A.I. Lookout Watch Prompts

Six generic watches covering all clients, plus six bonus examples

PREPARED FOR
SuiteDash users

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Six practical watches for SuiteDash A.I. Lookout

WrightClick · Public prompt pack · Generic watches (v2)

How to use

These six watches are written to cover your whole CRM, not one named client. Paste each instruction into **What to Look For**, keep one **What to Watch** subject selected, choose staff recipients, then **Run Test**. Read which records the preview included. **Save as Draft** until you are ready to start ongoing monitoring. Your team still decides the next step.

Match field names and values to your portal. If you mention a custom field in the instruction, turn on the matching field under **Additional Fields**. Naming a field is not enough.

Watch the walkthroughs on YouTube: https://www.youtube.com/@meetmattwright

Set up your provider first: Connect Your AI Provider in SuiteDash.

Using placeholders and custom fields

In **What to Look For**, use **Insert Field** when you want a SuiteDash value in the sentence. The picker offers three groups:

- **Contacts** — for example Display Name, Primary Email, Coordinator, Salesperson, Title, phone and address fields
- **Company Public** — for example Company Name, phones, emails, website, address, Background Info
- **Staff** — for example names, email, Role, Title, phone, Time Zone

Custom fields do **not** appear in that Insert Field picker. Turn them on under **Additional Fields**. If you insert a field into the instruction, turn on its matching field there as well.

On CRM Custom Fields watches, **Narrow to a Circle** is optional. Leave it empty ("Make a Selection") and the watch reads the whole CRM.

1. Slipping Deadlines – All Active Clients

What it watches: Work & Deadlines

Instruction

> *Flag tasks that are overdue, or due within the next three days, on active projects. Ignore completed tasks. Include the task name, due date, and Company Name.*

What it reads

- Always Read: project name, stage and assignee; start, due and completion dates; the client by name.
- Also Read in this example: Project Description, Comments on Tasks and Logged Time.
- Optional Insert Field: Company Name (Company Public). Enable any matching Additional Fields you insert.
- Additional Fields: enable only fields the instruction needs.

Recipients tip: Start with yourself as the only staff recipient and in-app notifications on. Leave email and browser push off while you test. Review before adding more recipients.

2. Stalled Pipeline – Open Deals Over $3K

What it watches: Deals in the Pipeline

Instruction

> *Flag open deals over $3,000 with no stage change or logged activity in the last 14 days. Ignore Won and Lost. Name the deal, value, stage, days quiet, and Company Name.*

What it reads

- Always Read: deal name, stage and owner; value and currency; creation, last-moved and expected-close dates.
- Also Read in this example: Deal Description and Activity History.
- Optional Insert Field: Company Name. Enable the matching Additional Field if you insert it.

Recipients tip: Start with one responsible staff member, using in-app alerts only. Review the deal's actual history before deciding whether to follow up.

3. Client Tone – Frustrated or Quiet Threads

What it watches: Client Conversations

Instruction

> *Flag threads where the client sounds frustrated, mentions a missed deadline, or stops replying after a question. Quote the line that supports the concern. Include Company Name. Do not suggest contacting the client automatically.*

What it reads

- Always Read: conversation participants, subject, message count and time since the last reply.
- Also Read in this example: The Latest Message, Earlier Messages in the Thread and Attachment Names.
- Attachment names are file names only, not file contents. This watch reads Messages, not the separate real-time Chat product.
- Optional Insert Field: Company Name.

Recipients tip: Alerts go to staff, not the client. Choose your staff recipients and set minimum certainty to fit your team. Read the supporting line before choosing a response.

4. Ticket Cluster – Login and Payment Issues

What it watches: Support Tickets

Instruction

> *Flag open tickets about portal login failures or payment page errors. If two or more describe the same incident, group them and explain the connection. List subjects and Company Name only.*

What it reads

- Always Read: ticket subject, status, priority, assignee and who raised it; opened, last-updated and closed dates.
- Also Read needed for this example: The Opening Message and Replies on the Ticket.
- Optional Insert Field: Company Name.
- Only share ticket custom fields if you know what they hold and the question needs them.

Recipients tip: Send findings to the staff member responsible for triage. Keep clients out of the recipient list; the watch is a prompt for internal review, not an automatic client reply.

5. Renewal Risk – Companies Near Contract End

What it watches: CRM Custom Fields

Instruction

> *Flag companies where Renewal Risk is High, or Contract End Date is within thirty days. Include the company name, risk value, and end date.*

What it reads

- Company information across the CRM when Narrow to a Circle is left empty.
- **Additional Fields to turn on:** Renewal Risk and Contract End Date.
- Both matching fields must be enabled. A field mentioned in the instruction is not automatically shared with the watch.
- Custom fields do not appear in the Insert Field picker; enable them under Additional Fields.

Recipients tip: Start with the staff member responsible for renewals. Use in-app alerts while testing, and check the company and date before taking action.

6. Coverage Gap – Out Of Office or Cert Expiry

What it watches: Staff Custom Fields

Instruction

> *Flag active staff where Out Of Office is Yes, or Cert Expiry Date is within fourteen days. Include the person's Display Name and the relevant values.*

What it reads

- Active staff and the staff custom fields you enable.
- **Additional Fields to turn on:** Out Of Office and Cert Expiry Date.
- Do not enable unrelated staff fields just because they are available.
- The person being evaluated never receives their own alert; only the watch recipients do.

Recipients tip: Choose the manager or person responsible for coverage. Send findings to that staff recipient, with in-app alerts on.

Bonus prompts — extra starting points

These six extras are starting points, not the watches shown in the walkthrough. Replace the brackets, enable only the reads listed, then Run Test against your own records. The custom-field examples work only if you maintain those fields and share them with the watch. These prompts ask for staff findings, not client messages or automatic record changes.

B1. Work & Deadlines — work blocked by a missing item

> *Flag projects for [Client name] where a task comment says work is blocked by [Blocker]. Name the project and quote the supporting comment. Do not treat a question about a possible blocker as a confirmed delay.*

What it reads: The project and client details already included under Always Read, plus Comments on Tasks. The watch can only read comments on tasks it is allowed to open; it cannot check whether a delivery arrived outside SuiteDash.

Recipients tip: Choose the project lead. Check the comment's context before chasing anyone.

B2. Deals in the Pipeline — expected close date has passed

> *Flag open deals in [Pipeline stage] where the expected close date has passed. Ignore Won and Lost. Name the deal, expected close date, stage, and owner.*

What it reads: Deal name, stage, owner and expected close date under Always Read. No extra reads are needed for this question. Use the exact stage name in your portal. A past date is a reason to review the deal, not proof that it is lost.

Recipients tip: Choose the staff member responsible for sales follow-up. Review the date and stage before taking action.

B3. Client Conversations — a request to reschedule

> *Flag message threads with [Client name] where the latest message asks to reschedule [Service or appointment]. Quote the request and name the conversation. Do not suggest changing a booking or contacting the client automatically.*

What it reads: Conversation details under Always Read, plus The Latest Message. This reads a request in Messages; it does not inspect the calendar, check availability or change a booking.

Recipients tip: Choose the staff member who handles client scheduling. They should confirm the request and availability themselves.

B4. Support Tickets — important tickets going quiet

> *Flag open support tickets from [Client name] with priority [Priority value] that have not been updated in [Number of days] days. Name the ticket subject, priority, and last-updated date.*

What it reads: Ticket subject, status, priority and last-updated date under Always Read. No ticket-message or custom-field reads are needed for this question. Use the exact priority value shown in your portal.

Recipients tip: Choose the person responsible for ticket triage. A quiet ticket needs review; the watch is not proof that nobody has worked on it elsewhere.

B5. CRM Custom Fields — service reviews coming due

> *Flag companies where [Service review date field] is within [Number of days] days and [Account status field] is [Active value]. Name the company, service review date, and account status.*

What it reads: Company information when Narrow to a Circle is left empty (whole CRM), plus your own [Service review date field] and [Account status field]. Create or maintain these company fields and enable both under Additional Fields; this does not calculate a review date from service history.

Recipients tip: Choose the person who manages those client accounts. Verify the stored date before arranging a review.

B6. Staff Custom Fields — training needs a follow-up

> *Flag active staff where [Training status field] is [Training required value]. Name the staff member and the training status. Do not alert the staff member who is being evaluated - only the watch recipients.*

What it reads: Active staff and your own [Training status field], enabled under Additional Fields. The status must already be recorded; Lookout is not checking an external training system or inferring qualifications.

Recipients tip: Choose the manager responsible for training. Keep these findings with the appropriate staff recipients.

Before you publish a watch

Run Test, read the included records and check the finding. An empty preview is not proof that every record is fine. Save as Draft keeps the watch stored without starting ongoing monitoring. Publish only when the question, shared information and recipients are right.

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