101 ways to ask double

Double makes it easy to manage your team, workflows and client data — **all supercharged by conversational AI.**

Manage client details

"Show me all my clients"
Pulls a list with key details and properties

"Add a new client called Acme Inc."
Onboards a client without leaving chat

"Get the full profile for Acme"
Shows contact info, properties, and engagement details in one view

"Show me all contacts at Acme"
Lists every contact person associated with a client

"Add a secondary contact for Acme's CFO"
Adds an additional contact to a client

"Update the main contact for Acme to Jane Doe"
Keeps contact records current

"Mark a contact at Acme as inactive"
Removes a stale contact without deleting history

"Show me Acme's industry and engagement type"
Pulls custom property values you track per client

"What custom fields do we track on clients?"
Reviews the property column schema your firm uses

"Set the 'fiscal year end' to December for all my SaaS clients"
Bulk-updates properties across many clients at once

"Add a new custom property column for industry type"
Defines a new firm-wide data field

"Rename the property column 'FYE' to 'Fiscal Year End'"
Updates the column label or settings

"Filter my clients to ones with no activity in 30 days"
Surfaces at-risk or stalled engagements

Streamline your tasks and workflow

"Create a closing task for Acme's March close to reconcile the bank account"
Spins up close work on the fly

"Update the due date on Acme's reconciliation task to next Friday"
Reschedules work

"Add a firm-level task to update our pricing policy"
Tracks internal firm work, not just client work

"Mark this task as complete"
Closes out work

"Create a project task for the Acme onboarding project"
Task work tied to a specific project

"Update this custom task to assign it to Sarah"
Reassigns ownership

"Add a custom task for an ad-hoc request"
Free-form tasks outside the templates

"Show me our task templates"
Sees what reusable workflows exist before creating something custom

"What tasks are open for the bookkeeping team this week?"
Gets a live workload view

"What tags do we use on tasks?"
Browses the firm's tag taxonomy

"Show me overdue tasks across all my clients"
Surfaces what's slipping firm-wide

"What tasks are tagged 'urgent'?"
Filters tasks by tag

"Get the full history and comments on task #456"
Drills into a single task

"List all our active closes and workstreams"
Sees the structure of work across the firm

"Comment on task #123 that we're waiting on a statement from the client"
Keeps team updates inside the task

"List all tasks in the Acme onboarding project"
Scopes a project's work

"Show me all comments on task #456"
Reads the full conversation on one task

"Show me all sections in Acme's close"
Sees how a close is broken down

Simplify the month-end close

"What's the status of all my March closes?"
Sees every client's close progress in one place

"Show me the full close package for Acme's March"
Pulls every section, task, and footnote

"What close statuses do we use?"
Sees your firm's stage definitions

"Mark Acme's March close as ready for review"
Moves closes through your firm's stages

"Update Acme's May close start date to the 10th of this month"
Adjusts close timing

"Show me closes stuck in review for more than a week"
Finds bottlenecks

"Show me Acme's last 6 closes side by side"
Tracks close progress over time

"Which closes are still in progress past their due date?"
Surfaces overdue closes

"Add a footnote to Acme's March close about the unusual rent prepayment"
Captures the narrative behind the numbers

"Update the rent footnote with the corrected figure"
Edits existing narrative

"Show me all footnotes on Acme's March close"
Reviews the full commentary

Speed up financial reporting

"Pull Acme's March P&L"
Gets a profit & loss report ready to share

"Compare Acme's P&L month-over-month for the last 6 months"
Trend analysis on profitability

"Show me Acme's P&L grouped by class or department"
Segmented profitability view

"Show me the year-to-date balance sheet for Acme"
Generates financials without leaving chat

"Pull a comparative balance sheet for Acme vs last year"
Year-over-year balance sheet comparison

"Pull Acme's cash flow statement for Q1"
Cash flow on demand

"Which of Acme's customers owe us the most past 60 days?"
AR aging report for collections

"Show me Acme's overdue bills by age bucket"
AP aging report to manage payables

"Who are Acme's top vendors by spend this quarter?"
Expenses-by-vendor breakdown

"Which customers drove the most revenue for Acme in Q1?"
Sales-by-customer report

Track down transactions instantly

"Show me all uncategorized transactions for Acme in March"
Surfaces bookkeeping work to do

"How many transactions did Acme have last month?"
Quick volume check for scoping or billing, no need to pull them all

"Show me all transactions over $5,000 for Acme this quarter"
Finds material activity

"Pull every transaction with the 'Marketing' dimension for Acme"
Filters by tracking category

"Show me transactions categorized to a specific GL account"
Audits categorization on one account

"List transactions with unanswered client questions"
Finds what's blocking the close

"Are the chart of accounts set up?"
For newer clients, will help the accountant review the current setup and if it's ready.

"Leave a comment on this transaction asking the client what it was for"
Starts a client question right from the line item

Record meeting notes and address client questions

"Draft a note summarizing what we did on Acme's March close"
Keeps a client-facing record of work

"Update last week's note with what changed today"
Edits existing notes

"Show me all notes on Acme"
Reviews the full history of commentary

"Show me Acme's note history for the last quarter"
Filters notes by period

"Update that question to also ask for the receipt"
Refines an open question

"Show me all open client questions for Acme"
Chases down what's blocking the close

"Show me all resolved questions from last month"
Reviews what was answered recently

"Filter open questions where I asked about the vendor"
Triages by type of question

"What tags do we use on client questions?"
Browses the question taxonomy

Find the files you need in a flash

"Show me all files attached to Acme"
Sees every file tied to a client

"Upload this PDF directly to Acme's file library"
Brings new documents into Double

"Search the file library for receipts from Q1"
Finds documents by type and period

"Create a new folder called Q1 statements for Acme"
Organizes the file library

"Pull all bank statements uploaded this month"
Filters by document type and date

"Attach this receipt to the rent transaction on March 15"
Links supporting docs to the right transaction

"Get me the file metadata for this receipt"
Inspects a single file's details

"Move all the receipts attached to this question over to the close task"
Reorganizes files in bulk

Track time easily

"Start a timer on Acme's March close"
Bills accurately without breaking flow

"Show me all timers logged on Acme's March close"
Total effort on one engagement

"Add 30 minutes of time to yesterday's Acme close task"
Backfills time you forgot to track live

"Get total time logged on the Acme onboarding project this quarter"
Project-level effort total

"How much time did I log this week across clients?"
Reviews your own billable hours

"List timers logged by Sarah this week"
Tracks a teammate's hours

Monitor your team's activity

"Who on my team made changes to Acme yesterday?"
Audit trail for any client

"Show me all comments left across Acme this week"
Sweeps every comment, no matter the entity

"Show me what changed on Acme's March close in the last 24 hours"
Focused audit on a single close

"List everyone on the firm"
Quick team roster

"Filter the activity log to file uploads only"
Drills the log to one action type

"Get a teammate's profile and recent activity"
Reviews one person's work

"Show me login activity for the firm this week"
Security and usage view

"Get my user profile" or "update my notification settings"
Manages your own account

"What kinds of activity does Double track?"
Sees the full list of action types in the audit log

"Update permissions for a teammate"
Manages team members

Navigate effortlessly

"Give me a link straight to Acme's March close"
Jumps into the app from chat

"Give me a deep link to a specific transaction"
Jumps to one line item

"Get the URL for Acme's client page"
Jumps to a client record

...With Double AI, the possibilities are endless.
What will you ask?