

How Levi Should Use the Booking Admin Copilot in Real Life (Phase 1, Reliability-Optimised)

This guide shows **exactly how to use the Booking Admin Copilot in day-to-day work**, without changing your current website, calendar, or payment process. It keeps everything simple, safe, and predictable.

The Copilot is not an automated system. It's a **thinking assistant** that prepares clean, accurate information and message drafts for you to review and send yourself.

Follow this guide and the Copilot will stay reliable, controlled, and helpful.

1. Start Every Session Properly

Before you ask the Copilot to do anything, send:

"Use the Booking Admin Copilot rules."

This activates the Control Layer, which stops the AI guessing, improvising, or doing anything outside Phase 1.

Send this once at the start of each new conversation.

2. When a Booking Request Arrives

When you receive a new booking request email from your website:

1. Forward or paste the whole message into ChatGPT.
2. Say: **"Extract the booking details using the standard schema."**

The Copilot will give you: - all the details pulled out clearly, - anything missing, - anything unclear.

You read it and confirm it makes sense.

3. If Information Is Missing

If the parent didn't give everything you need:

Say: "Identify missing or unclear items and draft a message asking only for those."

You'll get a very short draft email.

Review it.

If it's correct, copy and send it yourself.

4. Checking Availability

After you check your spreadsheet calendar:

1. Copy the relevant part of your calendar (just the days/times needed).
2. Paste it into ChatGPT.
3. Say:

“Here is the calendar excerpt. Check it for conflicts with the requested times. Use only the times I provide.”

If there is a clash: - Give the Copilot a list of alternative times you’re happy to offer. - Say: **“Draft a message offering only these alternative times.”**

You send the message yourself.

5. Confirming the Booking

Once you and the parent agree on the exact times:

Say: “Draft a confirmation message using these agreed session times and lesson type.”

Paste the dates/times.

Review the draft.

Send it yourself.

Then update your spreadsheet calendar manually.

6. Reminding Parents Who Don’t Respond

If a parent stops replying:

Say: “Draft a reminder asking for the missing information or confirmation. Say the slot will be released if they don’t reply.”

Check the wording, send it, update your calendar if needed.

7. Handling SEND or Sensitive Information Safely

Sometimes parents send long emails about medical or behavioural needs.

1. Paste the message into ChatGPT.
2. Say: **“Summarise only the essential safety-relevant points. Identify information that should not be kept.”**

The Copilot will: - pull out only what you need for safe lessons, - tell you what should be ignored or deleted, - draft a short explanation you can send to the parent if needed.

You then: - Store essential notes in your secure Google Workspace,
- Delete anything unnecessary, - Copy/send your chosen message.

The Copilot must never judge suitability or safety.
That's always your decision.

8. Sending CST the Information They Need

After a booking is confirmed:

Say: "Create a CST summary using only these details."

Paste: - parent name, - child name, - session dates / block length, - lesson type.

Copy the summary into an email to CST.

9. Handling Cancellations or Rescheduling

When a parent cancels or wants to reschedule:

Say: "Draft a cancellation or reschedule message using these exact times."

Paste the times. Review. Send.

Update your calendar manually and notify CST if it affects invoicing.

10. Creating Internal Safety Notes

When you have essential safety points (from a parent email or a chat at the pool):

Say: "Create a short internal safety note from the essential points only."

Store the note in your secure Google Workspace.

11. When the Copilot Drifts or Starts Guessing

If the AI starts: - making assumptions, - adding detail that wasn't in the message, - interpreting SEND needs, - proposing times you didn't give, - giving advice instead of drafts, - or doing anything strange...

Stop it immediately:

Say: “Reset. Follow the Booking Admin Copilot rules only. No inference.”

This forces it back inside the boundaries.

12. Your Golden Rules

- You always send the actual emails — the AI never sends anything.
- You update the calendar yourself — the AI never edits it.
- You decide all safety or SEND-related judgments — the AI never assesses risk.
- If the AI doesn’t have enough information, give it more or ask it what’s missing.

Follow these and the Copilot will consistently save you time without creating surprises.

End of Guide