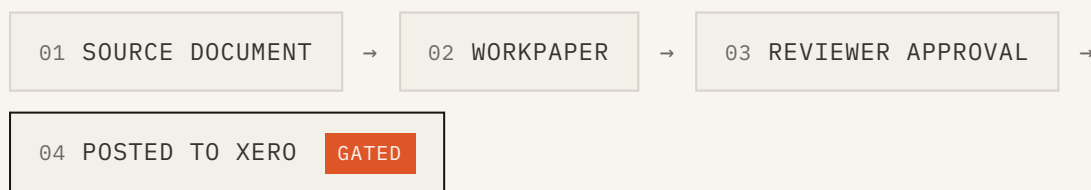


20 practical Claude *workflows* for New Zealand accounting practices.

See what Claude can do on its own, what Airclerk's NZ Accounting Pack adds, and how approved connections turn selected drafts into controlled, reviewer-ready work inside the systems your practice already runs.

— CLAUDE IS ANTHROPIC'S AI ASSISTANT. AIRCLERK IS THE NEW ZEALAND CONSULTANCY THAT IMPLEMENTS IT INSIDE ACCOUNTING PRACTICES.

Runs in your firm's own Claude environment, and nothing consequential happens without your reviewer.



— 01 / HOW THE WORK GETS COMPLETED

The model reasons. The pack supplies the

method. The connection completes the workflow.

i. CLAUDE · ANTHROPIC'S AI ASSISTANT

Layer 1: Claude.

Claude can read supplied documents, structure information, explain reports, identify issues and prepare drafts. On its own, the method is generic, the inputs are manual and it cannot safely act on a live client ledger.

ii. 25 ACCOUNTING SKILLS

Layer 2: Airclerk's NZ Accounting Pack.

The pack adds New Zealand sources, client and period discipline, materiality, reconciliations, result states and named reviewer gates. It turns one-off prompting into a repeatable practice method.

iii. THE LAST MILE

Layer 3: approved system connections.

Connections let the configured method reach the records and actions it needs. For Xero, the Airclerk connection is built for a client list, requires an explicit organisation for every write, and can post an approved action with its supporting evidence attached.

The outcome is not more tools. It is more accounting work completed to the firm's review standard.

Start with the work your practice *repeats*.

These are practical use cases supported by the pack and the firm's configured connections. They are not a one-to-one list of the pack's 25 skills. Start where the volume is high, the source material is available and the review is clear.

WF-01 YEAR-END AND CLOSE

Year-end workpaper pack

Lead schedules for each balance-sheet line, tied to the trial balance, with queries and reviewer notes prioritised.

CLAUDE ALONE

Structures supplied trial-balance exports and supporting files into a first draft.

THE PACK ADDS

Client and period headers, materiality, source requirements, tie-out rules, exception severity and result states.

A CONNECTION ADDS

Pulls the named client's ledger detail and supporting Xero records without repeated exports.

YOUR REVIEWER DECIDES

Resolves judgement items, approves conclusions and signs the file.

Year-end adjusting journals

Accruals, prepayments, depreciation and reclassifications drafted from the workpaper that calculated them.

CLAUDE ALONE

Drafts journal logic from supplied schedules.

THE PACK ADDS

Account mapping, debit and credit checks, narration, reconciliation and approval requirements.

A CONNECTION ADDS

Posts the approved journal to the explicitly named Xero organisation with the supporting schedule attached.

YOUR REVIEWER DECIDES

Approves the accounting treatment and the write.

Accrual schedule

Unrecorded expenses identified, calculated and carried into a reviewable accrual schedule.

CLAUDE ALONE

Reads invoices, contracts and prior-period schedules supplied in the conversation.

THE PACK ADDS

Cut-off tests, period logic, materiality, reversal treatment and ledger tie-out.

A CONNECTION ADDS

Checks the named ledger for existing entries and posts an approved journal where configured.

YOUR REVIEWER DECIDES

Decides uncertain obligations and approves the entry.

Prepayment schedule

One invoice becomes a period-by-period schedule and an approved accounting entry without spreadsheet re-keying.

CLAUDE ALONE

Extracts dates, amounts and coverage terms from a supplied document.

THE PACK ADDS

NZ date and GST treatment, monthly allocation, reconciliation and the reviewer gate.

A CONNECTION ADDS

Checks the original transaction and posts the approved journal with evidence attached.

YOUR REVIEWER DECIDES

Confirms the treatment and approves posting.

Fixed-asset completeness and depreciation

Potential assets hiding in repairs or additions are surfaced, checked against the fixed-asset register and prepared for review.

CLAUDE ALONE

Reviews supplied transaction listings and invoices for capital indicators.

THE PACK ADDS

Capital-versus-repair tests, source citations, depreciation-method checks and register-to-ledger reconciliation.

A CONNECTION ADDS

Reads the named client's transactions and asset register and performs approved asset actions where configured.

YOUR REVIEWER DECIDES

Makes the capitalisation and tax-treatment decision.

Payroll reconciliation

Payday-filing, PAYE, KiwiSaver and ESCT totals are matched to the ledger with exceptions tabled.

CLAUDE ALONE

Compares supplied payroll and general-ledger exports.

THE PACK ADDS

NZ payroll checks, current-source verification, reconciling-difference rules and exception severity.

A CONNECTION ADDS

Retrieves approved Payroll NZ and accounting data for the named organisation.

YOUR REVIEWER DECIDES

Resolves payroll exceptions and approves any consequential action.

GST exceptions review

The cases the ledger cannot decide are flagged before filing, including registration boundaries, adjustments, change of use and zero-rated land.

CLAUDE ALONE

Organises supplied transactions and identifies unusual items.

THE PACK ADDS

Current NZ source checks, issue classification, evidence requirements and a clear result state.

A CONNECTION ADDS

Retrieves transaction-level detail for the named GST period.

YOUR REVIEWER DECIDES

Determines the tax position and files the return.

Provisional tax planning

Instalment options, dates, use-of-money-interest exposure and a draft client explanation assembled in one schedule.

CLAUDE ALONE

Explains supplied calculations and drafts the communication.

THE PACK ADDS

Balance-date logic, current IRD verification, option comparison and schedule controls.

A CONNECTION ADDS

Supplies relevant ledger results where approved; the planning workflow can also run from verified supplied figures.

YOUR REVIEWER DECIDES

Chooses the advice and communicates it to the client.

FBT workings

Vehicle, loan and unclassified-benefit workings laid out with evidence and alternatives for review.

CLAUDE ALONE

Extracts information from supplied registers, policies and transactions.

THE PACK ADDS

Current-source verification, rate alternatives, evidence gaps and reviewer decision points.

A CONNECTION ADDS

Brings relevant named-client ledger transactions into the review where configured.

YOUR REVIEWER DECIDES

Selects and approves the treatment and the filing position.

AML/CFT onboarding support

Captured-activity checks, CDD level and beneficial-ownership information organised under the firm's existing programme.

CLAUDE ALONE

Structures supplied documents and identifies missing information.

THE PACK ADDS

Engagement isolation, escalation points, evidence status and boundaries around compliance-officer decisions.

A CONNECTION ADDS

Approved practice-management or document connections can reduce manual collection; Xero is not required for the primary task.

YOUR REVIEWER DECIDES

The compliance officer makes the decisions and handles any suspicious-activity process.

EOT season control

Agency-list progress, missing information, 31 March risks and terminal-tax reminders consolidated into a practice view.

CLAUDE ALONE

Organises supplied job lists and drafts questionnaires or reminders.

THE PACK ADDS

NZ deadline logic, client and period separation, severity, ownership and a controlled status model.

A CONNECTION ADDS

Approved practice-system data keeps status current; Xero context can support individual jobs.

YOUR REVIEWER DECIDES

Owns filing decisions, client escalation and final submission.

IRD correspondence triage

Correspondence classified by client, deadline and severity, with routine drafts prepared and material items escalated.

CLAUDE ALONE

Summarises supplied letters and drafts a response.

THE PACK ADDS

Client isolation, deadline extraction, authority checks, severity and result states.

A CONNECTION ADDS

Uses only firm-approved correspondence feeds and practice systems; it does not operate myIR.

YOUR REVIEWER DECIDES

Approves every response and handles consequential matters.

Client query consolidation

One engagement query log becomes a single, firm-toned missing-information request instead of repeated emails.

CLAUDE ALONE

Groups supplied questions and drafts a message.

THE PACK ADDS

Client and period controls, duplicate removal, priority, due dates and the firm's communication style.

A CONNECTION ADDS

Approved workpaper, document-store or practice-system connections keep the query list current.

YOUR REVIEWER DECIDES

Approves the request and sends it through the firm's normal channel.

Multi-client ledger questions

Aged receivables, coding exceptions or trial-balance questions answered for one explicitly named client at a time.

CLAUDE ALONE

Analyses supplied exports for a single entity.

THE PACK ADDS

Client and period declarations, ambiguity stops and source labelling.

A CONNECTION ADDS

Selects an unambiguous Xero organisation and retrieves live detail across the practice's approved client list.

YOUR REVIEWER DECIDES

Interprets the answer and approves any follow-on write.

Coding-exception review

Unusual, inconsistent or incomplete coding grouped into a concise review queue.

CLAUDE ALONE

Finds patterns in a supplied transaction export.

THE PACK ADDS

Materiality, client context, evidence requests, prior-treatment comparison and result states.

A CONNECTION ADDS

Retrieves current transaction detail and performs approved corrections where configured.

YOUR REVIEWER DECIDES

Decides ambiguous coding and approves corrections.

Practice workflow monitoring

Repeated workflows checked for missing sources, skipped gates, unresolved differences and incomplete outputs.

CLAUDE ALONE

Reviews a supplied run or workpaper for obvious omissions.

THE PACK ADDS

A defined Workflow Charter, expected stages, named gates and completion criteria.

A CONNECTION ADDS

Approved system events provide evidence of what was read or written; not every monitored workflow requires Xero.

YOUR REVIEWER DECIDES

Owns exceptions, control design and remediation.

NZ tax research note

A substantive question answered at a stated depth, with every relied-on claim linked to a source that was actually opened.

CLAUDE ALONE

Searches, reasons and drafts a memo.

THE PACK ADDS

Source hierarchy, authority status, historical-version checks, a contrary-authority pass and a declared result state.

A CONNECTION ADDS

Optional named-client ledger context can frame the question; no Xero connection is required for primary research.

YOUR REVIEWER DECIDES

Reviews the research, decides the position and provides any advice.

Provision or ruling status check

One provision, determination, ruling or guidance item checked for status and relevance before someone relies on it.

CLAUDE ALONE

Finds and summarises candidate material.

THE PACK ADDS

Opened-source evidence, in-force dates, binding-status classification and historical-version discipline.

A CONNECTION ADDS

Not required unless client facts need verified ledger context.

YOUR REVIEWER DECIDES

Determines whether and how the authority applies.

Client-document tax analysis

Agreements, correspondence and supporting records organised into facts, missing evidence and issues before a conclusion is formed.

CLAUDE ALONE

Extracts and compares the supplied documents.

THE PACK ADDS

Confidentiality boundaries, fact and source separation, unresolved-question handling and a no-premature-conclusion rule.

A CONNECTION ADDS

Approved document and ledger connections can confirm bounded facts without placing client details into public search queries.

YOUR REVIEWER DECIDES

Forms and approves the tax conclusion.

Draft advice review

An existing memo or letter checked claim by claim against official sources, with weaknesses and contrary material surfaced.

CLAUDE ALONE

Critiques a supplied draft and suggests improvements.

THE PACK ADDS

A claim inventory, authority-status checks, source verification, contrary-authority testing and correction without silently rewriting the author's position.

A CONNECTION ADDS

Not required unless the review depends on verified client-ledger facts.

YOUR REVIEWER DECIDES

Owens the final position, the wording and the client communication.

03 / ONE WORKFLOW, END TO END

From insurance invoice to approved *journal*.

01

Source identified

An insurance invoice and its coverage period.

02

Calculation prepared

The period allocation, reconciled and ready to check.

03

Workpaper assembled

Source, assumptions and calculation trail retained.

04

Reviewer approval

The Airclerk connection holds the write until an authorised reviewer approves.

05

Approved action

Posted to Xero through the Airclerk connection, with the supporting evidence attached.

Claude did not replace the reviewer. It removed the exporting, re-keying and blank-page work around the review.

— 04 / BUILT FOR PUBLIC PRACTICE

The accountant remains responsible.
The system makes that *visible*.

One client, one period

Every output names its client and period. An ambiguous organisation stops the workflow rather than being guessed.

Source and reconciliation

Outputs identify the evidence they used. A schedule either ties to the ledger or states its reconciling difference.

Named human approval

Consequential outputs and writes stop for the responsible reviewer. Approval is an explicit workflow stage, not a habit.

Retained evidence

The source, the calculation, the reviewer's decision and the resulting action remain readable afterwards as an AI Workpaper.

Privacy architecture

Everything runs in the firm's own Claude instance, under the firm's agreement with Anthropic. Client records reach it through connections the firm approves and scopes. The Airclerk connection for Xero runs on the firm's own hardware, where its credentials and refresh tokens remain. Nothing routes through Airclerk.

The difference is the accounting workflow the connection can *finish*.

7

READ-ONLY TOOLS

Xero's own connector in Claude answers summary questions about one connected organisation.

54

CLAUDE TOOLS

The Airclerk connection runs accounting workflows across the practice's client list.

WHERE THE 54 REACH

312 published Xero API operations: 235 Accounting, 6 Assets and 71 Payroll NZ. Every operation Xero publishes for those three APIs.

Xero's connector is useful for summary questions about one connected organisation. Public practice also needs transaction-level records, fixed assets, New Zealand payroll, selection of one client from the whole list, and controlled writes after review.

Counts checked 15 August 2026. The Airclerk connection covers the published Xero Accounting, Assets and Payroll NZ API surface; covering the published specification is not a claim that every operation has been exercised in every live-client scenario. Airclerk is independent, and is not affiliated with or endorsed by Xero or Anthropic.

Start with one bounded workflow. Configure it to the way your firm *works*.

i. **Anchor on year-end workpapers.**

The implementation is built around year-end workpaper preparation; most of the other skills in the pack feed that file or follow it.

ii. **Configure the method.**

Adapt the accounting skills to the firm's templates, client mix, reviewers and risk settings.

iii. **Connect and test.**

Scope the approved systems, then test the workflow on held-out client jobs, including wrong-client and prompt-injection cases.

iv. **Operate with evidence.**

Launch with a Workflow Charter, reviewer gates, a retained AI Workpaper, and reviews at 30, 60 and 90 days.

A 20-minute workflow session qualifies the fit: your systems, your client base, your balance-date load. A six-week implementation then builds around year-end workpaper preparation, with the reviewer gates tested before anyone relies on them.

Workflow map FAQ.

01	What is Claude?	—
Claude is an AI assistant made by Anthropic. Airclerk implements governed workflows that use Claude inside a firm's own environment. Airclerk is not another AI model or chat portal.		
02	Is Airclerk selling a Xero connector?	+
03	Does client information route through Airclerk?	+
04	Can Claude post to the wrong client?	+
05	Is this tax advice or a substitute for a Chartered Accountant?	+
06	Do all 20 workflows require Xero?	+
07	Is the pack ready to install unchanged?	+

START WITH ONE JOB

See what Claude can do in your practice.

Bring one recurring job. In 20 minutes we will map the work, the systems it touches and the approval that stays with your team.

A working session, not a generic AI demo.

BOOK A 20-MINUTE PRACTICE WORKFLOW SESSION

www.airclerk.ai/accounting/claude-workflow-map

or email hello@airclerk.ai



CLAUDE IMPLEMENTATION FOR
REGULATED FINANCIAL AND
PROFESSIONAL SERVICES.

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PAGE VERSION 18 AUGUST 2026. COMPARISON COUNTS VERIFIED 15 AUGUST 2026.
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