FOR GST, ITR AND BOOKKEEPING PRACTICES IN INDIA

AI for Tax Practitioners

Run a faster, safer GST, ITR and bookkeeping practice with Claude Code



CHANDAN GUPTA

100+ READY PROMPTS

FOR TAX PRACTITIONERS IN INDIA

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Free sample: the introduction and Chapter 1

CHANDAN GUPTA, CA, CIA

First edition, November 2026

AI for Tax Practitioners: Run a faster, safer GST, ITR and bookkeeping practice with Claude Code

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Not professional advice. This book is for education. Tax laws, rates, thresholds, forms and due dates change often and are mentioned here only to illustrate how to use the tool. Always check the current law, notifications and portal instructions, apply your own professional judgement, and review every output before you file it or share it with a client. The author accepts no liability for decisions made using this book.

All clients, businesses, people and figures in the examples are made up. Any resemblance to real people or entities is coincidental.

How this book was made. The author produced it with the same AI-assisted workflow it teaches, and reviewed, edited and checked every chapter. Worked examples in Parts 1 to 3 are illustrative; the walkthroughs in Part 4 were run on the practice files supplied with the book, as each chapter's testing note describes.

Updates and corrections. Claude Code, Anthropic's terms and Indian tax law all change. If you find an error or something that no longer works, please tell the author (the contact is on the About the author page). Corrections go into the next update and are listed by date on this page. Buyers of the PDF can download the latest version from the store page at no charge.

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BEFORE YOU START

How to Use This Book

This book shows a small tax practice how to hand the copying, matching and re-typing of its monthly cycle to an AI tool that runs on the office computer, send the AI as little client data as the job needs, and check every result before a client or a portal sees it.

> SCENARIO · BANSAL TAX CONSULTANTS · INDORE · A TRIAL MONTH
>
> Neha Bansal is back in her father's practice in Indore: six people, about 210 clients, and a wall calendar full of due dates. Imran spends two weekends a month typing sales registers into GSTR-1 files. Rakesh Bansal will allow an AI tool on one condition: "On our own files first, and nothing leaves this office that I can't explain to a client."

Who this book is for

You run, or work in, a small tax practice. You may be a GST practitioner, an income-tax consultant, an accountant with a bookkeeping practice, a tax return preparer, or one of a handful of people in a small accounting firm. You may or may not be a CA. What you share is volume: a hundred or more clients, the same returns every month, and a July that never seems to end.

You know Tally or Busy, the GST portal, the income-tax portal and Excel very well. Your clients send photos and PDFs on WhatsApp. Your juniors spend hours copying figures from one format to another, and you spend hours checking that they copied them right.

You do not need to code. You will type requests in plain English, and the tool will write the small programs the work needs. Set up as in Chapter 2, it asks before each step, you approve it, and you check what comes back.

What Claude Code is

Claude is an AI model made by a company called Anthropic. Many people use it in a chat window on a website or a phone.

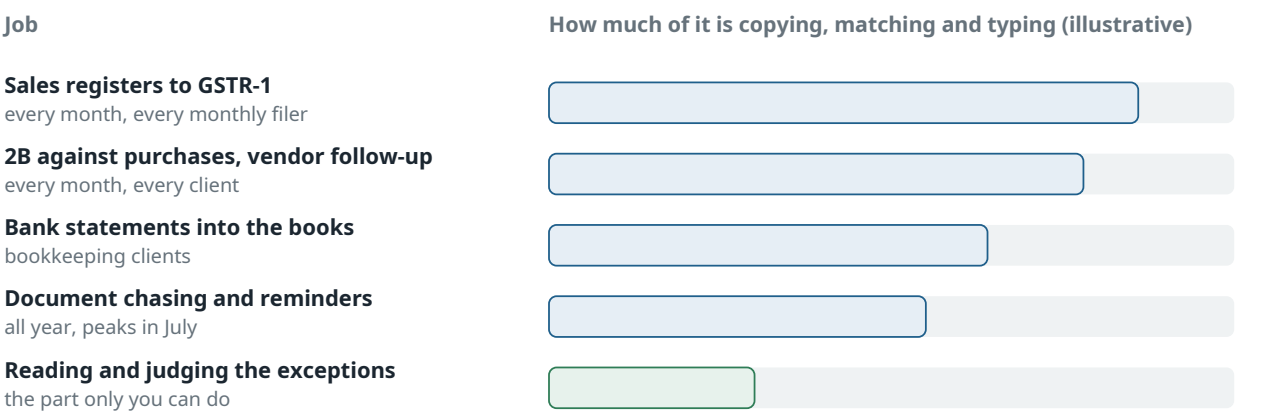
Claude Code uses the same model differently. It is a program you install on your own computer and start inside one folder, such as the folder for one client's October GSTR-1. From there it can look at files in that folder, create new ones, and run small programs called *scripts* on your computer. Set up as in Chapter 2, it asks your permission first. It runs in a text window called a terminal, and also in Anthropic's desktop app.

Why does that matter for a tax office? Because the work you want help with is mostly files: sales registers, 2B downloads, AIS files, bank statements, Tally exports. A chat window has to be sent the whole file. Claude Code can instead write a script that does the matching on your computer, and only the totals and the list of exceptions go back to the AI. Chapter 1 explains exactly what is sent and what is not, and where that protection stops.

	Free chat app on a phone	**Claude Code on the office computer**
Client's bank statement	Sent in full, from a phone, with no record in the client file	Read by a script on your computer; only a few sample rows, totals and exceptions are sent
600 invoices	Read by the AI, which can skip or misread rows	Every row checked by a script, with counts that must add up
Next month	Start again from scratch	Run the same saved script on the new files
Who decides	Whoever typed the question	You, at each permission prompt, and at review

Where the hours go

A small practice is not short of skill. It is short of hours, and most of them go into work that is the same for every client: copying a register into a template, matching two lists, chasing a document. That is the work this book hands to a script. The reading of exceptions, the decision on each one and the conversation with the client stay with you.



The bars are a way of thinking, not a measurement. Hand the copying to a script; keep the judging.

Where a small practice's month goes, as a way of thinking. Most of each job is mechanical; the last row is yours.

How the book is organised

Part	Chapters	What you get
Part 1: Foundations	1 Keeping Client Data in the Office; 2 Setting Up a Small Office	What leaves your computer, privacy settings, the data-protection basics, and a safe setup with one folder per client.
Part 2: The practice cycle	3 Client Intake; 4 GSTR-1 for Many Clients; 5 ITC at Volume; 6 ITR Season at Scale; 7 TDS Returns; 8 Bookkeeping Cleanup; 9 Notices; 10 The Compliance Calendar and Fee Register; 11 Client Messages	For each job: where it helps, a figure, three worked examples with copy-ready prompts, more prompts to try, and the traps.
Part 3: Running it well	12 Office SOPs: CLAUDE.md and Skills; 13 Checking the Output, and the Limits	Making every person in the office run a job the same way, and checking what comes back.
Part 4: Try it yourself	14 GSTR-1 Against the Books for Three Clients; 15 A Bank Statement Into the Ledger	Two walkthroughs on downloadable practice files with planted traps, an answer key and a grading script.

Tip. Short of time? Read Chapter 1, do Chapter 2, then do the walkthrough in Chapter 14 on the practice files. After that, take one job you finished by hand last month and run it again with Claude Code. Comparing the two teaches you more than any chapter.

> **From the desk.** Before you start, list the five jobs in your office that are mostly copying and matching. For most practices the list starts with sales registers to GSTR-1, 2B against purchases, and bank statements into Tally. Start with the smallest client on that list, not the biggest.

How to read a worked example

1. **The situation**
   Who is doing the job, for which client, with which files, and what has to come out.
2. **The prompt**
   The exact request to type, in a box labelled **Type this**. Change the file names, columns and periods to yours. Keep the instruction to use a script whenever the data belongs to a client.
3. **What Claude Code does**
   What you should see happen, in a few steps. Your screen will not match word for word.
4. **What to check**
   The checks to do yourself before you rely on the result: totals that must agree, rows to open in the source file, rules to confirm.

> **Read this once.** **Illustrative or tested?** The worked examples in Parts 1 to 3 are marked *illustrative*: the prompts are written to work, but the files and results shown are representative, not from a recorded run. The two walkthroughs in Part 4 are marked *tested*: each was run with Claude Code on the practice files that come with the book, graded by a test script, and its "How this was tested" note says what was run and when.

The people in this book

Each chapter opens with a short scenario from Bansal Tax Consultants, a made-up practice of six people in Indore, in its first year with Claude Code.

Who	Role	Watch for
Rakesh Bansal	Proprietor. Income-tax consultant and GST practitioner. Signs off what is filed.	Careful and protective of clients. Wants every figure traced to a paper.
Neha Bansal	His daughter, M.Com. Back after two years at a larger firm.	Pushes for tools; becomes the office's Claude Code person. Sometimes faster than the checking.
Imran Sheikh	Senior accountant. Runs the GST desk.	A Tally expert and a sceptic who spots a wrong number from across the room.

Who	Role	Watch for
Pooja Rathore	ITR desk and TDS returns.	Organised, keeps her own checklists. Dreads July.
Sandeep Yadav	Junior accountant: bookkeeping and bank statements.	Quick and eager. Probably the closest to where you start.
Kavita Malviya	Front office: calls, WhatsApp, document chasing, billing.	Writes the best Hindi messages in the office.

Conventions

- Every client, name, GSTIN, PAN and figure in the examples is made up.
- File names look like `Mahakal_Sales_Oct25.xlsx`. Things you type into Claude Code are in the same style or in a **Type this** box.
- Hindi messages are printed in Roman script (Hinglish), because that is how many clients write on WhatsApp and because the book's font has no Devanagari. Claude Code can write them in Devanagari for you.
- Tax rules change all the time. This book avoids quoting due dates, rates, limits and thresholds, and asks you to keep them in your own master sheets, checked against the official source. Where a form or section is named, check that it still applies to the period you are working on.
- From 1 April 2026 the Income-tax Act, 2025 replaces the Income-tax Act, 1961. Returns for FY 2025-26 and earlier are under the 1961 Act; for later periods, form names and section numbers may differ from those you know. Tell Claude Code which Act and period you mean.
- Claude Code changes often. Screens and option names may differ from what is shown here.

A note before you start

> **Independence and advice.** This book is independent. It is not affiliated with, sponsored by or endorsed by Anthropic, the GST Network, the Income Tax Department, Tally Solutions or Busy Infotech. Anthropic's own documentation and terms are the authority on how Claude Code works. Nothing here is legal or tax advice: it describes ways of working that you stay responsible for, with each client and under the rules that apply to you.

CHAPTER

1

Keeping Client Data in the Office

Your clients hand you their bank statements, PAN cards and passbooks because they trust you. This chapter shows exactly what an AI tool sends out of your office, and the working habit that keeps their data on your own computer.

> SCENARIO · SHREE SAI AUTO SPARES · SIX MONTHS OF BANK STATEMENT · A PHONE AT 10 PM
>
> At 10 pm Sandeep Yadav is still categorising six months of Shree Sai Auto Spares' bank statement, a 38-page PDF. On his phone he opens a free chat app and is about to forward the PDF with "make a ledger from this". He stops and asks Rakesh in the morning. Rakesh's answer: "Filed means checked. Checked means by us." Neha has to explain what these tools actually send.

Sandeep did the right thing: he stopped. This chapter is Neha's answer to the question he asked. It explains where an AI tool does its work, what travels out of your office, and one habit that keeps a client's statement on your desk while you still get the help.

Where the work really happens

Claude Code is installed on your computer, and it works inside a folder on your computer. That makes it feel local. It is only half local.

The part that understands your request, reads files and decides what to do next is the AI model, and the model runs on Anthropic's servers. Claude Code on your computer is the messenger. It sends your request to the model, receives instructions back ("open this file", "run this script"), carries them out on your computer, and sends the results back to the model. This goes back and forth until the job is done.

From this one fact comes the rule for the whole book:

> **The rule.** Whatever Claude Code reads, it sends. If it opens a bank statement, the statement goes to the model. If it runs a command, whatever the command prints on screen goes too. If nothing opens a file and shows its contents, the contents stay on your computer.

You cannot stop the model from seeing what Claude Code reads. You can decide what Claude Code reads. The rest of this chapter is about making that decision on purpose.

What happens in a session	Does it leave your computer?
What you type, including any PAN, name or amount you paste	Yes, every word
The `CLAUDE.md` instruction files (Chapter 12)	Yes, at the start of every session
A file Claude Code opens to look at: Excel, PDF, photo, Word	Yes, the contents. A scanned PDF or a WhatsApp photo goes as an image
Names of files and folders it lists	Yes. A folder called `Ramesh Patidar ITR` tells the model the client's name
Whatever a script or command prints on screen	Yes
A file a script reads but does not print	No. The script runs on your computer
A file a script writes, such as `Output.xlsx`	No, until something opens it
Folders it never touches	No

Two more facts belong here. First, Claude Code keeps a copy of each conversation on your own computer, in a hidden folder under your Windows user account, so that you can resume a session. That copy is ordinary text. A Windows password for each person, and not sharing one login across the office, protect it more than any AI setting does.

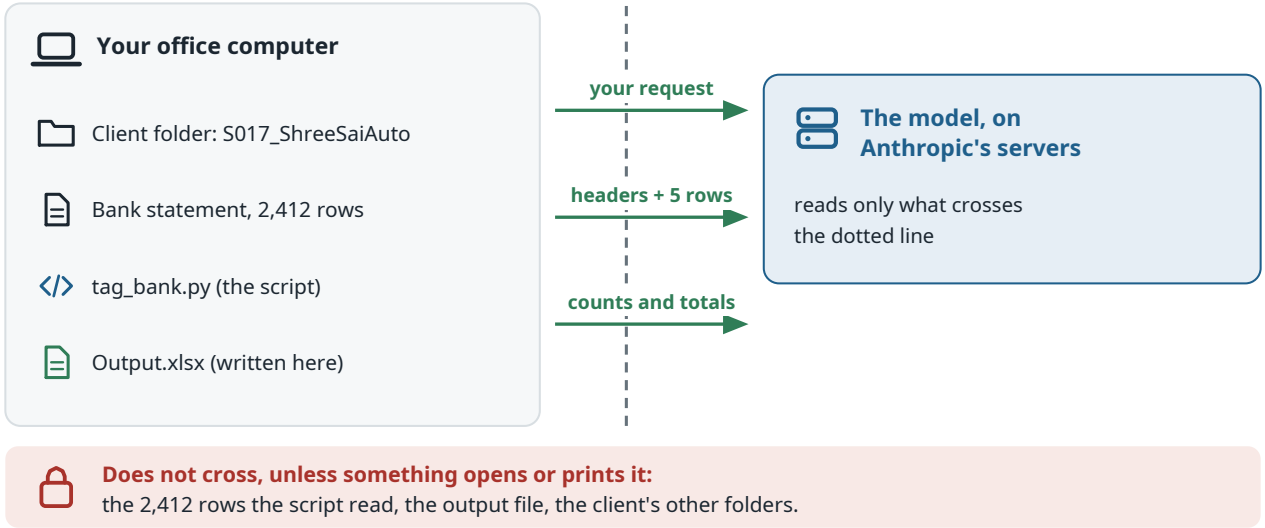
Second, Anthropic also offers Claude Code sessions that run on its own machines, on copies of your files held there. This book always means Claude Code running on your own computer. Do not use the cloud version for client files.

The local-script pattern

Go back to Sandeep's bank statement. He wants each of 2,412 lines tagged to a ledger: rent, purchases from a supplier, UPI receipts, EMI, cash withdrawal. There are two ways to ask.

Hand over the file. Forward the PDF and ask for a ledger. The whole statement leaves the office. The model then has to read thousands of lines in one go, and on a file this size it can skip, merge or misread lines without saying so. You get a neat answer that you cannot easily prove.

Hand over the job, not the file. Ask Claude Code to look at the layout only, then write a small program (a *script*) that does the tagging, and run that script on your computer. The script reads all 2,412 lines locally. Only its summary goes back.



The dotted line is your office wall. Three small things cross it: your request, a peek at the layout, and the script's summary. The statement itself stays on your computer. Illustrative example.

1 **Look at the layout**
Claude Code opens the file just far enough to see the column names and a few lines: where the date is, how the narration is written, whether debits and credits are in one column or two.

2 **Write the script**
It writes a short program, usually in Python, that does the work on every line. You do not need to read code. You can ask it to explain the script in plain words.

3 **Run it here**
With the Chapter 2 settings, it asks your permission, then runs the script on your computer. The script reads every line of the statement here, and sends none of them anywhere.

4 **Report the summary**
The script prints counts and totals: lines read, lines tagged, lines not tagged, opening and closing balance check. That printout is what the model sees, and what you see.

5 **Keep the detail in a file**
The tagged statement is saved as an Excel file in the client's folder. You open it yourself. Unless you ask Claude Code to open it, it stays put.

This pattern is better for accuracy as well as privacy. A script treats line 2,000 the same way it treats line 2. It also gives you figures that must agree: lines read should equal lines tagged plus lines not tagged, and the closing balance should follow from the opening balance and the movements. If they do not agree, you know before the client does.

Every worked example in this book uses this pattern, and every prompt asks for it in words. Here is the line to add to any request on client data:

> **ADD THIS TO EVERY REQUEST ON CLIENT DATA**
>
> Do this with a Python script that runs on this computer. Look only at the column headers and the first 5 rows before you write it. Do not print data rows on screen. Show me only counts, totals and the

names of the files you save.

WORKED EXAMPLE · ILLUSTRATIVE

Tagging a bank statement without sending it

The next morning Neha sits with Sandeep. Shree Sai Auto Spares, a two-wheeler spares retailer and a bookkeeping client, sent its statement as a PDF; Neha asks for the same April to September statement as an Excel download from net banking instead: 2,412 lines. Sandeep keeps a simple rules sheet of words seen in narrations and the ledger each belongs to. The client's folder holds only these two files.

TYPE THIS

This folder has `SBI_CA_Apr-Sep.xlsx` (the client's bank statement) and `Narration_Rules.xlsx` (columns: Keyword, Ledger). Look only at the headers and first 5 rows of each. Do not open the full statement.

Write a Python script `tag_bank.py` that runs on this computer and:

1. Reads every line of the statement and tags it with a ledger when the narration contains a keyword from my rules sheet. If two keywords match, tag it "Check: two rules".

2. Leaves lines with no match as "Untagged".

3. Checks that opening balance plus credits minus debits equals the closing balance, line by line, and lists any line where the running balance breaks.

4. Saves `Bank_Tagged_Apr-Sep.xlsx` with the original columns plus Ledger, and a Summary sheet with totals by ledger.

Run it. On screen, show only: lines read, lines tagged, lines untagged, lines with two rules, balance check result, and totals by ledger. Do not print any narration.

What Claude Code does

1. **Peeks at the layout**
   It reads the headers and five lines and tells you which columns it will use, for example Txn Date, Description, Debit, Credit, Balance.

2. **Writes the script**
   It creates `tag_bank.py` and asks permission to run it.

3. **Runs it locally**
   The script reads all 2,412 lines on your computer.

4. **Reports counts**
   Something like: 2,412 read, 2,101 tagged, 287 untagged, 24 with two rules, balance check passed, with ledger totals.

5. **Leaves the file with you**
   `Bank_Tagged_Apr-Sep.xlsx` is in the folder. Sandeep works through the 287 untagged lines in Excel.

BEFORE YOU RELY ON IT, CHECK

- [ ] Lines read equals the number of transaction rows you see in Excel (ignore title and total rows).
- [ ] The opening and closing balances in the summary match the first and last page of the statement.
- [ ] Pick five tagged lines at random and confirm the ledger is right by reading the narration yourself.
- [ ] Open `tag_bank.py` and ask Claude Code to explain, in plain words, what it does with a line that matches two rules.

Note. If Sandeep now asks "what are the 287 untagged lines?", Claude Code must read them to answer, and they will be sent. Sometimes that is fine. The point is that you decide how much goes, and you can usually decide "none". Chapter 8 builds this into a full bookkeeping routine, and Chapter 15 is a tested walkthrough on a practice statement.

What the pattern does not stop

The local-script pattern controls what reaches the model. It is a habit, not a lock. Know its edges.

- **The peek is real data.** Five rows of a bank statement show five real transactions. For most files that is a fair price. For a very sensitive file, ask for the column names only, or make a dummy copy with the same headers and invented rows for it to look at.
- **What you ask for gets printed.** "Show me all cash deposits above ₹50,000" prints them, and anything printed is sent. Ask for counts on screen and lists in a file.
- **Error messages can quote data.** When a script fails, the error sometimes shows the cell that caused it. Usually one value; still, be aware.
- **Scripts run with your rights.** A script you approve can open any file your Windows account can open, not only the client folder. Claude Code's folder limits apply to its own file tools, not to programs it runs. Glance at which files a script opens before you say yes.
- **Commands can reach the internet.** An install, a download or an upload can send data out without the model being involved. Say no to any command that contacts an address you did not expect.
- **Add-ons have their own providers.** Web search, web fetch and any connectors you add send what you give them to someone else. Keep them out of client folders.

Know the limits. Anthropic offers an optional sandbox that limits what commands can read and where they can connect, but at the time of writing it does not run on native Windows, which is what most practices use. Check the current documentation. On a Windows desktop, your protection is the habits in this chapter: a clean client folder, reading each permission prompt, and counts on screen.

Plans, training and how long data is kept

Two separate questions decide how your data is treated once it reaches Anthropic. Is it used to train future models? And how long is it stored? The answer depends on the kind of plan.

Plan type	Training on your data	What you do
Individual plans such as Pro and Max	Controlled by a setting in your account	Open claude.ai, then Settings, then Privacy, and switch off the option that lets your chats help improve the models. Check it again whenever Anthropic changes its consumer terms.
Commercial plans: Team, Enterprise, or an API key	Not used for training by default	Ask whoever manages the account to confirm that no opt-in programme is switched on. Keep a copy of the commercial terms in your office records.

How long conversations are kept differs by plan and setting, and it changes, so this book does not quote numbers. Read Anthropic's privacy centre and the Claude Code data-usage page before you start, and once a year after that.

For a practice of two or more people working on client files, a commercial plan is worth pricing. Training is off by default, one person can manage settings for everyone, and you have terms you can explain to a client. On individual plans, each person's own setting is the protection, so check every account in the office.

> **Watch out.** The `/feedback` command, and an occasional survey that asks to share a session, send a full transcript to Anthropic on purpose. On client work, always say no. Chapter 2 shows the settings that switch both off.

The WhatsApp office

Book-keeping and tax offices run on WhatsApp. Clients send photos of bills, PDF statements, Form 16, PAN cards and passbook pages to whichever phone is handy. The biggest leak in most small practices is not a carefully set-up tool on an office computer. It is a tired person forwarding a client's file from a phone to a free chat app at night, as Sandeep nearly did.

You cannot ban phones. You can make the safe way the easy way:

- **One route in.** Every document from a client is saved from WhatsApp to that client's folder on the office computer the same day, renamed, and then worked on there. Chapter 3 shows how to keep this from becoming a second job.
- **No AI on phones for client files.** Write it on the office rules sheet. Free chat apps on personal phones are where you have no settings, no consent and no record.
- **No personal accounts for office work.** If someone uses Claude Code on client files, it is on an office account whose settings you have checked.
- **Delete from phones.** Once a document is in the client folder, delete it from the phone's gallery and downloads. Kavita does this every Friday.

From the desk. Rakesh now asks one question when anyone shows him a result made with AI: "Which computer did it run on, and what did it read?" If the answer is "my phone" or "the whole file", the work is redone. It took two weeks for the question to stop being needed.

Your clients' personal data and the law

Most of what a tax practice holds is personal data: names, PANs, Aadhaar numbers, addresses, mobile numbers, bank statements, salary slips, medical bills for deductions. India's Digital Personal Data Protection Act, 2023 (the DPDP Act) sets out duties for anyone who decides why and how such data is processed. A tax practice that collects clients' documents to prepare their returns is likely to have such duties, at least for individual clients.

This book is not a guide to the Act. Its rules were notified in November 2025 and come into force in phases; at the time of writing, most of the duties below have not yet started. Check the current position, and build the habits now. In general terms, the ideas you will meet are these:

Consent and purpose
Personal data is collected for a stated purpose, with the person's consent or another lawful basis, and used for that purpose.

Only what you need
Collect and use what the job needs. A return needs the PAN; it rarely needs a full Aadhaar scan.

Reasonable security
Take reasonable steps to protect the data you hold, including from the tools and people you use.

Others who process for you
If someone processes data on your behalf, such as a software provider, you remain responsible for how it is handled.

Breaches
A leak of personal data can carry duties to report and inform. Know who in the office would act.

Not forever
Do not keep personal data longer than the purpose and other laws require.

Read the Act and its rules in their current form, or take advice, on how they apply to your practice. What matters for this book is that every habit in it points the same way as the law: send less, keep it local, know where it went.

Not the only rule. The DPDP Act sits alongside your other duties of confidentiality: the professional rules that apply to you (as an enrolled GST practitioner, a tax return preparer or a member of a professional body), your engagement terms, and plain trust. Meeting one does not excuse the others.

Tell clients, and record it

Clients do not need a lecture on AI models. They do deserve to know, in one paragraph, that you use software tools, including AI tools, to help process their documents, and how you protect their data. Put it in your engagement letter or client onboarding form, and keep the signed copy. Here is a first draft to adapt with your own adviser:

> **Sample wording, for your review.** *"We use accounting and software tools, including AI-assisted tools, to help prepare your returns and records. These tools run on our office computers. We set them up so that, wherever practical, your documents are processed on our own computers and only summaries are shared with the software provider. We do not use your data for any purpose other than the services you have asked us for. Every return is reviewed by our staff before it is filed. You may ask us at any time how your data is handled."*

DRAFT THE ENGAGEMENT LETTER CLAUSE

I run a tax practice. Draft a short clause (under 120 words, plain English) for our engagement letter telling clients that we use software including AI-assisted tools, that processing is done on our office computers where practical, that we review every return before filing, and that they can ask how their data is handled. Then give me a Hindi version in Roman script. Do not promise anything absolute such as "your data never leaves our office". Do not cite any law or section.

Notice the last two lines of that prompt. They stop the draft from promising more than the script pattern can deliver, and from quoting a law you have not checked. Ask for drafts that way everywhere in this book.

What never goes near it

Some things should never be in a folder where Claude Code works, script or no script.

Never	Why	Instead
Portal user IDs, passwords and OTPs (GST, income tax, TRACES, bank)	They belong to the client. Anything typed is sent. An automated login may also break the portal's terms	Log in yourself. Download the file. Put the file in the folder
Full Aadhaar scans and PAN card images	Identity documents, rarely needed for the analysis	Keep them in a separate KYC folder Claude Code is never started in. Type the PAN where needed
Digital signature files and their PINs	They sign returns in the client's name	Keep the token with the person authorised to use it
Medical records behind a deduction	Highly personal	Record the amount and the bill number; keep the paper
A client's whole Tally data folder	Every ledger, party and narration in one place	Export the one report the job needs

A routine for every client job

✓ **EVERY JOB, EVERY CLIENT**

- ☐ Copy only the files this job needs into the client's folder for this period. No KYC, no passwords.
- ☐ Start Claude Code in that folder, never in the top-level clients folder.
- ☐ Ask for a local script and counts on screen, using the line you saved above.
- ☐ Read every permission prompt. Say no to anything that reaches outside the folder or the internet.
- ☐ Decide consciously before you let it open an output file with client rows in it.
- ☐ Check the counts and totals against the source yourself before anything is filed.
- ☐ Close the session when the job is done. Start a fresh one for the next client.

Key takeaways

- Claude Code runs on your computer, but the model runs on Anthropic's servers. Whatever Claude Code reads or prints is sent.
- Hand over the job, not the file: a peek at the layout, a script that runs locally, and counts on screen.
- Check your plan's training setting, switch off transcript sharing, and keep client files off phones and personal accounts.
- Treat clients' documents as personal data under the DPDP Act, in general terms; take advice on the detail, and tell clients in writing how you use software tools.
- Never put portal passwords, OTPs, Aadhaar scans or signature files in a folder where Claude Code works.

ABOUT THE AUTHOR

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CA, CIA. Builds the small tools that take the copying out of accounting work.

Chandan is a Chartered Accountant and a Certified Internal Auditor (The Institute of Internal Auditors), with experience in statutory audit, internal audit, internal financial controls and tax audit reporting.

I started at the junior's desk, ticking and vouching, and have worked in audit and assurance full time since 2022. Much of the data an auditor works with arrives the way it reaches a tax practice: Tally exports, bank statements, GST workings, TDS files. The same thing struck me every season. Capable people spend their evenings re-typing data from one format into another, and the checking that needs their experience gets the last, tired hour.

So I build my own tools, almost all of them offline, because I am not comfortable with client data leaving the machines it belongs on. Among them: a workbench that loads a year's books from a Tally or ERP export and proves they are complete, analytics that turn messy exports into findings traceable to the source row, a utility that turns a tax audit working file into something the e-filing utility can import, and vendor reconciliations. Claude Code is how I build them. I describe what the work needs; it writes the code; I test the result the way I would review a junior's file. Many tools needed three or four rounds. This book is built from those rounds.

I wrote it for the practitioner with two hundred clients and six people, because that is where the hours go and where a careful routine pays back fastest. Send the AI only what the job needs, let the script do the copying, and keep the judgement and the final check with you.

If this book saves your office a weekend, or falls short on your files, I would like to hear about it, and what you would want in the next edition. I'm on LinkedIn:
https://www.linkedin.com/in/chandan-gupta-b8a108192

Get the full book

This sample has the introduction and Chapter 1. The full **AI for Tax Practitioners** adds setup for a small office, nine chapters on the practice cycle (client intake, GSTR-1, ITC at volume, ITR season, TDS returns, bookkeeping and bank statement cleanup, notices, the compliance calendar and fees, and client messages in English and Hindi) with worked examples, chapters on practice SOPs and on checking output, two tested walkthroughs on downloadable practice files, and an appendix of every prompt in the book.

> ✓ **Get it.** The full book is a PDF at https://topmate.io/chandan_gupta31, where the bonus pack (every prompt plus the practice files) is a free download. Also on Amazon Kindle.