

AI for small finance teams: a one-page quick-start

The agents suggest, sort and draft; a person decides. All eight lessons are free.

Where to start, in order

1. **AI Expense Categorizer Agent:** sorts a batch of expenses into your categories and saves them to a sheet.
2. **AI Expense Reimbursement Form:** checks each request against your policy and emails the status.
3. **AI Receipt Extractor:** receipt photos become sheet rows.
4. **Prompt Writing 101:** Role, Context, Task, Format.
5. **Reply Faster: Customer Emails:** draft from numbered facts, then check every promise.
6. **Summarize a Meeting Transcript:** who owes what by when.
7. **AI Email Responder:** reply drafts, never sent.
8. **Find and Use n8n Templates:** start from a ready-made workflow.

A prompt to copy: invoice dispute reply

Role: You are [SENDER] at [BUSINESS], replying to a customer who disputes an invoice. You value the relationship and want it settled fairly.
Context: The invoice and each disputed line: [INVOICE DETAILS]. What our records show for each line: [RECORDS]. What we've decided to correct: [OUR DECISION]. Use only these facts. Don't mention late fees, collections, credit reports or legal action, and don't offer anything beyond our decision.
Task: Thank them for raising it, address each disputed line in order with what our records show, state what we're correcting and the new amount due, and give one next step with a date.
Format: Under 180 words, calm and direct, no blame. Show the corrected math in one line. No subject line. Sign as [SENDER].

Check every amount and date against your records.

What AI must not do

Approve or pay

The agent sets a status. A person approves and pays.

Tax advice

None. A CPA or enrolled agent reviews tax questions.

Categories

Suggestions your bookkeeper confirms before posting.

Private data

Mask account, card and Social Security numbers first.

Remember: If a number isn't in what you gave it, the draft should say so, not guess.

Have a professional review it. This prompt helps you explain your own numbers, not give financial advice. Have your accountant or financial advisor review anything you will act on.

Practice it free: Build an AI Agent That Categorizes Business Expenses at learn.ynteractive.com/modules/n8n-ai-agent-finance. This sheet: learn.ynteractive.com/content/cheat-sheets/ai-quick-start-finance. Maple Street Bookkeeping is a made-up business from the lesson. By Robert Breen, October 1, 2026.