

TEXAS AI LAB

PROMPT PACK

Accountant AI Prompt Pack

Ten practical prompts for CPAs, bookkeepers, tax preparers, and accounting firms that want cleaner client communication and fewer admin bottlenecks.

PLAIN ENGLISH

REAL WORKFLOWS

USEFUL THIS WEEK

Client Document Chase

01

Use when: clients have not sent the files needed to finish the work.

Write a client document request for an accounting or tax client who has not sent everything we need. Here is what is missing: [list items]. Make the message clear, polite, and specific. Group the items by category, explain why each category matters, give a simple deadline, and include a short note about secure upload. Write versions for email, text, and a firmer follow-up if they still do not respond.

Monthly Bookkeeping Summary

02

Use when: you want to turn bookkeeping work into a useful client update.

Turn these bookkeeping notes into a monthly client summary: [paste notes]. Include what changed, unusual transactions, cash flow concerns, missing information, questions for the client, and recommended next steps. Keep it plain English. Do not give tax or legal advice beyond the facts provided. Create a short version for busy owners and a detailed version for clients who want more context.

Tax Season Triage

03

Use when: a new or existing client asks for tax help close to a deadline.

Classify this tax-season request by urgency, complexity, and fit for our firm: [paste request]. Identify what information is missing, what risk flags appear, and what we should ask before accepting the work. Draft a response that is helpful but protects our capacity. Include one version for a good-fit client, one for a late or messy client, and one for work we should decline or refer out.

Advisory Opportunity Finder

04

Use when: you suspect a client needs more than compliance work.

Review these client notes and financial observations: [paste notes]. Find advisory opportunities that could help the client make better decisions. Look for cash flow issues, pricing problems, payroll pressure, tax planning needs, entity questions, owner draws, weak reporting, and operational patterns. Create a ranked list of possible advisory conversations, the plain-English reason each matters, and the first email we should send.

Client Question Answer Draft

05

Use when: a client asks a financial question and you need a safe first draft.

Draft a response to this accounting client question: [paste question]. Keep the answer plain English and careful. Separate facts we know from assumptions. Flag anything that requires CPA review, legal review, payroll review, or more client information. Give me a client-ready draft, a shorter text-message version, and an internal note listing what a human should verify before sending.

Scope Creep Detector

06

Use when: a client keeps asking for work outside the agreement.

Review this client request against our current scope: [paste scope and request]. Tell me whether this is included, borderline, or out of scope. Explain why. Draft a friendly response that protects the relationship while naming the boundary. If it should become paid advisory or cleanup work, write a simple offer with deliverables, timeline, and what we need from the client.

Cleanup Project Plan

07

Use when: books are messy and the team needs a clear path.

Create a cleanup plan for this accounting file: [describe issues]. Break the work into phases: access, diagnosis, transaction cleanup, reconciliations, payroll or sales tax review, reporting, client questions, and final handoff. Estimate the effort level as small, medium, or large. List what can be delegated, what AI can help draft or summarize, and what must be reviewed by a qualified accountant.

Client Onboarding Checklist

08

Use when: a new client signs and the handoff needs to be cleaner.

Build an onboarding checklist for a new accounting client. The client type is [business type]. Services include [services]. Include welcome email copy, secure document request, software access list, deadline expectations, communication rules, recurring meeting cadence, cleanup questions, and the first 30-day plan. Make it feel organized and reassuring, not bureaucratic.

Financial Report Translator

09

Use when: reports are technically correct but the owner does not understand them.

Translate this financial report or set of notes into plain English for a business owner: [paste report or notes]. Explain what matters, what changed, what looks healthy, what looks risky, and what questions the owner should ask next. Avoid jargon. Do not invent numbers. End with three practical decisions the owner may need to consider.

Weekly Firm Bottleneck Report

10

Use when: the accounting firm needs a clearer operational view.

Act like an operations advisor for our accounting firm. I will paste notes from the week: client delays, staff bottlenecks, tax deadlines, bookkeeping issues, review queues, and sales calls. Turn them into a weekly firm report with risks, stuck clients, overloaded roles, missed revenue opportunities, process fixes, and three actions for next week. Be direct and practical.