



Miller Bookkeeping & Tax
A division of Emerald Executive Consulting
MillerBookkeepingAndTax.com |
MillerBookkeepingAndTax@gmail.com

FREE CLIENT RESOURCE

AI Prompt Ideas for Small Business Admin & Bookkeeping

Prompt examples business owners can use to organize notes, prepare questions, draft messages, and reduce admin clutter.

Privacy reminder: Do not paste Social Security numbers, full bank account numbers, passwords, client confidential data, payroll details, or private tax documents into public AI tools.

Bookkeeping Organization Prompts

Use case	Prompt
Receipt notes	Turn these receipt notes into a monthly expense log with date, vendor, amount, category, and questions for my bookkeeper: [paste non-sensitive notes].
Transaction questions	Review these unclear business transactions and create a question list. Do not guess; flag missing information: [paste descriptions].
Monthly close checklist	Create a month-end bookkeeping checklist for a service business using bank deposits, card expenses, and payment apps.

Client, Vendor, and Admin Prompts

Use case	Prompt
Client follow-up	Draft a polite email asking a client to send missing documents by Friday. Keep it friendly and clear.
Vendor dispute	Draft a professional message asking a vendor for a corrected invoice and receipt copy.
Task list	Turn these notes into a prioritized task list with due dates, owner, and next action: [paste notes].

Tax Prep Prompts

Use case	Prompt
Tax appointment prep	Create questions to ask my tax professional based on these business changes: [paste general changes, no private IDs].
Document checklist	Create a tax-season document checklist for a self-employed owner. Include income, expenses, mileage, contractors, assets, loans, and home office items.
Plain-English explanation	Explain receipts, invoices, bank statements, and profit and loss reports in plain English for a new business owner.

Best practice: Use AI to organize and draft, not to make final tax, payroll, legal, or HR decisions. Bring unclear items to a qualified professional.