

Batoi Flex in Claude.

A copy-ready prompt library for running your daily workspace — CRM, projects, finance, and web presence — through Claude.

PROMPT FORMULA | Using Batoi Flex + Action + Workspace Area + Filter / Timeframe + Output Format

START HERE Daily Brief — your morning standup

> **Using Batoi Flex**, prepare my daily workspace brief with CRM leads due today, project tasks due soon, overdue invoices, and recent form submissions. Return a short executive summary followed by a table.

CRM

01 READ

> **Using Batoi Flex**, list open CRM leads and show name, status, stage, source, next action, and next action date.

Projects

02 READ

> **Using Batoi Flex**, list tasks due in the next 7 days and group them by project.

Finance

03 READ

> **Using Batoi Flex**, show overdue invoices and group them by customer.

Web Presence

04 READ

> **Using Batoi Flex**, summarize recent website inquiries and group them by topic.

Safe Write

05 WRITE

> **Using Batoi Flex**, add this note to contact UID [contact_uid]: [note text].

Troubleshooting

06 TIP

> **Using Batoi Flex**, first list matching records with their UIDs, then ask me which one to inspect.