

The Money Stuff Invoices, Quotes & Follow-Up

AI for Finance & Sales Operations

The two places money leaks: numbers you don't understand fast enough, and follow-ups nobody makes. Assistant explains the money; Agent chases it for you. (Honest note: AI is a first pass... your accountant still signs off.)



Created by Jay Vics | JVI Mobile Marketing
fridays.jaytheaiguy.com

This Week's Jobs

The two places money leaks: numbers you don't understand fast enough, and follow-ups nobody makes. Assistant explains the money; Agent chases it for you. (Honest note: AI is a first pass... your accountant still signs off.)

ASSISTANT = you review and send (Claude / Gemini, free to start). **AGENT** = it runs solo (JourneyBuilder). **BOTH** = starts Assistant, graduates to Agent.

34. Summarize the month's financials in plain language

ASSISTANT · Claude / Gemini · Free

Export your P&L, paste it in, and ask it to explain the numbers like you're the owner.

35. Build a simple cash-flow or revenue snapshot on demand

ASSISTANT · Gemini / Claude · Free

Paste the data and ask for a quick snapshot with a simple chart you can glance at.

36. Flag unusual spending or transactions worth a second look

ASSISTANT · Claude / Gemini / QuickBooks · Free to start

Paste recent transactions and ask, plainly, what looks off here?

38. Draft quotes and estimates from intake information

ASSISTANT · Claude / Gemini · Free

Paste the intake details and ask for a quote built from your standard template.

41. Assemble proposals from a template plus the client's specifics

ASSISTANT · Claude / Gemini · Free

Give it your template and the client details and ask for a filled, polished proposal.

37. Qualify inbound leads and route them by fit and urgency

BOTH · JourneyBuilder / Claude · Free to start

Add a scoring rule with routing, or batch-score leads in Claude before they hit your pipeline.

39. Follow up automatically on quotes that haven't been accepted

AGENT · JourneyBuilder · Paid + usage

Trigger a follow-up sequence whenever a quote is sent but not accepted after a few days.

40. Update CRM records from call notes and email threads

BOTH · JourneyBuilder / Claude · Free to start

Paste notes and ask for CRM-ready fields, or use built-in note-to-CRM automation.

32. Chase overdue invoices with polite, escalating follow-ups

AGENT · JourneyBuilder · Paid + usage

Set an overdue trigger that sends a polite nudge, then a firmer one, automatically.

Without JourneyBuilder? The duct-tape version

- QuickBooks for the books (you probably have it)
- A separate CRM to track leads and quotes (another login)
- A separate email-sequence tool for the follow-ups (another)

Your accountant handles the books either way... but chasing quotes and invoices is one JourneyBuilder workflow instead of three tools.

Your move: pick ONE Assistant job above and do it this week (Claude and Gemini are free to start). When you want the Agent jobs running on their own, that's the JourneyBuilder conversation... book a call at fridays.jaytheaguy.com.