



FOR CHARTERED ACCOUNTANTS

From Chatbot to Digital Workforce

1. Memory (Projects)

2. Expertise (Skills)

3. Speed (Context)

4. Knowledge (Markdown)

5. Integration (Desktop+Office)

6. Connectivity (MCP+Dispatch)

7. Creation (Artifacts+Agents)

THE INSTITUTE OF CHARTERED
ACCOUNTANTS OF INDIA

Eastern India Regional Council

25th June 2026 · 2:00 PM Onwards

ICAI BHAWAN, Kasba 6 CPE Hrs

AI WORKSHOP ON
CLAUDE

CA Shyam Agarwal

11:30 PM. Kolkata. A Notice. A Phone.

"Sir, GST notice aaya hai. ₹43 lakh demand. Burra Bazaar client hai. Kal subah meeting hai. Kya karein?"

The CA had TWO choices:

Option A

Wake his senior. 2-hour calls.
Sleep at 2 AM. Stressed.

Option B

Open Claude. Upload PDF. Type 12 words.
Complete strategy in 45 seconds.
Sleep by 12:15 AM. ✓

₹43 Lakh

Notice Amount

45 sec

Full Strategy

12 words

The prompt

0

Calls to senior

Every Generation Faced Technology That Seemed Impossible.

1850

Kolkata — India's First Capital

Merchants built India's first modern commerce

1947

Howrah Industrial Belt

Manufacturers built modern India's backbone

1993

Salt Lake IT Sector

Techies built India's digital economy

2026

This Conference Room

CAs will build AI tools the world hasn't seen yet

Your Turn

Your domain knowledge is Bengal's greatest asset. Claude is the engine. The tool you build is the future of this profession.

The Fundamental Shift

Why Claude is a different category of tool from everything you've used before

ChatGPT

Search Engine with Reasoning

- ✗ Ask → Answer → Forget
- ✗ No memory between sessions
- ✗ No firm-specific context
- ✗ No integration with your work
- ✗ Generic output every time



Claude OS

Operating System for Your CA Firm

- ✓ Memory across sessions (Projects)
- ✓ Firm-specific expertise (Skills)
- ✓ Office integration (Excel + Word)
- ✓ External system connectivity (MCP)
- ✓ AI Agents that work autonomously

Today's Journey

7 Superpowers · 6 Acts · Multiple Live Demos · All of CA Practice Covered

01

Wake-Up Call

The story & generational shift

02

Ecosystem

8 features
Models
guide

03

Hidden Weapons

Projects
Skills
Markdown

04

Magic Show

5 live tricks
Notices
Calc

05

Deep Dives

Tax
GST
Audit
Local stories

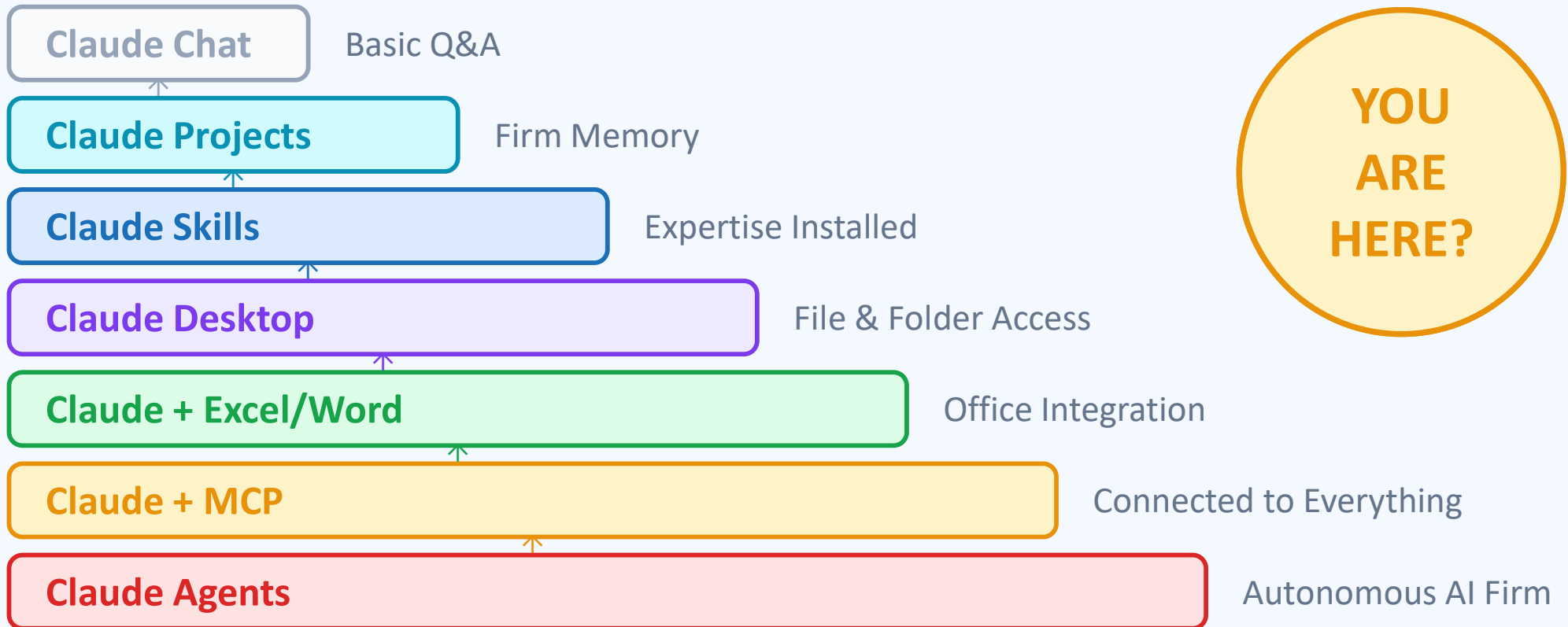
06

Creator Framework

AI Firm
3-tier ladder
7-day

The Evolution of AI in Your Firm

Where are you on this ladder today?



Most CAs stop at Level 1. Today you reach Level 7.

Which Claude Model Should You Use — and When?

Three models. Completely different purposes. Wrong choice = slow results or wasted cost.

FAST

Claude Haiku 4.5

Your Speed-Runner

USE FOR:

- WhatsApp reply drafting
- Quick TDS rate lookups
- Date/deadline checks
- Summarise a short email
- Batch process 100+ invoices

DEFAULT ★

Claude Sonnet 4.6

Your Daily CA Partner

USE FOR:

- GST notice analysis & replies
- Client email drafting (Hinglish)
- Tax planning memos
- Audit observation writing
- Document upload & analysis

POWER

Claude Opus 4.8

Your Senior Partner

USE FOR:

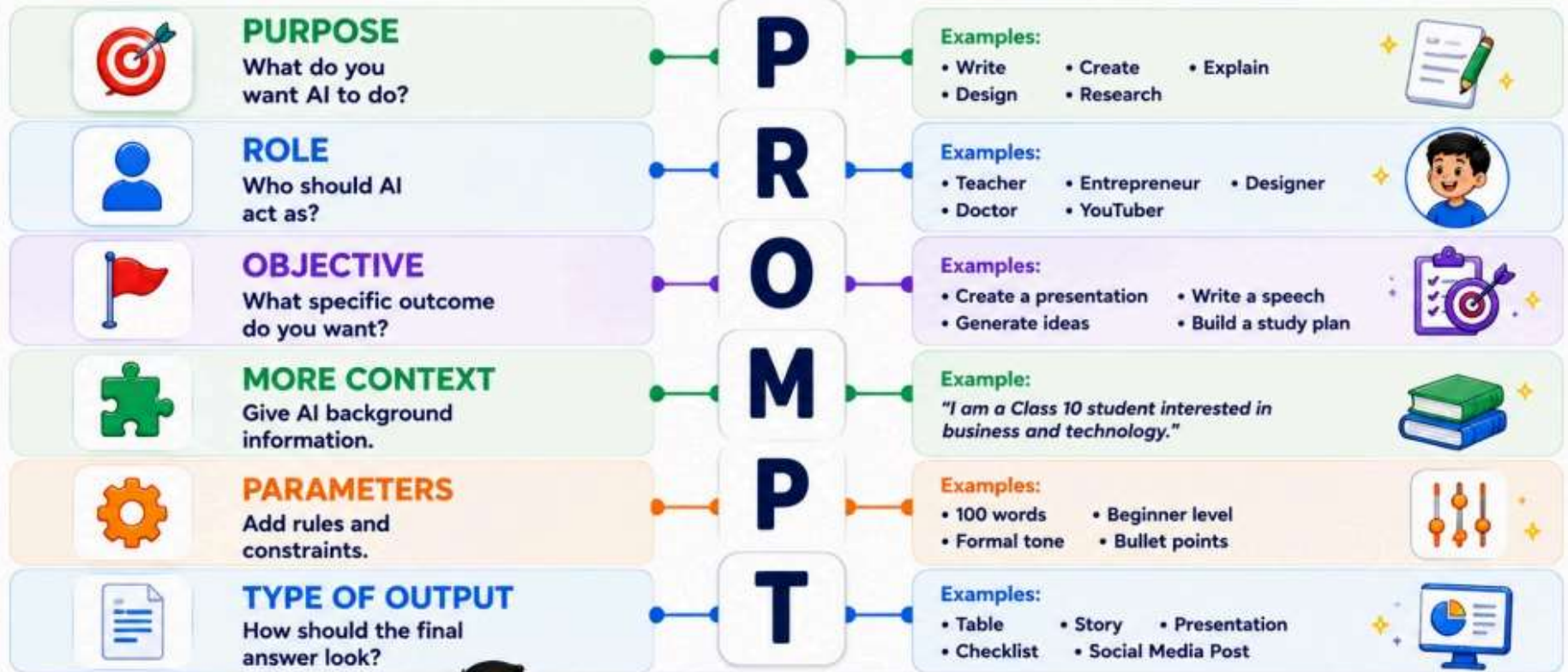
- DTAA analysis & treaty application
- Complex restructuring advisory
- Sec 271(1)(c) penalty opinion
- Multi-jurisdiction GST classification
- High-stakes litigation strategy

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



THE PROMPT FRAMEWORK

Great AI results start with great prompts.



The better your prompt, the better the result!



Clear Prompt
Better AI
Amazing Results!

Claude Is Not One Tool. It's an Entire Office.

8 features every CA must understand — built for your practice



01

Projects

Permanent client memory



02

Artifacts

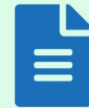
Builds tools & documents



03

Extended Thinking

Senior partner reasoning



04

Document Vision

Reads any PDF/notice



05

Connectors

Gmail, Drive, Calendar



06

Claude Code

Build real software



07

Claude in Excel

AI inside your sheets



08

Cowork (Agent)

Autonomous task agent

PROJECTS — Claude Remembers Every Client

Create a Project for each client or practice area. Upload files, set instructions — permanent memory.

THE PROBLEM

- ✗ Ask → Answer → Claude Forgets
- ✗ Repeated uploads every session
- ✗ Inconsistent answers each time
- ✗ No firm context retained

THE SOLUTION

- ✓ Permanent Knowledge Departments
- ✓ Upload once — always remembered
- ✓ Consistent CA-grade output always
- ✓ Firm SOPs built into every reply

Garment & Textile Exporters

Export invoicing · ITC ·
RoDTEP · FEMA

Burra Bazaar Commodity Traders

Commodity GST · TDS · Cash
limits

Salt Lake IT / ITES Clients

TP · Sec 10AA · ESOPs · TDS
software

Real Estate Developers

Sec 9(3) RCM · ITC reversal ·
194IA

 LIVE DEMO: claude.ai → Projects → New Project → Add your firm's client types and always-follow instructions

Skills — Teach Claude Your Exact Way of Working

Reusable instruction sets saved as .md files. Save once — Claude follows every time.

WITHOUT Skill

User: Draft reply to GST scrutiny for XYZ Ltd...

[Long explanation every session]

[Inconsistent format each time]

[Missing key legal points]

WITH Skill

User: GST scrutiny notice XYZ Ltd

- ✓ Professional format auto-applied
- ✓ Section 73/74 cited correctly
- ✓ Firm letterhead tone maintained
- ✓ Ready in 30 seconds

CA Skills to Build Today:

GST Notice Analyser

Auto-analyse any notice format

Audit Observation Writer

CARO format, non-accusatory tone

Hinglish Email Drafter

Warm, professional CA-client tone

Tax Planning Memo

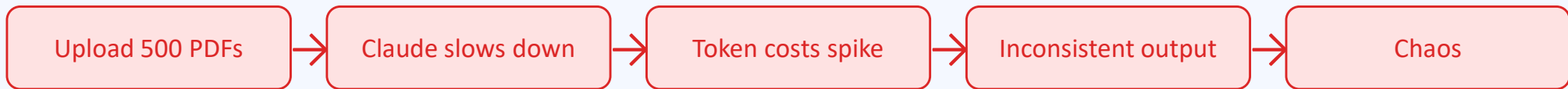
From client profile input

148A Reply Machine

With case laws, structured reply

Markdown — The Language Claude Loves Most

Most AI trainers NEVER teach this. Master it and you get 80% better outputs at 80% lower token cost.



Markdown Cheat Sheet for CAs

# Heading	Big section title	## Sub-heading	Sub-section
bold	Important term	<i>*italic*</i>	Emphasis
- bullet	List item	1. number	Steps
Col	Table row	``code``	Prompt block
---	Divider		

Structured CA Knowledge Base

```
Income Tax/  
├─ Section_68.md  
├─ Section_54.md  
└─ Section_56.md  
  
GST/  
├─ ITC_Rules.md  
├─ Refund_Process.md  
└─ Scrutiny_Replies.md  
  
Audit/  
└─ CARO_Checklist.md
```

Claude Connects to Your Entire Digital Office



Gmail

Scan inbox for notices, draft replies, hunt deadlines across all GSTN/MCL emails



Google Drive

Access client files mid-meeting, save outputs directly, retrieve audit workpapers



Google Calendar

Set compliance reminders, visualise deadline clashes, schedule GST calendar



TRY THIS NOW — The Deadline Hunter

"Check my Gmail for last 7 days. Find any GST notices, Income Tax communications, or compliance deadlines. Create a priority action list: Client name · Matter · Deadline · Urgency (RED/AMBER/GREEN)"

Connect: [claude.ai](#) → [Settings](#) → [Connectors](#) → [Gmail](#) ✓

Claude Lives Inside Excel and Word

Claude in Excel — CA Use Cases

- **Debtor Ageing** Flag overdue debtors & risk tiers
- **GST Reconciliation** GSTR-1 vs Books — auto-flag mismatches
- **Bank Statement Review** Find unusual transactions instantly
- **Variance Analysis** Budget vs Actual with narrative
- **Tax Audit Workpapers** 4 hrs → 45 min with AI review
- **GSTR-9 Reconciliation** Annual return vs books

 **DEMO: Bank Audit / Balance sheet review**

Claude in Word — Draft & Review

- **Notice Reply Drafting** Type, deadline, risk, strategy in 60 sec
- **Assessment → Appeal** Auto-converts order to structured draft
- **Contract Comparison** Two agreements → risks flagged in 5 min
- **Audit Observation Writing** CARO format, non-accusatory language
- **Board Resolution Drafting** Sec 188 RPT, dividends, all standard items
- **LFAR Bank Audit** Observation + management reply drafted

 **DEMO: Upload Assessment Order → 'Convert into a structured IT appeal draft with legal grounds'**

5 Tricks. Live. On Your Phone. Right Now.

Every trick does something that used to take hours.

TRICK 1



The Notice Whisperer

Was: 3 hours
Now: 60 sec

Complete legal reply strategy

[DEMO →](#)

TRICK 2



The Balance Sheet Oracle

Was: Half day
Now: 4 min

Board-level audit briefing

[DEMO →](#)

TRICK 3



The Tax Planning Oracle

Was: 2 hours
Now: 2 min

2-page personalised memo

[DEMO →](#)

TRICK 4



The Contract Guardian

Was: 1 day
Now: 5 min

Risk-flagged contract summary

[DEMO →](#)

TRICK 5



The 148A Reply Machine

Was: 1 week
Now: 5 min

Legal reply with case laws cited

[DEMO →](#)

The Two Tricks That Make Senior Partners Nervous

TRICK 5: The 148A Reply Machine

Was: Senior partner + 1 week | Now: 5 minutes

I am a CA. Client received Section 148A notice. AO alleges undisclosed income ₹12L in FY 2021-22.

Client: Garment exporter in Kolkata (Park Circus).

Draft complete reply:

- Deny allegation with legal basis
 - Cite 3 case laws favouring assessee
 - Challenge if information is vague
 - Request copy of documents relied upon
 - Include prayer for dropping proceedings
- Use Extended Thinking. Format professionally.

TRICK 3: Tax Planning Oracle

Was: 2 hours | Now: While client sits in front of you

Generate a personalised tax planning memo:

Client: [Name], Age [X], Salaried, ₹[X] LPA

Deductions: PPF ₹[X], LIC ₹[X]

Home loan: Principal ₹[X], Interest ₹[X]

HRA city: [Metro/Non-metro], Rent ₹[X]/mo

Provide:

- Current tax liability estimate
- Every saving available before March 31
- Recommended actions + ₹ saving each
- New vs Old regime comparison
- Total potential saving — exact rupees

These two prompts will permanently change how your clients see you.

The AIS Reconciler — Most Common Notice Source

26AS says ₹8L. AIS says ₹12L. TIS says ₹10.5L. Claude tells you which is correct — and what to do.

 Upload 26AS + AIS + TIS PDFs and type:

- Step 1: List every income item in each document.
- Step 2: Compare amounts — flag every mismatch.
- Step 3: For each mismatch: which is correct + why.
- Step 4: If filing ITR — what income to show.
- Step 5: If notice received — draft my reply.

All 4 Common IT Notices — One System Handles All:

Sec 143(1)

Intimation

AIS mismatch. Reply within 30 days.

Sec 143(2)

Scrutiny

AO selects for scrutiny.

Sec 245

Demand Adj.

Old demand vs new refund.

5 Income Tax Tricks — Every CA's Daily Work:

IT-1

AIS Reconciler

2 days → 20 min

IT-2

Capital Gains Oracle

3 hrs → 8 min

IT-3

New vs Old Regime

30 min → 2 min

IT-4

Form 3CD Assistant

2 days → Half day

IT-5

43B(h) Tracker

Missed → Flagged

GST: The 4 Hardest Problems — Solved in Minutes

Annual return · RCM · Notice strategy · Block credit. Every CA struggles. Claude solves.

GSTR-9 / 9C Annual Return



3-5 days → 1 day

Help me complete GSTR-9 for FY 2024-25. Client: [turnover, industry]. Identify Table 6 ITC bifurcation, Table 8 ITC mismatch, Table 17/18 HSN gaps. Flag GSTR-9C scrutiny risks.

GST Sec 73 vs 74 — Know the Difference



Panic → Strategic reply

My client received a GST notice. [Upload PDF]. Is this Sec 73 (non-fraud) or 74 (fraud)? Optimal response strategy, timeline, and whether to pay under 73(5) to avoid penalty.

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



Manual+errors → Accurate

My client uses: advocates, GTA, security services, motor vehicles, director's remuneration. For each: RCM liability, input credit eligibility, filing requirement in GSTR-3B.

Block Credit under Section 17(5)



Guessing → Certain

Purchases include: company car, office construction, food for employees, club membership, health insurance. For each: Is ITC blocked under 17(5)? Exception? Disclosure in GSTR-9?

GST accounts for 60% of compliance burden for trading and manufacturing clients. These 4 prompts handle 80% of that.

Every CA Wears 4 Hats. Claude Helps With All 4.

HAT 1 — Statutory Audit

- CARO 2020 Clause 3(vi) — Fraud reporting
- Going Concern Assessment + disclosure
- CARO 3(ix) — Loan utilisation diversion
- Related Party audit observation + notes

HAT 2 — Bank Audit (LFAR)

- Large Borrower NPA classification analysis
- KYC Compliance — flag documentation gaps
- Revenue Leakage — interest/charges not collected
- Concurrent Audit observation drafting

HAT 3 — Corporate Compliance

- MCA/ROC Calendar — MGT-7, AOC-4, DIR-3 KYC
- Board Meeting Minutes + resolutions drafting
- MSME Udyam benefits advisory
- Cash limits Sec 269SS/T/ST — coal traders

HAT 4 — Salary Structuring

- Section 10 Exemptions — HRA, LTA, medical
- Perquisite Valuation — Sec 17(2) car/ESOP
- Form 12BB — structured declaration design
- NPS Employer 80CCD(2) — 10% extra saving

A CA in Kolkata does all 4 hats. Claude does all 4. No separate software. No extra cost.

Real Clients. Real Problems. Right Here in Kolkata.

Kolkata Garment Exporter

Park Circus · ₹2Cr/month · RMG exporter to USA/Europe

Monthly compliance: GST on exports (LUT), RoDTEP claims, TDS, PF/ESI, FEMA remittance, advance licence

Your client onboarding checklist. Done in 40 sec.

Salt Lake IT / ITES Company

Salt Lake · 120 employees · Software services firm

GST on software exports (zero-rated?), ESOP TDS Sec 17(2), transfer pricing on parent payments, Sec 10AA STPI exemption eligibility

Big-4 level advisory. In 45 seconds.

Burra Bazaar Commodity Trader

Burra Bazaar · ₹5Cr turnover · Cotton/jute trader

HSN for cotton/jute, RCM on commission agent, Sec 43B(h) MSME compliance, advance tax computation, cash limits 269ST

Pan-India advisory from Kolkata. Today.

Park Street Real Estate Developer

Park Street · ₹8Cr project · Builder/developer

Sec 9(3) RCM on development rights, ITC reversal on residential vs commercial, TDS under 194IA, capital gains on land sale

Walk in prepared. Not panicked.

MCP & Dispatch — Claude Connects to Everything

DISPATCH — Firm-Wide AI Consistency

WITHOUT Dispatch: Chaos

20 staff · 20 different prompts · 20 different quality levels · No control

WITH Dispatch: Standardised Excellence

Tax Team → GST Team → Audit Team → Admin →

DISPATCH

↓ Standard quality · Partner-level output · Every time

MCP — USB Port for AI

Claude can now plug in to any software in your firm:

Excel / Tally

Gmail / Outlook

Google Drive

ERP / CRM

Practice Mgmt

Database

Result: Claude reads your Drive, writes to Tally, emails clients, updates CRM — autonomously.

ARTIFACTS — Claude Builds Real Tools

194Q Calculator

GST Interest Calc

HRA Exemption Calc

Rent Agreement
Generator

Tax Audit Query Tool

GUARDRAILS · WITH GREAT POWER...

Great CA Responsibility — Use Claude Right

Claude is the smartest intern you've ever hired. Brilliant, fast, tireless — but review before it goes out.



Never paste PAN, Aadhaar, bank details

Use placeholders: 'Client A', 'PAN: XXXXX', 'Amount X'. Analysis quality unchanged. Confidentiality intact.



Always verify section numbers & deadlines

New GSTN circulars, SEBI/RBI notifications, West Bengal state tax changes — Claude may not know. You verify.



You sign it. You own it.

Claude drafts. You review. The advice, the signature, the client relationship — yours permanently.



WB-specific laws need double check

West Bengal Professional Tax, Kolkata Municipal Corporation rules, WB state GST notifications — always verify on official portal.

Claude writes the first draft. Your Kolkata CA experience writes the final advice. The CA-client relationship is yours — forever.

3 Tiers. Where Are You? Where Will You Be in 90 Days?

3 TIER 1

Smart User

This Week

- Set up Projects for top 5 clients
- Enable Gmail + Drive Connectors
- Use Artifacts for CA calculators
- Use voice mode during client drives

Save 1–2 hours daily

2 TIER 2

Prompt Engineer

This Month

- Build GST Notice Analyser Bot
- Build client email engine in Hinglish
- Build compliance calendar tool
- Build audit observation drafter

Save 3 hrs daily + impress clients

1 TIER 3

Creator

Next 90 Days

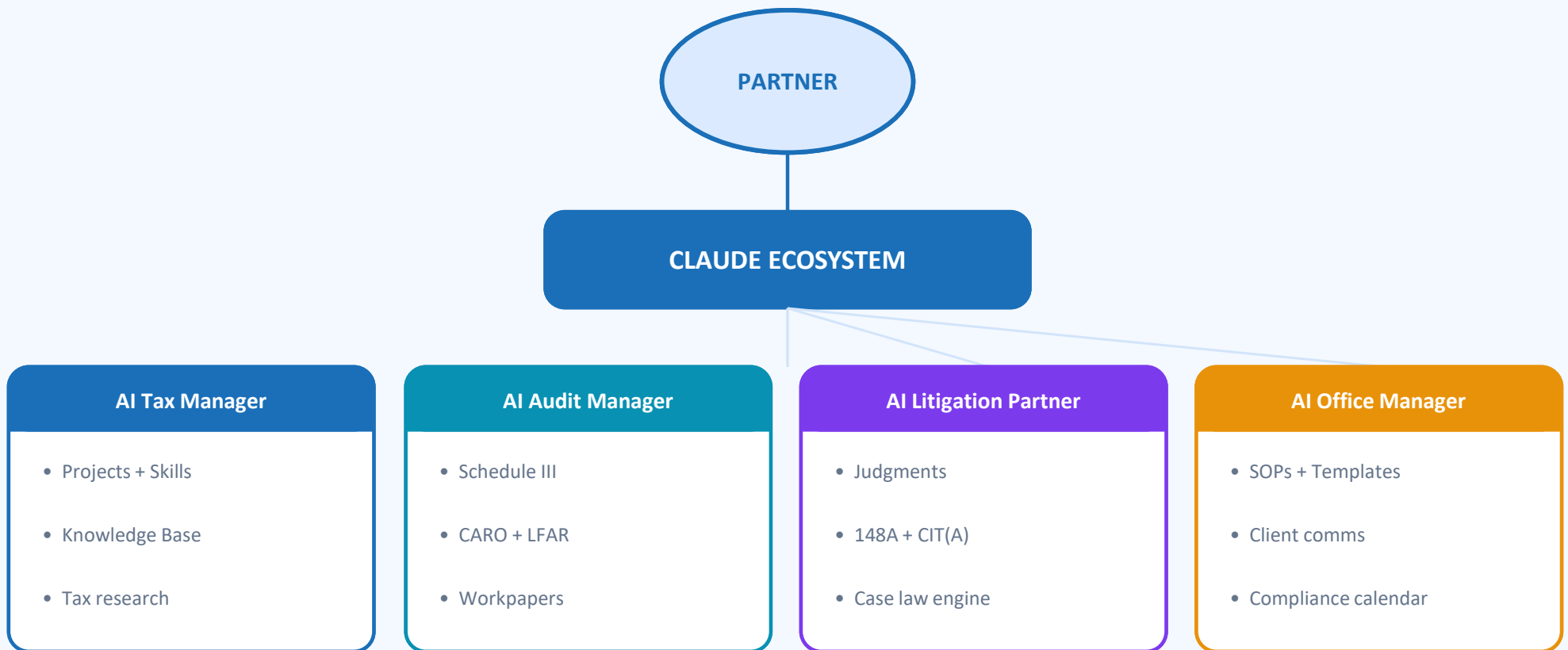
- Build GSTR-2B reconciliation script
- Build complete CA suite for clients
- Sell access to 500 regional CAs
- ₹500/month × 500 = ₹30L/yr revenue

New passive income stream

THE AI FIRM BLUEPRINT · COMBINE ALL 7
SUPERPOWERS

Build Your Digital Workforce

Every department. Every function. Powered by Claude.



The CA who builds this firm will outperform the entire market — by 10x.

THE KOLKATA CA CREATOR CHALLENGE

Your 7-Day Action Plan

Leave this room as a Creator — not just a user.

Day 1

Create your first Claude Project

Add city + client industry types (garment, IT, commodity, real estate)

Day 2

Analyse a real client notice

Upload actual GST or IT notice (anonymised). See Claude read your world.

Day 3

Build Kolkata compliance calendar

Generate for your top 5 clients. Save as Artifact. Share with team.

Day 4

Draft client email in Hinglish

Pick a real pending communication. Compare your draft vs Claude's output.

Day 5

Connect Gmail connector

Let Claude scan your inbox for deadlines and notices. Run the Deadline Hunter.

Day 6

Build one Artifact tool

TDS calculator, HRA calculator, or engagement letter generator — live in 5 min.

Day 7

Share with 3 CAs in your branch

Post on LinkedIn. Tag CA Shyam Agarwal. The community grows together.

THE ULTIMATE REFRAME

✗ WRONG — Position Claude as:

✗ AI Chatbot

✗ Question Answering Tool

✗ Google Replacement

✗ Time Pass

✓ RIGHT — Position Claude as:

✓ **Knowledge Management System** *Your firm's brain*

✓ **Research Department** *Available 24x7, zero fatigue*

✓ **Software Developer** *Builds your tools on demand*

✓ **Digital Workforce** *Works at scale, never leaves*

✓ **Firm Memory** *Never forgets a case law or circular*

✓ **Review Manager** *Zero errors, zero missed items*

The CA who uses Claude as an OS will outperform the CA who uses it as a chatbot — by 10x.

Toolkit & Key Takeaways

Equip yourself with these cutting-edge tools to maximize efficiency and insight :

1. ChatGpt/ Gemini / Copilot / Claude / arena
2. CAGpt/ Vidur/ Lexlegis
3. Quillbot
4. Chatedu.io
5. Gamma
6. Google AI Studio / Google Notebook LM
7. tinywow
8. Typingtest
9. Turboscribe
10. Thereisanaiforthat.com

Invest in these platforms to future-proof your finance career

SCAN THIS QR



CA Shyam Agarwal | +91 9903040775 | shyamagarwalfca@gmail.com



Human Intelligence + Artificial Intelligence

Partnership, not replacement.



I am not
REPLACABLE,

I am
UPGRADABLE






Thank You & Q&A


We appreciate your participation. Let's discuss how AI and automation can revolutionize your life.

Let's Connect!

Join me on social media for updates and insights




 **Contact** : + 91 9903040775

 **Email** : shyamagarwalfca@gmail.com

 **Website** : www.shyamagarwal.in

 **Linkedin** : <https://www.linkedin.com/in/cashyamagarwal>

 **Youtube** : <https://www.youtube.com/@cashyamagarwal>



CA Shyam Agarwal

AI Enthusiast