

SMB and Growth Connectors

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Prerequisites check

- You should have completed Chapters 1-8. In particular, you need:
- Native Claude tool-use flow from Chapter 1.
- MCP tools/resources/prompts from Chapters 2-4.
- Structured logs from Chapter 5.
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The SMB workflow stack

- An SMB connector rarely talks to one system. A real workflow may touch:
- Finance ledger: invoices, payments, payouts, fees.
- Payment processor: settlements, disputes, transaction IDs.
- CRM: customer owner, deal stage, account notes.
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Split reconciliation from action

- **The Payroll Assistant should not combine "find mismatches" and "email customers" into one call.**
- **Collect ledger entries for the period.**
- **Collect payment settlements for the same period.**
- **Match by amount, date window, payer, and reference.**
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Approval state

- Use an explicit `awaiting_approval` state for sensitive actions. Do not hide it in prose.
- `"status": "awaiting_approval"`,
- `"workflow": "payroll_reminders"`,
- `"run_id": "payroll_2026_05_14"`,
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CRM coordination

- CRM updates are also write actions. A safe connector can draft proposed updates:
- "Move deal to Payment follow-up."
- "Add note: settlement missing for invoice INV-123."
- "Assign owner Alex because account owner is Alex."
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Try it next

- **Deploy a gateway with RBAC, rate limits, and JSONL auditing**
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