

**creatorhq.**

THE COMPLETE FREE WORKBOOK

# Clear messages. Private details.

Three finished tenant drafts.  
Facts checked before sending.

## A draft is not a send.

Verified fact packet / Complete messages and correction / Ten worked answers

EDITION 2.0 / SEPTEMBER 2026

A practical workbook, not a promise of results.

# Inside the workbook

Welcome a tenant, explain the known balance and handle a disputed charge without inventing policy or exposing access information.

|                                                          |   |
|----------------------------------------------------------|---|
| 1. Build a fact packet a reviewer can trust              | 3 |
| 2. Send a welcome message without exposing entry details | 5 |
| 3. Answer money questions without promising an outcome   | 6 |
| 4. Correct mistakes and distinguish delivery states      | 7 |
| 5. Practice with changes before using a template live    | 8 |
| 6. Use the answer key and release checklist              | 9 |
| Sources and review notes                                 | 9 |

# How to use this workbook

Edition 2.0. Reviewed September 18, 2026. This complete free workbook helps a storage team write a move-in message, answer a balance enquiry and acknowledge a disputed charge without inventing policy or exposing access information. The fact packet, completed drafts, correction exercise and ten reference answers are all included. No account or paid tool is required for this practice.

Use a document, the supplied fictional packet and a reviewer. Kimi or another AI assistant is optional for a first draft or a contradiction check. This workbook does not send messages, connect to a gate, collect money or monitor tenants. Provider messaging permissions, limits and charges vary; no particular tool is promised to be free or suitable for your operation.

Everything about Juniper Storage below is fictional. This is a separate communication branch, not a continuation of the other workbooks' opening inventory: here S10 has been assigned for T01's approved move-in and is not available for another offer. The supplied rules are exercise inputs, not universal facility policies or legal advice. Collections, lease changes, refunds, access restrictions and emergency response require the relevant authorized process. Do not paste real gate credentials, tenant identities, payment details or private disputes into an AI assistant.

## 1. Build a fact packet a reviewer can trust

A useful message starts with a current record, not a persuasive prompt. Give every fact an owner, evidence reference and review time. If the evidence changes after the draft is approved, reopen approval before sending. "The AI said so" is not an evidence reference.

## Eight facts for this exercise

| Fact                    | Approved exercise information                                                                                                                                                           |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| F1: business and time   | Juniper Storage; September 18, 2026; all times are local.                                                                                                                               |
| F2: hours               | Office Monday-Friday 09:00-17:00; gate daily 07:00-21:00. No 24-hour-access claim.                                                                                                      |
| F3: contact route       | Reply through the existing verified tenant message channel. Staff does not request passwords or full payment-card details there.                                                        |
| F4: move-in record      | Tenant T01 has agreement A01 approved and unit S10 released for the September 21 move-in. Entry credentials are provided separately through the approved secure process.                |
| F5: balance record      | T02's September obligation is \$80. Receipt P20 confirms \$20 received. The remaining \$60 is under review; no late fee or due-date rule is supplied.                                   |
| F6: charge complaint    | T03 reports two \$120 bank entries. Processor record P31 shows one completed \$120 payment; P32 is processing. Staff has not confirmed a duplicate settled charge or approved a refund. |
| F7: follow-up ownership | Case owner Morgan will send an update by September 21 at 12:00, even if the investigation is incomplete. This is an approved update commitment, not a resolution guarantee.             |
| F8: marketing choice    | T01 opted into optional promotions. T02 opted out. T03 has no recorded choice. Service-message eligibility is reviewed separately.                                                      |

A service update and a promotional offer serve different purposes. A stored phone number, an existing rental or a message about an invoice is not a blanket permission to add someone to a campaign. Use the current channel rules and your approved consent records, and keep optional offers out of necessary service messages.

Create the message record before drafting: case ID / purpose / latest fact version / verified recipient / approved destination / sender / reviewer / intended send time / required next step / unresolved facts. Keep the raw private evidence in the approved business system; the AI input can use a fictional substitute or a minimized description.

## 2. Send a welcome message without exposing entry details

First verify identity and destination using the existing approved record. Do not accept a new recipient merely because someone knows a unit number. Check agreement approval, operational unit release and the latest move-in date separately. Payment success alone does not establish all three conditions.

### Completed move-in orientation for T01

Subject: Your September 21 move-in at Juniper Storage

Your September 21 move-in for S10 is recorded against approved agreement A01, and the unit has been released for that move-in. Our office is open Monday-Friday, 09:00-17:00. Gate access hours are 07:00-21:00 daily; these are different from office hours.

Your entry credentials will be provided separately through our approved secure process. We will not include them in this message. If you have not completed that step, reply through this existing tenant message channel so staff can help verify the next action before you travel.

Please do not send passwords or full payment-card details in your reply. If your preferred move-in date has changed, tell us here; a different date is not confirmed until staff updates the record. Thank you, Juniper Storage.

### Recipient challenge

At 10:10 someone claiming to be T01's relative requests the entry code through a new number. The packet contains no approved representative or verified alternative channel. Do not disclose a code, the agreement, the unit assignment or whether T01 is a customer. Send a neutral response through the appropriate public support route and direct the account holder to the established verification process.

Completed response: "For account security, we cannot share access or account information through this unverified channel. Please ask the account holder to contact us through their established tenant channel so staff can review the request. We cannot confirm account details here."

This response does not accuse the sender of wrongdoing and does not claim the person lacks authority forever. It states that authority has not been verified through this route. A screenshot of a private message is not a substitute for the approved verification process.

### **3. Answer money questions without promising an outcome**

Check the actual obligation, successful payments, adjustments and pending items before composing a balance message. A scheduled reminder drafted yesterday may be wrong today. Recheck immediately before sending, especially after a payment event or a complaint.

#### **Completed balance enquiry response for T02**

Subject: September balance check

Thank you for asking us to check the September balance. Our exercise record shows an \$80 September obligation and receipt P20 for \$20 received. The difference is \$60. That amount is under review in the current record; this message does not add a fee or change your agreement.

If you believe a payment or adjustment is missing, please reply through this existing verified channel with the relevant receipt reference. Do not send your full card number or password. Staff will compare the receipt with the current ledger before issuing another balance update. Thank you, Juniper Storage.

The arithmetic is eighty minus twenty, not eighty plus twenty. The message does not say "seven days late," threaten access changes or invent a late fee. None of those facts or authorizations is in the packet. If a draft supplies them, remove them and return to evidence collection.

#### **Completed disputed-charge acknowledgement for T03**

Subject: We are checking the two entries you reported

Thank you for flagging the two \$120 entries. We understand why you want this checked. Our current processor record shows P31 completed and P32 still processing. We have not yet confirmed that two payments settled, and no refund decision has been made.

Morgan owns this review and will update you by September 21 at 12:00 local, even if the investigation is not complete. Please keep any receipt references available; do not send a full card number or password in a reply. We will compare the processor records and any relevant adjustments before explaining the next step. Thank you, Juniper Storage.

Do not describe a bank entry as "just a temporary hold" unless the authoritative evidence supports that exact explanation. Do not promise a bank release time, immediate refund or guaranteed resolution. Acknowledging the concern is useful even while the answer remains unknown.

## 4. Correct mistakes and distinguish delivery states

An incorrect message needs a specific correction, not a quiet template edit. Preserve the original message ID, identify recipients who received it, approve the corrected information and record the correction outcome. If a mistaken message exposed a credential, follow the incident process; a friendly apology alone is not a security response.

### Completed hours correction

At 11:00, message M40 incorrectly tells T01 the gate is open twenty-four hours. At 11:05, staff identifies F2 as the current approved source. Correct M40 through T01's verified channel:

Subject: Correction to the gate hours in our earlier message

Our earlier message M40 incorrectly described gate access as twenty-four hours. The correct gate hours are 07:00-21:00 daily. Office hours remain Monday-Friday, 09:00-17:00. Please use these corrected hours when planning your visit. We are sorry for the mistake. If the correction changes your plans, reply through this channel so staff can discuss the next step; no alternative arrangement has yet been approved.

### Message log exercise

| Message             | Evidence and outcome                              | What may be reported                             |
|---------------------|---------------------------------------------------|--------------------------------------------------|
| M41 orientation     | Reviewer approved; queued; no send result         | Queued, not sent                                 |
| M42 balance answer  | Provider accepted; delivery unconfirmed           | Accepted, not confirmed delivered                |
| M43 complaint reply | Provider reports delivered; no recipient response | Delivered, not acknowledged                      |
| M44 correction      | Recipient replies "Received, thank you"           | Acknowledged by recipient                        |
| M44 retry request   | Same message ID; prior acknowledgement exists     | Review before any resend; no automatic duplicate |

Record unknown outcomes honestly. If a send times out, inspect the provider's current record before retrying. Otherwise, an uncertain response can become two messages. A recipient acknowledgement also does not mean the person agrees with a balance or authorizes a payment.

Use a short internal handoff: "T03 / case C03 / Morgan / update due September 21 at 12:00 / P31 completed, P32 processing / no refund approved / reply channel verified / latest customer message retained in the approved system." That is actionable without exposing financial details to an unrelated team or public review response.

## 5. Practice with changes before using a template live

Optional Kimi prompt: "Use only fictional facts F1-F8. Draft the three messages requested below. Keep gate hours distinct from office hours, processing distinct from completed payments, and an update deadline distinct from resolution. Do not include a gate code, late fee, access restriction, promotional offer or refund promise. After each draft, list the facts used and anything still unknown."

Do not paste an entire tenant thread just to save time. Start with synthetic data, compare the model's draft against the finished examples, and inspect each factual claim. The human reviewer remains responsible for the destination, approved wording and send action. This exercise makes no claim about a model's privacy settings or current plan limits.

### Fresh practice packet

Make these three independent changes to the opening packet, rather than stacking them on each other. First, before sending the T02 answer, receipt P21 confirms a further \$60 received against the same September obligation. Second, T03 requests all future communication at a newly supplied address that has not been verified. Third, someone proposes adding "Refer a friend for \$20 off" to all three service drafts; there is no approved offer or promotion-permission record beyond F8.

Write one decision for each change and revise the T02 answer. Correct T02 revision: "Our updated September record shows the \$80 obligation matched by receipts P20 for \$20 and P21 for \$60, leaving \$0 outstanding for that obligation in this exercise. Thank you for allowing us to check. This does not make a statement about any other period or obligation."

Hold the T03 destination change for the approved verification process; do not simply replace the recipient in a queued draft. Remove the referral offer from all three service messages. Even T01's optional marketing choice does not create an approved discount. The revised T02 message should also replace any queued earlier \$60 reminder after current-state verification, not create a contradictory second instruction.

Editorial review role: CreatorHQ workflow editor, using synthetic arithmetic, recipient and state checks. Edition 2.0 replaces "AI handles it all" and predicted complaint outcomes with complete messages, a correction trail, send-state distinctions and independent practice. It remains a complete free workbook, not an incomplete teaser.

## 6. Use the answer key and release checklist

| Check                                                    | Reference answer                                                           |
|----------------------------------------------------------|----------------------------------------------------------------------------|
| 1. Which hours belong in the welcome message?            | Office 09:00-17:00 Monday-Friday; gate 07:00-21:00 daily.                  |
| 2. Does the welcome include credentials?                 | No; the approved secure process is separate.                               |
| 3. Can the unverified relative receive the unit details? | No; the supplied packet establishes no verified authority.                 |
| 4. Opening T02 balance difference?                       | $\$80 - \$20 = \$60$ , with the stated review caveat.                      |
| 5. Do two bank entries prove two settled payments?       | No. P31 completed; P32 is processing.                                      |
| 6. What does Morgan promise?                             | An update by September 21 at 12:00, not resolution or refund.              |
| 7. What is known about M42?                              | Provider accepted it; delivery is unconfirmed.                             |
| 8. What is known about M43?                              | Delivered, not acknowledged.                                               |
| 9. Revised T02 September balance?                        | $\$80 - \$20 - \$60 = \$0$ for that obligation.                            |
| 10. Can the referral line be added?                      | No approved offer; service purpose and marketing eligibility are separate. |

Before releasing a real message, a reviewer checks the recipient, purpose, channel, timestamp, current amount, approved policy, exact next step, responsible person and deadline. Then confirm the send result without overstating it. Keep an exception queue for unknown facts, verification failures and disputed amounts. Do not schedule a more forceful message merely because a timer elapsed.

## Sources and review notes

- [FTC: Protecting Personal Information](#) provides a basis for collecting less sensitive information and limiting access.
- [Stripe: Payment status updates](#) explains why pending processing differs from completed payment; later refunds and disputes need their own checks.
- [Mailchimp: The importance of permission](#) describes permission for marketing communications. Provider guidance is not a complete statement of every jurisdiction's messaging law.

Reviewed September 18, 2026. Examples are original fictional teaching materials. Verify current provider behavior, applicable messaging requirements, facility agreements and approved security processes before real use.