

AI Prompt Pack for Plumbers and Trades

8 copy-paste prompts for quotes, follow-ups, invoices and customer messages, with a code and licensing caution.

Read this first: code and licensing. AI is for the paperwork, not the trade. Do not use it to decide code compliance, permits, safety, sizing or what work needs a license. Local code, your license and the authority having jurisdiction decide those, and rules differ by city, county and state. You provide every price and diagnosis; the AI only helps with the wording.

This free pack gives you 8 copy-paste prompts for the office side of a trade business: quote templates, follow-ups on quotes, review requests, invoice wording from job notes, appointment messages, plain-English repair explanations, repair-or-replace comparisons and maintenance reminders.

Fill in the [BRACKETS] with your own facts, paste the prompt into the AI tool you use, and treat the answer as a first draft. AI can make mistakes or invent details, so check every price, scope item and claim before a customer sees it.

How to use these prompts

1. Replace every [BRACKET] with your own findings, scope and prices. The AI never decides what is wrong or what it costs.
2. Leave out customers' full names, addresses, phone numbers and payment details. Use general descriptions.
3. Ask follow-ups: "shorter", "friendlier", "make it a text", "give me two more options".
4. Read, fact-check and edit the result, then make it sound like you. You are responsible for what goes to the customer.

What's inside

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| → 1. Quote or estimate template | → 2. Follow-up after an unanswered quote |
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The 8 prompts

01 Quote or estimate template

When to use it: Creating a clean, reusable quote layout.

Create a reusable quote template for a **[TRADE, e.g., plumbing]** business named **[BUSINESS NAME]**. Sections: customer and job address (blank lines), description of work, what is included, what is not included, materials (blank lines), labor (blank lines), total (blank), how long the quote is valid (**[DAYS]** days), how to accept, and a line for **[LICENSE NUMBER IF REQUIRED IN YOUR AREA]**. Use plain language and leave all prices as blanks. Do not add any prices or legal terms.

TIP Check your state and local rules on what a written estimate must include, such as license numbers, and ask an attorney if unsure.

02 Follow-up after an unanswered quote

When to use it: Checking in without being pushy.

Write a short, friendly text message and a short email following up on a quote I sent on **[DATE]** for **[JOB DESCRIPTION, no address]**. Mention that the quote is good through **[DATE]**, offer to answer questions, and make it easy to say yes or no. The text must be under 300 characters and the email under 90 words. Do not pressure or offer discounts.

TIP If you decide to offer anything extra, add it yourself and put it in writing.

03 Review request message

When to use it: Asking happy customers for an honest review.

Write a short, friendly text asking a customer to leave an honest review after we finished **[JOB TYPE]**. Thank them, include this link placeholder: **[REVIEW LINK]**, and make it clear that any honest feedback is welcome. Keep it under 250 characters. Do not offer anything in exchange for a review and do not ask for only positive reviews.

TIP Review sites have rules against paying for reviews or gating them to positive ones. Keep the ask neutral.

04 Job notes to invoice wording

When to use it: Turning your field notes into a clear invoice description.

Turn these job notes into clear, professional invoice line descriptions. Use only what is in the notes: **[YOUR NOTES: what you found, what you did, parts used, time]**. Write each line in plain language a customer can follow. Do not add parts, work or prices I did not list. If anything is unclear, ask me at the end.

TIP Match invoice wording to your quote and to any permit or warranty paperwork. Totals come from you, not the AI.

05 Appointment confirmation and running-late messages

When to use it: Keeping customers informed on scheduling day.

Write three short text messages for my **[TRADE]** business: 1) an appointment confirmation for **[DAY]** between **[TIME WINDOW]**, 2) a "running about **[NUMBER]** minutes late" message with a brief apology, 3) a "we are on our way" message. Sign each as **[YOUR NAME OR BUSINESS]**. Friendly, clear, each under 200 characters. Do not include addresses or customer names.

TIP Keep a copy of each template so you can reuse it without sending customer data to the AI.

06 Explain a repair in plain English

When to use it: Helping a customer understand what you found and what you recommend.

Explain this repair to a homeowner in plain English, in under 150 words, without jargon or scare tactics. What I found: **[YOUR DIAGNOSIS]**. What I recommend: **[YOUR RECOMMENDED WORK]**. What happens if they wait: **[HONEST CONSEQUENCE, if any]**. Do not add problems or risks I did not list and do not make safety claims beyond what I wrote.

TIP The diagnosis is yours. The AI only helps you say it clearly. Re-read it to make sure it is accurate and fair.

07 Repair or replace options for a customer

When to use it: Laying out choices honestly.

Write a short, neutral summary of two options for a customer: Option A: **[REPAIR, what is included, your price]**. Option B: **[REPLACE, what is included, your price]**. Include pros and cons based only on this information: **[YOUR PROS AND CONS]**. End with how they can reach me to decide: **[CONTACT]**. Do not pressure the customer or add claims about savings, lifespan or efficiency that I did not provide.

TIP Do not let AI add savings or lifespan claims. Quote only what you can support.

08 Seasonal maintenance reminder

When to use it: Reminding past customers about routine service.

Write a friendly text and email reminding past customers that it is a good time for **[SEASONAL SERVICE, e.g., water heater flush or system check]**. Include what the visit covers: **[WHAT YOU DO]**, how to book: **[PHONE OR LINK]**, and my service area: **[AREA]**. Keep the text under 250 characters and the email under 100 words. No scare tactics and no claims about savings.

TIP Check your state's rules on marketing messages and consent for texts and emails before you send.

Safety checklist

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Run through this before every prompt and before you send or publish anything.

- ☐ Do not use AI to decide code compliance, permits, safety, sizing or whether work requires a license. Local code and your license rules decide.
- ☐ Check local licensing, written-estimate and advertising rules for your area. They differ by city, county and state.
- ☐ You provide every diagnosis, price and scope item. Do not let the AI add work, parts or promises.
- ☐ Do not paste customer names, addresses, phone numbers, payment details or photos of their home into a general AI tool.
- ☐ Do not offer anything for reviews, and do not make safety or savings claims you cannot back up.
- ☐ Read every message and invoice before it goes out, and keep copies of what you send.

For more on local code, safety and licensing, see the guide on code, safety and licensing with AI in the AI for Plumbers and Trades hub. This pack is general information, not legal advice or code guidance. <https://plainaiguide.pages.dev/ai-for-plumbers-code-safety-and-licensing/>

More from the AI for Plumbers and Trades hub

These prompts complement our step-by-step guides.

Find them all at <https://plainaiguide.pages.dev/ai-for-plumbers-and-trades/>

New prompts may be added over time.

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