

SAFEPOINT IT WEBINAR · OCTOBER 15



Managed IT & Cybersecurity for healthcare and mission-critical businesses

24

Years in Business

95%

Customer Satisfaction

3x

Inc 5000 Honoree

WHAT WE DO

Cybersecurity & Compliance

Cloud & Infrastructure

Helpdesk & Onsite Support

Virtual CIO & Strategy

AI Integration & Automation

Data Backup & Disaster Recovery

Local Chicagoland Team

90-Day Satisfaction Guarantee

SAFEPOINT IT WEBINAR · OCTOBER 15

QuickBooks on Autopilot: **An AI Agent** That Runs Your Books

Claude can tell you what to do with your books. Today we show you the agent that actually goes and does it — entering bills, chasing invoices, and building reports on a schedule.

PRESENTED BY

Alek Pirkhalo · CEO & Technology Strategist

Kaden Evenson · Service Manager

Jared Bahr · Enterprise Engineer

WHAT WE WILL COVER

01 Why Autopilot

The owner who became the bookkeeper by accident — and what the agent takes off your plate.

02 Before You Automate

Guardrails, written rules, and closing sessions — then connectors and skills.

03 Live Demo

Bills entered, errors found, reports built — in a real QuickBooks file.

04 Working With Us + Q&A

Setup, training, the 14-day guarantee, and your questions.

WHY AUTOPILOT

FOR WHOEVER IS STILL DOING THE BOOKS AT 10 PM

Made for Whoever Became the Bookkeeper by Accident

Owner, office manager, or accountant: you already pay for QuickBooks Online. You're just tired of doing financial admin at night — and generic AI can talk about your books, but can't act inside them. Six things your agent handles, so you don't.

1 • Enters your bills

Drop PDFs in a folder. It reads each one, enters it in QuickBooks, attaches the source document, and files it.

2 • Finds hidden errors

Duplicate vendors, miscategorized expenses, stale checks, missing receipts — caught before your CPA finds them.

3 • Builds your reports

P&L variance with commentary, cash flow snapshot, collections with chase emails drafted — sent on a schedule.

4 • Answers anything in seconds

"How much did we spend on Verizon last year?" "Which customer is paying slower each quarter?" No more digging.

5 • Catches revenue that stopped

A failed card, a plan line at zero, an invoice for the wrong amount — found before it's three months of missed billing.

6 • Runs locked down

Same SOC, monitoring, and incident response that protects 50+ Chicago businesses. Full audit log; rollback if anything looks wrong.

→ Not a chatbot that gives advice — a configured agent that takes real actions in QuickBooks, on a schedule.

BEFORE YOU AUTOMATE

GUARDRAILS & GUIDELINES

Set the Rules Before You Turn It On

An agent that can write to your books needs boundaries written down before the first session — what it may do on its own, what it has to ask about first, and what it never touches.

Least privilege & scoping

Read-only by default. Write access only where the workflow genuinely needs it — create a bill, yes; delete history, no. Most irreversible mistakes simply can't happen.

Your rules, in writing

Approval thresholds, vendor rules, and off-limits accounts written into the setup — kept where you can read and change them, not assumed by the model.

Ask first, with a preview

High-stakes actions pause for a person — paired with a clear preview of exactly what will change. An "Are you sure?" with no detail gets clicked through reflexively.

Close the session when the job is done

Every task runs in a session. Closing it ends the agent's access and clears its context — a clean stop, a bounded audit trail, and no agent left running with permissions it no longer needs.

→ Guardrails aren't the brake — they're what let you trust the gas.

What's an MCP Connector?

On its own, Claude only knows what you paste into the chat. A connector (built on MCP, the open standard) is the bridge to one tool — QuickBooks, your email, your CRM — and it defines exactly what Claude can see and do there. That's the difference between advice and action.

PRE-BUILT CONNECTOR

Easy to turn on, uncontrolled

Without guardrails, a default connector hands Claude essentially full permissions to whatever the connector can reach — every action the vendor exposed, all or nothing. You can't narrow it to the tasks you actually want done, and you can't tell it what it may never touch.

CUSTOM MCP CONNECTOR

Scoped to your rules

A custom MCP connector lets you limit or expand access to each system you connect, and define exactly which permissions it has in each one — read here, write there, never touch that. More work to set up, but you get control built in rather than bolted on with extra guardrails.

→ **Default connectors give Claude the keys. Custom connectors decide which doors they open.**

CHROME CONNECTOR

WHEN THERE'S NO DOOR, USE THE SCREEN

What's the Chrome Connector?

Some things a connector simply can't edit: the QuickBooks API doesn't expose every screen and setting. For those, the Chrome plugin lets Claude drive a real browser: it opens the page, reads it, clicks and types, the same way a person at the keyboard would.

CONNECTOR

Fast, but only what's exposed

Talks to QuickBooks directly, through its API. Reads and writes in seconds, but only the data and actions the API makes available. If a field or screen isn't there, the connector can't touch it.

CHROME CONNECTOR

Slower, but reaches anything you can

Works through the same web pages you use, logged in as you. Anything you can do in a browser, it can do too. It's slower because it moves one screen at a time, but it gets the job done.

→ **Connector first for speed. Chrome when the connector can't reach it.**

What Are Skills, and Why Use Them?

A connector gives Claude hands. A skill gives it your procedure: a written, reusable set of instructions — your bill-entry steps, your month-end checklist, your report format — that Claude loads automatically whenever the task calls for it.

CONSISTENCY

Same way, every time

The P&L variance report comes out in the same format every month. Bills get categorized by your rules, not the model's best guess.

SPEED

Stop re-explaining

No 200-word prompt before every task. Say "run month-end" and the skill carries the steps, the thresholds, and the exceptions.

SHAREABLE

One skill, whole team

Skills live in a shared repository. A new user is added in minutes and works exactly the way your business does from day one.

→ **Connectors are what Claude can do. Skills are how your business does it.**

DEMO ONE

ACCOUNTS PAYABLE

A vendor invoice, entered without typing

THE MANUAL TASK IT REPLACES

Open the PDF. Key in the vendor, invoice number, dates and every line. Pick the account, work out the due date from the terms, then file the email. Every invoice, every week.

Approved Bills for QB Entry · NDS-48812_Northgate-Dental-Supply.pdf

NORTHGATE DENTAL SUPPLY
2200 Northgate Industrial Dr · Elk Grove Village, IL 60007
(847) 555-0148 · ar@northgatedental.example.com

INVOICE
Page 1 of 1

BILL TO
Riverside Dental Group
18 Riverside Plaza, Suite 210
Palatine, IL 60067

Invoice number NDS-48812
Invoice date October 6, 2026
Terms Net 30
Customer account RDG-0042
PO reference —

ITEM	DESCRIPTION	QTY	UOM	UNIT	AMOUNT
NG-4410	Nitrile exam gloves, powder-free, medium — case of 10 bx	4	ea	68.00	272.00
NG-4412	Nitrile exam gloves, powder-free, large — case of 10 bx	2	ea	68.00	136.00
NG-2207	Patient bibs, 3-ply, 500 ct	3	ea	42.00	126.00
NG-2250	Saliva ejectors, 100 ct	6	ea	11.00	66.00
NG-3120	Prophy angles, soft cup, 100 ct	2	ea	60.00	120.00
NG-7702	Sterilization pouches, 3.5 x 9, 200 ct	4	ea	45.00	180.00

Subtotal 900.00
Shipping & handling 40.00
Sales tax 0.00
TOTAL DUE (USD) 940.00

Note: Back-ordered item NG-3145 (fluoride varnish, unit dose) has been removed from this invoice and will ship separately under a new invoice number. Your account remains on Net 30 terms; payment for this invoice is due November 5, 2026. Remit by ACH to the

Net 30 →
due 11/05/2026

6 lines → Dental
Supplies

Shipping →
Postage

\$940.00

→ INVOICE NDS-48812

\$940.00 · due 11/05/2026

Paper to ledger, with no data entry.

DEMO TWO

BILLING A VISIT

Two hours and a hard drive, invoiced

● ● ● Claude · new request

YOU TYPE

Invoice Lakeshore for two hours of consulting and one external SSD.

INVOICE IT BUILDS · LAKESHORE PEDIATRIC DENTAL

ITEM	QTY	RATE	AMOUNT	REVENUE ACCOUNT
IT Consulting (hourly)	2	\$150.00	\$300.00	Software & Outside Services
External SSD 2TB	1	\$189.00	\$189.00	Equipment Sales
Total		\$489.00	Rates from the item list	

THE MANUAL TASK IT REPLACES

Look up the hourly rate and what the drive sells for. Split labor and hardware into the right revenue accounts. Fill in the customer details by hand.

→ LAKESHORE PEDIATRIC DENTAL

2 hrs + 1 drive = \$489.00

The total is easy. The account split is what people get wrong.

DEMO THREE

ACCOUNTS RECEIVABLE

A credit memo that ties back to what changed

THE MANUAL TASK IT REPLACES

Find the original invoice. Work out what one lost seat cost at the rate actually charged. Write the credit, note why, then decide whether to apply it.

Harbor Point Insurance · Invoice 1042

INVOICE 1042 · AS BILLED

LINE	QTY	RATE	AMOUNT
Smile Club Individual — Corporate	20	\$95.00	\$1,900.00
Preventive Care Rider	20	\$18.00	\$360.00
Total			\$2,260.00

CREDIT MEMO · ONE EMPLOYEE DROPPED

Smile Club Individual — Corporate	-1	\$95.00	-\$95.00
Preventive Care Rider	-1	\$18.00	-\$18.00
Memo: seat count 20 → 19	Credit		-\$113.00

Apply it now?

1 · Enter only

2 · Apply to 1042

3 · Another invoice

→ INVOICE 1042 · 20 SEATS → 19

-\$113.00 on two named lines

In six months anyone can still see why the balance moved.

DEMO FOUR

CARD SPEND

A photo of a receipt becomes a coded expense

THE MANUAL TASK IT REPLACES

Dig the receipt out of a drawer or a camera roll. Split the items by account, spread the tax, pick the card and attach the photo. Most weeks it never happens.

demo-data / inbox · staples-receipt-2026-10-07.jpg



LINE 1 · OFFICE SUPPLIES

Copy paper, Post-it notes
\$63.99 + \$6.56 tax
\$70.55

LINE 2 · COMPUTER & IT EQUIPMENT

Logitech webcam
\$79.99 + \$8.20 tax
\$88.19

Paid with: Amex Business

Photo attached

→ **STAPLES · 07 OCT 2026**

\$158.74 across two accounts

It reasons about what the items are, not just what they cost.

DEMO FIVE

THE FOR REVIEW PILE

QuickBooks already guessed. Five are wrong.

THE MANUAL TASK IT REPLACES

Click through every row in For Review and second-guess QuickBooks' suggestion. Most are right, so the wrong ones get accepted along with them.

Practice Visa · For review (12)

DATE	BANK DESCRIPTION	AMOUNT	QUICKBOOKS GUESSED	
10/14	WM SUPERCENTER #1234	-118.63	Job Expenses:Job Materials	Wrong
10/13	ZOOM.US 888-799-9666	-79.20	Dues & Subscriptions	OK
10/12	PANERA BREAD #601234	-84.16	Meals and Entertainment	OK
10/11	AMZN MKTP US*2K4LZ8H91	-310.00	Match · 2 matches found	Wrong
10/10	AMZN MKTP US*RT4K9	+42.99	Customer income	Wrong
10/09	SHELL OIL 574412908	-140.20	Automobile:Fuel	OK
10/08	INTUIT *QB00KS ONLINE	-90.00	6310 Merchant Fees	Wrong
10/07	USPS PO 1613400153	-27.40	6610 Postage and Shipping	OK
10/06	DELTA AIR 0062312345678	-412.80	Travel	OK
10/05	MSFT * E0800LKJ2	-51.00	Dues & Subscriptions	OK
10/03	SQ *NORTHGATE DENTAL	-62.50	Uncategorized Expense	Wrong
10/02	ADOBE *CREATIVE CLOUD	-59.99	Dues & Subscriptions	OK

→ 12 ROWS IN FOR REVIEW

Seven right, five wrong.

A wrong match is worse than a wrong category.

The revenue leak nobody was going to catch

THE MANUAL TASK IT REPLACES

Compare every customer's billing to their own last three months, line by line, to find out why revenue dipped. Nobody has that afternoon, so nobody does it.

Account 4041 · Membership Revenue · by member, Aug-Oct

MEMBER	AUG	SEP	OCT	FLAG
Dana Lopez	\$160.00	\$160.00	\$0.00	Critical · billed \$0.00
Marcus Webb	\$240.00	\$240.00	\$120.00	2 seats → 1
Priya Nair	—	\$52.50	\$105.00	Joined Sep 15 · not churn
Sam Carter	—	—	\$95.00	New member
All other members	\$720.00	\$720.00	\$720.00	Steady
Total	\$1,120.00	\$1,172.50	\$1,040.00	-11.3%

Cause: Smile Club autobill template for Dana Lopez — unit price \$0.00. Every future invoice would bill zero.

→ ACCOUNT 4041 · MEMBERSHIP REVENUE

\$160.00/mo → \$0.00

It explains the 11.3% drop with the one line that caused it.

DEMO SEVEN

GETTING PAID

Who owes us, and who to chase

THE MANUAL TASK IT REPLACES

Run the aging, decide how hard to push each customer, check every balance, then write each email yourself. Twelve customers is an afternoon.

→ OVERDUE \$2,712.50 OF \$11,176.50

Three drafts, one refusal.

An agent that sends one bad email is worse than no agent.

Accounts receivable · overdue \$2,712.50 of \$11,176.50

CUSTOMER	OVERDUE	DAYS	WHAT CLAUDE DOES
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Harbor Point Insurance Corporate account · invoice 1041	\$2,260.00	45	Draft · firmer letter
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Marcus Webb Member · September	\$240.00	29	Draft · reminder
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Dana Lopez October billed \$0.00	\$160.00	29	Withheld · fix billing first
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Priya Nair Member · prorated first month	\$52.50	15	Draft · gentle nudge
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OUTLOOK · DRAFTS

3 drafts, 0 sent

NOT YET DUE

Not chased

DEMO EIGHT

THE MONTH BEFORE YOU SIGN IT

Did every charge land in the right month?

THE MANUAL TASK IT REPLACES

Line up every recurring vendor month by month and hunt for what posted late, never posted, or moved accounts. A missing charge leaves nothing to review.

Recurring expense check · September 2026

VENDOR	JUN	JUL	AUG	SEP	STATUS
RadCloud Imaging Archive	1,240	1,240	1,240	—	Posted Oct 1 · wrong month
ScanBridge Scanner Software	580	580	580	—	Stopped charging
Midwest Dental Supply				3,130	Coded to Office Supplies
Sterilis Supply	415	415	415	—	Renamed · Sterilis Supply Co.
RecallText	89	89	89	—	Now paid via PearlPay
LabCourier	310	310	310	—	Contract ended 8/31
12 other recurring vendors	✓	✓	✓	✓	On schedule

Red = fix · Blue = checked and explained · Green = clean. **Read-only** — nothing changed.

→ **SEPTEMBER · RECURRING VENDORS**

\$1,240 in the wrong month

Plus \$3,130 miscoded, verified before it accuses.

DEMO NINE

MONTH-END CLOSE

The entry that closes the month

Journal entry 118 · 30 September 2026 · draft

LINE	DEBIT	CREDIT	AMOUNT
REPEATED FROM JE-117			\$4,140.75
Depreciation	Depreciation	Accum. Depreciation	\$1,000.00
Prepaid insurance used	Liability Insurance	Prepaid Insurance	\$800.00
Card fees out of default	Merchant Account Fees	Merchant Fees	\$2,340.75
FROM SEPTEMBER'S EVIDENCE			\$5,575.00
Materials used	Lab & Materials COGS	Materials Not Yet Billed	\$1,865.00
Accrue what never charged	Clinical Software	Accrued Expenses	\$580.00
Reclass miscoded charge	Clinical Supplies	Office Supplies	\$3,130.00
Debits = credits			\$9,715.75

12 lines · balanced

Waiting for your yes

THE MANUAL TASK IT REPLACES

Rebuild the adjusting entry from last month: depreciation, prepaid insurance, card fees, materials used, accruals and reclasses. Then make debits equal credits.

→ JOURNAL ENTRY 118 · 30 SEPTEMBER

12 lines, balanced to the penny.

Nothing posts without a yes.

HOW WE CAN HELP

FROM WHAT YOU SAW TO YOUR OWN BOOKS

Anthropic Gives You the Engine. We Make It Drive.

Whether you own the business, run the office, or keep the books, switching on Claude for Small Business hits the same wall: it can read your books, but it can't enter bills, post journal entries, or run on a schedule. That gap is exactly what we build, secure, and train your team on.

ANTHROPIC GIVES YOU

The model

Generic bundled connectors

A self-serve toggle

No security obligation

No accountability

WE ADD

A line-of-business connector that actually does the work

Connectors and skills for your industry tools and workflows

White-glove setup, guardrails tuned to your business, training for your team

A cybersecurity firm operationally responsible for the deployment

A phone number, an engineer who knows your setup, and a support team

→ You own it, we run it: the subscription is in your name, your data stays in your environment.

WORKING WITH US

HOW IT WORKS

Live With Your Own Agent in About Two Weeks

Beyond your own Claude subscription, you do almost nothing. We build the connector, configure it to your business, train your team, and hand it over.

1

Scoping call

What you use, what hurts, what success looks like.

Free · 20 min

2

Your Claude account

Team or Enterprise, in your company name. You own it.

~15 min

3

Connect QuickBooks

We build and secure the connector against your real books.

2–3 days

4

Teach it your business

Your chart of accounts, vendors, and approval rules.

5–7 days

5

Train & hand over

Live training sessions plus a user guide written around your business.

1–3 hrs, by tier

6

Live

Day 1 it starts working. By Day 14 it's entering your bills on its own.

Day 1–14

→ Live in about two weeks — with your team trained and your guardrails set the way you want them.

Q&A

Your questions, **our answers.**

Nothing is off the table: your books, your setup, or anything you just watched. Not sure where to start? Try one of these.

Which task would you hand off first?

Is my financial data safe?

Will it work with my QuickBooks setup?

Where does a person stay in the loop?

What would setup look like for us?

→ Reach out at getanswers@safepointit.com or (847) 499-1500 to book your scoping call.

→ You're on the list: everyone here today will be invited to our next event.



SCAN TO LEARN MORE

Book your free scoping call