FREE GUIDE

Connect QuickBooks to Claude.

Your books can finally talk back. Four copy-paste prompts that turn QuickBooks into plain answers about your money. No code. No accountant-speak.

> Most owners open their P&L once a year, at tax time, when it is too late to change anything. Here is the fix, and it takes about five minutes. Go to **claude.ai**, open **Settings**, click **Connectors**, find **Intuit QuickBooks**, and sign in with your QuickBooks login. That is the whole setup. No code, nothing to install. Claude (use the newest model, Fable 5) can now read your books and answer like a sharp CFO who speaks human. Below are the **four money prompts** we give every owner, word for word.

PROMPT 1 · PROFIT The Plain-English P&L

Your P&L is technically written in English. It just does not read like it. **This prompt translates the whole thing into words you would actually say out loud**, and tells you what moved this month and why.

What it does

Reads your live P&L from QuickBooks and explains what changed this month and why it changed. Plain words, not a 40-row report to decode.

Why it makes money

You catch a margin slide in week one instead of at tax time. Problems you find early are cheap to fix. Old ones are expensive.

COPY-PASTE THIS INTO CLAUDE

```
"Using my connected QuickBooks, explain my profit and loss for [month] in plain English, no accountant-speak. Tell me what changed from last month and why, then the three numbers I should watch. Rules: this is read-only analysis, never edit anything in QuickBooks. Use only what QuickBooks shows, never estimate or invent a number. If data looks incomplete, flag it and ask me. I will verify key figures in QuickBooks before acting."
```

THE NEXT THREE PROMPTS

PROMPT 2
Who Owes You Money
Overdue invoices ranked, with polite chase-up drafts ready to go.

PROMPT 3
The Cash Look-Ahead
See where cash gets tight in the next 60 days, week by week.

PROMPT 4
Where Am I Bleeding
Catch expense creep and subscriptions outgrowing your revenue.

PROMPT 2 · GET PAID — Who Owes You Money

Somewhere in your books there is an invoice past 60 days that you quietly gave up on. **That is your money, already earned.** This prompt finds all of it and writes the awkward email for you.

What it does
Lists every overdue invoice ranked biggest first, with days overdue, then drafts a polite chase-up email for each one.

Why it makes money
Unpaid invoices sit there because chasing feels awkward. A ready-made polite draft removes the awkward, and the money shows up.

COPY-PASTE THIS INTO CLAUDE

```
"Using my connected QuickBooks, list every overdue invoice ranked biggest to smallest, with customer,
amount, and days overdue. Then draft a polite chase-up email for each in a [friendly / firm] tone. Rules:
read-only, use only real invoice data, never invent amounts or dates. If something looks off, flag it and
ask me. Do not send anything. These are drafts, I review and send every email myself."
```

PROMPT 3 · CASH — The Cash Look-Ahead

Most cash crunches are visible weeks ahead, sitting right there in your invoices and bills. **Nobody looks.** This prompt looks.

What it does
Maps unpaid invoices and upcoming bills across the next 60 days, week by week, and flags the weeks where cash gets tight.

Why it makes money
A tight week you see three weeks out is a phone call and a payment plan. A tight week you find that morning is a crisis.

COPY-PASTE THIS INTO CLAUDE

```
"Using the unpaid invoices and upcoming bills in my connected QuickBooks, walk me through my cash for the
next [60] days, week by week. Show me where cash gets tight and which invoices or bills cause it. Rules:
read-only analysis, use only what QuickBooks shows, never guess a number. If bills or invoices seem to be
missing, flag the gap and ask instead of assuming. I will verify in QuickBooks before I act."
```

PROMPT 4 · EXPENSES — Where Am I Bleeding

Expense creep is quiet. A $49 tool here, a small price bump there, and suddenly your software bill rivals your rent. **This prompt finds whatever is growing faster than your revenue.**

COPY-PASTE THIS INTO CLAUDE

```
"Using my connected QuickBooks, compare my last [3] months of expenses. Show me every subscription and
recurring charge, plus any category growing faster than revenue or that doubled. Rules: read-only, never
invent or estimate a number. If categories look messy or incomplete, flag it and ask. I decide what gets
cut, and I verify every number in QuickBooks first."
```

RUN IT TONIGHT

Three steps, one evening

You do not need a bookkeeper on standby. You need the connector switched on and one honest look at the numbers.

1

Connect QuickBooks

Go to claude.ai, open Settings, then Connectors. Find Intuit QuickBooks and sign in with your QuickBooks login. Done in five minutes.

2

Run Prompt 1

Open a new chat on the newest Claude (Fable 5). Paste the Plain-English P&L prompt and set the **[green blank]** to last month.

3

Verify, then act

Check the key figures in QuickBooks itself. Then send the chase-up drafts and cancel the subscriptions nobody remembers buying.

The rules that keep your books safe

Every prompt in this guide has these guardrails baked in. Here is what that means in practice.

- ✓ **Read-only, always.** Every prompt tells Claude to analyze, never edit. Your books stay exactly as you left them.
- ✓ **Chase-ups are drafts.** Nothing emails a customer by itself. You review each one and hit send yourself.
- ✓ **Verify before you act.** Treat every number as a first draft. Confirm it in QuickBooks itself before any money decision.
- ✓ **Gaps get flagged, not filled.** When data is missing, every prompt tells Claude to ask you instead of guessing.

READY TO GO DEEPER?

These four prompts read your books. The certification builds the system around your whole business.

In the 12-Week AI Certification we sit with you live and build working AI helpers around your actual business. Your real books and your real week. You leave with systems that keep working after the call ends, and a credential to show for it. No tech skills needed.

Get Your 12-Week AI Certification →

Start at **brainvaultai.com**

The numbers were always there. Now they answer in plain English.