Prerequisites

This seminar is designed for accountants, bookkeepers, finance professionals, controllers, and business owners who work with accounting information. Familiarity with everyday accounting processes is recommended. No programming experience or prior use of Claude is required.

Duration

This seminar includes four hours of training and guided hands-on practice.

Premium Training

This premium seminar can be delivered in Hebrew or English, online or in a hybrid format. Examples and exercises can be adapted to your accounting workflows, reporting requirements, organizational policies, and applicable regulatory environment.

The Lecturer

Haim Michael, an experienced software development trainer, lecturer, and consultant with more than 30 years of teaching experience, delivers this seminar. Haim's academic background includes a BSc in Accounting and Economics and an MBA (Cum Laude) in Information Systems Management, both from Tel Aviv University. Haim has been teaching advanced computer science topics at universities for more than 25 years. Earlier in his academic career, he taught Microeconomics courses at the Open University of Israel. His professional experience also includes extensive work with AI technologies, software development, and delivering professional training.

The Topics

This seminar explores practical ways to use Claude as an assistant for accounting and financial workflows, while maintaining professional judgment, accuracy, and confidentiality. Topics include:

Claude for Modern Accounting: Capabilities and Limits

Getting Started with Claude and Its Interface

Writing Effective Prompts for Accounting Tasks

Working with Spreadsheets, CSV Files, and Documents

Extracting and Structuring Financial Information

Categorizing Transactions and Supporting Reconciliation

Analyzing General Ledger and Journal Entries

Investigating Exceptions and Unusual Transactions

Preparing Management Reports and Summaries

Explaining Financial Trends and Variances

Assisting with Invoice and Expense Reviews

Creating Reusable Accounting Workflows

Checking Calculations, Sources, and AI Output

Privacy, Confidentiality, and Data Protection

Human Review, Accountability, and Professional Ethics

Hands-on: Analyzing a Sample Accounting Dataset

The seminar can be tailored to your organization's accounting tasks and preferred report formats. Hands-on exercises use fictional or anonymized accounting data. Participants should have access to Claude; availability of file analysis and other features depends on the account and plan. Sensitive client or company information should not be uploaded without appropriate authorization and approved data-handling arrangements.

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