
The Bookkeeper's Guide to Agentic AI

From a desk buried in document-chasing and status calls to a digital worker that answers every client, gathers what you need, and leaves the registered work to you.

PUBLISHED BY

Agntic.ai
AI voice agents & digital workers

EDITION

2026 · Australia
General information only

FIND US

Agntic.ai
Book a 20-minute walkthrough

— FOREWORD

The scarce thing is your registered time.

At 30 June 2025 there were 16,965 registered Business Activity Statement (BAS) agents in Australia, part of a registered tax practitioner population of 63,865.¹ Becoming one of them takes study, supervised experience and ongoing professional development. It is the part of your work that carries real value and real responsibility. Yet most bookkeeping practices spend a startling share of the week nowhere near it: chasing a client for last month's bank statement, answering "has my BAS gone in yet" for the third time, or keying details off a photo of a crumpled receipt.

That is the quiet trap of a bookkeeping practice. The work that pays, the work only a registered agent can do, sits behind a wall of administration that anyone could do but nobody has time to. The chasing never ends. The status calls arrive at the worst moment, always during a BAS crunch. New client enquiries land after hours and go cold. None of it shows up as a line on your profit and loss statement, which is exactly why it goes unaddressed year after year.

This guide is about a specific, practical answer to that problem: an agentic artificial intelligence (AI) voice agent that works the phones, the inbox and the document-chasing around your practice, so your registered people can spend their hours on the work that needs them. It is written for practice owners, registered BAS agents and the bookkeepers who run the day to day, who want to understand what this technology does, what it must never do, and how to put it to work without crossing a single professional line.

We have tried to be honest throughout. There is a clear boundary we keep coming back to, the line between handling the administration around a client's books and providing a BAS service, and a good deal of this guide is spent making sure the technology stays firmly on the right side of it.

Brad Riley

CEO, Agntic.ai

¹ Tax Practitioners Board (TPB), Annual Report 2024–25. At 30 June 2025 the registered tax practitioner population was 63,865, comprising 46,900 tax agents and 16,965 BAS agents.

— WHAT IS INSIDE

Contents

01	Agentic AI, in plain language	06
	What a digital worker is, how it differs from a chatbot, and the one line it must never cross.	
02	A week in your practice	09
	The hidden cost of chasing and admin, told the way your team lives it.	
03	The five jobs a digital worker does best	12
	Where an AI voice agent earns its place in a bookkeeping practice.	
04	What the chasing really costs	16
	The four quiet leaks, totalled.	
05	The registered line you never cross	18
	BAS services, the law, the Code, and the boundary the agent is built around.	
06	Under the bonnet	22
	How a digital worker actually works, in six parts.	
07	Before you switch it on	24
	The groundwork that makes the difference, mapped for two weeks.	
08	Building the business case	26
	An illustrative model for hours, clients and capacity.	
09	What you don't need	28
	The myths worth retiring before you start.	
10	In practice	30
	Three composite practices and what changed.	
11	Questions bookkeepers ask	32
	The honest answers to the common ones.	
12	Your first seven days	35
	A short, concrete path to a live agent.	

Agentic AI, in plain language

Before the benefits, the basics. What a digital worker is, why it is different from the chatbots you have already met, and the single boundary that makes it safe to use in a registered practice.



THE IDEA

A worker, not a chatbot.

You have used generative AI already. You type a question, it writes you an answer, and the conversation ends there. It is a clever tool, but it waits for you and does nothing on its own.

Agentic AI is the next step. An **agent** does not just talk. It is given a goal, a set of rules and access to the tools it needs, and it carries the task through from start to finish. For a bookkeeping practice, the goal is usually simple to state: answer the client, work out what is needed, and gather it, the same way a capable practice administrator would.

That is why we call it a **digital worker** rather than a chatbot. It speaks naturally on the phone, it listens, it asks the follow-up questions your team would ask, and then it acts: it sends the document request, chases the client who has not replied, books the call, and updates the file. When something falls outside its rules, it hands over to a person.

A chatbot answers. A digital worker finishes the job, then knows when to step back.

The difference shows up most in the work that never ends: the chasing, the routine status enquiries, the new client who calls after hours. A chatbot on your website might capture a message. A digital worker actually picks up the phone, holds a real conversation, and leaves the bank statement sitting in your inbox by morning.

None of this replaces your team. It removes the repetitive, interruptive work that stops your registered people from doing the parts of the job that genuinely need them: reconciling, reviewing, advising, and lodging.

THE ONE RULE

What it must never do.

A digital worker in a bookkeeping practice is built around a boundary that does not exist in most other businesses. It handles the administration around the books. It does not, under any circumstances, provide a BAS service.

That means it does not advise on how goods and services tax (GST) should be applied, it does not work out pay as you go (PAYG) withholding or super, it does not decide a client's liabilities or entitlements, and it does not prepare or lodge a BAS in its own right. Those are services the law reserves for registered agents. If a client asks one of those questions, the agent's job is not to answer it. Its job is to capture the request, gather what is needed, and route it to a registered BAS agent.

THE LINE, IN ONE SENTENCE

The agent handles the administration around the books. A BAS service always belongs to a registered agent. It can chase the documents, answer routine questions and tee the work up. It never advises on GST, payroll or super, and it never lodges. The registered agent reviews, decides and signs off, every time.

This is not a limitation we apologise for. It is the design. A practice that adopts this technology should be able to say, hand on heart, that no BAS service was ever provided by a machine. Everything in the rest of this guide is built on top of that promise, and Section Five sets out exactly how it is enforced.

A week in your practice

The cost of an overloaded practice does not appear on any report. It shows up as a tired team, a quarter that always ends in a scramble, and a prospect who quietly went elsewhere. Here is the week as your team actually lives it.



— JO'S WEEK · A THREE-BOOKKEEPER PRACTICE

The chasing never stops.

Jo runs a practice serving around eighty small-business clients. Nothing here is unusual. That is the point.

EARLY IN THE QUARTER

Mon **The chase begins.** BAS is due in three weeks. Jo sends the first round of requests for bank statements, receipts and payroll details to forty clients.

Wed Eleven clients have not replied. Two phones ring while Jo is mid-reconciliation. One is a client asking the same question for the third time.

Fri **A prospect calls at 5:40pm.** The team has gone home. The call rings out, no message. They were ready to switch bookkeepers.

BAS WEEK

Mon Nine clients still owe documents. The second and third reminders go out by hand, between other jobs.

Wed **Status calls peak.** "Has mine gone in?" "How much do I owe the tax office?" Each one pulls a bookkeeper off the work that has to be finished.

Thu A new client signed a fortnight ago is still not onboarded. Software access, identity and prior records were never collected. First billing slips another month.

Fri The last three clients send everything at 4pm on the due date. The team works late. Again.

THE INVISIBLE COST

None of it was anyone's fault.

Jo is good at the job. The practice is well run. And yet by the end of BAS week the team is exhausted, a prospect was lost, a signed client is still not billing, and the registered work was done under pressure rather than with room to think.

This is the trap of practice administration. The losses are real but invisible. A missed call is not recorded as a missed client; it is simply a call that never reaches a person. A document that arrives late does not announce itself; it just compresses the quarter into a single frantic week. An unbilled new client looks like nothing at all, not like the four weeks of fees that quietly never started.

Because nobody can see the cost, nobody can justify hiring against it, and the team is asked to absorb a little more each quarter. The work that gets dropped is always the same work: the patient chasing, the after-hours enquiry, the gentle onboarding. The work, in other words, that a digital worker is built to pick up.

The rest of this guide is about handing that specific layer of work to an agent, so the next quarter looks different: every client answered, every document chased on time, every prospect captured, and your registered people free to do the registered work properly.

The five jobs a digital worker does best

Not everything should be automated, and a good deal of bookkeeping never will be. These five jobs are where an AI voice agent is genuinely strong, and where practices see the change first.



— WHERE IT EARNS ITS PLACE

Five jobs, done properly, every time.

JOB 01**ANSWERED**

Answering every client call and message

Every call picked up on the first ring, at every hour, plus the emails and texts. No hold queue, no message bank, no prospect lost to the practice down the road because nobody answered at 5:40pm.

JOB 02**CHASED**

Chasing the documents you need

Bank statements, receipts, invoices and payroll details, requested and then chased patiently across phone, text and email until they arrive, before every BAS, so the quarter is not compressed into one frantic week.

JOB 03**REMINDED**

Deadlines and reminders

BAS and instalment activity statement (IAS) due dates, super guarantee, Single Touch Payroll (STP) finalisation and payment dates, tracked per client and reminded without fail. The slow, repetitive outreach that always gets dropped first.

JOB 04**HANDLED**

Routine status and account enquiries

"Has my BAS been lodged?" "Can you resend the invoice?" "When is the next one due?" answered from your records, with anything that needs registered judgement passed straight to an agent.

JOB 05**CAPTURED**

New-client enquiries and onboarding

The agent answers the prospect who calls, explains how you work, and books the first conversation. Once a client signs, it collects the details, identity, software access and prior records your team needs, so the file is ready and the first billing does not slip. Sensitive information is collected only with clear consent and stored to your practice's privacy rules.

WHY THESE FIVE

High volume, low judgement, high impact.

The jobs worth handing over share a shape. They happen often, they follow rules you already have, and getting them wrong costs you clients and capacity. That is precisely the shape an agent handles well, and where a registered person is wasted.

16,965

registered BAS agents in Australia, the scarce resource. Spend their hours on the registered work, not on chasing receipts.

TPB ANNUAL REPORT 2024-25

30%

of Australian small businesses manage their finances completely on their own, a large pool of future clients waiting for a practice with capacity.

DEXT, BUILT FOR BIGGER THINGS, 2025

4%

of small businesses have fully automated their finance processes, so the demand for what you do is nowhere near met.

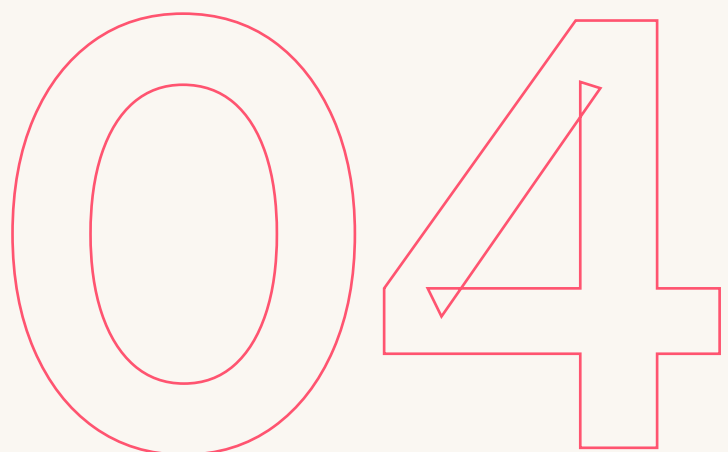
DEXT, BUILT FOR BIGGER THINGS, 2025

Read those numbers together and the case is straightforward. Demand is not the problem. The constraint is capacity: the hours your registered people lose to administration are hours they cannot spend winning and serving clients. Hand the administration to an agent and you free the one thing you cannot buy more of.

Sources: TPB, Annual Report 2024-25 (16,965 registered BAS agents at 30 June 2025). Dext, "Built for Bigger Things," 2025, surveying Australian small-business leaders (30% manage finances solo; 4% have fully automated their finance processes).

What the chasing really costs

An hour chasing a client feels like nothing. A few hours, every week, across a team, for a year, is a different story. Here are the four quiet leaks, and what they add up to.



— THE LEAKS LEDGER

Four leaks, one total.

The weekly figures below are illustrative drivers for a three-bookkeeper practice serving around eighty clients, at a \$90 charge-out rate, not a quote. Every practice's numbers differ. The value of laying them out is that the leaks stop being invisible.

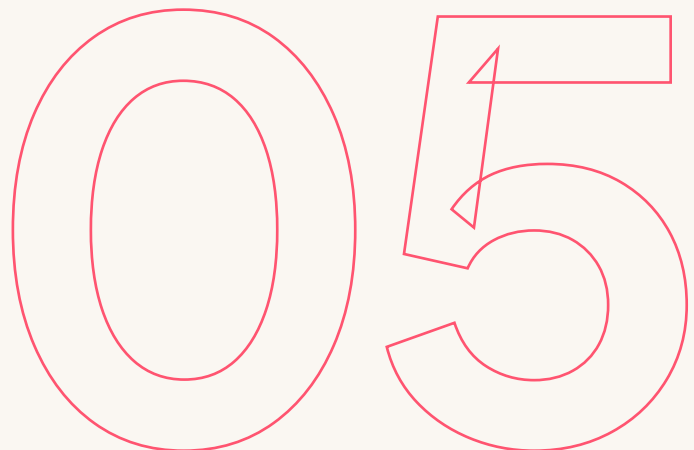
<p>Chasing clients for documents</p> <p>~8 hours a week across the team requesting and re-requesting statements, receipts and payroll details. Non-billable time, at \$90/hr.</p>	\$720 /wk
<p>Routine status enquiries</p> <p>~25 calls and emails a week ("is it lodged?", "what do I owe?"), about 12 minutes each, roughly 5 hours at \$90/hr.</p>	\$450 /wk
<p>Onboarding drag</p> <p>~3 hours of principal time per new client collecting access, identity and prior records; about one a week, delaying first billing.</p>	\$270 /wk
<p>Prospects lost after hours</p> <p>~3 enquiries a quarter go cold for want of an answer; each was worth about \$4,200 a year. Spread across the year.</p>	\$260 /wk
<p>The combined leak</p>	\$1,700 /wk

That is roughly \$81,600 a year leaking quietly through four holes, none of which shows up on an invoice. You do not need these exact numbers to act; even at half the assumptions the annual cost dwarfs the price of closing it. A digital worker addresses all four at once: it chases every document, it answers the routine enquiries, it onboards new clients, and it picks up the prospect who calls after hours. Section Eight builds the full model with your own numbers.

Figures are illustrative drivers for a composite practice, not a quote. Average client value of ~\$4,200 a year is an illustrative assumption for the example, not a market figure.

The registered line you never cross

This is the section that matters most for a bookkeeping practice and the one most guides skip. What counts as a BAS service, what the law and the Code require, and exactly how the agent is kept on the right side of the line.



A BAS SERVICE IS REGULATED

Some work is reserved by law.

In Australia, providing a BAS service for a fee or other reward requires registration with the Tax Practitioners Board (TPB) under the Tax Agent Services Act 2009 (Commonwealth). This is not optional. There are significant civil penalties for anyone who provides, or even advertises, BAS services while unregistered.²

The fee does not have to be charged separately to count. A service is still provided for a fee even where it is bundled into a broader bookkeeping engagement, so the boundary cannot be sidestepped by how an invoice is worded. This matters when you introduce any tool into the workflow: the question is not who pressed the button, but whether a BAS service was provided.

So what is a BAS service? It is, broadly, working out or advising a client about their liabilities, obligations or entitlements under a BAS provision, or dealing with the Commissioner of Taxation on their behalf. In practice that includes applying GST to transactions, calculating PAYG withholding, handling super guarantee obligations, and preparing or lodging the BAS or IAS.

The question is never who pressed the button. It is whether a BAS service was provided, and by whom.

What is not a BAS service is just as clear. Basic bookkeeping such as data entry, bank reconciliations and coding transactions to the client's or the registered agent's instructions, processing payments, record keeping, and collating draft reports can be done without registration. That is the side of the line the agent works on.

So the agent gathers, records and routes. It can assemble everything needed for a BAS and hand it to your registered agent. The registered agent applies the GST treatment, makes the calls that require judgement, reviews the result, and lodges. Responsibility stays with a person, exactly where the law puts it.

2. TPB, "BAS services" and "What is a BAS service?" (TPB(I) 38/2023). A BAS service is defined in section 90-10 of the Tax Agent Services Act 2009 (Cth). Registration is required to provide BAS services for a fee or other reward, with significant civil penalties for unregistered provision or advertising.

THE BOUNDARY, ENFORCED

How the line is held.

Section One set the rule: the agent handles administration, never a BAS service. This is how that rule is enforced in the way the agent is actually built.

THE AGENT WILL

- + Chase and collect documents, statements and payroll details

- + Do data entry and reconciliations to your agreed rules

- + Send deadline reminders and routine confirmations

- + Answer status and account questions from your records

- + Assemble a draft and route it to a registered agent to review and lodge

- + Hand over the moment a question calls for registered judgement

THE AGENT WILL NOT

- Advise how GST applies to a transaction

- Calculate PAYG withholding or super obligations as advice

- Decide a client's liabilities or entitlements

- Prepare or lodge a BAS or IAS in its own right

- Deal with the Commissioner on a client's behalf

- Provide any tax advice, or sign off registered work

HUMAN IN THE LOOP

A registered agent is never removed from the work that the law reserves for them. The agent is a layer in front of the administration, with clear routing back to your registered people and a standing instruction to hand over the moment a conversation needs registered judgement. You set the rules; the agent keeps to them; you can see everything it did.

THE CODE, PRIVACY AND GOVERNANCE

Built to be inspected.

Registered agents work to the Code of Professional Conduct, and that Code has just been strengthened. The Tax Agent Services (Code of Professional Conduct) Determination 2024 added new obligations that apply from 1 July 2025 for practitioners with 100 or fewer employees. They tighten expectations around keeping clients properly informed, maintaining accurate records, and not making false or misleading statements.³ A well-built agent supports those duties rather than working against them.

Because every interaction is logged, transcribed and summarised, you have a clearer record of client communication than most practices keep today, when a phone call or a chase leaves no trace at all. That record helps you show what was requested, when, and what was said, which is exactly the kind of evidence the Code's record-keeping and client-communication obligations call for.

Client financial information is personal information, protected under the Privacy Act 1988 (Commonwealth) and the Australian Privacy Principles. A digital worker has to be built to that standard, not retrofitted to it. The agent tells callers plainly that they are speaking with an automated assistant, collects information only for the purpose at hand and with consent, encrypts it in transit and at rest, and keeps it within boundaries you control, which for Australian practices usually means Australian data centres. It connects to your accounting software through permissioned access, seeing only what you allow.

This guide is general information, not legal, tax or professional advice. Before you go live, confirm your obligations with the TPB and your professional association, such as the Institute of Certified Bookkeepers (ICB) or the Australian Bookkeepers Association (ABA). What the technology gives you is a practice that is easier to govern, not harder.

3. Tax Agent Services (Code of Professional Conduct) Determination 2024 (Cth); TPB guidance. The additional Code obligations apply from 1 July 2025 for practitioners with 100 or fewer employees (and from 1 January 2025 for others).

Under the bonnet

You do not need to be technical to use this, but it helps to know what is happening when a client calls or a document is due. Here is the whole thing, in six parts.



HOW IT WORKS

Six parts, one workflow.

PART 01

It picks up and listens

The agent answers in a natural voice, on the first ring, and tells the client they are speaking with your practice's automated assistant. It understands ordinary speech, accents and interruptions.

PART 03

It chases until it lands

It requests the bank statement, the receipts, the payroll run, then follows up by phone, text and email until they arrive, and drops them straight into the client's file.

PART 05

It works after hours

Evenings, weekends and the BAS crunch are covered without extra rostering. The prospect who calls at 5:40pm is answered, and the morning inbox is already moving.

PART 02

It follows your rules

Which documents each client owes, your deadlines, your fees, what always goes to a registered agent: it works from the rules you set, in plain language, not from guesses.

PART 04

It routes cleanly

When a question is a BAS service, or needs registered judgement, it hands over to your team and assembles what they need. It never advises on GST, payroll or super itself.

PART 06

It reports back

Every call and chase is logged, transcribed and summarised. You see who still owes documents, what was escalated, and what happened, and you tune the rules from there.

Before you switch it on

You can stand up a working agent quickly. The practices that get the most from it spend a little time first, getting the groundwork right. Here is what to map across two weeks.



— THE GROUNDWORK

An hour of mapping saves a month of patching.

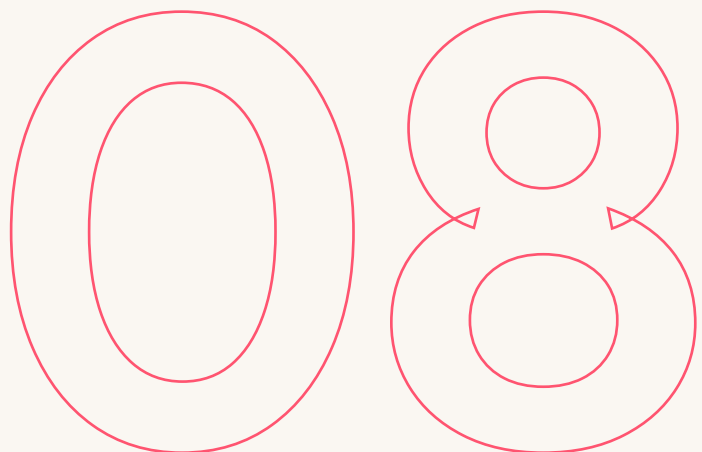
Getting an agent live is fast. The difference between a good launch and a frustrating one is whether you have written down the things your team currently hold in their heads. Work through this list before you go live.

- Your top ten reasons clients call, in order
- Your deadline calendar: BAS, IAS, super, STP, payments
- What is always a BAS service and must go to a registered agent
- Which software the agent may access, and at what level
- Consent wording for collecting client information
- What documents each client owes, and when
- Your chasing cadence and the wording you want used
- Your onboarding checklist for a new client
- Your fee and engagement answers, plain enough to read aloud
- Who owns the agent's rules and reviews its reports

This is a fortnight of light work, not a project. Most of it is writing down decisions you have already made informally. Once it is on paper, the agent can be configured to match exactly how your practice already runs, which is the whole point: it should sound and behave like your practice, on its best day.

Building the business case

An illustrative model, not a promise. Plug in your own numbers and the shape of the return tends to hold: it pays for itself on returned hours and captured clients, long before you count the calmer quarters.



— AN ILLUSTRATIVE MODEL

Where the return comes from.

A worked example to show the mechanism, not a quote. The numbers are illustrative and rounded; replace them with your own. The point is that the returns stack, and the returned hours usually cover the cost by themselves.

THE SCENARIO · A THREE-BOOKKEEPER PRACTICE

Serves about 80 small-business clients at a \$90 charge-out rate, with an average client worth roughly \$4,200 a year. The team loses around 16 hours a week to chasing documents, routine enquiries and onboarding, and lets a couple of prospect enquiries go cold each week during BAS crunches.

Where the return comes from	Illustrative annual figure
Hours returned to billable work Of the ~16 hours/wk the agent absorbs, count only half as recovered, billable or capacity-building, time: 8 hrs/wk × \$90 × 48 weeks.	\$35,000
New clients captured Answering every enquiry and onboarding faster wins ~6 clients a year that would otherwise have gone cold, at ~\$4,200 each.	\$25,000
Calmer quarters, fewer errors Less BAS-week overtime, fewer corrections from rushed work, and better client retention. Conservative, real, and felt by the team.	\$12,000
Cost of the agent Indicative annual platform cost for a practice of this size, plus the groundwork time in your first fortnight.	(\$9,000)
Net illustrative return Returned hours and captured clients, less the cost of running it.	\$63,000

Read it conservatively and the case still holds. Halve every assumption and the model clears the cost of the agent several times over, on returned hours alone, before the captured clients and the calmer quarters are counted. We will build this with your real numbers in a short call rather than ask you to take a generic figure on faith.

What you don't need

Some of what holds practices back is not cost or risk, but a set of assumptions that are simply not true. Here are the ones worth retiring before you start.



— MYTHS WORTH RETIRING

Less than you think.

YOU DON'T NEED

- To replace your team. The agent takes the repetitive layer, not the people

- To rip out your accounting software. It connects to what you already run

- To be technical. The rules are written and changed in plain language

- A long IT project. A working agent is a matter of days, not quarters

- To worry it will provide a BAS service. By design, it never goes there

YOU DO NEED

- + A clear picture of why clients call, and what documents they owe

- + Agreement on what is always a BAS service and goes to a registered agent

- + Your privacy and consent wording confirmed

- + One owner inside the practice who watches the reports

- + A willingness to start with one job and grow from there

The honest summary is that the barrier is smaller than the reputation of "AI in finance" suggests. You are not rebuilding your practice. You are adding a reliable, well-governed layer to the administration and keeping a firm hand on what it is allowed to do.

In practice

Three composite practices, drawn from the kinds of deployments this technology suits. The names are illustrative; the situations are not.



COMPOSITE CASE STUDIES

What changed, and how fast.

COMPOSITE · SOLE PRACTITIONER

A solo BAS agent, ~40 clients

Every quarter ended in a week of late nights chasing the last few clients.

0

documents still outstanding on the morning of BAS due date

The quarter, smoothed out.

The agent now starts chasing three weeks out and keeps going, by phone and text, until each client's documents arrive. The pile that used to land at 4pm on the due date is in days earlier.

With the chasing handled, the practitioner spends the final week reviewing and lodging with room to think, rather than racing the clock. The late nights are gone.

COMPOSITE · GROWING PRACTICE

A three-bookkeeper practice

Turning away work because admin ate the capacity to take it on.

+12

clients onboarded in a year without adding a fourth bookkeeper

Growth without a new hire.

The practice had stopped taking referrals because nobody had time to onboard them. The agent now answers every enquiry, books the first call, and collects the onboarding details, so the registered team only does the registered work.

COMPOSITE ·
PAYROLL-HEAVY PRACTICE

A practice with many STP clients

Endless "is payroll done?" and
"where is my payslip" enquiries
each cycle.

5→1

days of enquiry load each pay
cycle, compressed to almost none

The pay-cycle noise, gone.

Every pay run brought a wave of routine questions that pulled the team off the work. The agent now answers them from the practice's records, confirms timing, and resends documents, while anything that needs registered judgement is routed straight to an agent.

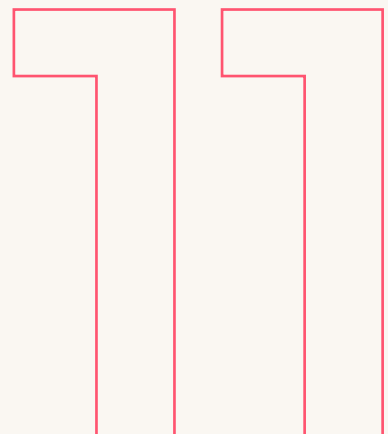
The team feels the change first in the days around each cycle, which used to be the loudest of the fortnight and are now quiet enough to plan around.

A NOTE ON THESE EXAMPLES

These are composites built to illustrate common patterns, not named clients. Your practice's results depend on your client mix, your deadlines and how you choose to use the agent. We are happy to talk through a realistic picture for your specific practice.

Questions bookkeepers ask

The questions that come up in almost every first conversation, with straight answers.



FREQUENTLY ASKED

The honest answers.

Will this make me provide a BAS service without being registered?

No. The agent works only on the non-BAS side of the line: chasing documents, data entry and coding to your rules, reminders and routine enquiries. It never advises on GST, payroll or super, and it never lodges. Your registered agent does the BAS service, every time. Section Five sets out the boundary in full.

Will clients know they are talking to an AI?

Yes, always. The agent tells callers plainly that they are speaking with your practice's automated assistant, and clients can ask for a person at any time. Transparency is a requirement, not an option.

Does it work with our accounting software?

It connects to common accounting and practice software through permissioned access, reading and writing only what you allow. We confirm compatibility with your specific stack before you commit to anything.

Where does our client data go?

It is treated as personal information under the Privacy Act and the Australian Privacy Principles, collected with consent, encrypted, and held within boundaries you control, which for Australian practices typically means Australian data centres. Every interaction is logged.

Will it replace my bookkeepers?

No. It takes the repetitive, interruptive layer of the work so your team can focus on reconciliation, review and the registered work that needs them. Practices generally redeploy their people, and often grow without hiring, rather than reduce headcount.

Does it help me meet my Code obligations?

It supports them. Because every chase and call is logged and summarised, you have clear records of client communication, which is exactly what the Code's record-keeping and keeping-clients-informed obligations call for. It does not replace your professional judgement or your responsibilities.

What happens when a call is complicated?

It hands over. The agent is built to recognise when a conversation has left its rules or needs registered judgement, and to route it cleanly to your team. You decide in advance which situations always go to a person.

How long until it is live?

Days, not quarters. The groundwork in Section Seven is the main task, and most of it is writing down how your practice already runs. After that, configuration and testing are quick.

What if we want to change how it behaves?

You change the rules in plain language and the change applies from then on. Consistency becomes a setting. You can also listen back and read transcripts whenever you like.

Your first seven days

A short, concrete path from reading this guide to a live agent working your practice. Three steps, one week.



FROM HERE TO LIVE

Start with one job. Grow from there.

DAYS 1-2**Map the basics**

Work through the Section Seven checklist. Pin down your call reasons, your document lists, your deadlines and the line that always goes to a registered agent. This is the real work.

DAYS 3-5**Configure and test**

We set the agent up to match your rules, connect it to your software in a controlled way, and test it together against real scenarios until it sounds like your practice.

DAYS 6-7**Go live on one job**

Start with a single job, often document-chasing or after-hours enquiries, watch the reports, then widen its remit once you trust it. Small start, fast confidence.

THE ONE DECISION TO MAKE THIS WEEK

You do not need to commit to a full rollout. Pick the single job that hurts most right now, the endless document-chasing, the after-hours enquiries, or the onboarding that always slips, and let an agent take just that. The rest follows from what you learn.

When you are ready, the best next step is a short walkthrough where we build a realistic picture for your practice: your numbers, your rules, and a clear view of what the agent would and would not do. No generic figures, no pressure.

Answer every client. Never cross the registered line.

A digital worker that answers your phones, chases your documents and onboards your clients, governed by your rules and kept firmly clear of any BAS service. Built for Australian bookkeepers.

TALK TO US

Agntic.ai
Book a 20-minute walkthrough for your practice

ABOUT THIS GUIDE

General information only.
Not legal, tax or professional advice.
Confirm your obligations with the TPB and your association.