

AI for accounting and bookkeeping firms: a one-page quick-start

AI fits best on the writing around the accounting: client email, meeting recaps and document requests. It drafts; your firm decides.

Where to start, in order

1. **Reply Faster: Client Refund Emails:** draft a refund reply from numbered facts, then check every promise.
2. **Summarize a Client Meeting:** a quarterly review becomes decisions, an action items table and a client email.
3. **AI Receipt Extractor:** receipt photos to a spreadsheet with n8n.
4. **AI Expense Categorizer Agent:** a batch of expenses sorted into your categories.
5. **AI Email Responder:** reply drafts saved in Gmail for routine questions.
6. **Prompt Writing 101:** Role, Context, Task, Format. Take it first if prompts are new to you.

A prompt to copy: fix the tone, keep the facts

Role: You are an editor improving the tone of a reply from [BUSINESS]. You change how it sounds, never what it says.

Context: What's wrong with the tone: [TONE PROBLEMS]. The tone I want: [TARGET TONE].

These facts must survive exactly: [MUST KEEP].

Task: Rewrite the draft to fix those tone problems. Keep every fact, number, date and refusal as it is, including anything that says we can't do something. Add no new promises, apologies or information.

Format: The rewritten reply, under [LENGTH], then a short list headed What changed, one line per change.

From the free prompt library. Paste the draft under it.

What AI must not do

Tax advice

A CPA or enrolled agent reviews anything about taxes before it reaches a client.

Refund dates

Timing comes from the IRS or the state. Say what the firm will do next.

Filing promises

Filing depends on the client reviewing and signing. Spell out those steps instead.

Client data

Mask Social Security numbers, account numbers and dates of birth before pasting.

Remember: Check forms, dates and dollar amounts in every reply before it goes out. If a promise isn't in your facts, it comes out.

Have a professional review it. This prompt helps you draft and organize, not give tax advice. Tax rules change and depend on the client, so have a CPA or enrolled agent review anything about taxes before it goes out.