



Three Claude Skills to Start With

A bonus from our October 15 webinar. A skill is a set of written instructions that Claude follows the same way every time you ask for that job. This PDF contains three of them, written so Claude can set them up for you.

HOW TO USE THIS PDF

Three steps, about twenty minutes

1**Get Claude Code**

It comes with a paid Claude plan. Install it from claude.com, or use the Code tab in the Claude desktop app.

2**Check your connections**

Read the prerequisites on page 2. They decide how much each skill can do for you.

3**Paste the prompt below**

Start a new Claude Code session, paste it, and attach this PDF. Answer the questions Claude asks.

The prompt to paste (attach this PDF with it):

Read the attached PDF. It describes three skills for my back office. First, check which connections I have and what each one is allowed to do, then tell me which skills can run fully, which will run from files I export, and what is missing. Then ask me the setup questions for each skill and create the skills. Do not change anything in QuickBooks and do not send or draft any email while setting up.

WHAT YOU GET

The three skills

Skill	What it does	What it never does
Bill intake	Reads vendor invoice PDFs, checks the math and the due date, catches duplicates, and suggests an expense account from your own history. You approve before anything is entered.	Pay a bill, mark one paid, or create a vendor or account without asking.
Collections drafter	Works your open invoices, checks for recent payments, and drafts reminder emails tiered by how late each one is. Flags the ones you should call instead.	Send an email. Every one is a draft for you to read.
Month-end check	Compares this month to the last three and flags recurring charges that are missing, doubled, in the wrong month, or at a new amount.	Change anything. It only reads and reports.

BEFORE YOU START

Prerequisites: the right connections, with the right access

A skill can only do what its connections allow. Each one below works best connected to QuickBooks Online and, for collections, to your email. Each one also works from files you export, with less done for you. The setup prompt checks what you have and tells you which mode each skill will run in.

Skill	Connection	Access it needs	Without it
Bill intake	QuickBooks Online	Read vendors, accounts and past bills, to suggest accounts and catch duplicates. Write bills, to enter what you approve.	Read only: it builds a review table you key in. No connection: same, and you give it your chart of accounts.
Collections drafter	QuickBooks Online	Read open invoices, customers and recent payments.	Export your A/R aging report and give it the file.
	Email (Microsoft 365 or Outlook)	Create drafts in your mailbox. It never needs permission to send.	Drafts appear in Claude for you to copy into email.
Month-end check	QuickBooks Online	Read transactions and the profit and loss report by month. Nothing more.	Export transaction detail by vendor for the last four months.

Rules for giving access

- Give the least access that does the job. Read access first. Add write access only for bill intake, and only after it has run clean in read-only mode for a few weeks.
- None of these skills needs permission to send email, move money, or change your chart of accounts. If a connection asks for that, do not grant it.
- Connect with a separate login for Claude where you can, not your own admin login and not your bookkeeper's. That keeps its actions visible in the QuickBooks audit log.
- Know what a ready-made connector hands over. It gives Claude whatever its vendor exposes, usually all or nothing, and you often cannot narrow it. Most can read your books but cannot enter bills, so expect bill intake to start in review-table mode. The rules inside each skill (draft only, never pay, never delete) are what keep it in bounds.
- If a connector cannot reach a screen, Claude can work through the Chrome extension instead, logged in as you, with everything you are allowed to do. These skills do not need it. If you use it, keep it to reading.
- Close the session when the job is done. That ends the access and clears what Claude was holding.
- Turn on multi-factor authentication on every account a connection uses.

Where to add connections

- Connectors you add in your Claude account settings, under Connectors, are available in Claude Code when you sign in with the same account.
- In Claude Code, type `/mcp` to see what is connected and its status.

Before you connect anything, decide who owns these skills: one person who reads what they did, approves new ones, and can switch them off.

FOR CLAUDE | SKILL 1 OF 3

Instructions for Claude. Build each skill as a personal skill: one folder per skill under `~/ .claude/skills/`, containing a `SKILL.md` file with YAML frontmatter (name, description) followed by the instructions below written as the skill body. Before creating any skill, list the user's connections and the tools each exposes, report the mode each skill will run in (connected, read-only, or file), and ask the setup questions. Write the user's answers into a Rules section inside each `SKILL.md` (approval limits, vendor rules, off-limits accounts), in plain words the user can read and edit. Never run a skill during setup.

Bill intake

Folder	<code>~/ .claude/skills/bill-intake/SKILL.md</code>
name	<code>bill-intake</code>
description	Turn vendor invoice PDFs into bills for QuickBooks Online, with checks and suggested accounts. Use when the user says enter bills, process invoices, or points to invoice PDFs.
Modes	Connected with write: enters approved bills. Read-only: review table to key in. File: same table, accounts suggested from an exported chart of accounts.

Setup questions to ask the user

- Which folder do invoice PDFs arrive in?
- Which QuickBooks company should it work in?
- Above what dollar amount should a bill always be reviewed on its own, never in a batch approval?
- Which accounts must it never post to?
- What payment terms apply when an invoice shows none?
- After a bill is entered, may it move the PDF into an Entered subfolder?

Steps every run

1. List new PDFs in the folder. Skip any already in `processed-log.md` in the skill folder.
2. Read each one: vendor, invoice number, invoice date, terms, due date, each line, tax, total. If any value cannot be read clearly, flag it. Never guess an amount.
3. Check that the lines add up to the total and the due date matches the terms.
4. Check for duplicates: same vendor and invoice number in QuickBooks (when connected) or in `processed-log.md`. Stop on a match.
5. Suggest an expense account for each line: first `vendor-memory.md`, then this vendor's recent bills in QuickBooks, then the closest account in the chart of accounts. Give the reason and say how sure you are.
6. Show the review table, previewing exactly what will be entered, and wait. The user approves, corrects, or skips each bill. Batch approval is allowed only for bills under the dollar limit from setup.
7. Connected with write: create each approved bill, read it back, and confirm the total matches. Otherwise: output the approved table for the user to key in.
8. Record confirmed vendor-to-account choices in `vendor-memory.md` and the bill in `processed-log.md`.

Guardrails

- Never pay a bill, mark one paid, or schedule a payment.
- Never create a vendor or an account without asking first.
- Never write anything the user has not approved in this session.

Output

A table per run: vendor, invoice number, date, due date, total, suggested account and reason, status (entered, ready to key in, flagged, duplicate). Flagged items listed first.

FOR CLAUDE | SKILL 2 OF 3

Collections drafter

Folder	~/ .claude/skills/collections-drafter/SKILL.md
name	collections-drafter
description	Work the open invoices and draft collection emails, tiered by days overdue. Use when the user asks who owes money, to work the A/R aging, or to draft payment reminders.
Modes	Connected: reads invoices and payments from QuickBooks, creates drafts in the mailbox. File: works from an exported A/R aging report, drafts appear in the chat.

Setup questions to ask the user

- Whose name and signature go on the emails?
- Which customers should never get a collection email from this skill (call-only or handled personally)?
- Below what balance should it not bother drafting?
- What do your invoices say about late fees, if anything? Use only that wording.
- Do you send a payment link or instructions? Paste the exact text to include.

Steps every run

1. Get every open invoice past its due date, grouped by customer, with days overdue.
2. Before drafting, check for payments, credits, or unapplied payments in the last 14 days. If any could cover the balance, do not draft. List it for the user instead.
3. Assign a tier by the oldest overdue invoice: 1 to 15 days, a friendly reminder. 16 to 45 days, a firm reminder. 46 to 90 days, a final reminder plus a note to the user to call. Over 90 days, no email; flag it for the user.
4. Draft one email per customer, listing each invoice number, date, amount, and the total due, with the payment text from setup.
5. Connected to email with draft access: create the drafts in the mailbox. Otherwise: show them in the chat.

Guardrails

- Never send an email. Drafts only.
- Never mention legal action, collections agencies, or late fees beyond the wording from setup.
- Never draft to a customer on the do-not-email list.
- Never include another customer's information in an email.

Output

A summary table: customer, balance, oldest invoice, tier, action (drafted, call, withheld), and the reason for every withheld or flagged customer.

FOR CLAUDE | SKILL 3 OF 3

Month-end check

Folder	~/ .claude/skills/month-end-check/SKILL.md
name	month-end-check
description	Check that every recurring expense landed in the right month before the books are closed. Use when the user asks to check a month, review recurring charges, or sanity-check the profit and loss.
Modes	Connected: reads transactions from QuickBooks. File: works from exported transaction detail by vendor. Read-only in both modes.

Setup questions to ask the user

- Which accounts or vendors matter most? Default: every expense account.
- How much can a recurring amount change before it is worth flagging? Default: 10 percent.
- Any vendors billed quarterly or yearly that should not be expected every month?

Steps every run

1. Pull expense transactions for the target month and the three months before it.
2. Build a vendor-by-month grid of counts and amounts, and note which account each charge went to.
3. Find: a recurring charge missing from the target month; two charges in one month and none in the month next to it; an amount outside the tolerance; a charge coded to a different account than usual; a vendor never seen before.
4. Verify each finding before reporting it: search seven days either side of the month, check whether the vendor bills quarterly or yearly, and check for the charge under a different name or payment method.
5. Drop anything that verification explains. Keep the rest.

Guardrails

- Read-only. Never create, edit, or delete a transaction or journal entry.
- Suggest fixes in plain words. The user or their bookkeeper makes them.

Output

A findings table: vendor, what looks wrong, the evidence (dates and amounts), and the suggested fix. Then a short list of recurring charges that checked out clean.

AFTER SETUP

Using your skills

Just ask in plain words. Claude picks the right skill from what you say.

Bill intake	Enter the new bills in my invoices folder.
Collections drafter	Work the A/R aging and draft the reminders.
Month-end check	Check September before I close it.

The first month

- Check every result in the first two weeks, line by line. That is how you learn where to trust it.
- When it gets something wrong, tell it, and ask it to update the skill so it does not happen again.
- Keep vendor-memory.md. It is how bill intake gets better every week.
- Add the next skill only after the first one runs clean.
- Your rules live in each skill's SKILL.md. Open it to read or change them at any time.
- To give the whole team the same skills, ask Claude to move them into a shared project folder.

Want the last step done too?

These skills read, check and draft. Entering everything into QuickBooks reliably, on a schedule, on a custom connector scoped to your rules, with every action logged, is what we build for clients. Live in about two weeks. Book a free scoping call at getanswers@safepointit.com or (847) 499-1500.

These skills are a starting point, provided as is. Review every result before it reaches your books or your customers. Nothing here is accounting or tax advice. Claude, QuickBooks and Microsoft 365 are trademarks of their owners.