



AI & data use policy

How AI uses accounting context, how provider and connector choices affect data, and where human responsibility stays.

VERSION 1.0 | REVISED 13 SEPTEMBER 2026

Why AI processes information

BooksAI uses relevant connected records, submitted documents, questions and company guidance to answer accounting questions and prepare work. Relevant portions of this context may be processed by the configured AI provider.

AI output may be incorrect, incomplete or unsuitable for the task. Customers remain responsible for reviewing the source and the proposed result before relying on it or releasing accounting work.

Managed AI and customer-provided keys

BooksAI offers approved managed AI access and supported customer API-key options. The managed experience is primarily built around Claude, subject to the configured service, plan and workspace policy. Other supported providers may be used according to those settings.

With a customer API key, supported requests use the selected provider account. Provider charges, model access, processing terms and limits apply separately. Neither a customer key nor managed access means processing happens entirely on your device.

Company context and learning

Company history, reviewed guidance and corrections can help prepare more relevant suggestions. This does not guarantee that every correction is remembered or that future accounting treatment will always be correct.

Broader model-training participation is not enabled by default. QuickBooks data and Google user data are excluded from model training, consistent with our privacy policy. Any separately offered participation involving other eligible data requires an informed choice. We do not sell your QuickBooks data.



External assistants and messaging

An MCP connection lets a compatible external assistant use the BooksAI tools available to that connection. In the private pilot, supported actions are questions, draft preparation, history search and pending-approval lists. The connector does not provide an approve or post tool.

Information returned to an external assistant or sent through an enabled messaging channel is also handled under that service's terms. Check the destination, audience and account permissions before sharing. Consumer AI connectors and customer API keys are different arrangements.

What customers should control

Use only companies, records and provider accounts you are authorized to connect. Keep company guidance current, inspect uncertain results and review permissions and learning settings as your team changes.

Avoid submitting unnecessary personal information, secret keys, authentication codes or unrelated customer records. Do not use AI output as a substitute for qualified accounting, tax or legal judgment.

Retention, location and questions

AI providers and connected services may process information outside your country. This policy does not promise a particular processing region or universal retention period. Customer exports and external conversations may create copies outside BooksAI.

Before onboarding, discuss any required processing location, retention arrangement or contractual restriction with us. For data requests or questions, contact SumPulse Software Inc. at Krishna@booksai.io and review the privacy notice and data-processing overview.