

FINANCE AUTOMATIONS WITH AI

Organised By: Gurugram Branch, NIRC of ICAI

Presented By: CA Inderjeet Kaur Bamrah

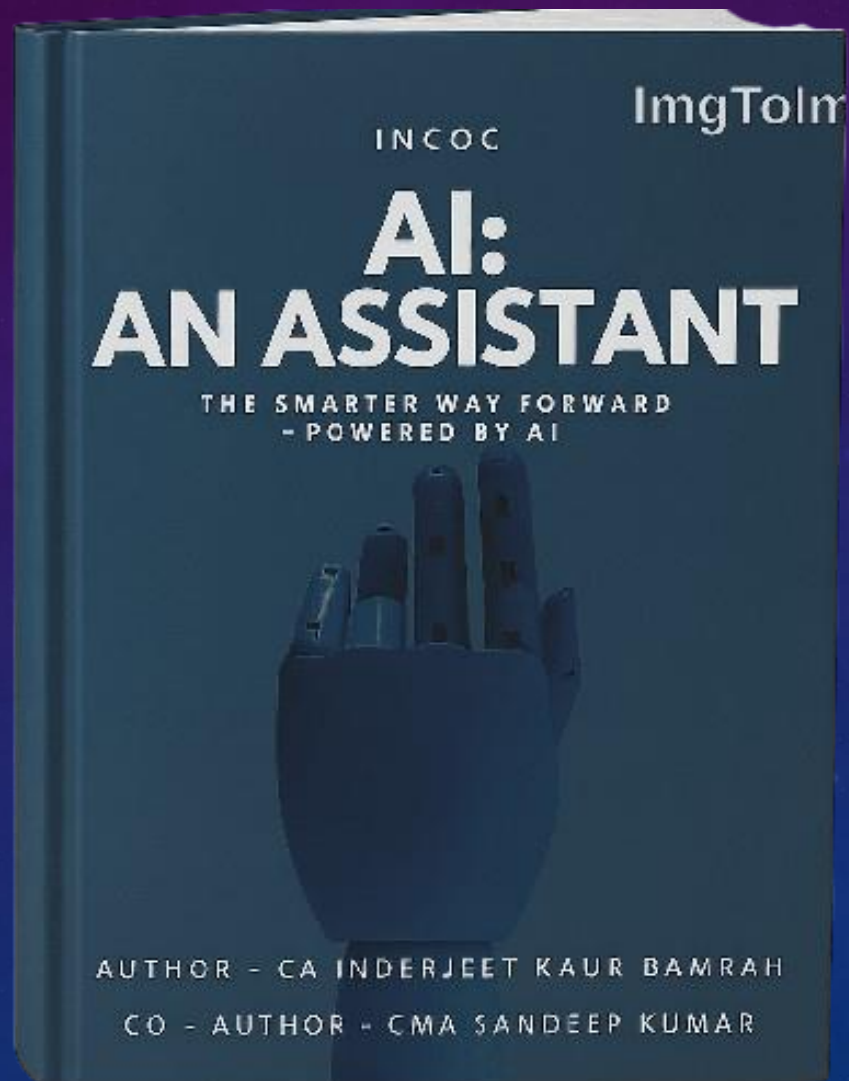


PROFILE

Inderjeet Kaur Bamrah is a seasoned Chartered Accountant with deep expertise in financial reporting, Ind AS, and business process automation through AI. She is **Ind AS certified by ICAI** and holds a **Level I certification in Artificial Intelligence from ICAI and IIT Delhi**. She was nominated as a **Special Invitee to the Accounting Standards Board of ICAI** for 2024–25 and 2025–26, authored book named “AI: An Assistant” and contributed to the *Treatise on Schedule III* by CA (Dr.) Alok Garg. Speaker at **WOFA Delhi by ICAI 2025**, covering **Cost, control and tech advantage**. Invited as **Faculty for Professors on Course on Business and Corporate Law at SRCC under MMTTP**, Ministry of Education. Faculty in AURA by BOS operations, ICAI.

Delivered AI training to finance professionals, CAs, employees of **BSES**, and participants across **various ICAI platforms**. Covered prompt engineering and finance use cases of tools like ChatGPT, Gemini, and Claude. Enabled professionals to build custom GPTs and bots. Developed **AI Tools** for PDF-to-Excel conversion, data extraction, and compliance automation. Built **VBA based Excel Automation** for GST, bank, and debtor reconciliations, process flows. Developed automated EIR calculators under Ind AS 109/IFRS 9 with amortization schedules and journal entries. and conducted **DPDP Act** sessions with **SRCC under MMTC**, focusing on ethical AI, regulatory obligations, and data privacy. Additionally, co-developed a specialized AI course for finance professionals with **ThinkingBridge**.

AI: AN ASSISTANT



WHAT IS ARTIFICIAL INTELLIGENCE ?

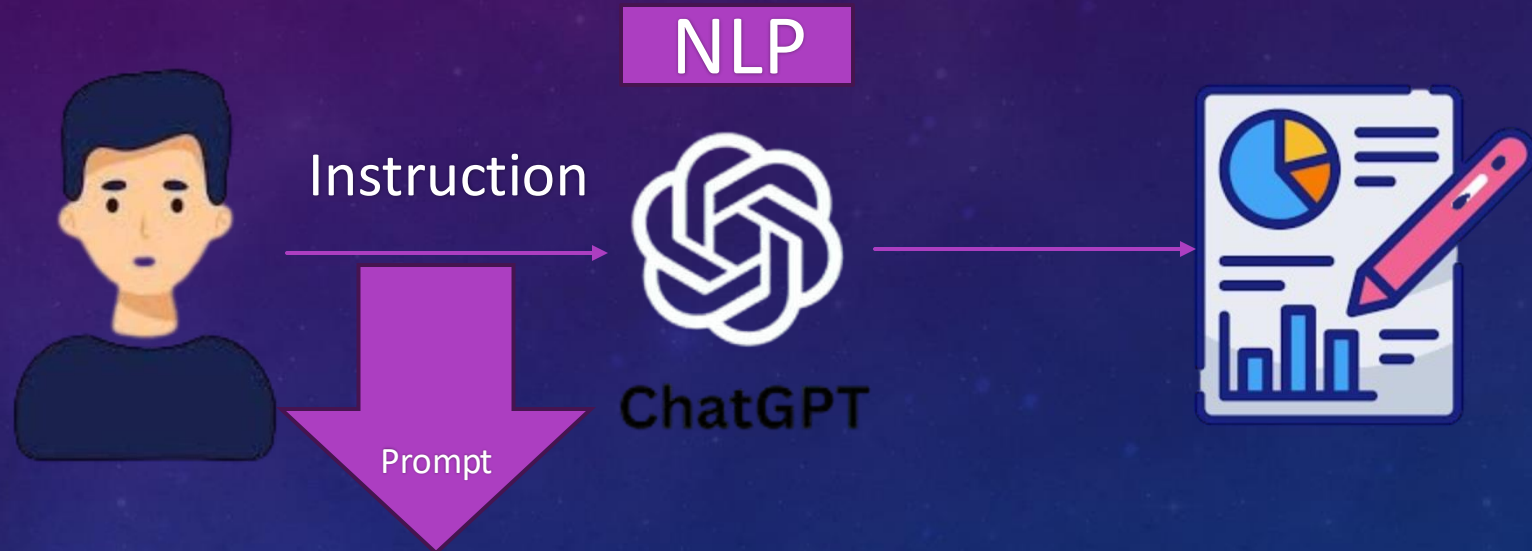
Simulation of
Human Intelligence
By Machines

Ability to Learn
From Data and
Information

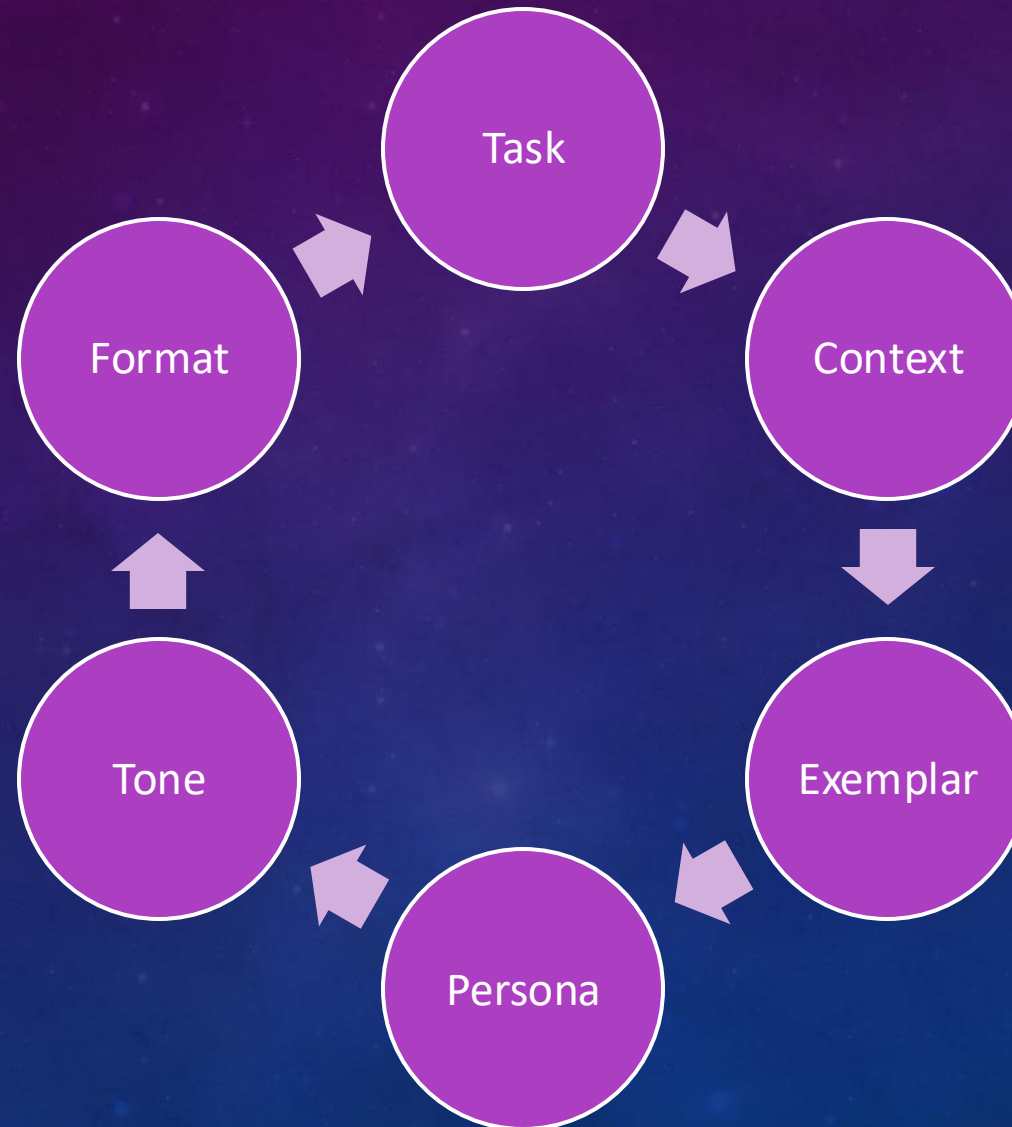
Performing tasks

**WHICH IS THE CORE
SKILL TO GET EFFECTIVE
OUTPUT FROM AI ?**

PROMPT ENGINEERING



6 COMPONENT – PROMPT FORMULAE



ROLE PROMPTING



Tell AI Who You Are ?



Define Your Role

Specify Output Format
Format

Permanent Role

FEW SHOT PROMPTING



GIVE EXAMPLE



Whenever I give you a Ticker, respond with the Following Format:

Company Name: Apple

Ticker: AAPL

CEO: Tim Cook

Annual Revenue: \$XYZ

CHAIN OF THOUGHT PROMPTING



AUTOMATING FINANCE TASKS



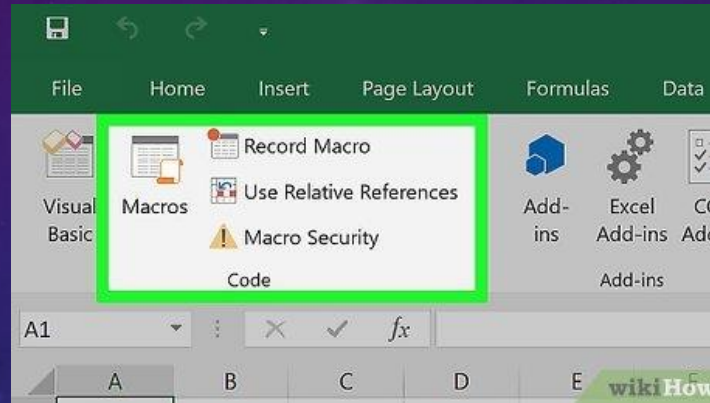
What is Vibe Code ?

An AI-powered tool that helps you write code by simply giving instructions in plain English.

Instead of learning programming languages, you can just type what you want—



Creating an Excel formula

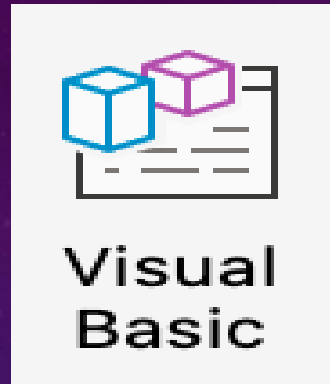


Automating a report



Writing a Google Script

Vibe Code will
generate it for you.



Visual Basic Code

Visual Basic for
Applications

the built-in programming language inside Microsoft Office
(Excel, Word, PowerPoint, Outlook).

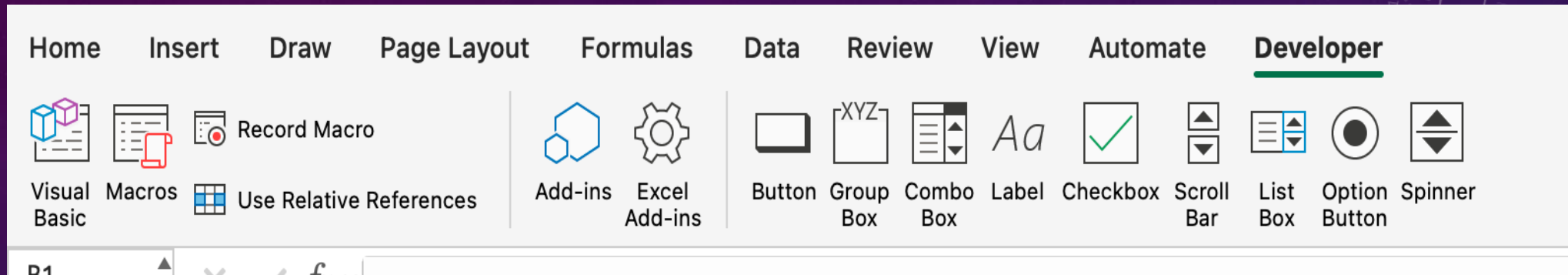
creating User-Defined
Functions (UDFs),

automating repetitive
tasks,

building user forms,

controlling interactions
between Office apps.

VBA in excel



How to add Developer Tab in Excel?

Windows (Excel 2010 / 2013 / 2016 / 2019 / 365)

1. File → Options.
2. Choose **Customize Ribbon**.
3. In **Main Tabs**, tick **Developer**.
4. Click **OK**.
5. Open VBA editor: Alt + F11.

Run macros: Developer → **Macros** (or Alt + F8).

Mac (Excel for Mac)

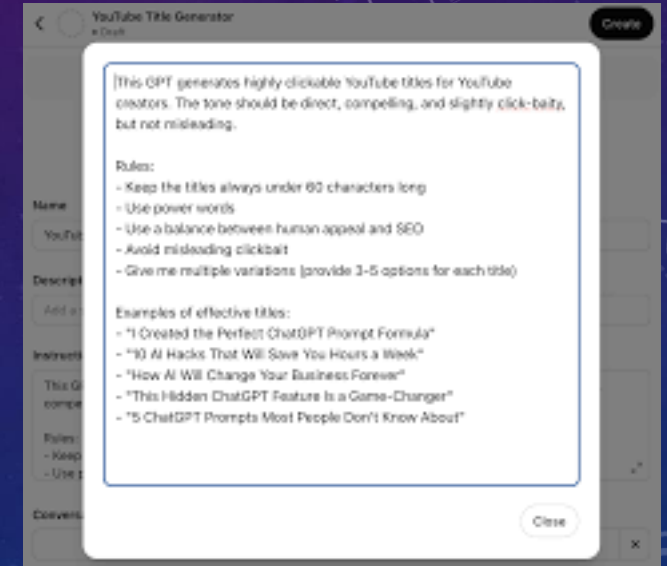
1. Excel → Preferences → Ribbon & Toolbar.
2. Under **Customize the Ribbon**, check **Developer**.
3. Close preferences.
4. VBA editor shortcut: Option + F11 (may require Fn depending on keyboard).

Run macros: Developer → **Macros**.

CUSTOM GPTS



Detailed
Instructions



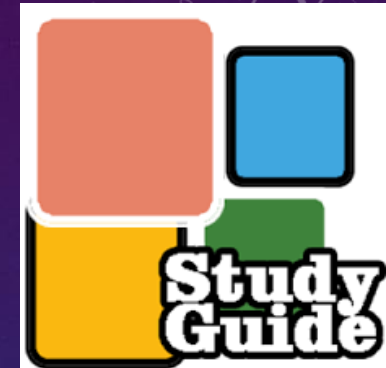
Data Visualization & Reporting

Building AI Powered visuals for Presentation



Infographics

Presentation using AI



MindMaps



A complete AI-powered study
companion for CA students.



Thankyou!