

AI Agent Setup Checklist

Connect AI Agents to your FlipperForce workspace through the Public API.

Work top to bottom the first time. Setup takes about **10 minutes** and you only do it once. Do not upload this checklist to your Project. Keeping your Project's knowledge tight gives you better answers than loading it with everything you have.

1 Before you start

- ☐ Active FlipperForce subscription keys stop working if it lapses
- ☐ API key requested at `tools.flipperforce.com/integrations/public-api`
- ☐ Paid Claude plan Projects are a paid feature
Request the key first. We reply by email, usually within 24 to 48 hours.

2 Environment Claude settings → Capabilities

- ☐ Code execution and file creation enabled
- ☐ Network egress enabled
- ☐ Domain allowlist set to **Package managers and specific domains**
- ☐ `tools.flipperforce.com` added
- ☐ `flipperforce-prod.nyc3.digitaloceanspaces.com` added only if uploading receipts or photos
- ☐ Retailer domains added only if checking material pricing
- ☐ New conversation opened after saving

The two that catch everyone. If the allowlist is left on "Package managers only," which is the default on some plans, every call fails. And allowlist changes never reach a conversation that is already open, so always start a fresh one before testing. On Team and Enterprise plans an organization owner has to make these changes.

3 Project

- ☐ Claude Project created and named after your company
- ☐ Project instructions pasted into the **instructions field**, not knowledge
- ☐ Bracketed sections in the instructions edited for your business
- ☐ Decided solo or shared, consistent with where you keep your key

4 Knowledge files

- ☐ **FlipperForce Public API Agent Guide** uploaded
- ☐ API key uploaded as a file, or your paste-each-session process decided
- ☐ Notes about your company added optional
A short file covering how you run your flips, how you use your expense categories, and who your regular vendors are will noticeably sharpen what you get back.

5 Verification in a brand new conversation

- ☐ `/user/account` returns your workspace
- ☐ `/project/list` returns your projects
- ☐ A financial read succeeds on one project
- ☐ A write was proposed and required your approval before executing
A 403 on one particular module usually means your plan does not include that feature, not that the integration is broken.

6 Security

- ☐ Key is not in a Project shared with anyone who should not have write access
- ☐ Claude instructed never to display the key in a response, script or log
- ☐ Rotation triggers understood
Rotate your key if you share a screen recording, hand off a laptop, remove a team member, or suspect exposure.

Stuck? See "My AI agent cannot connect to FlipperForce" in our knowledge base at flipperforce.com/learn/tools/ai-agents, or email support@flipperforce.com.