The cheat sheet for your files

Step 1 from the CA Craft Beer Summit talk, November 11. A cheat sheet is a short file that tells AI what's in your spreadsheets, so every question starts from the same understanding. Some people call it a context file. Write it once and save it where your AI tool reads it every time (in Claude, that's a project's instructions or a file in the project). Below are the things worth putting in it, with what Coastline, the made-up brewery from the talk, wrote for its weekly sales review.

Start with the files behind one report

Pick the report you most want off your plate and describe only the files it needs. You can add the rest later.

- **Where each file comes from, and how often.** *Coastline's depletions file: "The distributors' report, exported every Monday."*
- **What one row is.** *"One account, one item, one week."*
- **The columns that matter, in your words.** *"Cases means case equivalents."*
- **The quirks a new hire would trip on.** *"Each distributor spells the same account differently."*

Say how the files connect

- **Which column links them,** and which file sorts out the different spellings. *"The mapping file matches each distributor's account names to ours, and says which rep owns each one."*
- **What to do with a name it can't match.** *"List it and ask. Don't guess."*

Tell it what it can't see

This is the first habit from the talk. Whatever you write here, it believes, so keep it current.

- **How your week runs.** *"Our week starts on Monday."*
- **Seasonals and timing.** *"Don't flag a seasonal as a drop when its season ends."*
- **A month that isn't over yet.** *"The current month isn't over yet."*
- **When you're busiest.** *"Strongest in summer and winter."*
- **What you changed, and when.** *"Each initiative has a start date and its accounts."*
- **The words your team uses,** and any it should never use.

Say what the report is for

Who reads it, when, and what they look at first. *"The weekly sales review for Sam's team, read Monday morning: the team against goal, who's ahead and behind, and which regular accounts went quiet."*

Give it a number you trust

This is the second habit. Name the report it should check its totals against, and what to do when they don't match. *"Check the total against the distributor's own depletion report for the same week. If it's off, stop, say by how much, and don't write anything else until it matches."*

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