



Nebula KnowLab™

AI for Accounting

A hands-on 2-hour workshop with Claude, Zapier & NotebookLM

2 hrs

Hands-on

6

Features

3

Tools

Presented by Nebula KnowLab · Coimbatore

What we're doing today

AGENDA

- 0:00 Intro — Why AI for Accounting
- 0:15 Prompting Fundamentals
- 0:35 Claude Cowork (Desktop Agent)
- 1:00 Gmail + Drive Connectors
- 1:20 Skills
- 1:35 Zapier Automation Workflow
- 1:45 Deep Research with NotebookLM
- 1:55 Wrap-up & Challenge

TOOLS USED

- Claude (claude.ai + Claude Desktop)
- Zapier (workflow automation)
- NotebookLM (deep research)

OUTCOME

- Write effective prompts for accounting tasks
- Automate invoice tracking with Zapier + Claude
- Use Cowork to generate reports autonomously
- Run deep research with NotebookLM



What is prompting — and how to do it right

A prompt is the instruction you give Claude. Think of it like briefing a very sharp intern who knows everything — but only knows what YOU tell them about your situation.

WEAK PROMPT

"explain GST"

Why it fails

- No role or context
- Claude does not know you are an accountant
- Output will be generic and unhelpful

STRONG PROMPT

*"Act as a senior CA in India. I file monthly GST for a pvt ltd.
Explain GSTR-1 vs GSTR-3B in 4 bullet points."*

Why it works

- Role: tells Claude who to be
- Context: company type, task, country
- Format: specific output requested

The problem with your current workflow

Hundreds of invoice PDFs

You open each one, copy the data, paste it into Excel — one by one, every month.

Analytics reports take hours to build

Collect numbers, write narrative, build charts, format slides — all manual, all repetitive.

After-call notes never become action items

Meeting recordings sit untouched. No summary, no next steps, no client follow-up.

What if you could say it once and it just does it?



Claude Cowork — your autonomous desktop agent

Not a chatbot. An agent that reads your files and executes multi-step tasks.

Demo 1 · Invoice folder to structured Excel

"Read every PDF and XML in /invoices/june. Extract: vendor, date, amount, GST, HSN code. Build one Excel row per invoice."

-> 50 invoices extracted and structured in under 2 minutes

Demo 2 · Generate an analytics PPT from P&L data

"Take the Q1 P&L in /data/q1.xlsx. Build a 5-slide PowerPoint with department-wise spend charts, a variance table, and a 3-bullet executive summary."

-> Branded analytics deck ready for the management meeting — no manual formatting

Demo 3 · Fathom call recording to client action report

"Read the Fathom transcript from /calls/client-abc-june.txt. Write a Word doc with: key decisions, open items, action items with owner and deadline."

-> Post-call client report in 60 seconds — ready to send

Your inbox is a compliance minefield

GST notices buried in your inbox

Department emails arrive alongside vendor mails. Easy to miss. Penalties do not wait.

Overdue payments scattered across threads

You have to manually hunt through dozens of emails to find who has not been paid.

Analytics data lives in three different places

Reports in Drive, raw numbers in Sheets, context in emails — you stitch it all together by hand.

What if Claude could see your inbox and Drive — and just answer?

Gmail + Drive Connectors

Claude reads your real emails, documents and databases — and acts on them.

Gmail Demo · Scan inbox for overdue vendor payments

"Search my Gmail for vendor emails about unpaid invoices in the last 60 days. List: vendor name, amount, days overdue, urgency level."

-> Prioritised action list — no manual inbox hunting

Drive Demo · Compare last two MIS reports

"Find the April and May MIS reports in my Drive. Compare them. Flag any expense category that increased more than 15%."

-> Variance summary without opening a single file

Dashboard Demo · Build an analytics dashboard from connected data

"Pull the June expense sheet and the vendor list from Drive. Build a department-wise spend dashboard and flag the top 3 cost overruns."

-> Live analytics dashboard from cross-tool data — one command

Every month, the same tasks. From scratch.

GSTR-2B reconciliation — every single month

Purchase register vs GSTR-2B. Match by invoice number. Flag mismatches. Same process, every month, forever.

TDS calculations done manually each time

Which section? Which rate? Is PAN available? You know the logic — but you still recalculate every time.

No institutional memory

Your workflow lives in your head. When you are busy it slows down. When someone is on leave, it stops.

Skills = Claude remembers your exact process and runs it every time.

Skills — reusable AI workflows

Calculates income tax, TDS, advance tax, STCG/LTCG on equity and F&O — under Old and New regimes for FY 2025-26. All Indian-specific rules included.

Demo 1 • Bank reconciliation skill

"Reconcile /bank-statements/june.pdf with invoices in /invoices/june/. Flag unmatched entries. Save to /outputs/june-recon.xlsx"

-> Flagged mismatches + clean reconciliation sheet in minutes

Demo 2 • Build a GST reconciliation skill

"Use Skill Creator: Take GSTR-2B download + purchase register. Match by invoice number. Flag mismatches. Output report for CA review."

-> Runs for every client every month with one command

Invoice emails come in. Nothing happens automatically.

You check email to find invoices

Every day you scan the inbox, identify invoice mails, download attachments, then manually log the details.

Data extraction is fully manual

Vendor name, invoice number, amount, due date — you copy each field from the PDF into your tracker by hand.

Nothing is tracked until someone remembers to track it

Invoices slip through. Due dates are missed. You only notice when the vendor follows up — or when there is a penalty.

What if every invoice email triggered an automatic extraction — with zero manual work?

Zapier + Claude — automated invoice tracking

Set it up once. Every invoice email is captured, extracted, and logged automatically.

1

Trigger

New email arrives in Gmail with subject containing 'invoice' or attachment named *.pdf

2

Claude extracts

Zapier sends the email body + attachment to Claude via API. Claude returns: vendor, amount, invoice no., due date, GST.

3

Log to Sheets

Extracted fields are mapped and written as a new row in your Google Sheets Accounts Payable tracker automatically.

4

Scheduled digest

Every Monday 9am: Zapier triggers Claude to scan the tracker and email you a summary of all invoices due this week.

Scheduled task — Weekly invoice digest

Claude prompt: "Review my AP tracker in Google Sheets. List all invoices due in the next 7 days. Flag anything overdue. Send as a formatted email digest."

Deep research — without reading 200 pages

The problem: a new GST circular drops. It is 40 pages. You need to know the impact on your clients by tomorrow morning.

What NotebookLM does

Upload any document

PDFs, URLs, Google Docs, audio.
NotebookLM reads the full content and builds a private research workspace.

Ask questions across multiple sources

Upload the GST circular, your client's last filing, and the previous circular. Ask: what changed and how does it affect input tax credit?

Get cited answers

Every answer comes with a source citation — exact page and quote. Not guesswork. Grounded research.

Live demo: Upload GST Circular 211 + last quarter GSTR-3B. Ask: what changed for ITC on construction services?

You just covered 5 ways to work smarter.

1**Prompting**

Right input, right output

2**Cowork**

Autonomous desktop agent

3**Connectors**

Gmail + Drive

4**Skills**

Reusable workflows

5**Zapier**

Invoice automation

Your challenge this week

- Pick ONE repetitive task from your daily work
- Use Claude instead of doing it manually
- If it does not work the first time — refine the prompt and try again
- Share your result with the team next week

You know your numbers. Claude knows everything else. Together that is a powerful combination.

Questions? Let's solve a real problem live right now.