The office keys: minimum access by role

One page to decide what to connect to your AI employee, and with which permission. Cost: $0. Time: 10 minutes.

Every connection is a key (a tool). Every key opens just enough (a permission): **view**, **add** (create or log) or **change** (edit or send). **Delete and move money: never.**

Minimum access by role

Role	View	Add	Never
Customer texts	Prices, hours, inventory	Orders and holds	Supplier invoices, your email, deleting products
Scheduler	Open slots on the business calendar	New appointments, after the customer's "yes"	Your personal calendar, deleting other people's appointments
Follow-up after the sale	Visit or sales log	Draft texts	Sending without your OK, payment details
Quotes	Current price list	Draft quotes	Changing prices, giving discounts, sending without your OK
Billing and invoices	Open invoices	Draft payment reminders	Moving money, changing amounts, card numbers
Owner's assistant	Your email and calendar	Draft replies, appointments you confirm	Sending as you without asking, deleting email

Before you hand over a key

- [ ] Does it need it **for this role**? If it's not in that row, it doesn't get it.
- [ ] Can it be **view only**? Start there, and move up to "add" when the job calls for it.
- [ ] Does it see **only the business folder, sheet or calendar**? Not your whole personal account.
- [ ] Does that key let it **delete, send as you or move money**? If so, take it away or put your approval in front of it.
- [ ] Is what it can see **something a customer could read** without a problem? Sometimes it repeats it.

Before you leave it on its own

- [ ] You ask for something behind another key ("check my invoices") and it **says it doesn't have access**.
- [ ] You ask it to delete something and it **can't**.
- [ ] You know **where to take each key back** in a minute (each service's connections or permissions screen).
- [ ] You review its permissions **every month**, or whenever its job changes.

If something went wrong

Take back the key it used (disconnect that integration), check what it touched in the version history and undo it, then give the key back with **view** permission only before testing again.

How to know you used it well: every connection your AI employee has shows up in its row, with the lowest permission that gets the job done.

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Once you finish, reply **DONE** to the message it came in.

Blackcircuit Labs. Reviewed and tested with a fictional case on ChatGPT free: Nov 17, 2026.