business that nobody told it. Saying "I don't know". When it doesn't know something, it often makes up an answer that sounds right. People call this being "confidently wrong", and it's the most important thing to remember. You fix it by giving it the facts and telling it to use only those.

What an automation is. An automation is a rule that does a step for you when something happens. "When a new enquiry arrives, send a reply and add it to my list." You set the rule up once, and it runs every time, day or night. If you've ever done a mail merge in Word, it's the same idea, except it runs by itself each time a new entry arrives.

What an AI automation is. An automation where one of the steps is the AI writing something. In this guide, the AI writes the reply to each enquiry. The other steps are plain rules: copy this, send that, add a row.

Try this now (5 minutes). Go to chatgpt.com or claude.ai and make a free account. Paste this in, fill in the brackets, and press Enter:

COPY THIS

I run a small [TYPE OF BUSINESS] in [CITY]. A customer emailed asking: "Do you do [SERVICE] and how soon could you come?" Write a short, friendly reply. We do offer that service. The earliest we can visit is [DAY].

Read what comes back. Then ask again, but leave out the last two sentences (the facts). The second reply will guess or stay vague. That's the whole lesson: the AI is only as good as the facts you give it.

Words you'll see

Word	What it means
Prompt	The instructions you type for the AI.
Automation	A rule that does a step for you when something happens.
Zapier	A website that runs automations between your other apps. You click; you don't code.
Zap	Zapier's name for one automation.
Trigger	The event that starts a Zap. Here: "someone filled in my form".
Action	Something the Zap does after the trigger, like "write a reply" or "send an email".
Step	One trigger or one action. A Zap is a list of steps, top to bottom.
Field	One box of information, like "Name" or "Email".
Draft	An email that's written and saved but not sent. It waits in your Drafts folder.
Spreadsheet	A grid of rows and columns, like Google Sheets or Excel.
Row	One line across a spreadsheet. Here, one row is one enquiry.
Filter	A step that stops the Zap unless a condition is true.
Publish	Zapier's button that switches a Zap on.
CASL	Canada's anti-spam law. It covers business emails and texts.

1. What you're building

Someone fills in the contact form on your website at 9:15 on a Tuesday night. A few minutes later they get an email back. It uses their name. It answers the question they asked. It tells them what happens next and when. It's signed by you.

At the same moment, a new row appears in a Google Sheet with their name, contact details, what they asked, and the reply they got. You also get a short note saying a new enquiry came in.

You read it all the next morning. Nobody waited, and nothing got lost in an inbox.

Here it is as a chain:

Form filled in → AI writes a reply → Reply sent from your email → Row added to your list → Note to you

Each arrow is a step you set up by clicking and filling in boxes. You won't write code. The first version takes an afternoon. The week of reading drafts afterwards is what makes it good.

2. Why this one first

A new enquiry is when a stranger decides whether you're a business that answers. Someone who fills in three forms on a Sunday evening may well go with whoever replies first and sounds like they read the question. A fast reply won't win every job. A slow one loses jobs you never hear about.

It's also the safest place to learn. You can see every result, and for the first week nothing goes to a customer until you've read it. What you learn here carries into every other automation.

And you end up with a list. Many small businesses don't have one. They have an inbox, a notebook and a memory. After a month, you'll have a record of who asked, for what, and what happened.

Before and after, one enquiry. (Priya, Sam and Greenway are made up.)

Before: a homeowner asks about a patio on Sunday night. You see the email on Tuesday between jobs and reply Wednesday. She's already booked someone else.

After: the same homeowner gets this at 9:17 on Sunday night.

COPY THIS

Hi Priya, Thanks for getting in touch about a patio. Yes, we build patios in Langley. Every quote starts with a free visit so we can measure and see the ground. Visits are booking about two weeks out right now, and I'll call you by Tuesday to find a time. Sam, Greenway Landscaping

Her details are already in your sheet. On Tuesday you call, and she's expecting you.

3. Get ready (30 minutes, pen and paper)

Do this before you open any website. It decides how good the replies are.

Find where your enquiries arrive

Pick one place to start:

- The contact form on your website
- A quote request or booking request form
- A Google Form (a free form you make at forms.google.com)

If you're not sure your website form can connect to anything, use a Google Form. It connects easily, and you can link to it from your website and your Google Business Profile.

Make a Google Form (only if you need one)

1. Go to **forms.google.com** and sign in with a Google account. If you use Gmail, you already have one.
2. Click **Blank form**.
3. Click "Untitled form" at the top and type a title, like "Ask us a question".
4. Click the first question box, type **Name**, and on the right set the type to **Short answer**.
5. Click the + on the right side to add more questions: **Email** (short answer), **Phone** (short answer) and **How can we help?** (choose **Paragraph**, so there's room to write).
6. Switch on **Required** at the bottom of the Name, Email and "How can we help?" boxes.
7. Click **Send** at the top right, then the link icon, and copy the web address. Put that link on your website and your Google Business Profile.

Write your fact sheet

This is the list of things the AI is allowed to say. It's the most important part of the build. Fill in the blanks:

COPY THIS

Fact sheet for [BUSINESS NAME] We are a [TYPE OF BUSINESS] in [CITY/AREA]. We do: [YOUR SERVICES] We don't do: [WHAT PEOPLE ASK FOR THAT YOU DON'T DO] We serve: [TOWNS, NEIGHBOURHOODS OR REGION] Our hours: [HOURS] A person follows up within: [FOR EXAMPLE, ONE BUSINESS DAY] What happens next: [A CALL, A VISIT, A QUOTE, A BOOKING LINK] Booking link, if any: [LINK] Never promise in writing: prices, exact dates, availability, results. Right now: [ONE LINE YOU UPDATE WEEKLY, SUCH AS "VISITS ARE BOOKING ABOUT TWO WEEKS OUT"]

Write two replies by hand

Take two real enquiries from last month. Write the reply you wish you'd sent within a minute. Keep them short, warm and specific. They show the AI what "sounds like you" means.

Make your list

1. Go to **sheets.google.com** and click **Blank spreadsheet** (or use Excel in OneDrive if your business runs on Microsoft 365).
2. Name it "Enquiries".
3. In the first row, type one heading per box, left to right:

Date · Name · Email · Phone · What they asked · Source · Reply sent · Status · Notes

You fill in Status yourself later: New, Contacted, Quoted, Won, Lost, Not a fit.

Printable checklist: before you open Zapier

- ☐ I know which form my enquiries come through
- ☐ I can fill that form in myself to test it
- ☐ My fact sheet is written and fits on one page
- ☐ I've written two example replies
- ☐ My "Enquiries" sheet has its headings
- ☐ I know which email account the replies come from, and I can sign in to it

4. Build it, step by step

These steps use Zapier, because its screens are the easiest to follow. (Make is a similar tool. If you use it, a Zap is called a "scenario" and each step is a "module". Pick one tool and stay with it.)

Screens change from time to time. If a button has moved, look for the same word nearby.

About plans. Zapier's free plan allows a trigger and only one action. This build has more steps than that, so you'll need one of Zapier's paid plans. When you sign up, check whether a free trial is offered, and read the current plans on their site.

Step 0: Sign up

1. Go to **zapier.com** and click **Sign up**.
2. Sign up with your Google or Microsoft account, or with an email and password. Use your business email.
3. Zapier asks a few questions about your work. Answer them or skip them. They only change what it suggests.
4. You land on your Zapier home page.

Step 1: Start a new Zap and choose the trigger

1. Click **Create** (top left), then **Zaps**. The Zap editor opens. You'll see a box labelled **Trigger** and under it a box labelled **Action**.
2. Click the **Trigger** box. A search box appears.
3. Type the app your form lives in: **Google Forms**, or your website builder (Squarespace, Wix and the popular WordPress form tools are listed).
4. Under **Trigger event**, choose the one that means "a new entry arrived". For Google Forms it's **New Form Response**.
5. Click **Sign in** (or **Connect**) and log into that account. A window asks whether Zapier may see your forms. Click **Allow**. That's Zapier getting permission to read new entries, and it's normal.
6. Choose your form from the list.
7. Open your own form in another browser tab and **fill it in as a fake customer**. Use your own email address, so the test reply comes to you. For example: name "Test Tina", message "Do you do fence repairs in Abbotsford?"
8. Back in Zapier, click **Test trigger**. Test Tina's answers should appear. If they do, the trigger works. Click **Continue**.

About speed. Some triggers say **Instant** beside them. Those run the moment the form is sent. Others check for new entries on a timer, which can take up to 15 minutes on lower plans. If minutes matter to you, pick a form tool whose trigger says Instant.

Step 2: Add the AI step

1. Click the + under your trigger to add an action.
2. Search for **AI by Zapier** and click it. (Zapier also has ChatGPT and Claude steps if you'd rather connect an account you already have.)
3. You'll see a **Prompt** box. This is where your instructions go. Copy Prompt A from section 5 and paste it in.
4. Where the prompt says [ENQUIRY], delete that word and type / (a forward slash). A list of your form's fields pops up: Name, Email, "How can we help?" and so on. Click each one to drop it in. Now the AI uses each person's real answers.
5. Where it says [FACT SHEET], paste your fact sheet.
6. Tell it you want two separate answers back. Find **Output Fields** (under **Settings**), click + **Add field**, type **Subject**, and save. Do it again for **Body**. Naming them lets later steps use the subject and the body separately.
7. Click **Preview** on the right. The AI writes a reply to Test Tina. Read it as if you were Tina.
8. Not right? Change the fact sheet or the prompt and preview again. When you're happy, click **Finish**.

Step 3: Stop spam with a filter

1. Click the + under the AI step.
2. Search for **Filter** (its full name is Filter by Zapier) and add it.
3. It shows **Only continue if...** Choose the AI step's **Body** field, then **(Text) Does not contain**, and type **SKIP**.
4. Prompt A tells the AI to answer SKIP for spam and sales pitches. This filter stops those here, so they never reach your drafts or your list.

Step 4: Create the email as a draft

1. Click + and choose **Gmail** or **Microsoft Outlook**, whichever your business email uses.
2. Choose the action that **creates a draft** (in Gmail it's **Create Draft**). Don't choose "Send Email" yet. The draft is your safety net for the first week.
3. Sign in to your email account and click **Allow**.
4. Fill in the boxes: - **To:** type / and pick the Email field from your form. - **Subject:** pick Subject from the AI step. - **Body:** pick Body from the AI step. Then, underneath, type your sign-off by hand: your name, business name, phone number, business address and website. - **From name** (if you see it): your name and business name, the way customers know you.
5. Click **Test step**. Open your email's **Drafts** folder. The reply to Test Tina should be there.

Step 5: Add a row to your list

1. Click +, choose **Google Sheets** (or **Microsoft Excel**), then **Create Spreadsheet Row**.
2. Sign in, pick your "Enquiries" sheet, and pick the tab (usually "Sheet1").
3. Zapier shows one box for each heading in your sheet. Fill them in: - **Date:** the form's submission time (type / and look for it) - **Name, Email, Phone, What they asked:** the matching form fields - **Source:** type the words **Website form** - **Reply sent:** Body from the AI step - **Status:** type **New**
4. Click **Test step**. Open your sheet. Test Tina should now be in row 2.

Step 6: Tell yourself

1. Click + and add another **Gmail** or **Outlook** step, this time **Send Email**, addressed to yourself.
2. Subject: type "New enquiry from" and then pick Name.
3. Body: pick the "How can we help?" field, then type "A draft reply is waiting."
4. Test it and check your inbox. (If your team uses Slack or Microsoft Teams, you can send the note there instead.)

Step 7: Name it and switch it on

1. Click the Zap's name at the top (it starts as "Untitled Zap") and call it "New enquiry reply".
2. Click **Publish**. The Zap is on.

Step 8: Test it five ways

Fill in your own form five more times as five different people. Prompt D in section 5 writes the five test enquiries for you. Include a spam message and someone asking for something you don't do. For each one, check:

- ☐ A draft appeared, and it's correct
- ☐ Nothing was invented: no price, date or promise that isn't in the fact sheet
- ☐ The spam one did not create a draft or a row
- ☐ A row appeared in the sheet
- ☐ You got the note

Delete the test drafts and test rows when you're done.

Step 9: The draft week

For seven days, every real enquiry creates a draft. Each time you get the note:

1. Open the draft.
2. Fix anything wrong, then press Send yourself.
3. If you had to fix a fact, add that fact to the fact sheet in the AI step. The fix is nearly always in the fact sheet, not the prompt.

Step 10: Let it send

When a few days go by without you needing to fix anything:

1. Open the Zap and click the email step (Step 4).
2. Change the action from **Create Draft** to **Send Email**. Check the To, Subject and Body boxes are still filled in.
3. Click **Publish** again.
4. Keep reading your Sent folder for two more weeks.

How to turn it off

Click **Zaps** in the left menu. Each Zap has an on/off switch beside it. Click it so it shows off. Nothing is deleted, and you can switch it on again any time. Do this whenever something looks wrong and you want time to think.

Canada's anti-spam law, in plain terms

CASL is Canada's anti-spam law. Replying to someone who contacted you and asked a question is the least risky kind of business email. CASL still expects your emails to say who they're from and how to reach you, including a postal address, and a promotional message needs a working unsubscribe. Someone asking a question hasn't agreed to your newsletter. If you later want to send enquirers marketing emails, you need their consent, and the consent that comes from an enquiry lasts only six months. This isn't legal advice. If your emails do more than answer the question, check with a professional.

5. Copy-paste prompts

A prompt is the instructions you give the AI. Copy these as they are, then change the parts in [BRACKETS].

Prompt A: The reply writer (goes in the AI step)

COPY THIS

You write the first reply to a new enquiry for [BUSINESS NAME], a [TYPE OF BUSINESS] in [CITY/AREA].

Here is everything you are allowed to say about the business: [FACT SHEET]

Here is the enquiry: [ENQUIRY]

Write a short email reply (under 120 words) that: - greets them by first name - answers their actual question using only the fact sheet - if the fact sheet does not answer it, says a person will reply by [TIME] rather than guessing - says clearly what happens next and when - never states a price, a date, an availability or a result unless it is written in the fact sheet - sounds like a friendly person at a small business, not a company - uses at most one exclamation mark - has no sign-off (we add our own)

If the enquiry is spam, a sales pitch to us, or empty, write only the word SKIP in both fields.

Return two fields: Subject (under 8 words) and Body.

Prompt B: Build your fact sheet from your website (use it in ChatGPT or Claude before you start)

COPY THIS

Here is the text of my business website: [PASTE]. Write a one-page fact sheet that an assistant could use to reply to enquiries. Include: what we do, what we don't do, the area we serve, our hours, how quickly we follow up, and what happens after someone gets in touch. Use only what is in this text. Put [?] next to anything you had to guess, and list the questions the website doesn't answer.

To copy your website's text: open a page, press Ctrl+A (Cmd+A on a Mac) to select everything, press Ctrl+C (Cmd+C) to copy, then paste it into the chat. Do this for each main page.

Prompt C: Make the replies sound like you

COPY THIS

Here are two replies I wrote to real enquiries: [PASTE BOTH]. Describe my writing style in five short rules (sentence length, how I greet people, words I use, words I avoid, how formal I am). Then rewrite these instructions so the replies follow those rules: [PASTE PROMPT A].

Prompt D: Test enquiries

COPY THIS

I've built an automatic email reply for new enquiries to my [TYPE OF BUSINESS]. Write five test enquiries I can submit through my own form: a normal new customer, someone asking for something we don't do, someone asking for a price, someone upset about a past job, and an obvious spam message. For each, say what a good reply would do.

Prompt E: Weekly tidy of the list

COPY THIS

Here are this week's rows from my enquiry spreadsheet: [PASTE]. Group them by what people asked for, flag any where Status is still New, and list questions my fact sheet should answer but doesn't.

6. Worked examples

These businesses are made up to show how the same build fits different kinds of work. They aren't Droom customers.

A physiotherapy clinic with three practitioners

Where enquiries arrive: a "Request an appointment" form on the website.

Fact sheet includes: the conditions they treat, that they don't do massage-only visits, their two locations, and that the front desk calls back within one business day.

What it does: the reply thanks the person, confirms the location they picked, says whether the clinic treats what they described (only if it's on the list), and gives the online booking link. The front desk works from the sheet each morning.

What they changed after the draft week: replies were answering health questions in too much detail. They added to Prompt A: "Never give medical advice. If they describe symptoms, say a practitioner will discuss it at the first visit." Because health details arrive through the form, they also limited who can open the sheet to the three front desk staff.

A property management company with 40 staff

Where enquiries arrive: an owner enquiry form ("Do you manage properties like mine?") and a separate tenant maintenance form.

What they did: they built it for owner enquiries only. Maintenance requests already went into their property software, and they didn't want two systems.

What it does: the reply confirms the property type and area, says whether it's a kind they manage, and says a named manager will call within two business days. The sheet has a "Units" column so the team can sort by size.

What they changed: early drafts promised "a proposal within the week", which wasn't in the fact sheet. That's the AI filling a gap. They added "never promise a document or a deadline" to the prompt and wrote the real next step into the fact sheet.

A landscaping company with two crews

Where enquiries arrive: a quote request form with a photo upload.

Fact sheet includes: design, planting, patios and fall cleanup; no tree removal; the towns they cover; every quote needs a site visit.

What it does: the reply names the service, confirms the town is covered or kindly says it isn't, explains the free site visit, and offers two ways to book one. A second filter marks out-of-area enquiries "Not a fit" in the sheet.

What they changed: in spring the replies said "we'll visit this week" when the crews were booked for a month. Now the owner updates the "Right now" line in the fact sheet every Monday. It takes a minute and keeps every reply true.

7. When it goes wrong

What you see	What's probably happening	What to do
No draft appeared	The Zap is off, or the trigger checks on a timer	Check the switch in your Zaps list. Wait 15 minutes. Then open Zap history in the left menu to see what ran
Zap history shows an error	One step couldn't finish, often because a sign-in expired	Click the error to read it. Reconnect the account it names, then test again with a fake enquiry
The reply invents a price or date	The fact sheet doesn't cover it	Add the real answer, or "don't state this", to the fact sheet
The reply says "Hi [Name]" or is blank	A field wasn't inserted with /	Open the AI step and insert the field again from the list

What you see	What's probably happening	What to do
Spam created a draft	The filter is missing, or the AI didn't write SKIP	Check the filter step, and test with an obvious spam message
The reply sounds stiff	The AI doesn't know your style	Use Prompt C with your two hand-written replies
Two replies went to one person	They filled in the form twice	Normal. Your sheet will show both rows
A column in the sheet is empty	A heading changed after you set up the step	Keep the headings the same, or reopen the sheet step and match them again

When in doubt: switch the Zap off, fix it, test with a fake enquiry, switch it back on.

8. Common mistakes and fixes

Letting it send on day one. You'll find mistakes in the first week. Fix: drafts for a week, then send, then keep reading for two more weeks.

A thin fact sheet. When the AI doesn't know something, it fills the gap with something that sounds plausible. Fix: every wrong reply means one new line in the fact sheet.

Promising prices, dates or results. The most common and most costly error. Fix: the "never states" line in Prompt A, and testing it on purpose with Prompt D.

Nobody owns the list. Rows pile up and nobody changes Status. Fix: one named person reads new rows every morning.

Adding enquirers to marketing emails. An enquiry is a question, not a sign-up. Fix: keep them out of newsletters unless they've agreed.

Building five automations at once. When something breaks, you won't know which one. Fix: this one, working, for two weeks, then the next.

Customer details in too many places. Every app you connect holds a copy. Fix: connect only what you need, share the sheet with as few people as possible, and remove access when someone leaves.

9. Four more starter automations

Once the first one has run cleanly for two weeks, try these. Each one uses the same parts: a trigger, an AI step, an action, and usually a list.

Call summary to the team. Trigger: your phone system emails a voicemail transcript (many business phone systems can). AI step: "Summarise this call in three lines: who called, what they want, what should happen next. Flag anything urgent." Action: post it to a shared Teams or Slack channel, or add it as a row in your enquiry sheet. Whoever calls back has the context without playing the recording. Keep the channel to people who need callers' details.

Review request after a finished job. Trigger: a job is marked "Done" in your sheet, or an invoice is marked paid. AI step: a short thank-you that mentions the actual job and links to your Google review page. Action: a draft email a day or two later. Two cautions. First, CASL applies: identify yourself, include your contact details and an unsubscribe, and only send to customers you have a current business relationship with or consent from; check with a professional if unsure. Second, Google's review rules: ask every customer, not only the happy ones, and never offer anything in exchange. One request per job, with no reminder chains.

Meeting notes to tasks. Trigger: a meeting transcript or notes file is saved to a folder (Teams, Google Meet and Zoom can make transcripts, depending on your plan). AI step: "List every action item with the person responsible and any deadline mentioned. If no one was named, write 'unassigned'. Don't invent deadlines." Action: add each item to your task list and email it to everyone who attended. Tell people when a meeting is being transcribed.

Monday report. Trigger: a schedule, every Monday at 7am (in Zapier it's called **Schedule by Zapier**). AI step: read last week's rows and write a plain summary of what people asked for most and which rows still say New. Action: email it to you or your managers. Let the spreadsheet do any counting with a formula and let the AI write only the sentences, because AI can miscount.

10. Quick reference

The build: form → AI writes reply → filter out spam → draft email → row in your list → note to you.

Before you start: one form, a one-page fact sheet, two hand-written replies, a sheet with headings.

Rules inside the AI step: only use the fact sheet; no prices, dates, availability or results unless written there; if unsure, say a person will reply; SKIP spam.

Rollout: test five fake enquiries, drafts for one week, then send, then keep reading for two weeks.

When a reply is wrong: fix the fact sheet first, the prompt second.

To pause it: Zaps list, click the switch.

CASL: answer the question, say who you are, include contact details and a postal address, and don't add people to marketing without consent. Ask a professional for anything beyond that.

Next builds: call summaries, meeting notes to tasks, Monday report, review requests.

Want it set up for your business? [Book a free call](#)

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