



Your Takeaway Kit

From our October 15 webinar, *QuickBooks on Autopilot: An AI Agent That Runs Your Books*. Everything here works with or without us. Use it to decide where an AI agent belongs in your back office, and how to keep it safe once it is there.

1	The workflow framework. How to tell a good first job for an agent from a bad one.	Pages 1 and 2
2	The guardrail checklist. What to have in place before any AI writes to your books.	Page 2
3	Your QuickBooks on Autopilot Roadmap. A worksheet for your own books, and where to start.	Pages 3 and 4

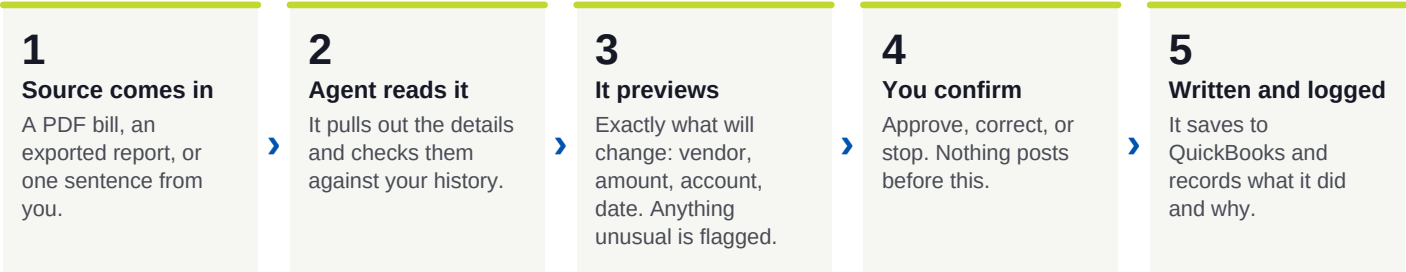
FRAMEWORK 1

A chatbot answers. An agent does the work, and shows you first.

Ask a chatbot	Give the job to an agent
Tells you how to enter the bill.	Reads the PDF, fills in vendor, amount, account and due date, and asks you to confirm before it saves.
Explains how to read an A/R aging report.	Works the report and drafts the collection emails in your mailbox, for you to read and send.
Needs you to paste your numbers in.	Connected to QuickBooks with its own limited access, so nothing gets copied into a chat window.

FRAMEWORK 2

The confirm loop. Every write to your books follows it.



FRAMEWORK 3

The five-question fit test

A task is a good first job for an agent when you can answer yes to most of these. Score each task on your roadmap worksheet from 0 to 5, one point per yes.

1	Does it happen every week or every month?	Repetition is where the hours are.
2	Does it start from a document or a record?	A PDF bill, an invoice, an exported report.
3	Could you explain the rules to a new hire in five minutes?	If you can say it, the agent can follow it.
4	Can a person check the result in under a minute?	Fast review keeps you in control.
5	If it is wrong, can you fix it before anyone outside sees it?	Start where mistakes stay internal.

Keep these with a person: anything that moves money out of the business, judgment calls about people or relationships, and anything a client or vendor sees before you have read it. The agent can prepare all three. A person sends them.

THE GUARDRAIL CHECKLIST

Before any AI agent writes to your books

Ours or anyone else's. Tick what you already have. Anything unticked is a conversation to have before you switch it on.

Access

- ☐ The agent has its own login. It does not use yours or your bookkeeper's.
- ☐ It reaches only what the job needs: the QuickBooks company it works on, not every app you own.
- ☐ The AI account is in your company's name, and you can switch it off yourself.
- ☐ Multi-factor authentication is on for every account the agent touches.
- ☐ Each job runs in its own session, closed when the job is done, so no access is left running.

Your rules, in writing

- ☐ Approval limits, vendor rules and off-limits accounts are written into the setup, where you can read and change them, not left to the model.

Confirm before it writes

- ☐ Every entry is previewed for a person before it posts, showing exactly what will change. A bare "are you sure?" does not count.
- ☐ Journal entries and anything over a dollar limit you set need a named approver.
- ☐ The agent never sends money. Payments and transfers stay with a person.
- ☐ Emails to clients and vendors are drafts. A person reads and sends them.

Audit trail

- ☐ Every action is logged: what it did, when, and what it was based on.
- ☐ Someone reviews that log on a schedule. Weekly is enough to start.
- ☐ Any entry can be traced back to its source document.

Backups and recovery

- ☐ Your QuickBooks data is backed up separately from QuickBooks, and a restore has been tested.
- ☐ You know how to undo an entry the agent made, and who does it.

Data handling

- ☐ Financial data stays inside the business account. Nobody pastes it into a personal or free chat tool.
- ☐ Your AI plan's terms say your data is not used to train the model. Check the plan you are on.
- ☐ Staff know which AI tools are approved and which are not.

People and process

- ☐ One person owns the agent: reads the log, approves new workflows, and can turn it off.
- ☐ Your bookkeeper or CPA knows the agent exists and what it does.
- ☐ Your cyber insurance carrier knows, or you have confirmed your policy covers it.
- ☐ You start with one workflow and add the next only after the first runs clean for a month.

YOUR QUICKBOOKS ON AUTOPILOT ROADMAP

Step 1. Where do your hours go?

Fill in a normal week. Hours are rough, and that is fine. Score each task with the five-question fit test on page 2.

Task	Hours / week	Who does it today	Fit score (0-5)
Entering vendor bills			
Issuing credits and invoice corrections			
Answering questions about your numbers			
Raising invoices			
Chasing overdue invoices			
Month-end close and journal entries			
Rebuilding the same reports every week or month			
Follow-up emails and scheduling			
Other:			
Other:			

Step 2. Pick your first workflow

Multiply hours by fit score. The highest number is usually your best first job. For most owners it is bills coming in, because every one starts from a document and every one is quick to check.

My first workflow:

What done looks like (hours saved, errors gone, caught up by when):

Who on my team checks its work:

YOUR QUICKBOOKS ON AUTOPILOT ROADMAP, CONTINUED

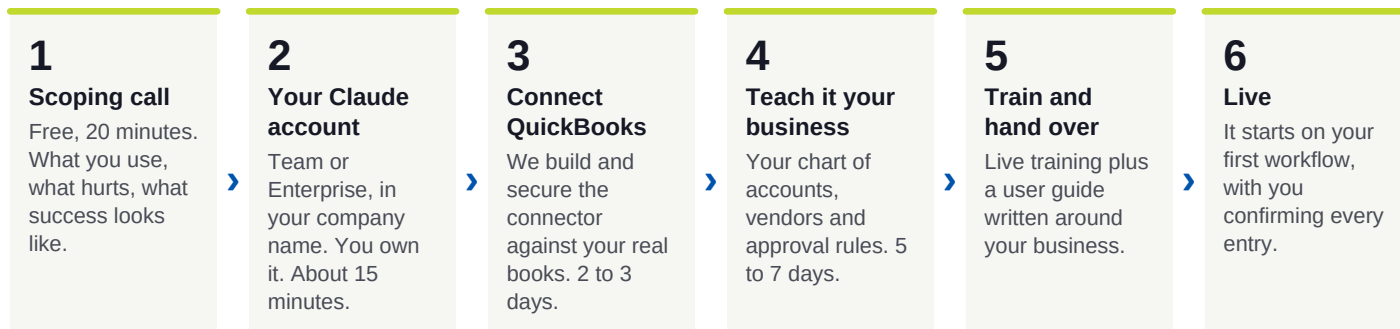
Step 3. The path most owners take

One workflow at a time, each one earning the next. The examples come from the workflows we walked through on October 15.

Month 1	Bills in Vendor bills entered from the PDF, with duplicates caught before they post. You confirm every entry and read the log each week.
Month 2	Money out the door, money coming in Invoices raised from one sentence. The A/R aging worked into collection email drafts, tiered by how late and how important the customer is. A credit memo when a customer's count drops.
Month 3	Close and see A check that every recurring charge landed in the right month. Month-end journal entries prepared for approval. The report you rebuild every month, built for you, with a revenue check that catches a customer billed the wrong amount.
After that	The rest of the back office The same agent in Microsoft 365: follow-ups drafted, calendar handled, inbox kept moving. Same confirm loop, same log.

Step 4. If you want us to build it

Everything in this kit works on your own. If you would rather have it built, connected and secured for you, you are live in about two weeks. Beyond your own Claude subscription, you do almost nothing.



Book your free scoping call

Email getanswers@safepointit.com or call (847) 499-1500. Bring your filled-in worksheet and we will start from your first workflow.

SafePoint IT is a managed IT and cybersecurity firm in Palatine, Illinois. We build AI agents the same way we run IT for our clients: access kept tight, every action logged, and a person in charge.