Beyond Basics: Smart Tech Moves for the Modern Chartered Accountant

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Before we begin……
Some Disclaimers and important points

1 Personal Insecurity

How keeping myself updated, has sometimes been overwhelming, AND IT IS OK. Take a deep breath, put your head down and break your tasks into smaller tasks – move forward.

2 Not a hands-on-training

This is NOT a hands-on-training, but to make you aware of the POSSIBILITES. Let's learn together.

3 Have a task in mind

Make sure you have at least 1 task in mind, which you are planning/wanting to automate. Let's discuss that at the end of the session.

4 Understand AI's do's and don'ts

Before the use of AI, we must understand its do's and don'ts.

5 Security is a MYTH

100% security is a MYTH in Cyberspace, Either you are HACKED OR you Don't know you're HACKED.

6 Be patient

BE PATIENT with yourself – learning can sometimes be a slow process.

Common Cyberattack Methods

1. Phishing (By Voice, SMS, Email)

Fake emails or messages that appear to be from trusted sources, tricking users into clicking links or giving up sensitive info.

2. Malware

Malicious software (like viruses, worms, spyware) installed unknowingly, often through attachments or downloads.

3. Ransomware

Locks or encrypts your data and demands payment (ransom) to unlock it — often spreads through unsafe email attachments.

4. Man-in-the-Middle (MitM) Attack

Intercepts communication between two parties (e.g., on public Wi-Fi) to steal data like login credentials or card info.

5. Social Engineering

Manipulating people (via phone, email, or face-to-face) into revealing confidential info or giving access.

6. Fake Software or Updates

You install what seems like a legitimate app or software update, but it contains malware.

7. USB Drop Attacks

A malware-laden USB drive is "accidentally" dropped in or near an office — someone picks it up and plugs it in out of curiosity.

8. Website Spoofing

A fake website made to look exactly like a real one (e.g., GST portal, bank) to steal login details.

9. Keyloggers

A hidden program or device records every keystroke (including passwords) and sends it to the attacker.

Cyber Crime & Safety

Avoid Suspicious Links

Never click suspicious links or download unknown attachments.

Password Manager

Use a Password Manager

Protect Credentials

Do not share OTPs or passwords—verify caller identity.

Recognize Fraud

Recognize panic-inducing fraud tactics—pause and think.
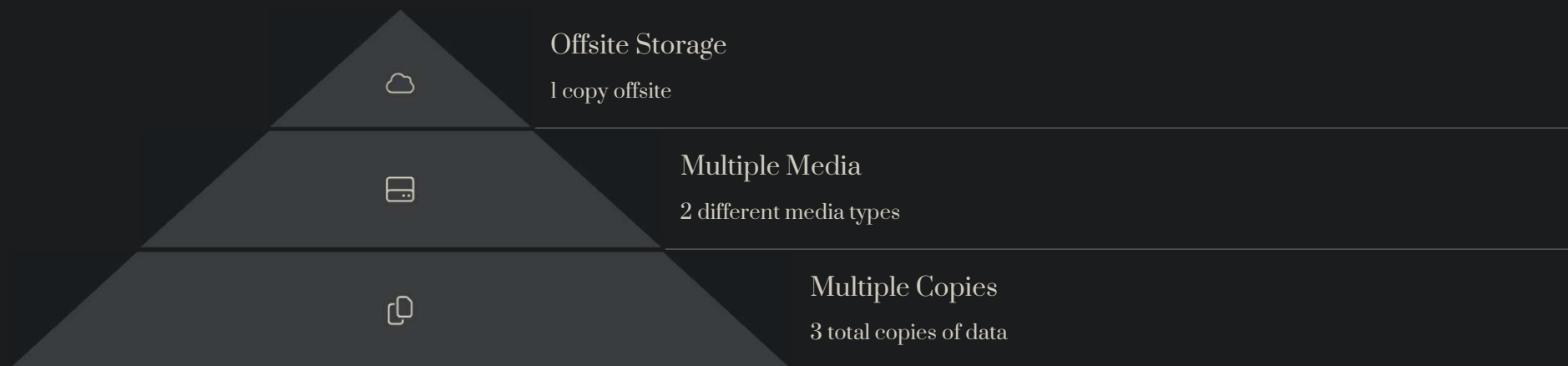
Limit physical access to personal/business devices.

If something feels off—even if familiar—verify the source.

Most cyber breaches happen via human error or internal access.

Cybersecurity is not a luxury—it's basic hygiene.

Data Security (Backups & Infrastructure)

Offsite Storage
1 copy offsite

Multiple Media
2 different media types

Multiple Copies
3 total copies of data

Implement 3-2-1 backup strategy (3 copies, 2 media, 1 offsite).

Use NAS for automatic, centralized backups.

Avoid storing client data on local drives—centralize and secure it.

Ensure your team knows local-only data isn't retrievable after failure.

Map data locations and link to backup scripts or services.

Demonstrate VPN & NAS setup screenshot or simple diagram.

Test data recovery quarterly—don't assume backup works.

AI Tools & Prompting Tips

Write Effective Prompts
Learn how to write effective prompts—be specific and clear.

Use AI Assistants
Use ChatGPT, Gemini, or Copilot to draft replies, summaries, reports.

Automate Excel
Explore Excel automation via ChatGPT + Power Query.

Create Scripts
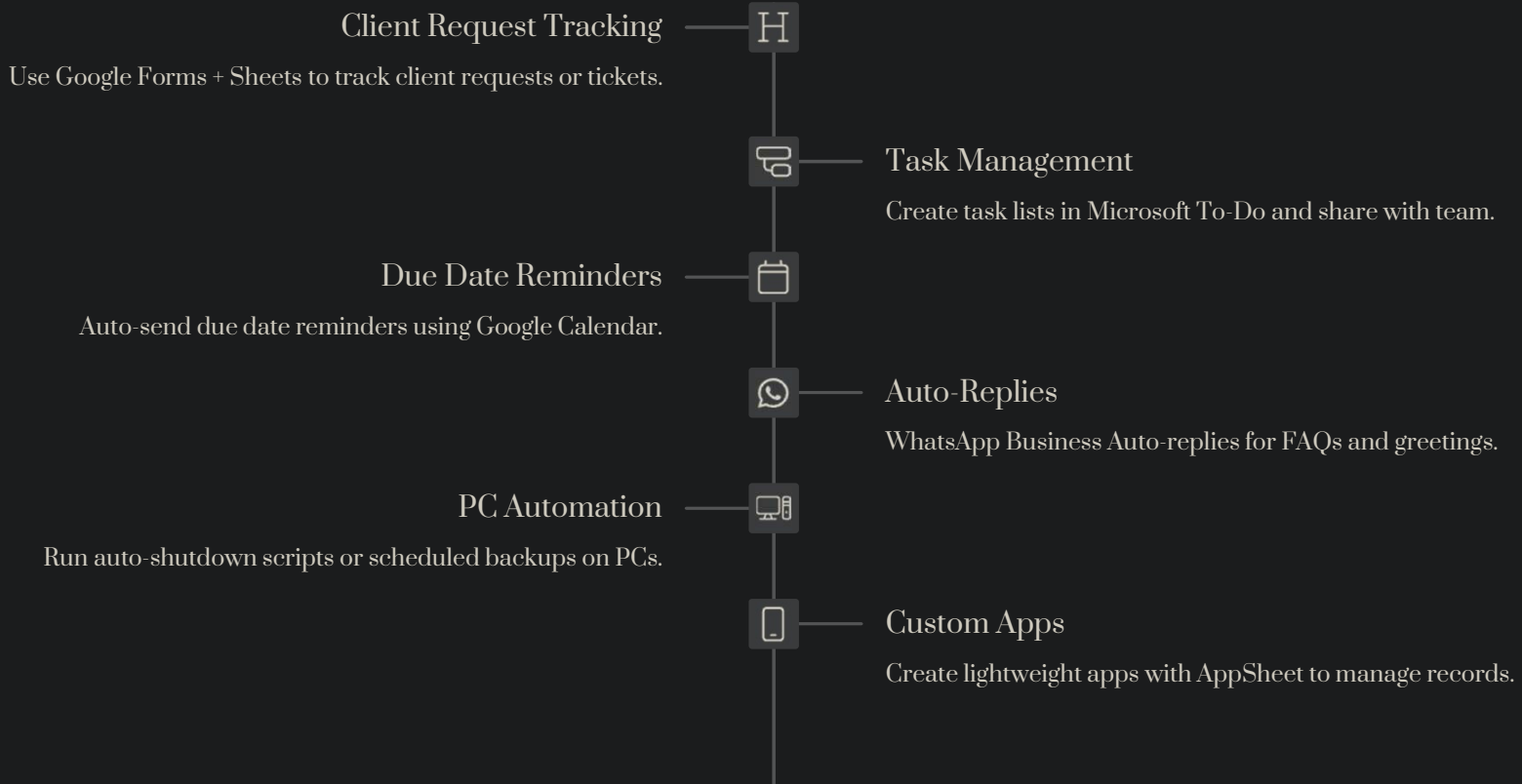Demo: Write prompt to create auto-shutdown script.

Build Bots
Demo: Telegram bot prompt to control remote actions.

Verify Outputs
Always verify AI outputs—use it as assistant, not authority.

Common Automations in CA Office

Client Request Tracking

Use Google Forms + Sheets to track client requests or tickets.

Task Management

Create task lists in Microsoft To-Do and share with team.

Due Date Reminders

Auto-send due date reminders using Google Calendar.

Auto-Replies

WhatsApp Business Auto-replies for FAQs and greetings.

PC Automation

Run auto-shutdown scripts or scheduled backups on PCs.

Custom Apps

Create lightweight apps with AppSheet to manage records.

If you repeat a task twice—automate it once.

Few Useful Tools & Tips

- ❖ PDF Gear
- ❖ Microsoft To-Do
- ❖ PC Automation Scripts
  - ❖ Auto shutdown
  - ❖ Auto start
  - ❖ Abort Shutdown
- ❖ Appsheet
- ❖ Link shortners (Tiny, Bitly, etc.)
- ❖ Power automate
- ❖ NAS
- ❖ VPN


https://bit.ly/icai-useful

Closing Thoughts & Key Takeaways

- Cybersecurity: Awareness + Discipline = Safety.
- Backups must be automated, tested, and centralized.
- AI tools are easy to use—start small and scale gradually.
- Automation doesn't need a tech team—just intent and a plan.
- Try one change in your setup within a week of this session.
- Your future-ready office is just one smart decision away.

Thank You

WhatsApp

Linked in
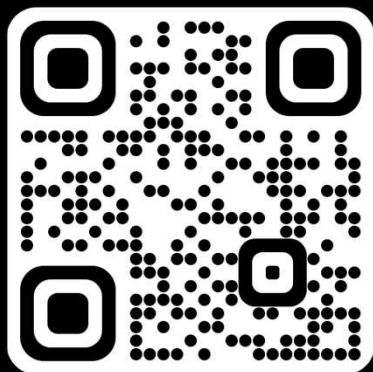
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