Joltly

AI Quick Start for Oil & Gas

Can your accounting system talk to Claude?

AI QUICK START GUIDE | 9 TOOLS | 9 QUESTIONS | WHAT AN MCP IS | 3 PROMPTS FOR MONDAY

HARRISON CHAMBERLAIN · FOUNDER, JOLTLY

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WHAT'S INSIDE

Six steps to an AI-ready back office.

/01 The readiness ladder — Where most oil & gas back offices are today.

/02 The AI stack — Nine tools in three tiers. Check what you already have.

/03 Brain + Reach — Joltly as the brain: your agreements and your books in one place.

/04 Ask your books — See Claude answer from real books, plus three prompts to use today.

/05 Is your data ready? — 9 questions about your books, data and documents.

/06 How we help — Bookkeeping, connected books, and your next step.

01

THE READINESS LADDER

Where is your back office today?

Four steps. Most oil & gas back offices stop at step two. The payoff is at step four.

/01

Tools

Notes and voice.

A notetaker on every call and voice-to-text in every app. Helpful, but AI still can't see your work.

→ EXAMPLES

Fathom · Wispr Flow

/02 MOST STOP HERE

Agent

AI that does the work.

A desktop agent that reads files, builds spreadsheets and works in your apps. Still blind to your books.

→ EXAMPLES

Cowork · Codex

/03

Brain

One place AI reads from.

Your JOAs, leases, owner decks and coding rules in one place, so AI answers from your records, not the web.

→ EXAMPLES

Joltly · JOAs · COPAS · decks

/04 THE PAYOFF

Books

Just ask your books.

Your accounting data connected to Claude. Ask about bills, JIBs, revenue or LOE by well, and get answers from the real numbers.

→ HOW

Joltly MCP → Claude

→ **THE GAP** Steps 1–3 are about tools. Step 4 depends on whether your accounting system can connect to AI at all.

02 THE AI STACK

Check what you already have.

Nine tools that earn their keep in an oil & gas back office. Start at Tier 1.

TIER 1 · START HERE

This week, low cost.

- [ ] **Claude** — $20/MO
  The AI everything else plugs into. Drafts, analyzes and answers.
- [ ] **Fathom** — FREE
  Notes on every partner, vendor and auditor call. No rewriting.
- [ ] **Wispr Flow** — FREE · PRO $15
  Talk instead of type. Emails and prompts go 3–4× faster.

TIER 2 · DOES THE WORK

AI that acts, not just answers.

- [ ] **Claude Cowork** — IN CLAUDE PRO
  A desktop agent that reads files, builds Excel and works in your apps.
- [ ] **Connectors** — INCLUDED
  Outlook or Gmail, SharePoint or Drive, Calendar. AI sees your inbox and files.
- [ ] **Skills** — INCLUDED
  Package month-end steps once. Run them every close.

TIER 3 · CONNECT YOUR BOOKS — WE SET THIS UP

Where the value is.

- [ ] **Joltly** — WE SET IT UP
  AP, JIBs, revenue and bank activity in one system.
- [ ] **Joltly MCP → Claude** — INCLUDED
  Ask your books questions in plain English.
- [ ] **A brain** — IN JOLTLY
  JOAs, COPAS and leases that Claude can read.

→ **YOUR SCORE** Tiers 1 and 2 run about $20 a month per person. The value starts at Tier 3, and that’s what we set up with you.

02

WHAT'S AN MCP?

A USB-C port for AI.

WITHOUT MCP

Export, upload, repeat.

Download a CSV from your accounting system, upload it to Claude, and get answers from last week's numbers.

STALE · MANUAL · ONE FILE AT A TIME

WITH MCP

Claude asks Joltly directly.

Claude signs in to Joltly as you and pulls today's bills, JIBs, revenue and bank activity the moment you ask.

LIVE · PERMISSIONED · NO EXPORTS

→ IN PLAIN ENGLISH

/01

What it is

An open standard, introduced by Anthropic, that lets AI plug into your software the way USB-C plugs into devices.

/02

What it does

Claude signs in as you and sees only what you're allowed to see in Joltly. Same roles, same approvals.

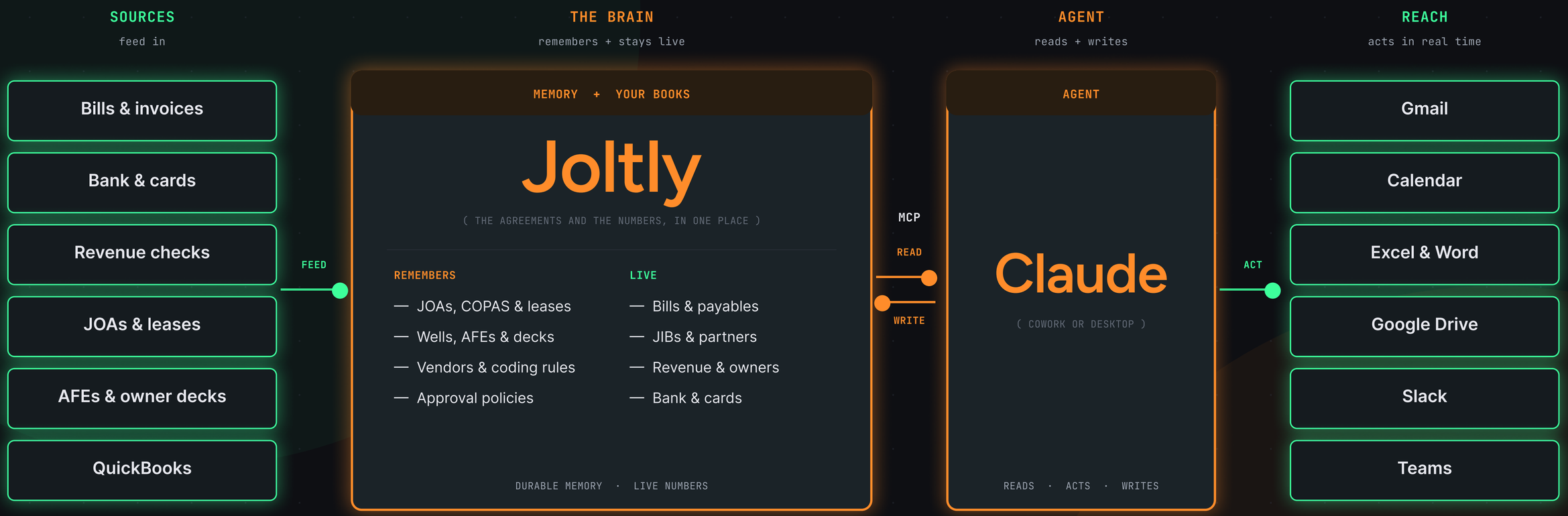
/03

What it's not

It doesn't hand AI your password, and it can't send payments or move money.

03 THE FULL PICTURE

Joltly is the brain.



→ **TOGETHER** Everything feeds Joltly. Claude reads your books and your agreements through MCP, then acts in the tools you already use.

03

ONE BRAIN · TWO HALVES

Why Joltly is the brain.

Most AI setups split documents and numbers across different tools. In Joltly they live together, and Claude reads both through one connection.

WHAT JOLTLY REMEMBERS

Memory

(the agreements behind every number)

EXAMPLES

— JOAs, COPAS & lease terms
— Owner decks & partner interests
— Vendor history & coding rules
— Approval policies

PROPERTIES

Curated · Persistent · Yours

Upload it once. Claude reads it for every bill, JIB and question.

WHAT'S LIVE

Books

(your books, live, through MCP)

EXAMPLES

— Today's unpaid bills
— Unmatched bank lines
— Open JIBs by partner
— LOE by well, this month

PROPERTIES

Live · Accurate · Permissioned · Current

Answers from the real numbers, not last month's export.

→ WHY IT MATTERS

"Why is this JIB higher than last month?"

JOA TERMS + LIVE NUMBERS → ONE ANSWER

Claude reads the overhead rates in the COPAS and checks them against this JIB's charges, line by line, citing the page.

04 ASK YOUR BOOKS

What it looks like.

A real question, answered straight from the books. No export, no spreadsheet.

SNAPSHOT

“Give me a snapshot of our books this week.”

PAYABLES

“What’s unpaid, by vendor, and what’s over 60 days?”

COSTS BY WELL

“What did we spend on the Smith 2H last quarter?”

VENDOR STATEMENTS

“Reconcile this vendor statement against our bills.”

CLAUDE · JOLTLY CONNECTED

Connect to my Joltly MCP and show me my invoices. Give me a report on my spend for the last month.

USED JOLTLY 4 TIMES

October 2026 invoices — 16 bills, $69,987.71

VENDOR	INVOICE	AMOUNT	STATUS
Permian Hot Oil Co.	INV-2291	$18,400.00	Paid 10/26
Red Mesa Water Hauling	WH-10442	$9,850.00	Paid 10/28
Caliche Roustabout LLC	7731	$6,508.48	Processing
Basin Chemical Supply	BC-55120	$2,415.00	Awaiting approval
Lone Star Compression	113012	$1,102.50	Paid 10/30
Tri-County Electric	2930	$550.00	Paid 10/30

Top vendor: Permian Hot Oil Co., 26% of October spend. One bill is waiting on your approval.

SAMPLE DATA · REAL JOLTLY MCP OUTPUT FORMAT

04 GUARDRAILS

What AI can touch, and what it can’t.

READS + PREPS

Does the busywork

Briefs you on the books, suggests bill coding, preps approvals, reconciles vendor statements and runs reports.

BILLS · CODING · APPROVALS · REPORTS

ONLY A PERSON

Moves the money

Claude can’t send payments or confirm bank matches through Joltly. Those stay with your team, every time.

PAYMENTS · BANK MATCHES

→ BUILT IN

/01

Signs in as you

Same roles and approval rules you already have in Joltly.

/02

Preview first

Bill coding runs as a dry run, so you see the change before anything saves.

/03

One connector

Plugs into Claude Cowork and Desktop with your Joltly sign-in.

04 START MONDAY

Three prompts that work today.

No Joltly required. Paste or upload into Claude, then ask.

/01 · AP AGING

Paste your AP aging report.

”

Flag likely duplicate invoices, and any vendor whose prices went up in the last 90 days.

→ YOU GET

A short list of bills to hold before they’re paid.

/02 · JIB VARIANCE

Paste two months of a JIB.

”

Explain the variance line by line, and flag anything that breaks last month’s pattern.

→ YOU GET

A partner-ready explanation of what changed.

/03 · JOA REVIEW

Upload a JOA.

”

Summarize the overhead rates, audit rights and non-consent terms in plain English.

→ YOU GET

The terms you need, without reading 80 pages.

→ **WITH JOLTLY** Skip the paste. Claude already has your AP, JIBs and JOAs, live.

05 IS YOUR DATA READY?

9 questions. Two minutes.

The tools are the easy part. AI is only as good as the data it reads. Section /01 matters most.

/01 MATTERS MOST

Accounting system

- [ ] It connects to Claude through MCP or an open API.
- [ ] It answers “what’s unpaid, by vendor?” without an export.
- [ ] Bills, JIBs and revenue live in one system.

→ 3 QUESTIONS

/02

Your data

- [ ] Every cost is coded to a well, lease or AFE.
- [ ] Owner decks and partner interests are clean.
- [ ] You have 12+ months of reconciled history.

→ 3 QUESTIONS

/03

Documents & process

- [ ] JOAs, COPAS and leases are digital and in one place.
- [ ] Month-end steps are written down, not just in someone’s head.
- [ ] Bills have a clear approval step before they’re paid.

→ 3 QUESTIONS

05 YOUR SCORE

Where you land.

8–9	Ready to just ask.	Connect Joltly to Claude and start asking your books questions this month.
5–7	Close. A few gaps.	Clean up coding and documents first. Most of these get fixed during setup.
0–4	The biggest upside.	This is where manual bookkeeping costs the most — and where AI saves the most.

→ **MOST COMMON GAP** Most oil & gas back offices answer no on /01. That’s the one we fix first.

06 HOW WE HELP

Three ways we get you there.

/01 OFFER

Autopilot

AI does the books. A person checks it.

Bills coded, bank matched, close prepped. An experienced accountant reviews everything and is your point of contact.

→ OFFER

First month at half what you pay now. We handle the switch.

/02

Connected

Your books, talking to Claude.

We connect Joltly to Claude Cowork or Desktop, set permissions, and show your team what to ask.

→ RESULT

Ask your books anything, in plain English.

/03

Brain

Your records, organized for AI.

We load your JOAs, COPAS, leases and owner decks into Joltly, and turn month-end steps into one-click skills.

→ HOW

Built with your team in a working session.

06 WHERE TO GO NEXT

Tools. People. Next step.

/ TOOLS

The AI stack from slide 4.

claude.ai
Claude · $20/mo

claude.com/cowork
Claude Cowork · in Claude Pro

fathom.ai
Fathom · free

wisprflow.ai
Wispr Flow · free

joltly.io
Joltly + MCP · we set it up

→ START WITH TIER 1 THIS WEEK

/ FOLLOW

Five accounts worth five minutes a week.

TIER 1 · START HERE

Matt Wolfe — YOUTUBE
Weekly AI tool roundups. Easy to follow.

The AI Advantage — YOUTUBE
Step-by-step workflows for beginners.

TIER 2 · BUILD THE HABIT

@emollick — X · SUBSTACK
Ethan Mollick on which model to use for what.

@alliekmiller — X
Allie K. Miller on practical business AI.

TIER 3 · STAY CURRENT

@AnthropicAI — X
First-party Claude and Cowork updates.

→ X FOR DAILY TIPS · YOUTUBE FOR TUTORIALS

/ NEXT STEP

Book your AI readiness review.

30 minutes. We score your back office with you and you leave with a 30-day plan. No pitch.

→ PICK A TIME
calendly.com/joltly-harrison/30min

Rather email?
harrison@joltly.io



→ SCAN TO BOOK

Opens my calendar on your phone. Pick any 30-minute slot.