AI Accounting Starter Checklist

Use this one-page guide to see where AI can simplify your accounting workflow. Print it, check the boxes, and take action one step at a time.

Foundation: Your Accounting Setup

☐ My business uses a cloud-based accounting platform (QuickBooks, Xero, Zoho, etc.)

☐ I have bank feeds enabled so transactions update automatically

☐ I review and reconcile my accounts at least once a month

Automate the Paperwork

☐ I use a receipt capture tool (Hubdoc, Dext, Zoho Scan, etc.)

☐ Receipts are automatically categorized into expense accounts

☐ I can find any receipt in my system within 2 minutes

Get Paid Faster

☐ Automated invoice reminders are set up for overdue clients

☐ I track average payment time for clients to monitor cash flow

☐ I've tested at least one AI chatbot or template for client billing questions

Smarter Insights with AI

☐ My system provides cash flow forecasts I review monthly

☐ I use AI reports to spot spending trends and anomalies

☐ I have alerts set for suspicious or duplicate transactions

Review and Improve

☐ I review AI categorizations weekly or monthly to ensure accuracy

☐ I measure how many hours I save each month using automation

☐ I've chosen one new AI tool to test this quarter: ______________________

Pro Tip from Brian Bricker

Start small. Pick the one pain point that costs you the most time and try a tool designed for that problem. Within weeks, you'll see the payoff.

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