

PLAYBOOK

# AI in Accounting:

How to use chatGPT to document your workflow faster, *plus 100 prompts to get you started.*

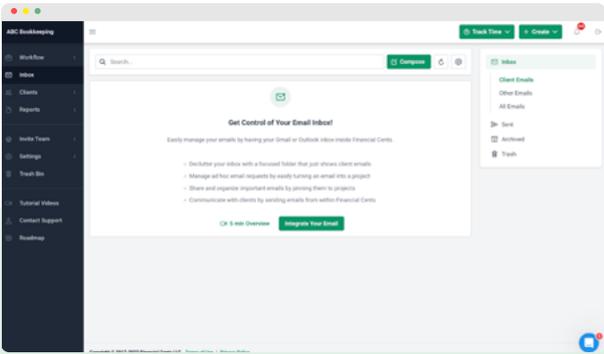


<b>About Financial Cents</b> .....	<b>03</b>
<b>Is ChatGPT coming for your job?</b> .....	<b>04</b>
<b>The Playbook</b> .....	<b>05</b>
<b>How to Use ChatGPT in Your Accounting Firm</b> .....	<b>05</b>
Create Invoices.....	<b>05</b>
Compose Emails to Your Clients.....	<b>06</b>
Create Excel Formulas for Accounting .....	<b>07</b>
Create Templates.....	<b>07</b>
Create Journal Entries.....	<b>08</b>
Complete Simple Tax Returns.....	<b>08</b>
<b>How to Integrate ChatGPT into Your Workflow</b> .....	<b>09</b>
<b>100 ChatGPT Prompts for Accountants and Bookkeepers</b> .....	<b>11</b>
ChatGPT Prompts for Bookkeeping Tasks.....	<b>12</b>
ChatGPT Prompts for The Client Onboarding Process.....	<b>14</b>
ChatGPT Prompts For the Staff Onboarding Process.....	<b>15</b>
ChatGPT Prompts For Client Communication .....	<b>17</b>
ChatGPT Prompts For Accounting Workflow.....	<b>19</b>
ChatGPT Prompts For Marketing.....	<b>21</b>
ChatGPT Prompts For Data Entry .....	<b>23</b>
ChatGPT Prompts For Financial Analysis .....	<b>25</b>
ChatGPT Prompts For Tax Preperation .....	<b>27</b>
ChatGPT Prompts For Excel Formulas .....	<b>29</b>
<b>Is Your Information Secure?</b> .....	<b>32</b>
<b>ChatGPT in Financial Cents</b> .....	<b>33</b>

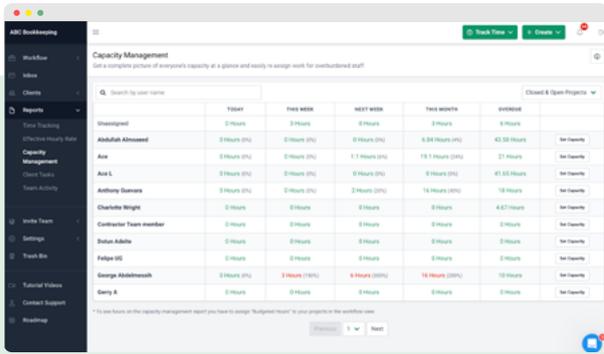
# About Financial Cents

Financial Cents is a project management software that has all the features you need to get work done in a simple user interface that your team will love and find easy to use.

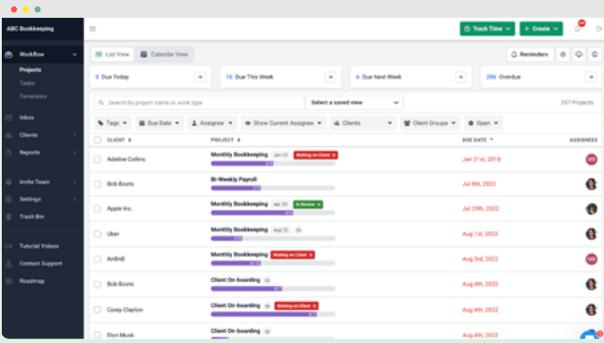
Whether you're just beginning to document your processes or have been doing it for a long time, our latest integration with AI will get you up and running in no time. Track & assign work, set up recurring tasks, store client information, automate client data collection, and more with Financial Cents. Don't take our word for it, hear what our clients have to say.



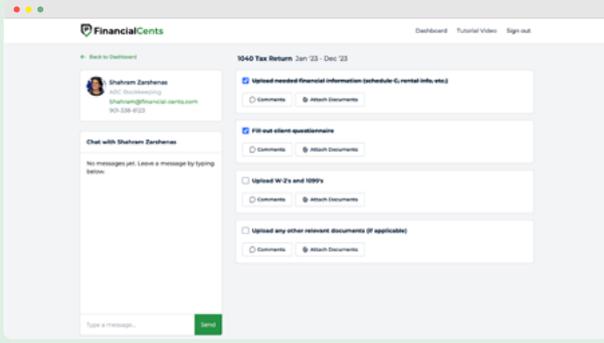
Financial Cents Email Inbox



Financial Cents Capacity Management Report



Financial Cents Workflow Dashboard



Financial Cents Client Portal

Hear from our clients

## Is ChatGPT coming for your job?

AI has proven incredibly useful across industries. With the right prompts, it can generate human speech, predict when engineering systems need repairs, and perform tasks.



**This explains why most people get caught between panic and fascination. But AI in accounting is a force multiplier, and at some point, you will need to know how it works to keep pace with your industry.**

Do you remember those times when accountants and bookkeepers recorded financial transactions by hand?

It was tedious and involved binders full of paper containing piles of transactions.

Then computers came. Now, we manage the general ledger with software programs in one place, making accounting teams faster and freeing up brain power for more complex tasks. If you refuse to take advantage of AI in accounting to increase your firm's productivity, you may soon be unable to keep up with the industry.

So, instead of seeing AI as the enemy, here's your chance to start learning to leverage relevant AI tools, particularly ChatGPT, to grow and scale your firm.



### KEY POINT:

Rather than taking people's jobs, the influence of AI in Accounting is basically to improve work processes and quality of results.



### ACTION STEP:

Think about 3 areas in your accounting firm that ChatGPT can help increase its productivity.

## The Playbook

### How to Use ChatGPT in Your Accounting Firm

One of the tasks ChatGPT excels at is repetitive tasks. This makes it invaluable to the accounting profession, where manual tasks could reduce the accuracy of a client's work.

Reducing the time and mental energy spent on these manual tasks frees you up to get more work done, make more money and grow your firm at a speed you didn't think possible.

---

Here are some of the tasks ChatGPT can do for you:

#### 1. CREATE INVOICES

ChatGPT can help you create invoices to bill your clients. You only need to provide the information about your business, the client, and the services you rendered.

The tool is not subject to human attention challenges, which makes its output more accurate, which could keep you from billing your clients less than you should.



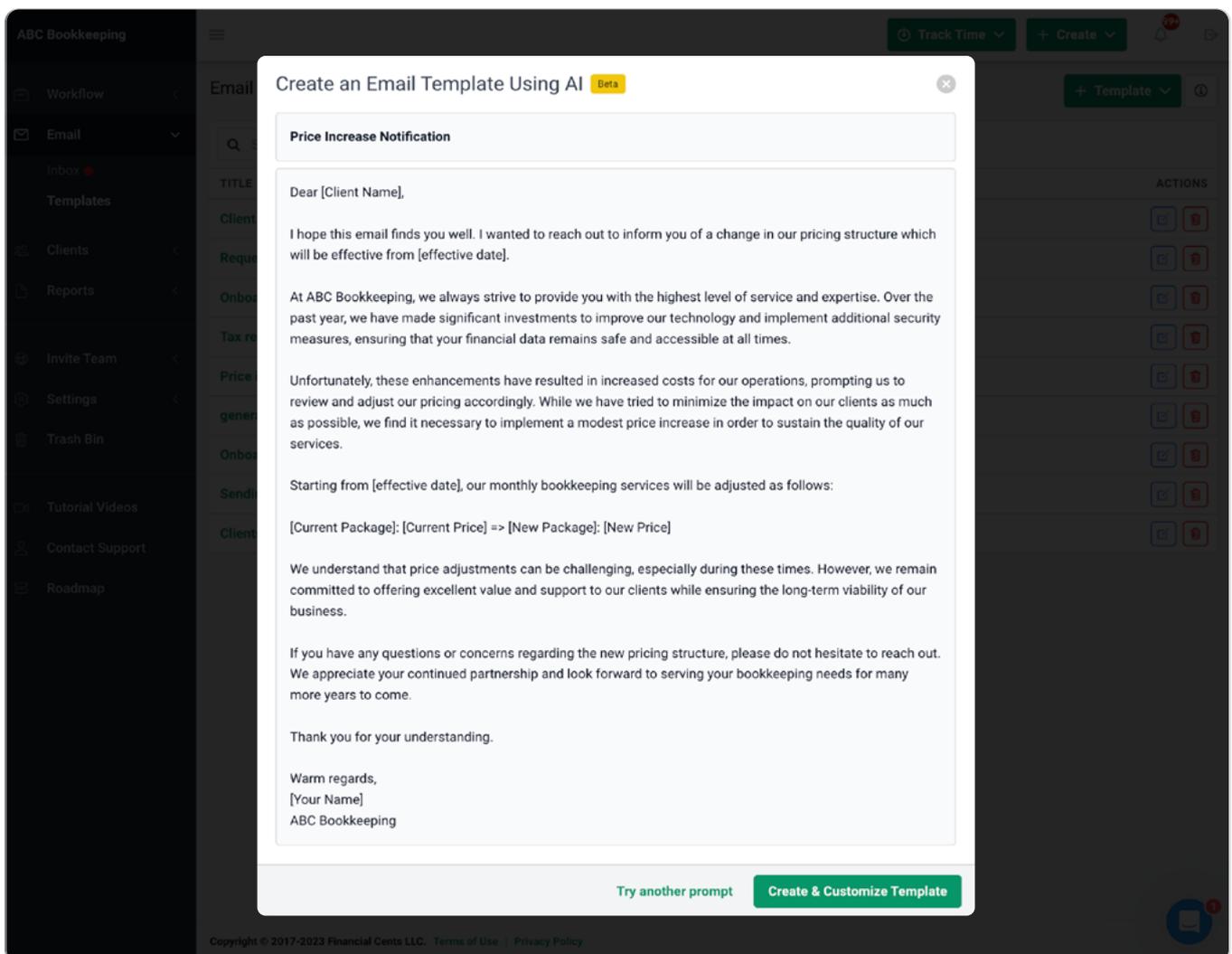
## 2. TO COMPOSE EMAILS TO YOUR CLIENTS

ChatGPT can write emails that help you explain financial concepts, ask for additional information, or communicate your decision to increase rates.

Type the kind of email you want it to write for you into ChatGPT and click the Send button.

Here is an example from [Shahram Zarshenas](#), Financial Cents founder. He prompted it to *“write a short price increase template that I can use to increase pricing with my bookkeeping clients successfully.”*

And here’s what ChatGPT generated for him.



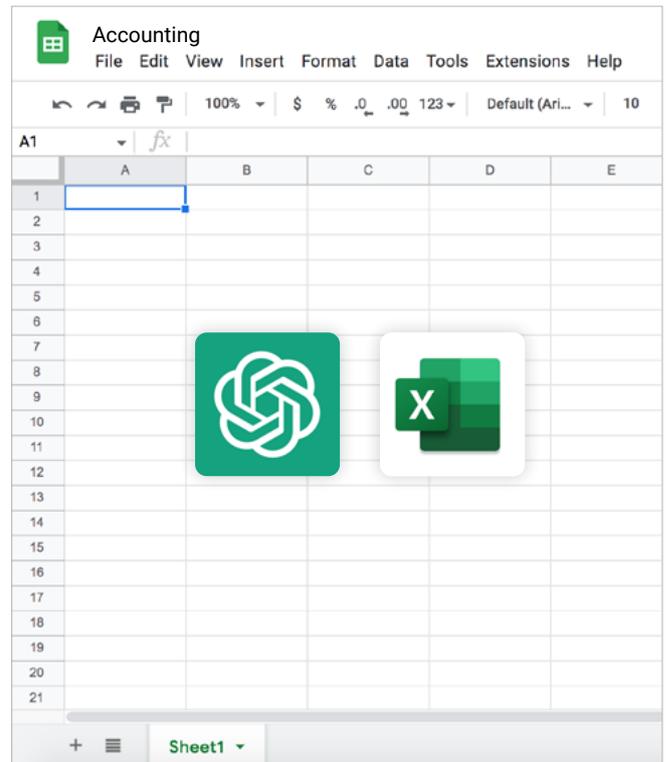
**PRO TIP:** You can take it further and ask it to write the email in the voice of a famous writer, and its accuracy will amaze you.

### 3. TO CREATE EXCEL FORMULAS FOR ACCOUNTING

ChatGPT also helps with Excel formulas to calculate the data value in spreadsheets.

All you need to do is give it the data to work with and clear instructions for what you want to calculate in any cell, roll, or column.

Here's [a brilliant example](#) of ChatGPT creating an Excel formula.



### 4. TO CREATE JOURNAL ENTRIES

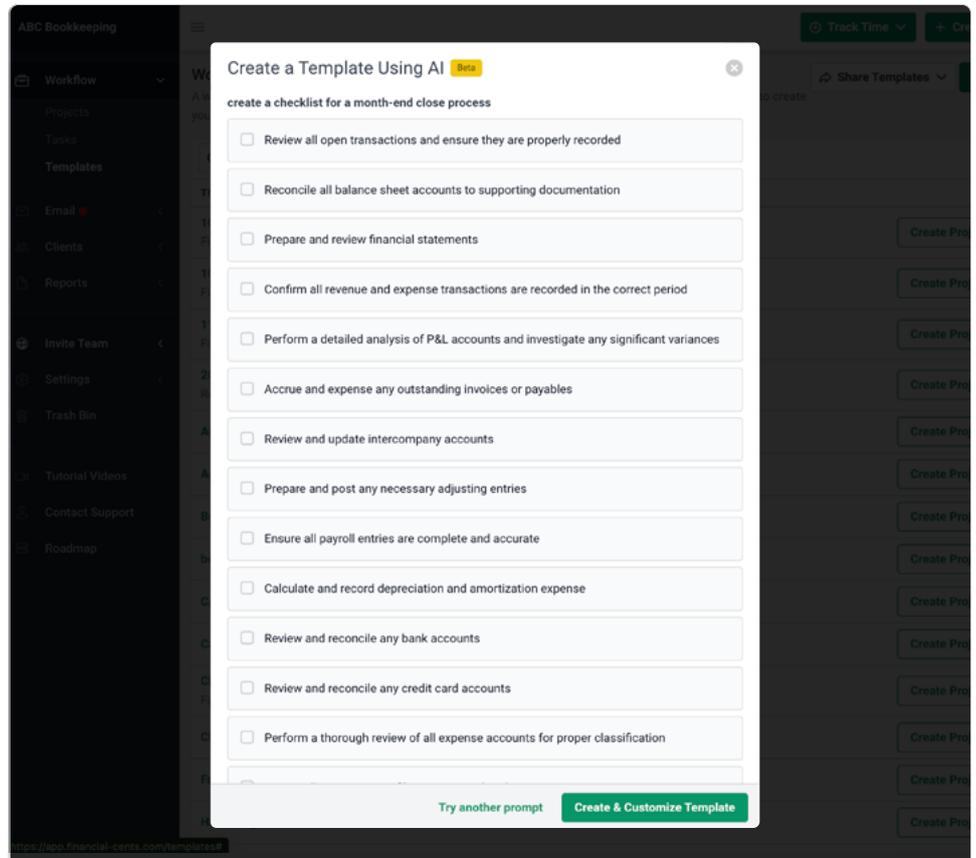
ChatGPT can identify and extract information (like dates, name of seller, amount, etc) from receipts to input them in your accounting journal.

You only need to provide the dataset and ChatGPT will analyze and input the client information accordingly.

## 5. TO CREATE TEMPLATES

You can also have ChatGPT create a list of steps that go into completing any of your accounting processes.

Here is an example of a prompt for ChatGPT to “*create a checklist for a month-end close process*” and it gave me the following tasks.



## 6. TO COMPLETE SIMPLE TAX RETURNS

Given the right data, ChatGPT will use the data you provide to complete a simple tax return for you. Of course, you will need to go over it to be sure everything checks out, but it does most of the work for you as it did for [Alice and Bob](#).

It can also detect errors or omissions in tax filings to ensure compliance with regulations and maximize tax savings.



### KEY POINT:

ChatGPT is capable of turning tasks that seem insurmountable into bits and pieces, thereby lifting the weights off you. While this tool isn't a magical wand that takes all your accounting problems away, with specific prompts tailored to the tasks you are trying to solve, you reduce the work on your to-do list, one at a time.



### ACTION STEP:

What are the tasks that constantly recur in your firm? List them.

# How to Integrate ChatGPT into Your Workflow

Now that we have established how you can use ChatGPT to sort your tasks, here is a deep dive into how you can integrate it into your workflow for optimal productivity and efficiency.

Using a workflow management software like Financial Cents, which integrates with ChatGPT, you can streamline your work (so you don't jump between too many apps) while giving you access to the innovative technology your team needs to do their best work.

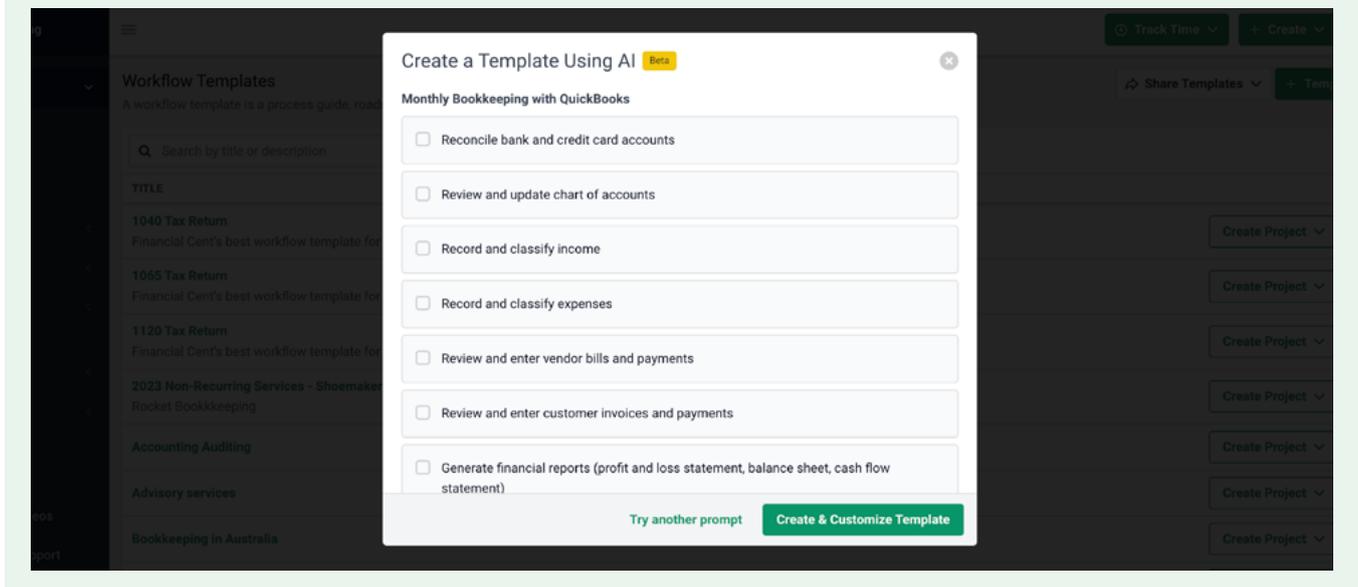
With this integration, you can:

## CREATE TEMPLATES WITHIN SECONDS

This allows you to quickly create checklist templates complete with the step-by-step process of completing them.

For a project like monthly bookkeeping with QuickBooks (with ChatGPT) in Financial Cents.

- Click Templates
- Click + Template
- Click Use AI
- Type *'Monthly Bookkeeping with QuickBooks'*, and you'll get the result below.



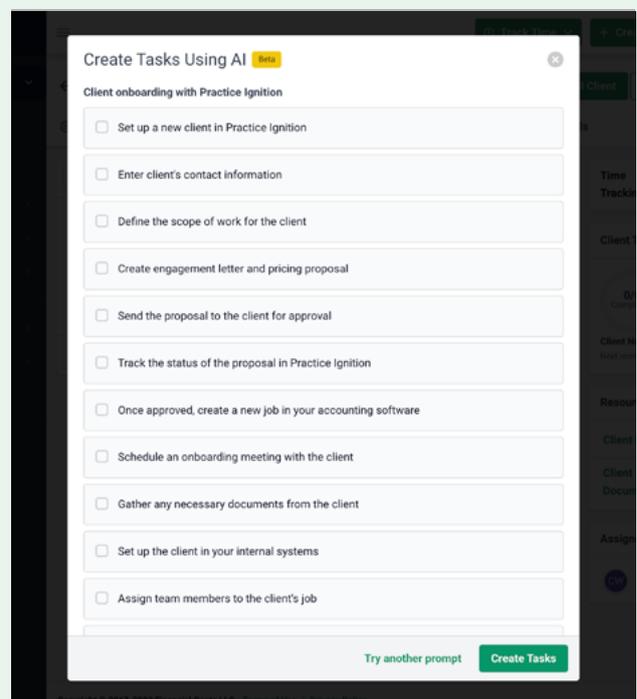
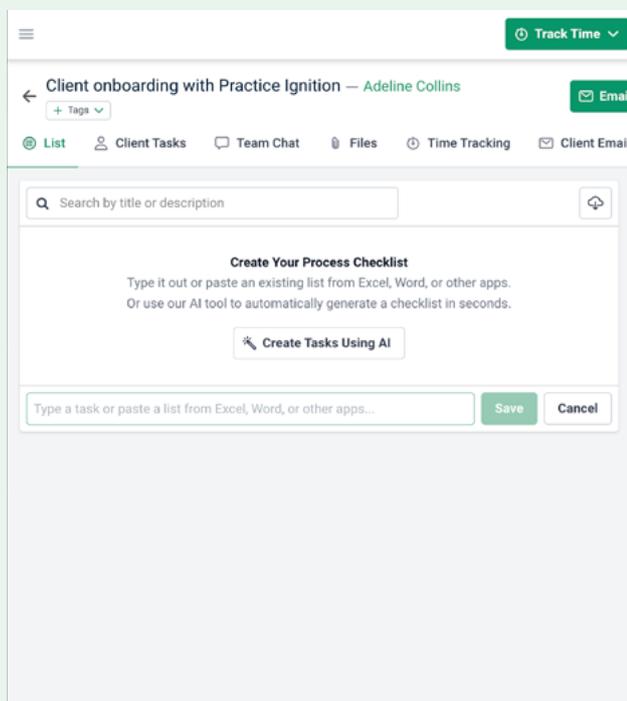
## CREATE TASKS WITHIN PROJECTS IN SECONDS

If you have created a project but need it auto-populated with the tasks that go into completing it, Financial Cents also helps with that.

Here's how:

→ Open the new project

→ Select **Create Tasks using AI**



And the system will populate the page with the tasks you need to complete the project. You can then go on to customize it to suit your specific needs.



### KEY POINT:

The quality of the work you produce depends on the technology running in your firm.



### ACTION STEP:

Use a workflow management software such as Financial Cents, which seamlessly integrates with ChatGPT, to efficiently manage your tasks while equipping your team with cutting-edge technology to enhance their productivity.



## 100 ChatGPT Prompts for Accountants and Bookkeepers

Prompts are the queries that get ChatGPT productive. They can be as long or as short as necessary to get the machine in the mood for your tasks.

Here are some prompts you can feed the system. Feel free to copy and paste them directly into ChatGPT to complete relevant accounting and bookkeeping tasks faster.

**PRO TIP:**

Be sure to add specifics to the parentheses for more tailored outputs.

## CHATGPT PROMPTS FOR BOOKKEEPING TASKS

### Revise Annual Income Forecast

Prompt:

*“Revise my annual income forecast based on the following (current annual income forecast), (actual performance data), (Reasons for revision), (relevant business updates), (historical data).”*

---

### Reviewing Estimated Tax

Prompt:

*“I have provided (Income details), (Expense details), (Tax deductions and credits), (Previous tax filings), (Tax obligations and jurisdiction) below. Analyze them and tell me if the business owes state or federal estimated tax payments.”*

---

### Reviewing Past Due Accounts

Prompt:

*“Analyze the following (list of past due accounts), (age of the past due accounts), (terms and conditions), and (communication history) to help me know whether to issue more reminders.”*

---

### Reviewing Financial Reports for Tax Returns

Prompt:

*“Here are (financial statements), (tax documents), (tax returns for previous years) and (expenses & deductions) and (revenue and income sources). Help me review tax returns.”*

---

### Reviewing Quarterly Sales Tax

Prompt:

*“With the following sales records, (sales tax rates), (exemptions or exceptions), and (sales tax collections), review my sales tax with this (reporting requirement).”*

---

### **Reviewing Quarterly Sales Tax**

Prompt:

*“With the following sales records, (sales tax rates), (exemptions or exceptions), and (sales tax collections), review my sales tax with this (reporting requirement).”*

---

### **Balancing and Reconciling Business Accounts**

Prompt:

*“Use these (account information), (account statements), (internal records), (transaction details) to reconcile my business accounts with (reconciliation process).”*

---

### **Reviewing Projected Cash Flow**

Prompt:

*“Review this company’s cash flow by analyzing (sales and revenue forecasts), (expense forecasts), (timing of cash flows), (A/R and A/P), (cash reserves or loans).”*

---

### **Making Adjusting Entries**

Prompt:

*“Analyze my (trial balance), and ( supporting documents) to (specific adjustments needed) for (the month, quarter, or year).”*

---

### **Reviewing Account Receivable**

Prompt:

*“Here are my current account receivable details: (accounts receivable details) including their payment history, communication history, allowance for doubtful accounts, and credit terms. Please review the outstanding invoices.”*

You can use this Financial Cents’ [Account Receivable template](#) inside the app or download it for use in Excel Spreadsheet.

## CHATGPT PROMPTS FOR THE CLIENT ONBOARDING PROCESS

### Client Onboarding Questionnaire

Prompt:

*"Suggest a list of questions to ask new clients during client onboarding."*

Financial Cents has a more personalized accounting client onboarding questionnaire. [Click here](#) to access it.

---

### Research Your New Payroll Client's Requirement

Prompt:

*"What should I do to understand the requirements of my new payroll client?"*

---

### Create A Client Onboarding Workflow Checklist

Prompt:

*"Suggest a list of questions to ask a new client with [number of employees] and [annual revenue] during client onboarding for me."*

Check out this Financial Cents' [client onboarding checklist](#).

---

### Conduct Better Client Kick-off Calls

Prompt:

*"Give me ideas to conduct a kick-off call with a new accounting client with [number of employees] and [annual revenue]?"*

Here's a [client meeting agenda](#) that you can use on the go.

---

### Setting Client Expectations

Prompt:

*"Give me ideas to set expectations for my new accounting client with [number of employees] and [annual revenue]."*

---

## CHATGPT PROMPTS FOR THE STAFF ONBOARDING PROCESS

### Staff Onboarding Checklist

Prompt:

*"Help me create an accounting staff onboarding checklist for my accounting firm."*

Standardize your [staff onboarding process](#) with this template from Financial Cents.

---

### Welcome Email

Prompt:

*"Can you create a welcome email for a new accounting staff joining my firm of [number of employees] working [fully remotely or specify State]?"*

---

### New Staff Orientation and Training

Prompt:

*"Ideas to conduct orientation and training for my new accounting hire."*

---

### Help Your New Hire Learn Your Internal Systems

Prompt:

*"How to best help my new employee learn my accounting firm's internal systems."*

---

### Keep Employee Information from Falling Through the Cracks

Prompt:

*"Brainstorm a system to help me record and store new employee details efficiently."*

---

### Conduct Better Onboarding Calls with New Hires

Prompt:

*"How do I conduct kick-off calls with your new hire that lives in another country?"*

---

### **Employee Agreement Letter**

Prompt:

*“What should be in an employee agreement letter for my new (Position).”*

---

### **Employee Background Check**

Prompt:

*“How can I best conduct a background check on my new hire [specify job role and any other important information]?”*

---

### **Setting Goals for Your New Hire**

Prompt:

*“How can I set better goals for my new accounting hire who is just starting in (role)?”*

---

### **Conducting Employee Check-ins**

Prompt:

*“What do I discuss with my new accounting hire [specify role or responsibilities] during daily or weekly check-ins?”*

---

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---

## CHATGPT PROMPTS FOR CLIENT COMMUNICATION

### Price Increase Letter

Prompt:

*“Compose a price increase letter for my accounting clients [specify previous rates, new rates, and your reason for the increase].”*

Use this [price increase letter](#) from Financial Cents to sound more convincing to your clients.

---

### Client Task Email

Prompt:

*“Draft an email requesting additional information [e.g. about financial statements] from an accounting client.”*

Setting up client tasks should be short and straightforward so you don't overwhelm your clients. [See how it works](#) in Financial Cents.

---

### Welcome Email Template

Prompt:

*“Help me draft a welcome email template for [client with specific but non-personal identifiable details].”*

Financial Cents [welcome email template](#) is designed to help get your client relationships to a positive start.

---

### Client Reminder Email

Prompt:

*“Write an email to my clients to remind them about sending their invoices by (1st September 2023).”*

### **Communicating Completion of Tax Returns**

Prompt:

*“Write an email informing my client [include specific but non-personal identifiable details] that their taxes have been completed and remind them how much time they have left to perform (action).”*

---

### **Sending Payment Reminder Emails**

Prompt:

*“Compose an email to remind (client name) of (client business) of their unpaid fees.”*

---

### **Quarterly Review Summary**

Prompt:

*“Give me ideas to write an email summarizing my client’s quarterly income, and expenses, and discussing opportunities for growth based on [specific but non-personal identifiable details].”*

---

### **Update on a New Tax Regulation**

Prompt:

*“A new tax regulation has just been passed and I need to update my clients on what it means for their business. How can I go about it?”*

---

### **Cash Flow Management Advice**

Prompt:

*“I have reviewed my client’s email and noticed (add observation) in their cash flow management system. Write an email communicating how they can leverage (strategy) to improve their cash flow.”*

---

### **Template for Conducting Online Meetings with Clients**

Prompt:

*“How can I best conduct virtual meetings with my accounting clients?”*

---

## CHATGPT PROMPTS FOR ACCOUNTING WORKFLOW

Financial Cents has an integration with ChatGPT so that you can create your workflow checklists where the work is being done. Check it out [here](#).

### **Payroll Workflow Template**

Prompt:

*“Create a monthly payroll checklist template for a client with [specific but non-personal identifiable details].”*

---

### **Year-End Review**

Prompt:

*“Create a year-end review template for a client with [specific but non-personal identifiable details].”*

---

### **Month-end Close**

Prompt:

*“Create a checklist for the month-end close process for a client with [specific but non-personal identifiable details].”*

---

### **Weekly Bookkeeping Workflow Checklist**

Prompt:

*“Create a weekly bookkeeping workflow checklist for a client with [specific but non-personal identifiable details].”*

---

### **1040 Individual Tax Return**

Prompt:

*“Create a workflow checklist for 1040 individual tax returns for a client with [specific but non-personal identifiable details].”*

---

### **Business Tax Return Workflow**

Prompt:

*“Create a tax return for a married couple filing jointly who own rental properties and have a business.”*

---

### **Annual Sales Tax**

Prompt:

*“Create a workflow checklist for 1040 individual tax return for a client with [specific but non-personal identifiable details].”*

---

### **Quarterly Financial Report**

Prompt:

*“Create a quarterly financial report checklist for a client with [specific but non-personal identifiable details].”*

---

### **Cash Flow Cycle**

Prompt:

*“Create a free cash flow cycle checklist.”*

---

### **Monthly Bookkeeping**

Prompt:

*“Create a monthly bookkeeping checklist.”*

---

## CHATGPT PROMPTS FOR MARKETING

### Create an Ideal Customer Profile

Prompt:

*"How can I create an ideal customer profile for my accounting practice?"*

---

### Creating a Website

Prompt:

*"Guide me on how to create a website."*

---

### Pay-per-click Strategy

Prompt:

*"Create a pay-per-click strategy to convert accounting clients."*

---

### Optimize Your Landing Pages

Prompt:

*"Give me ideas to optimize this website's landing pages (website link)."*

---

### Lead Tracking Template

Prompt:

*"I offer bookkeeping services to construction firms that make a minimum of \$25 million in annual sales. Create an accounting lead tracking template for fortune 500 real estate prospects."*

---

### Calculating Marketing ROI

Prompt:

*"Calculate the return on investment on these clients based on (revenue from clients) and customer acquisition costs."*

---

### **Creating a Community Marketing Strategy**

Prompt:

*"I own an accounting firm that focuses on (firm details). Create a community marketing strategy for my firm."*

---

### **Building Your Brand Awareness Through Webinars**

Prompt:

*"Suggest webinar ideas my accounting business focused on [client profile] can host to build brand awareness."*

---

### **Nurturing Leads By Email**

Prompt:

*"I provide (services) to (ideal clients), create a strategy to nurture leads via email for my firm."*

---

### **Following Up with Prospects**

Prompt:

*"How should I follow up with marketing prospects effectively?"*

---

## CHATGPT PROMPTS FOR DATA ENTRY

### **Extract Information from Receipt**

Prompt:

*“Extract key information from the following receipt: (Add receipt text).”*

---

### **Categorize Expenses from Credit Card**

Prompt:

*“Categorize accounting expenses from a credit card statement based on the following names of vendors and amounts.”*

---

### **Post Transactions to Account Receivables**

Prompt:

*“Here are my (Customer information), (Invoice details), (payment information, and (aging report). Help me post it to account receivables.”*

---

### **Categorizing Expenses**

Prompt:

*“Here’s a list of transactions I need you to allocate to their appropriate accounts: [Transaction List].”*

---

### **Sample Data Entry Report**

Prompt:

*“Write a sample report template for summarizing data entry results.”*

---

### **Extracting Data from Bank Statement**

Prompt:

*“Identify and categorize expenses from the bank statement below (add bank statement text).”*

---

### **Summarizing Financial Figures**

Prompt:

*“Summarize the key financial figures from the following financial statement (add financial statement text).”*

---

### **Post Journal Entries**

Prompt:

*“Use the following transaction details (add transaction text) and amount to record these transactions to (Add accounts) using (Add accounting system).”*

---

### **Extracting Information from Invoices**

Prompt:

*“Extract invoice details from this invoice information (add invoice text).”*

---

### **Update Account Payable**

Prompt:

*“I will provide you with a table containing account information, vendor, invoice, purchase, and payment details. I need you to update the accounts payable.”*

---

### **Update Account Receivable**

Prompt:

*“What information do I need to provide you to help me update my account receivables?”*

---

### **Bank Reconciliation**

Prompt:

*“Show me the quickest and most accurate way to do bank reconciliation.”*

---

### **Recording Transaction**

Prompt:

*“With the information I have provided below, help me separate client names, the service rendered, and the fee.”*

---

## CHATGPT PROMPTS FOR FINANCIAL ANALYSIS AND FORECASTING

### **Trend Analysis**

Prompt:

*“Analyze and compare the revenue, expenses, and profitability of the following financial statements to measure the company’s financial health.”*

---

### **Cash Flow Analysis**

Prompt:

*“With these (Add financials), analyze the operating activities and investing activities of my business to point out any impending cash flow issues.”*

---

### **Budgeting and Forecasting**

Prompt:

*“Here are my projected financial statements, create financial budgets and forecasts for my business.”*

---

### **Financial Statements Review**

Prompt:

*“Review my financial statement to show how each line item contributes to my company’s financial health. Here are my (balance sheet), (income statement), and (cash flow statement).”*

---

### **Keeping up with relevant news and reports**

Prompt:

*“What is the latest news or report on (relevant topic)?”*

---

### **Extracting insights from financial data**

Prompt:

*“Process this (financial data) and summarize the key insights for me.”*

---

### **Generate Insights from Data Sets**

Prompt:

“Provide economic commentary from the following data:

Year: 2020. Inflation Rate: 4%, Unemployment Rate 3, GDP Growth: 5%

Year: 2021. Inflation Rate: 3%, Unemployment Rate 4, GDP Growth: 4%

Year: 2022. Inflation Rate: 4%, Unemployment Rate 2, GDP Growth: 5%.”

---

### **Understand Your Client’s Area of Improvement**

Prompt:

“Process this (financial data) and summarize the key insights for me.”

---

### **Improving Your Client’s Financial Position**

Prompt:

“Based on this balance sheet, how can this company’s financial position be improved?”

---

### **Sales projection**

Prompt:

“What are the sales projections for this business in the next six months based on this (previous sales data)?”

---

## CHATGPT PROMPTS FOR TAX PREPARATION

### Calculate Above-line deductions

Prompt:

*"How can I subtract above-line deductions from my client's tax data?"*

---

### Calculate Standard Deductions

Prompt:

*"Determine my client's standard deduction or itemized deductions."*

---

### Determine tax liability

Prompt:

*"How can I determine my client's tax liability?"*

---

### Step-up in basis

Prompt:

*"When should I use a step-up basis for my client?"*

---

### Calculating Adjusted Gross Income

Prompt:

*"As a Tax professional, help me to calculate my client's adjusted gross income."*

---

### Updating tax filing for the digital age

Prompt:

*"How do we update taxes for the digital age?"*

---

### Tax Research

Prompt:

*"What tax updates should filers in the US take note of this year?"*

---

### **Documents Required for Individual Tax Returns**

Prompt:

*“What documents do I need to file an individual tax return in the United States?”*

---

### **Filing jointly as a couple**

Prompt:

*“What advantages does my client get from filing jointly as a couple with unique circumstance[?]?”*

---

### **Handling Refunds**

Prompt:

*“How should I advise my client to handle their US tax refunds?”*

---

## CHATGPT PROMPTS FOR EXCEL FORMULAS

### Calculating sales data

Prompt:

*"The following table contains my sales data. Column A is the sales figures and column B has the states. Sum all sales figures for (State) in the table."*

---

### Adding the value in multiple cells together

Prompt:

*"Give me the formula to sum cells that meet a certain criterion in Excel."*

---

### Finding the largest and smallest values in a data set

Prompt:

*"How do I use the MAX and MIN functions to find the largest and smallest values in the following table?"*

---

### Collapsing cells in a spreadsheet into one cell

Prompt:

*"In the cells below, combine text from multiple cells into one cell."*

---

### Rounding numbers to their decimal places

Prompt:

*"How can I round up the numbers in the following spreadsheets to a decimal place?"*

---

### Inserting data in cells using the PI function

Prompt:

*"How can I insert a number into a cell using the PI function?"*

---

### Using the SUM function

Prompt:

*“Give me the formula to use the SUM function to add (CELL) to (CELL).”*

---

### Creating dynamic cell references

Prompt:

*“Give me the formula to create a dynamic cell reference with the INDEX, MATCH, and INDIRECT functions.”*

---

#### **PRO TIP:**

These prompts are capable of giving you the headstart you need but as time goes on, you need to tweak them to suit the desired needs of your tasks.



## AI in Accounting: Is Your Information Secure?

AI models use robust security measures to prevent unauthorized access to the data on their platforms.

---

For example, ChatGPT:

Uses end-to-end encryption technology that keeps third parties from accessing your conversations.

Apart from the option to delete previous conversations, ChatGPT also has a strict policy of not sharing users' data with third parties.

However, the sensitive nature of accounting data requires you to avoid feeding ChatGPT with your client's personally identifiable information. This eliminates the chances of someone else squeezing that information out of the chatbot (by any means) in the future.

Instead, you can focus on using it for your productivity needs like creating workflow templates.

We've found that using **ChatGPT in Financial Cents** helps you enjoy the best of both worlds: the practice management features (with a secured client portal) of Financial Cents and the speed that AI provides.



## ChatGPT in Financial Cents: How We Protect Your Information

**Here's how Financial Cents ensures the security of its integration with AI tools like ChatGPT:**

- ✔ Financial Cents shares the same cybersecurity firm with Google and Intuit.
- ✔ Financial Cents doesn't store your prompts.
- ✔ Data transfer between Financial Cents and OpenAI is secured by TLS 1.3, which ensures secure communication between two applications.
- ✔ Financial Cents' communication with OpenAI's API is SOC II compliant. SOC II is an AICPA security framework for storing and processing customer data.

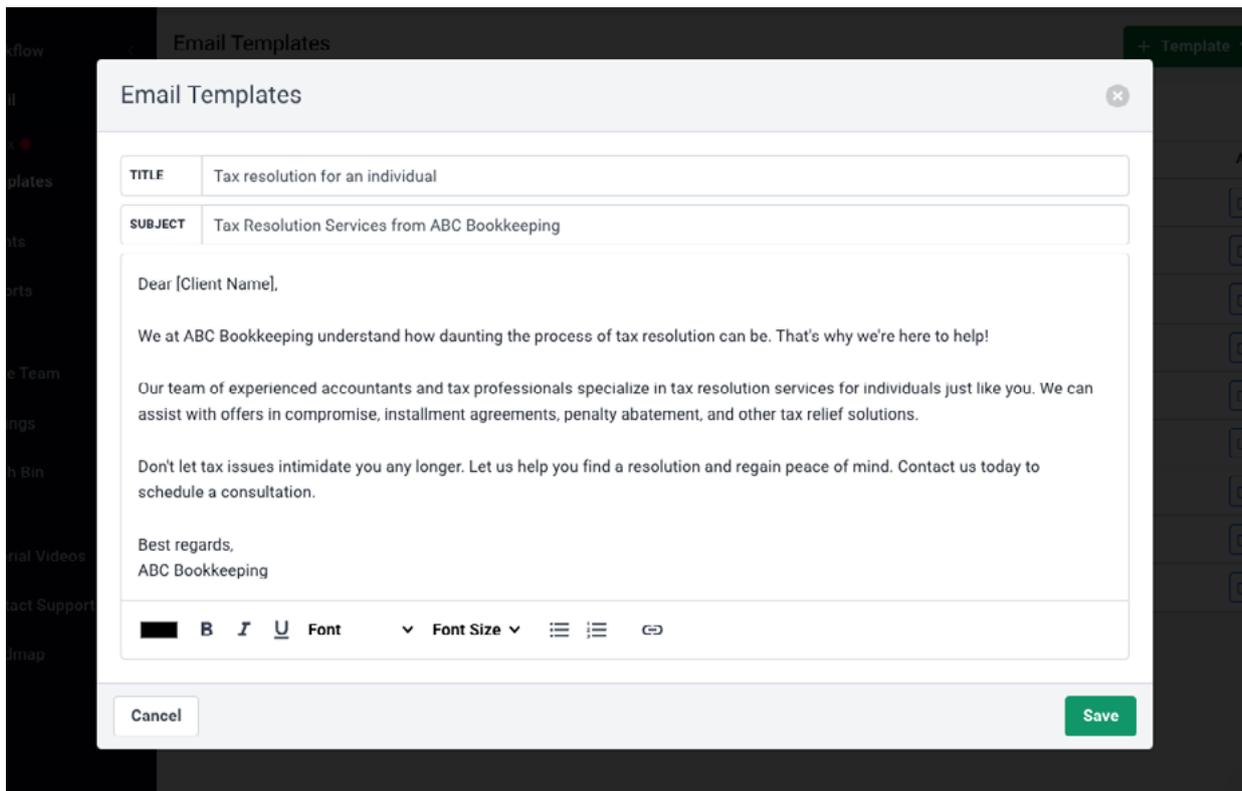


**Abdullah Almsaeed** (Co-Founder & CTO)

## More Ways to Use ChatGPT in Financial Cents

As part of our commitment to deploy the latest technologies to help firm owners automate manual tasks to stay efficient, productive, and profitable, we recently rolled out an additional feature (thanks to our ChatGPT integration) that gives you the ability to:

- ✔ **Generate Email Templates and Save Them in Financial Cents (To Send to Clients Whenever Needed):** Instead of typing new prompts for the emails you use for client communication each time, you will get to generate a template for that email and save it in Financial Cents. Your team can use them for client work on the go.



**Start Using ChatGPT inside Financial Cents** to work faster and more efficiently for FREE today. (14-Days Free Trial).

