

AI at Work for Finance Teams

Practical Prompts, Smarter Reporting and Everyday Automation

FA-0824 · 1 day

Agentic & Generative AI · AI for Leaders & Business · Automation, RPA & Power Platform

Use practical prompts, guided workflows and recurring AI tasks for accounting, accounts payable and finance reporting.

Introduction

Accounting, accounts payable and reporting teams spend much of their time reviewing information, following up on outstanding items and turning figures into explanations. AI can help with these tasks, especially when people know how to give clear instructions, check the results and keep control of the process.

This lively, practical workshop introduces participants to several ways of using AI at work. Through guided activities and short challenges, participants will explore Microsoft Copilot Studio, Power Automate, Gemini and Claude. They will work with prepared training data and starter templates to create useful prompts, build simple workflows and schedule recurring tasks. Guided demonstrations will also show how external APIs connect AI tools to information beyond the conversation.

The course begins with a brief introduction to how AI works, its risks and the importance of governance, before moving quickly into hands-on activities. The workshop focuses on practical, industry-demanded skills and everyday finance work.

Learning outcomes

By the end of this course, participants will be able to:

- Explain AI capabilities, limitations and key risks in everyday language.
- Apply governance principles when handling financial and confidential information.
- Write reusable prompts for accounting, accounts payable and reporting tasks.
- Create a simple Copilot Studio agent flow using Run a prompt in the standard harness.
- Build a basic Power Automate workflow and describe how external APIs support automation.

- Create and manage recurring AI tasks in Gemini and Claude.
- Verify AI outputs and identify suitable opportunities for workplace adoption.

Prerequisites

- Ability to work independently with invoices, payment records or routine financial reports.
- Ability to use spreadsheets, upload files and navigate browser-based applications.
- A laptop with a current browser and reliable internet access.
- Access to a prepared Copilot Studio standard-harness agent flow and Power Automate training environment with maker permissions, required licensing and AI usage capacity.
- Approved Gemini and Claude accounts with scheduling features enabled, required subscriptions and organisational permission for the relevant activity settings and connected applications.

Training outline

1. 1. A Brief Introduction to AI and Responsible Use

1. How Generative AI Works
2. AI Assistants, Agents and Workflows
3. Incorrect Answers, Calculation Errors and Misleading Outputs
4. Confidentiality, Approved Tools and Data Access
5. Human Review, Accountability and Audit Trails

2. 2. Better Prompts for Everyday Finance Work

1. Clear Instructions, Context and Output Formats
2. Invoice Information Extraction and Classification
3. Supplier Correspondence and Payment Follow-ups
4. Financial Summaries and Report Commentary
5. Checking Figures, Sources and Assumptions

3. 3. Hands-on with Microsoft Copilot Studio

1. Navigating the Workspace and Starter Templates
2. Creating Reusable Prompts with Inputs
3. Using Run a prompt in a Standard-Harness Agent Flow
4. Testing and Refining Finance-related Outputs

5. External API Connections: Guided Demonstration

4. 4. Hands-on with Power Automate

1. Triggers, Actions and Simple Workflow Design
2. Adding Run a prompt to a Cloud Flow
3. Routing Results for Human Review
4. Scheduled Runs and Run History
5. External API Calls: Guided Demonstration

5. 5. Recurring Work with Gemini and Claude

1. Reusable Task Instructions and Connected Applications
2. Creating Scheduled Actions in Gemini
3. Creating Scheduled Tasks in Claude Cowork
4. Reviewing Results, Checking Information Freshness and Managing Schedules
5. Comparing Suitable Tasks Across the Tools

6. 6. Bringing AI into the Workplace

1. Combining Prompts, Information and Review Steps
2. Comparing Outputs and Improving Instructions
3. Selecting a Practical First Automation
4. Measuring Time Saved and Output Quality

Disclaimer

This outline serves as a general guideline. The trainer reserves the right to amend the content, sequence, tools or delivery approach without prior notice to accommodate participant needs, available time, platform changes and learning objectives. Access to individual features remains subject to applicable subscriptions, organisational policies and service availability.