

AIFTPA Jointly with SGCCI

# AI POWERED FINANCE: UNLOCKING EFFICIENCY & INSIGHTS

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# CONTENT

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1. Concept of Robot - AI
2. Talking to AI Assistant – Quick Guide
3. Application: some popular AI TOOLS – ChatGPT ,  
Google notebookLM, Bricks, Gemini, Claude ,Dante

# SIMPLIFYING THE CONCEPT OF AI

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AI is **the ability of machines to mimic human intelligence**, such as analysing data, identifying patterns, making predictions, and automating decisions.

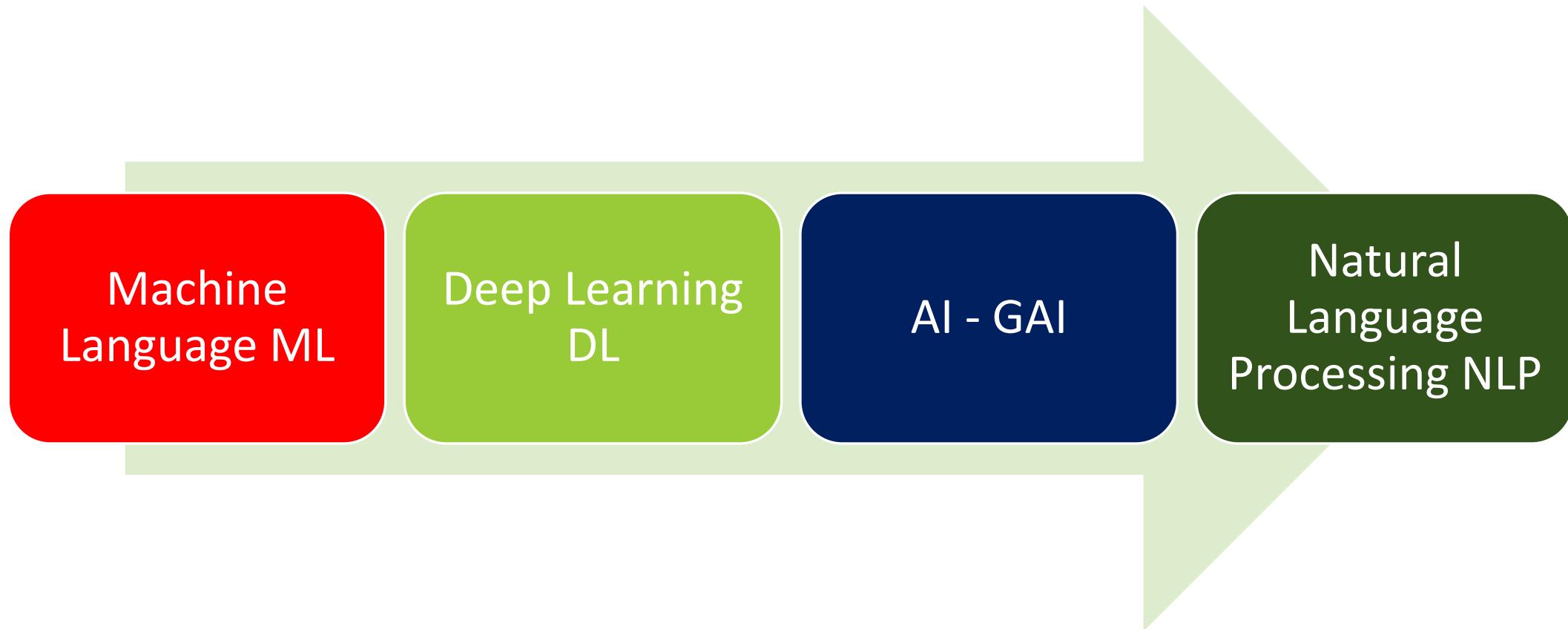
## ❓ Layman Explanation:

Think of AI as a **junior assistant who never sleeps** – it can read thousands of tax returns, notices, and judgments in seconds.

AI does not have “common sense” like humans; it only **learns from data and rules fed to it**.

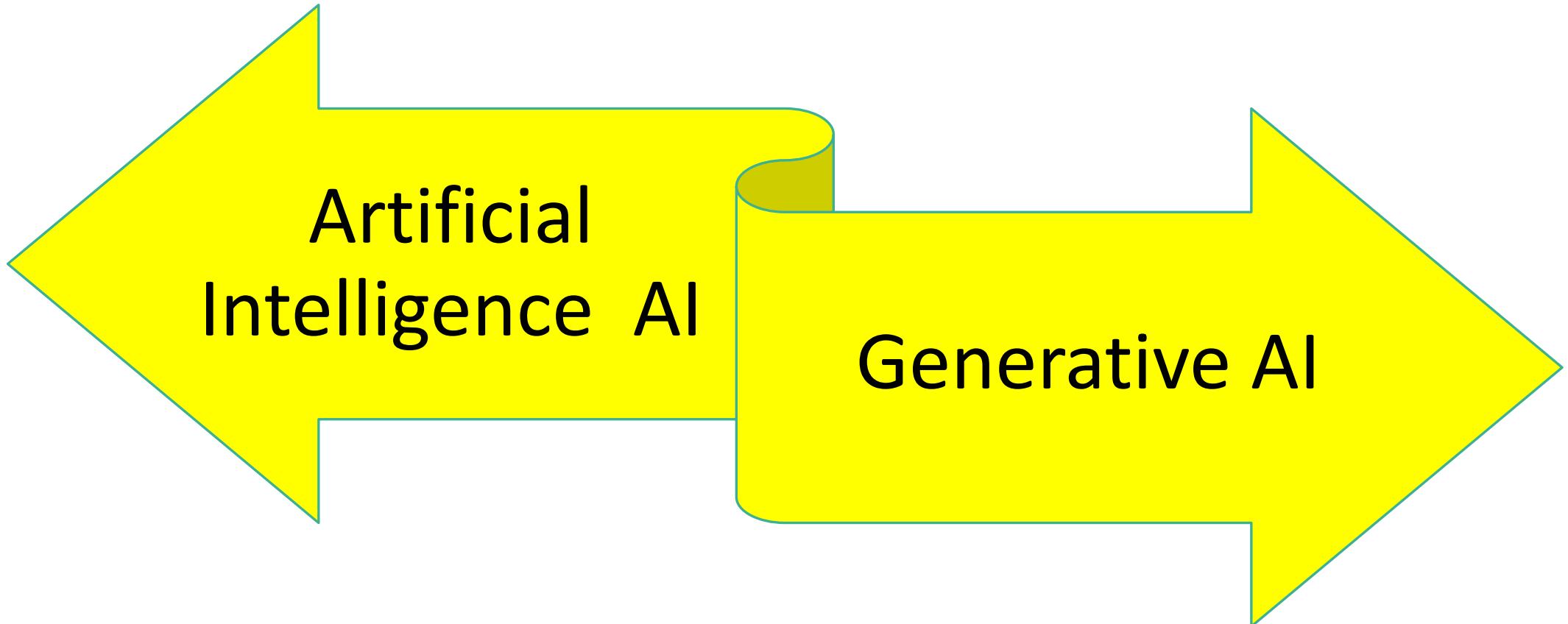
# CONCEPT OF AI

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# SIMPLIFYING THE CONCEPT OF AI

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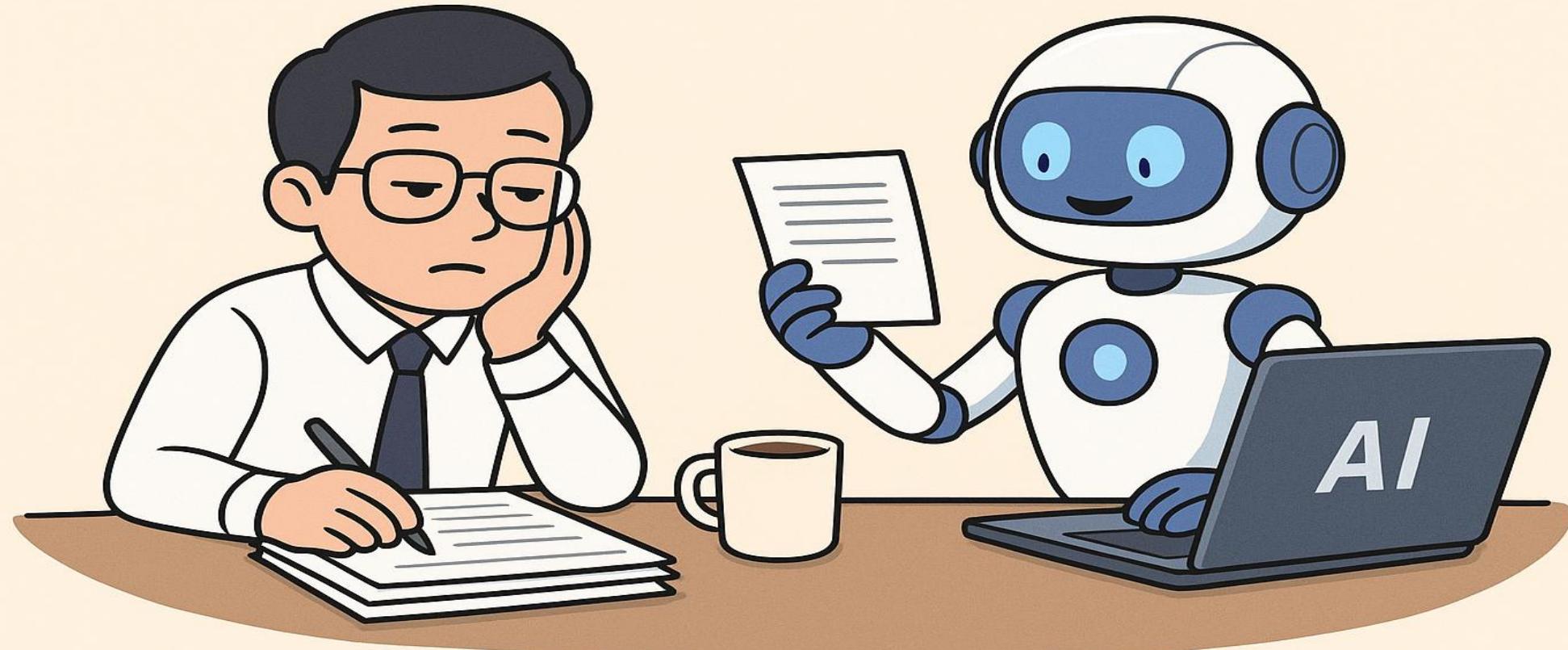


Term	Meaning (Simplified for Tax Context)
<b>Artificial Intelligence (AI)</b>	Technology that enables computers to perform tasks that normally require human intelligence, like reading, analysing, and decision-making.
<b>Machine Learning (ML)</b>	A branch of AI where systems “learn” from past data (e.g., past tax assessments) to make predictions (e.g., chances of scrutiny).
<b>Natural Language Processing (NLP)</b>	AI’s ability to read and understand human language, useful for analysing judgments, notices, and legal documents.
<b>Generative AI</b>	AI that creates new content (draft replies, summaries, explanations) based on the data it has learned.
<b>Automation</b>	Use of AI to perform repetitive tasks automatically, such as reconciling invoices or checking compliance deadlines.
<b>Algorithm</b>	A step-by-step set of rules or instructions used by AI to process data and give results.
<b>Data Privacy</b>	Legal and ethical obligation to protect client information when using AI tools (linked to Digital Personal Data Protection Act, 2023).
<b>Hallucination (AI)</b>	A situation where AI produces incorrect or fabricated results, such as citing non-existent tax judgments.
<b>Predictive Analytics</b>	AI technique that forecasts outcomes using past data (e.g., predicting likelihood of audit or litigation).



# SIMPLIFYING THE CONCEPT OF AI

AI is like your junior article clerk who never sleeps, never asks for leave, but sometimes makes over-smart mistakes!



\*TAAFT.com for short

# THERE'S AN AI FOR THAT®\*

41,296 **AI tools** for 12,882 **tasks** and 5,125 **jobs**

Sponsor:  **Rocket**  Vibe coding

Search...

CTRL + K



#1 website for AI tools. Used by 60M+ humans.

# PROMPT ENGINEERING

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A prompt is a piece of text or input that is used to elicit a specific response or output from a language model or other AI system.

Prompts can be questions, statements, or even just a few words that provide context for the model to generate a response.

Prompt Engineering:

Prompt engineering is the process of designing and optimizing prompts to get specific, accurate, and relevant responses from language models or other AI systems

# FEATURES OF PROMPT

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- **Be specific** (mention section, year, issue, context)
- **Define the format** (table, summary, draft, checklist)
- **Provide facts** (figures, assessment year, client scenario)
- **Set the tone** (formal, legal language, professional)
- **Add required sources** (e.g., Income-tax Act, GST Rules, SC/HC cases)

# RISK ASSESSMENT OF YOUR MAIL ID

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Check whether your mail is hacked or data breach  
using

<https://haveibeenpwned.com/>

# CONCEPT OF GPT

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GPT - Generative Pre-Trained Transformer.

*ChatGPT is a conversational AI designed to understand and respond to human-like queries.*

*Its purpose is to:*

- *Provide Information: answer questions and provide information on various topics*
- *Assist with Tasks: assist with tasks such as writing, editing, and brainstorming*
- *Engage in Conversation: engage in natural-sounding conversations*

# PERSONALISE SETTING -CHATGPT

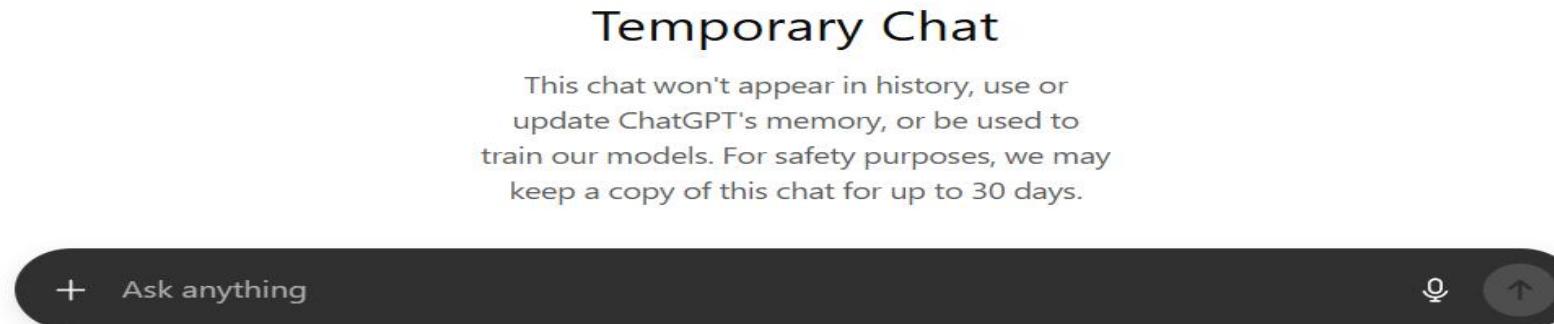
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*I am professional chartered accountant practicing in India and I would like my response in summarize formal format using legal and business language. I prefer all my responses in English and please make sure highlight the important text in bold. Also whenever possible please do provide the data in tabular format. Make sure that responses you give are to the point and not baseless. Adopt a skeptical, questioning approach. Provide reference to source of information used while replying. Verify and test your responses for correctness and accuracy of facts.*

# INCOGNITO MODE -CHATGPT

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**Left Corner in the ChatGPT window – Dotted Circle – Indicate – Turn on Temporary Chat**



# CREATE PRIVATE -GPT

Explore GTP - Right Corner – Create + i.e. You can create your name GPT with the sources you want.

The screenshot shows the PROTAXEDGE GPT creation interface. At the top, there are 'Create' and 'Configure' tabs. The 'Configure' tab is active, showing a detailed description of the GPT's behavior: it prioritizes accuracy, uses cross-verification, and employs cautious reasoning. It delivers responses in clear English with a formal legal-business tone, highlighting key points, using tables where helpful, and avoiding unsupported assertions. It aims to resolve user queries directly, and conversations with your GPT can potentially include part or all of the instructions provided.

**Conversation starters**

- Explain the tax impact of a specific transaction
- Compare old vs new tax regime for a case
- Summarise obligations under the DPDP Act
- Clarify compliance needs under the IT Act

**Knowledge**

Conversations with your GPT can potentially reveal part or all of the files uploaded.

- DPDP Act.pdf
- IT Act 2000.pdf
- TAR Content clausewise.pdf
- IT Bill 2025 Passed.pdf

**Preview**

**Model 5.1**

**PROTAXEDGE GPT**

Provides accurate, concise guidance on Indian Tax, DPDP Act, and IT Act.

Four cards are displayed, each corresponding to a conversation starter:

- Explain the tax impact of a specific transaction
- Compare old vs new tax regime for a case
- Summarise obligations under the DPDP Act
- Clarify compliance needs under the IT Act

At the bottom, there is a 'Upload files' button and a 'Ask anything' input field.

# AI TOOL-CHATGPT

## Prompt for Summary of ESIC challans

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*Attach the ESIC file after redacting*

*This file has 12 ESIC Challan in 12 pages*

*You are an auditor. For purpose of filing form 3CD I want you to create table with 4 columns First Column will have serial number Second Column will have Period of Challan Third Column will have Challan Submitted Date Fourth Column will have Amount paid*

# AI TOOL-CHATGPT

## Prompt for Analysis of Bank Statement

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*Attach Bank Statement after REDACTING i.e. **Erasing the KYC in the Data***

*This is a bank statement of one of my clients.*

*Please analyze this and try to assess entries and possible income and allowable deductions under Income Tax Act. Please give me detailed calculation of income to be considered under different heads that can be taxable under Income Tax Act. Also consider the debit entries and all possible deductions that can be claimed under Income Tax Act. Make sure to give detailed calculation.*

*Please analyze the pdf thoroughly and make sure all entries are covered and you don't miss out on any entry.*

# AI TOOL-CHATGPT

## Prompt for Generating Specific QR Code

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*Generate a high-quality QR code UPI payment for caparikshit@okhdfcbank for Rs 2000 against professional Fees.*

### Activity

- Generate QR for Multiple Clients
- Generate QR for Employees Details

# AI TOOL-CHATGPT

## PROMPT –AUTO -FOLDER CREATION

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Auto Creation of folder – Client name – Year – Income Tax – GST -Audit

Prompt

*Correct and Complete Prompt*

*Provide a macro code for creating folder client name , sub folder Income tax, GST Audit on the path E:\Presentations\AIPTPA\Demo Folder creation. column tittles are Sr. No. Client Name PAN GSTIN Entity Type Financial Year Folder Types Required*

Copy Paste the macro in excel – ALT + 11

Run the Macro -ALT + 8

## AI TOOL –BRICKS - [app.thebricks.com](http://app.thebricks.com)

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1. Create Financial Dashboard from the data you shared- Paid Version.
2. Share the data with dummy names and add.

# AI TOOL – CLAUDE – claud.e.ai

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*Prepare a **comprehensive and professional project report** for an **IT Staffing Startup in India** with an **initial investment of ₹50 Lakhs**. The report should be structured in a formal business and financial reporting format, suitable for submission to banks, investors, and regulatory authorities. The report should cover the following sections in detail: - AS REQUIRED BY USER*

# AI TOOL –GOOGLE NOTEBOOKLM

## notebooklm.google.com

The screenshot displays the Google NotebookLM interface, which is a AI-powered tool for managing research and notes. The interface is divided into three main sections: Sources, Chat, and Studio.

**Sources:** This section allows users to add sources, search the web for new sources, and select specific files. The selected file is "DPDP Act .pdf".

**Chat:** This section contains a summary of the Act's consequences, listing three types of violations: Breach of Voluntary Undertaking, False or Frivolous Complaint, and Blocking of Access.

**Studio:** This section provides options to create an audio or video overview, a mind map, reports, flashcards, or a quiz. It also shows recent activities like a Data Protection Quiz and a glossary of terms.

# AI TOOL –GOOGLE NOTEBOOKLM

## notebooklm.google.com

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*Add Manually Data sources – PDF file or webpage or any link*

## Tools

1. *Audio – Create an audio in 9 different languages from the sources*
2. *Video – Generate a note from the source video link*
3. *Podcast*
4. *Mind mapping – generate tree diagrams from the source*
5. *Quiz game – generate a quiz from the source*
6. *Create Report – Option to generate notes in customized formats*

# AI TOOL –GOOGLE NOTEBOOKLM

## notebooklm.google.com

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1. *Prepare podcast on section 54 of Income Tax Act*
2. *Prepare notes the video -*  
*[https://www.youtube.com/watch?v=kf86OHxN2\\_I](https://www.youtube.com/watch?v=kf86OHxN2_I)*
3. *Prepare notes of agreement/deed of your client*
4. *Prepare Study notes on section 143*
5. *Prepare Tree diagram of income from house property*
6. *Prepare quiz on section 2(24)*

# AI TOOL –GEMINI –[gemini.google.com](https://gemini.google.com)

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Prompt

*@google calendar set the reminder for Indian income tax tds payment 3 days before due date for next 3 months at 10am*

Summary of unread mails

*@Gmail summary of all the mails for last 1 months date wise*

# AI TOOL – DANTE – app.dante-ai.com

The screenshot shows the Dante AI Tool interface at [app.dante-ai.com](https://app.dante-ai.com). The top navigation bar includes a back arrow, forward arrow, and refresh icon, followed by the URL. A dark blue header bar features a fire icon, 'Limited Offers', a green 'Upgrade & Save' button, and another fire icon. The main content area is titled 'Manage AI Chatbots'. On the left, a sidebar shows a profile icon for 'Dante', a '+ Create New' button, and dropdown menus for 'AI Chatbots' (selected) and 'AI Voice Agents' (marked as 'New'). The central area displays a card for the 'Tax Advisor' chatbot, which has 0 flagged messages, 0 active integrations, and 0 AI voice agents connected. Buttons for 'Edit AI Chatbot' and 'Share AI Chatbot' are at the bottom of this card. A large button for 'New AI Chatbot' is also present.

Personal Workspace

Upgrade & Save →

Dante

+ Create New

AI Chatbots

AI Voice Agents

Manage AI Chatbots

New AI Chatbot

Tax Advisor

0 Flagged messages

0 Active integrations

0 AI Voice Agents connected

Edit AI Chatbot

Share AI Chatbot

# AI TOOL – DANTE – [app.dante-ai.com](http://app.dante-ai.com)

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1. Prepare customised CHATBOT
2. Purpose – Train Your Team
3. Purpose – Reply to Query of Clients

## Process

1. *You have to give the Source Document for the Chatbot*
2. *Connect the AI Trainer with Webpage or WhatsApp*

# PRECAUTIONS –AI IN FINANCE

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1. *Use AI as a Support Tool, Not Final Answer*
2. *Confidentiality & Client Data – Digital Personal Data Protection Act –DPDPA, 2023*
3. *Writing Prompts & Reviewing Output before using*
4. *Approvals & Professional Check – IF Staff is Using*
5. *Documentation & Transparency – AI Used and Sources*

✨ Thank You for Your Time & Attention! ✨



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