


CLAUDE OS

PARTICIPANT TOOLKIT

Prompts · Use Cases · Practice Exercises · 7-Day Challenge

1. Memory Projects	2. Expertise Skills	3. Speed Context Window	4. Knowledge Markdown
5. Integration Desktop + Office	6. Connectivity MCP + Dispatch	7. Creation Artifacts + Agents	

HOW TO USE THIS TOOLKIT

- 1 Open claude.ai** or the Claude app on your phone or desktop
- 2 Copy any prompt** from the grey boxes — personalise the parts in [brackets]
- 3 Upload documents** where indicated — PDFs, Excel files, notices
- 4 Try Extensions** marked  for more advanced practice
- 5 Complete the 7-Day Challenge** from Section 9 — start today

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SECTION 1: GETTING STARTED

Setting Up Your CA Workspace on Claude

1.1 Set Up Your First Project

A Project gives Claude permanent memory of your firm, clients, and working style. Create one now and paste the instructions below.

 **PROJECT SETUP — System Instructions (paste into Project Settings)**


You are a CA assistant working for a Chartered Accountant based in Kolkata, India.
My practice covers the following client types:

- Garment & textile exporters (Park Circus / Metiabruz area)
- Commodity traders – cotton, jute, rice (Burra Bazaar)
- IT / ITES companies (Salt Lake / New Town)
- Real estate developers and contractors (Park Street / EM Bypass)
- NBFCs and financial services companies




Always follow these rules:

1. Cite section numbers from Income Tax Act, GST Act, Companies Act
2. End every response with an Action Checklist
3. Flag deadlines in RED
4. Use professional language suitable for client communication
5. Assume Indian context unless otherwise stated

✓ **Claude will now remember your firm context in every future conversation within this Project.**

 *Customise the client types to match YOUR actual practice. More specific = better output.*

1.2 Choose the Right Model

Model	Best For	CA Examples
 Haiku 4.5 (FAST)	Quick lookups, short drafts, batch tasks	TDS rate lookup · Deadline check · WhatsApp draft
 Sonnet 4.6 (DAILY ★)	Most CA work — notices, memos, analysis	GST notice reply · Tax planning · Audit obs
 Opus 4.8 (SENIOR)	Complex advisory, high-stakes matters	DTAA analysis · Sec 148A strategy · Restructuring

Quick Rule: Routine = Haiku | Daily CA work = Sonnet | High-stakes opinion = Opus | When unsure = Sonnet

SECTION 2: INCOME TAX

AIS Reconciliation · Notices · Capital Gains · Tax Planning

2.1 The AIS Reconciler — Most Common Notice Prevention

Upload your client's 26AS, AIS and TIS together. Claude compares all three and flags mismatches before your client gets a Section 143(1) intimation.

AIS RECONCILIATION PROMPT (Upload 26AS + AIS + TIS PDFs)

I am a CA. I have uploaded my client's 26AS, AIS, and TIS documents.
Client: [Name], PAN: [XXXXX], FY: 2024-25

Step 1: List every income item shown in each of the three documents.

Step 2: For each item, compare amounts across all three forms.

Flag every mismatch with amount difference highlighted.

Step 3: For each mismatch, explain:

- Which document is likely correct and why

- Why the mismatch may have occurred

Step 4: If filing ITR – what income amount should I declare for each item?

Step 5: Draft a preliminary reply if a 143(1) notice has already arrived.

✓ **Complete mismatch analysis + ITR guidance + Notice reply. Was: 2 days. Now: 20 minutes.**

 Use this **BEFORE** filing every ITR to prevent notices from arriving.

2.2 The 148A Reply Machine

SECTION 148A REASSESSMENT NOTICE REPLY

I am a CA. My client received a Section 148A notice.
AO alleges undisclosed income of Rs [X] in FY [YYYY-YY].
Client: [Industry type], [City].

Draft a complete reply that:

1. Denies the allegation with proper legal basis
2. Cites 3 case laws favourable to the assessee
3. Challenges the notice if the 'information' is vague
4. Requests copy of all documents the AO has relied upon
5. Includes a prayer for dropping the proceedings

Use Extended Thinking. Format professionally.

✓ **Senior partner-quality reply with case law citations. Was: 1 week. Now: 5 minutes.**

 Turn ON 'Extended Thinking' in Claude settings for this prompt — dramatically improves legal reasoning.

2.3 Capital Gains + Exemption Planning

📄 CAPITAL GAINS ORACLE (complete advisory with reinvestment plan)

Client: [Name], Kolkata
 Sale 1: Flat in [area], purchased [month year]
 Cost: Rs [X]L, Sale price: Rs [Y]L, Sale date: [month year]
 Sale 2: Listed equity shares, held [X] months
 Cost: Rs [X]L, Sale price: Rs [Y]L
 Sale 3: Debt mutual fund, held [X] months
 Cost: Rs [X]L, Redemption: Rs [Y]L

Compute: LTCG / STCG for each. Apply indexation (CII) where applicable.
 Check Sec 54, 54F, 54EC exemptions. Show reinvestment deadline and amount.
 Calculate: Total tax with and without exemptions.

✓ Complete capital gains advisory with reinvestment roadmap. Was: 3 hours. Now: 8 minutes.

💡 Also ask: 'Which sale should I plan for next FY to reduce tax liability?'

2.4 New Regime vs Old Regime Decider

📄 REGIME COMPARISON (exact rupee difference while client sits in front of you)

Client: [Name], Salaried, CTC Rs [X] LPA, Age [X]
 Deductions claimed:

- 80C: PPF Rs[X] + LIC Rs[X] + ELSS Rs[X]
- 80D: Family health insurance Rs [X]
- 80CCD(2): Employer NPS contribution - [X]% of basic
- Home loan interest: Rs [X] (Sec 24b)
- HRA: [Metro/Non-metro city], Rent Rs [X]/month

Show me:

1. Tax under Old Regime (with all deductions)
2. Tax under New Regime 115BAC (FY 2025-26)
3. Exact rupee difference + clear recommendation
4. Breakeven: at what deduction level does switching become worthwhile?

✓ Client stops asking other CAs. Clear recommendation with exact rupee savings.

💡 Run this live in client meetings. The result is ready before the chai cools down.

SECTION 3: GST

Notices · GSTR-9 · RCM · Block Credit · Reconciliation

3.1 GST Notice Analyser — Any Notice Type

UNIVERSAL GST NOTICE PROMPT (Upload notice PDF)

I am a CA. My client has received the attached GST notice / Show Cause Notice.
 Client: [Name], GSTIN: [XXXXXXXXXXXXXXXXXX], [Industry]

Please:

1. Identify the type of notice and section invoked (SCN / DRC-01 / MOV / REG)
2. Extract: demand amount, period, response deadline
3. Explain in plain English what the department is alleging
4. Identify whether this is Sec 73 (non-fraud) or Sec 74 (fraud/suppression)
 - this determines whether penalty is 10% or 100%
5. Draft a complete preliminary reply
6. Cite 2-3 favourable case laws or AAR rulings
7. Flag any urgent 48-hour actions

✓ **Complete notice strategy in 60 seconds. Sec 73 vs 74 choice can save 90% penalty.**

 **CRITICAL:** Sec 73 = 10% penalty. Sec 74 = up to 100% penalty. Get this right first.

3.2 GSTR-9 Annual Return Completion

GSTR-9 FILING ASSISTANT (Annual Return — FY 2024-25)

Help me complete GSTR-9 for FY 2024-25.
 Client: [Name], GSTIN: [XXXXXXXXXXXXXXXXXX]
 Business: [Industry type], Turnover: Rs [X] Cr


My data:

- GSTR-1 aggregate turnover: Rs [X]
- GSTR-3B aggregate: Rs [X]
- ITC claimed in 3B: Rs [X]
- Books of accounts turnover: Rs [X]

Please identify:

1. Table 6 ITC bifurcation, 2. Table 8 ITC mismatch
3. Table 17/18 HSN summary gaps, 4. Missed RCM liabilities
5. Items that could trigger GSTR-9C scrutiny

✓ **Annual return without sleepless nights. Was: 3-5 days. Now: 1 day.**

 **Run in November/December when GSTR-9 season opens. Batch all clients one by one.**

3.3 RCM Liability Calculator (Sec 9(3)/9(4))

REVERSE CHARGE MECHANISM — Full Analysis

I am a CA for a [trading / manufacturing / service] company in Kolkata.
My client makes payments to: advocates, GTA, security services,
director remuneration, renting of motor vehicles.

For each service:

1. Is RCM applicable under Sec 9(3) or 9(4)?
2. Rate of tax and amount of RCM liability
3. Is input tax credit available on this RCM payment?
4. Where to report in GSTR-3B
5. Any exemption thresholds that apply

✓ **Zero missed RCM. Zero notices on this head. Perfect GSTR-3B filing.**

 *Run for ALL new clients during onboarding. RCM misses are a common and costly audit finding.*

3.4 Block Credit — Section 17(5) Analysis


ITC ELIGIBILITY CHECK (Sec 17(5) Block Credit)

My client's purchases include: company car, office construction,
food for employees, club membership, group health insurance for staff.

For each item, tell me:

- (a) Is ITC blocked under Section 17(5)? Yes/No
- (b) Which exception applies (if any)?
- (c) Any AAR ruling that is relevant?
- (d) What disclosure is required in GSTR-9?

✓ **Stop claiming ineligible ITC. Avoid SCN. Be audit-ready before the auditor arrives.**

 *Also ask: 'What is the risk of claiming these items at my client's turnover level?'*

SECTION 4: AUDIT

Statutory · Bank LFAR · Tax Audit 3CD · CARO 2020

4.1 Tax Audit — Form 3CD Assistant

FORM 3CD CLAUSE-BY-CLAUSE ANALYSIS (Sec 44AB)

I am conducting a tax audit under Sec 44AB.

Client: [Name], [Industry], Turnover: Rs [X] Cr, FY: 2024-25

Please help me with the following Form 3CD clauses:

Clause 19: Capital vs revenue expenditure

Clause 20: Amounts inadmissible under Sec 40(a) – TDS defaults

Clause 26: Sec 43B disallowances – PF, ESI, MSME

Clause 31: Cash receipts > Rs 2L (Sec 269ST violations)

Clause 34: TDS/TCS compliance – rate, deposit, return filing

For each clause: information needed, common errors, draft disclosure, penalty risk.

✓ **Tax audit quality improves dramatically. Was: 2-3 days. Now: Half day.**

 *Run once per client to create a custom audit checklist. Save as a Project note.*

4.2 CARO 2020 Observation Drafter

CARO 2020 — CLAUSE QUALIFICATION DRAFTING

I am the statutory auditor of [Company Name], a private limited company.

FY: 2024-25, Turnover: Rs [X] Cr


Situation: The company borrowed Rs [X] Cr as working capital.

However, Rs [Y] Cr was transferred to a group company for unrelated purposes.

Please draft:

1. CARO 2020 Clause 3(ix) qualification – exact wording
2. Corresponding Note to Accounts disclosure
3. Management Representation Letter request
4. Whether this requires modified audit opinion

✓ **CARO-compliant qualification language. Audit quality comparable to Big-4 standard.**

 *Also try: 'Going concern assessment — signs of stress + disclosure language'*

4.3 Bank Branch Audit — LFAR Observation

BANK AUDIT (LFAR) — LOAN ACCOUNT OBSERVATION

I am conducting bank branch audit of [Bank Name], [Branch].


Loan Account: Borrower [Name], Sanctioned Rs [X] Cr, Outstanding Rs [Y] Cr

Concerns: Stock statements not submitted for [X] months,
insurance on hypothecated stock has expired,
TOD used [X] times in last 6 months, repayment irregular.

Please draft:

1. LFAR observation for this account
2. NPA classification risk assessment
3. Revenue leakage check (interest, processing fees)
4. KYC compliance gaps to flag

✓ **Professional LFAR observation in 4 minutes. Bank auditors save 2-3 hours per account.**

 *Batch all large borrower accounts. Run each one. Save outputs in Drive per branch.*

SECTION 5: CORPORATE & SALARY

MCA Compliance · Board Resolutions · Salary Structuring · MSME

5.1 Board Resolution Drafter (Sec 188 RPT)

BOARD RESOLUTION — RELATED PARTY TRANSACTION (Sec 188)

Company: [Name], CIN: [XXXXXXXXXXXXXXXXXX]

Transaction: Approval of Related Party Contract under Sec 188

Related Party: [Name], Nature: [Sale/Services/Lease], Value: Rs [X] Cr

Please provide:

1. Notice of Board Meeting (with proper agenda)
2. Board Resolution – exact language
3. Annexure with RPT details as per Sec 188
4. MCA / ROC disclosure requirements
5. Whether shareholder approval (EGM) is required
6. Checklist of steps to complete within 30 days

✓ Compliance-ready board pack in 5 minutes.

💡 Also works for: Dividend declaration · Auditor appointment · Change of registered office

5.2 Salary Structuring — Maximize Take-Home

OPTIMAL SALARY STRUCTURE (CTC to Take-Home Maximizer)

Employee: [Name], CTC: Rs [X] LPA

Company type: [IT / NBFC / Manufacturing] in Kolkata

Has: Home loan (Rs [X] interest), Rented accommodation (Rs [X]/month)



Please structure:

1. Basic, HRA, Special Allowance split (HRA calculation for Kolkata)
2. All Sec 10 exemptions – LTA, Medical, Uniform allowance
3. Perquisites – company car, phone, gadgets (Sec 17(2))
4. NPS Employer contribution (80CCD(2)) – maximum tax-free amount
5. Monthly TDS after all exemptions + Annual tax saving vs unstructured CTC

✓ Client saves Rs 40,000-2,00,000 annually. You become their trusted advisor.

💡 Run for ALL salaried clients in April/May. Create a Project for each employer company.

5.3 MSME Section 43B(h) Tracker

 MSME PAYMENT COMPLIANCE — SEC 43B(h) DISALLOWANCE CHECK
<p>My client [Company Name] makes payments to MSME vendors (Udyam-registered).</p> <p>Vendor payment details:</p> <ul style="list-style-type: none"> - Vendor A (Micro): Invoice Rs [X], dated [DD/MM], paid [DD/MM] - Vendor B (Small): Invoice Rs [X], dated [DD/MM], paid [DD/MM] - Vendor C (MSME – unknown category): Invoice Rs [X], outstanding <p>Please:</p> <ol style="list-style-type: none"> 1. Identify payments exceeding 45-day limit (15 days for Micro) 2. Calculate disallowance under Sec 43B(h) for FY [YYYY-YY] 3. Draft a vendor payment policy to avoid future disallowances 4. Draft disclosure language for Form 3CD Clause 26
<p>✓ Prevent Sec 43B(h) disallowance. Protect client's tax deductions.</p> <p> <i>One of the most MISSED provisions right now. Every trading/manufacturing client needs this.</i></p>

SECTION 6: KOLKATA INDUSTRY PROMPTS

Garment Exporters · IT/ITES · Commodity Traders · Real Estate

6.1 Garment & Textile Exporter (Park Circus / Metiabruz)

EXPORT CLIENT COMPLIANCE CALENDAR (RMG / Garment Exporter)


I am the CA for a Kolkata-based RMG (Ready Made Garment) exporter.
Client exports to USA and Europe, turnover Rs [X] Cr/month.

Generate a complete monthly compliance calendar covering:

- GST: Zero-rated export supplies, LUT filing, ITC refund claim (Rule 89/96)
- RoDTEP: Rate applicability, claim procedure, scrip utilization
- FEMA: Export proceeds realization within 9 months, BRC submission
- TDS, PF/ESI monthly deposit, advance tax dates
- Customs: Advance license obligations, EPCG compliance

For each task: Due date · Consequence of default · Documents needed

✓ **Complete onboarding checklist for export client. Was: 40 minutes. Now: 40 seconds.**

 Save as a reusable Template in your Project. Update dates each year.

6.2 Salt Lake IT / ITES Company

IT COMPANY ADVISORY (Transfer Pricing + STPI + ESOP)

I am the CA for an IT services company in Salt Lake, providing services to its US parent.
Employees: [X], Revenue: Rs [X] Cr, FY: 2024-25

Please advise on:

1. GST on software exports: Zero-rated or exempt? LUT requirement?
2. STPI/SEZ: Is Sec 10AA exemption still available? Conditions?
3. Transfer Pricing: Arm's length price – which method (TNMM/CUP) applies?
Form 3CEB requirement?
4. ESOP taxation: When taxed – grant / vest / exercise? TDS and Sec 17(2)
5. TDS on payments to foreign parent: Sec 195 + DTAA applicability

✓ **Big-4 level advisory in 45 seconds. Client renews engagement without negotiation.**

 For DTAA analysis, use Opus model with Extended Thinking ON.

6.3 Burra Bazaar Commodity Trader

COMMODITY TRADER COMPLIANCE (Cotton / Jute / Rice)

Client: [Name], Burra Bazaar commodity trader
 Trades: Cotton / Jute / Rice, Turnover: Rs [X] Cr

Please advise on:

1. GST: HSN code and rate for [commodity] – exempt? ITC reversal?
2. Commission Agent: RCM applicability under Sec 9(4)
3. Cash transactions: Sec 269ST limit – is commodity trading exempt?
4. Sec 43B(h): MSME farmer/processor payments – compliance
5. Advance tax: How to compute for trader with fluctuating income

✓ **Pan-India commodity trader advisory from your Kolkata office.**

💡 *Add the specific commodity to the Project. Claude will remember it in all future sessions.*

6.4 Real Estate Developer (Park Street / EM Bypass)

REAL ESTATE DEVELOPER — GST + INCOME TAX ADVISORY

Client: [Name], real estate developer, [residential/commercial/mixed] project
 Project value: Rs [X] Cr, Location: [Kolkata area]

Please advise on:

1. GST: Applicable rate (1%/5%/12%/18%) + RCM on development rights Sec 9(3)
2. ITC: Eligibility on construction inputs – residential vs commercial split
 ITC reversal formula under Rule 42/43
3. Income Tax: Project completion method vs percentage completion
 Sec 45(5A) for JDA / land owner taxation
4. TDS: Sec 194IA on property purchase from landowner

✓ **Walk into developer client meeting fully prepared. Not panicked.**

💡 *Real estate developers are high-fee clients. This advisory quality justifies premium billing.*

SECTION 7: PRODUCTIVITY & TOOLS

Artifacts · Excel · Word · Gmail Connector · Claude Desktop

7.1 Build a Working Calculator (Artifact)

BUILD: HRA EXEMPTION CALCULATOR (Live interactive tool)

Build me a professional HRA tax exemption calculator.

Inputs: Basic Salary, HRA Received, Actual Rent Paid, City (Metro/Non-Metro)

Calculate exemption as lowest of:

- (a) Actual HRA received
- (b) 50% of Basic (metro) or 40% of Basic (non-metro)
- (c) Actual Rent Paid minus 10% of Basic

Display: Exempt HRA, Taxable HRA, Annual tax saving at each slab

Show step-by-step working for the client to understand

Design: Clean, professional, usable on mobile

✓ **Shareable working calculator. Clients use it and remember who built it for them.**

 Also try: '194Q TDS Calculator' · 'GST Interest Calculator' · 'Advance Tax Instalment Planner'

7.2 Excel — GST Reconciliation

EXCEL UPLOAD — GSTR-1 vs BOOKS RECONCILIATION

I am uploading two Excel files:


File 1: GSTR-1 data exported from GST portal

File 2: Sales register from my client's books (Tally export)


Please:

1. Match invoices between the two files by invoice number
2. Flag every mismatch – amount, GSTIN, rate, date
3. Categorise mismatches: Missing in GSTR-1 / Missing in books / Amount diff
4. Calculate total tax impact of all mismatches
5. Suggest which mismatches to rectify in the next filing

✓ **Complete GST reconciliation with risk scoring. Was: 4 hours. Now: 15 minutes.**

 Run EVERY quarter before filing GSTR-1. Catches errors before the department does.

7.3 Word — Contract Risk Review

 **CONTRACT ANALYSIS (Upload any agreement PDF / Word file)**


I am uploading a [Vendor / Lease / Loan] Agreement.
 Client: [Name], [Industry]

Please review this contract and:


1. Summarise key terms in plain English
2. Flag every clause unfavourable to my client
3. Identify clauses creating tax liability (TDS, GST, stamp duty)
4. Flag missing standard protections my client should insist on
5. Rate overall risk: HIGH / MEDIUM / LOW with explanation

Format: Executive Summary + Clause-by-Clause Risk Table

✓ **Complete contract review in 5 minutes. Lawyers charge Rs 10,000-50,000 for this.**

 *Upload TWO versions and ask: 'Compare these and highlight all changes'*

7.4 Gmail Connector — Deadline Hunter

 **GMAIL CONNECTOR (Connect via Settings → Connectors → Gmail)**


Check my Gmail for the last 14 days.
 Find any:

- GST notices, SCNs, DRC-01, or GSTN portal emails
- Income Tax communications (CPC, AO, or TRACES emails)
- MCA / ROC compliance reminders
- Any email with words: notice, demand, deadline, compliance, penalty

Create a Priority Action List:
 | Client / Matter | Issue | Deadline | Urgency (RED/AMBER/GREEN) |

Sort by urgency – RED items first.

✓ **Entire inbox compliance risk visible in 30 seconds. Never miss a deadline again.**

 *Run every Monday morning. Takes 30 seconds. Replaces 1 hour of inbox scanning.*

SECTION 8: ADVANCED TECHNIQUES

Extended Thinking · Skills Creation · Markdown Knowledge Base

8.1 Extended Thinking — DTAA Analysis

Extended Thinking makes Claude reason step-by-step like a senior partner. Enable it in the Claude interface before running these prompts.

EXTENDED THINKING — DTAA + FEMA + INCOME TAX (Complex Advisory)

Use Extended Thinking for this analysis.

Client: [Name], Indian resident
 Receives consulting fees from a US company: USD [X] per year
 Has W-8BEN form. No US tax withheld.

Please provide a complete advisory covering:

1. DTAA between India and USA – Article applicable to consulting income
2. Taxability in India under Income Tax Act + DTAA benefit
3. FEMA: Repatriation rules, LRS limit, purpose code
4. GST: Is this export of service? Rate?
5. Form 15CA/15CB requirement
6. Disclosure in ITR – which schedule and how
7. Risk if not disclosed – penalty under FEMA + Black Money Act

✓ **Partner-quality international tax advisory.**

 Always use OPUS model + Extended Thinking for DTAA, 148A replies, and restructuring.

8.2 Build Your Own Skill

SKILL CREATION — GST NOTICE ANALYSER (Save as gst-notice-skill.md)

```
# GST Notice Analyser Skill
## Purpose
Analyse any GST notice uploaded by the CA and produce a structured response plan.
```

```
## Instructions
When I upload a GST notice, always do the following in this exact order:
1. IDENTIFY: Notice type (SCN/DRC-01/MOV/REG-17/ASMT) and section invoked
2. EXTRACT TABLE: Notice no, Date, GSTIN, Demand, Period, Deadline
3. PLAIN ENGLISH: What is the department alleging? (2-3 sentences)
4. SECTION CHECK: Is this Sec 73 (non-fraud) or Sec 74 (fraud)?
5. DOCUMENT LIST: Every document needed to respond
6. DRAFT REPLY: Professional letter format
7. CASE LAWS: 2-3 favourable precedents
8. RISK FLAGS: Any action needed in 48 hours – in RED
```

✓ **Save this as a Skill. Every future notice analysis takes 3 words: 'Analyse this notice'**

 Create skills for: Tax Notice Reply · Audit Observation Writing · Client Email in Hinglish

8.3 Markdown Knowledge Base Creation


CONVERT TO MARKDOWN (Better Claude performance, lower token cost)

I am uploading a GST circular / CBDT notification / ICAI guidance note.
Please convert this document into a well-structured Markdown file:

```
# [Document Title]
## Key Provisions
## Applicability
## Effective Date
## Key Conditions / Examples
## Action Required for CA
## Risk if Not Complied
```

Keep language crisp. Remove all legalese. Make it CA-practice ready.
Output ONLY the markdown – no preamble.




✓ **80% reduction in tokens. Faster responses. Build your firm knowledge base one circular at a time.**

 Organise files: *Income_Tax/Section_54.md · GST/ITC_Rules.md · Audit/CARO_2020.md*

SECTION 9: THE CREATOR FRAMEWORK

From User → Prompt Engineer → Creator · 7-Day Challenge · Revenue Potential

9.1 The Three Tiers

 TIER 1	 TIER 2	 TIER 3
SMART USER This Week	PROMPT ENGINEER This Month	CREATOR Next 90 Days
Set up Projects for top 5 clients	Build GST Notice Analyser Bot	Build GSTR-2B reconciliation tool
Enable Gmail + Drive Connectors	Build Hinglish email engine	Build full CA suite for sale
Use Artifacts for CA calculators	Build compliance calendar tool	Sell access to 500 regional CAs
Use voice mode during client drives	Build audit observation drafter	Rs 500/month x 500 = Rs 30L/yr
Save 1-2 hours daily	Save 3 hours daily + impress clients	New passive income stream

9.2 Your 7-Day Challenge

Day	Task	Action	Done?
1	Create First Project	claude.ai → Projects → New Project → paste firm instructions	<input type="checkbox"/>
2	Analyse a Real Notice	Upload any client GST or IT notice (anonymised). Run the notice prompt.	<input type="checkbox"/>
3	Build Compliance Calendar	Use the export client prompt. Generate for your top 3 clients.	<input type="checkbox"/>
4	Draft Hinglish Email	Pick a real pending client communication. Compare your draft vs Claude.	<input type="checkbox"/>
5	Connect Gmail	Settings → Connectors → Gmail. Run the Deadline Hunter prompt.	<input type="checkbox"/>
6	Build One Artifact	Ask Claude to build a TDS or HRA calculator. Share with a client.	<input type="checkbox"/>
7	Share & Grow	Post experience on LinkedIn. Tag CA Shyam Agarwal. Help others grow.	<input type="checkbox"/>

SECTION 10: QUICK REFERENCE CARD

Prompt Formula · Time Savings · Model Guide

10.1 Prompt Formula for CA Work

ELEMENT	WHAT TO WRITE	EXAMPLE
ROLE	Tell Claude who you are	"I am a CA in Kolkata..."
CLIENT	Client type and context	"Client: garment exporter, Park Circus..."
TASK	Exactly what you need	"Draft reply to DRC-01 notice..."
FORMAT	How you want the output	"Format in markdown. End with action checklist."
THINKING	For complex matters only	"Use Extended Thinking."

10.2 Time Savings — Before vs With Claude

Task	Before Claude	With Claude
GST Notice Analysis	3 hours	60 seconds
148A Reply (Senior CA)	1 week	5 minutes
Capital Gains Advisory	3 hours	8 minutes
New vs Old Regime	30 minutes	2 minutes
AIS Reconciliation	2 days	20 minutes
GSTR-9 Annual Return	3-5 days	1 day
Tax Audit Form 3CD	2-3 days	Half day
Salary Structuring	2 hours	10 minutes
Contract Review	1 day	5 minutes
Board Resolution	2 hours	5 minutes

KEEP PRACTISING

You have just received 25+ ready-to-use prompts covering every area of CA practice.

Start with ONE prompt today. Try it on a real client matter. See the difference.

REMEMBER

Claude is not a chatbot. It is your Knowledge Management System, Research Department, and Digital Workforce.

ACT

Complete the 7-Day Challenge from Section 9. Day 1 takes 5 minutes. Create your first Project tonight.

GROW

Share your learnings on LinkedIn. Connect with other CAs using Claude. The community makes everyone better.

You are not REPLACEABLE. You are UPGRADABLE. 

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