Claude AI + Accounting

解锁会计 Daily Operation 全新效率

Unlock a New Level of Efficiency in Daily Accounting Operations!

从 One-by-One Processing
转向 Batch Processing

从 Manual Follow-up
转向 Automated Workflow





ANC GROUP

YS LT.KOL Bersekutu (PA)
Song Liew
Founder of ANC Group | License Tax Agent
FCCA (UK) | CPA (AUS) | ACAP (ASEAN) | CA (M) |
ACTIM (M) | CFMP | CFP

AMS

Meldy Ong
Founder of AMS Software
16 Years Experience - SQL Software Consultant
E-Invoice Panel Expert
Nationwide E-Invoice Seminar Speaker

Date:
Wed.
16/12
10AM - 6PM
Online Zoom Session

SQL + Claude

如何让会计工作 更快、更高效、更智能?

How to Make Accounting Faster, More Efficient, and Smarter?

HRDCORP CLAIMABLE

课程大纲 Course Outlines

模块 1 | 会计 AI 概览
Overview of AI for Accounting

- 了解 AI 在会计作业和财务分析中的实际应用场景
  Understand practical AI applications in accounting operations and financial analysis
- 认识 Claude 能做什么、不能做什么，以及如何下达清晰有效的指令
  Understand what Claude can and cannot do, and how to give clear and effective instructions
- 了解 SQL Accounting 与 AI 如何结合，打造更智能的工作流程
  Learn how SQL Accounting and AI can work together to create smarter workflows
- 学习如何选择适合自己的 AI 工具、从哪里开始，以及数据安全与使用注意事项
  Learn how to choose the right AI tools, where to start, and key considerations for data security and responsible use

模块 2 | AI 辅助会计数据录入与交易处理
AI-Assisted Accounting Data Entry & Transaction Processing

- 用 AI 协助准备销售发票与采购发票的数据
  Use AI to prepare data for Sales Invoices and Purchase Invoices
- 整理与处理客户付款及供应商付款
  Organise and process Customer Payments and Supplier Payments
- 将 Excel 或文件内容转换成可导入 SQL Accounting 的格式
  Convert Excel or document data into formats that can be imported into SQL Accounting
- 从逐笔输入转向批量处理，减少重复输入和人为错误
  Shift from one-by-one entry to batch processing to reduce repetitive work and human error

课程大纲 Course Outlines

模块 3 | AI 辅助收据处理与会计流程自动化
AI-Assisted Receipt Processing & Accounting Workflow Automation



- 用 AI 识别和整理收据资料，并准备成会计记录
  Use AI to identify and organise receipt information and prepare it for accounting records
- 提升总账、应收账款及应付账款的处理效率
  Improve processing efficiency for General Ledger, Accounts Receivable and Accounts Payable
- 设计定期重复交易的自动化流程
  Design automated workflows for recurring transactions
- 建立适合自己公司的会计工作流程
  Build accounting workflows tailored to your own company

模块 4 | AI 驱动的对账单与邮件自动化
AI-Powered Statements & Email Automation



- 用 AI 协助整理客户对账单
  Use AI to assist in preparing Customer Statements
- 设计付款提醒与付款跟进的邮件内容和流程
  Design payment reminder and payment follow-up email content and workflows
- 从人工跟进转向自动化工作流程
  Move from manual follow-up to automated workflows
- 提升收款效率，改善公司现金流
  Improve collection efficiency and support better cash flow

课程大纲 Course Outlines

模块 5 | AI 驱动的会计仪表板与财务报告
AI-Powered Accounting Dashboard & Financial Reporting



- 用财务数据和 AI 工具打造自己的会计仪表板
  Use financial data and AI tools to build your own accounting dashboard
- 一目了然掌握应收、应付、销售等关键数字
  Monitor key figures such as receivables, payables and sales at a glance
- 让财务报告更清晰、更容易向老板和团队说明
  Make financial reports clearer and easier to explain to management and teams
- 学习如何制作小工具，把常用的报表和计算做成自己的专属工具
  Learn how to build simple tools for commonly used reports and calculations
- 从 Excel 报表转向自定义仪表板
  Move from Excel reports to customised dashboards

模块 6 | AI 驱动的财务比率分析与商业洞察
AI-Powered Financial Ratio Analysis & Business Insights



- 用 AI 分析财务报表
  Use AI to analyse financial statements
- 进行财务比率分析，评估公司盈利能力和财务状况
  Conduct financial ratio analysis to assess profitability and financial health
- 从数字中找出趋势和问题，生成管理层可用的商业洞察
  Identify trends and issues from financial data and generate actionable business insights for management
- 以数据支持经营和决策
  Use data to support business operations and decision-making

主讲导师 Trainer Profile



淞老师(廖振雄 中校)

YS LT. KOL Bersekutu (PA) Song Liew

- 安式集团创办人 (MY & SG)
  Founder of ANC Group (MY & SG)
- 财政部认可税务代理
  Licensed Tax Agent
- 英国特许公认会计师
  Fellow Member of ACCA
- ACCA 中小企业全球论坛
  Member of ACCA SME Global Forum
- ACCA 马来西亚顾问委员会会员
  Member of ACCA Malaysia Advisory Committee
- ACCA亚太地区人力资本合作组织成员
  Member of ACCA Asia Pacific Human Capital Collaborative
- 澳洲特许公认会计师
  Member of CPA Australia
- 东南亚国家协会公认会计师
  Member of ASEAN CPA
- 马来西亚特许会计师
  Member of MIA
- 马来西亚特许税务公会会员
  Fellow Member of CTIM
- 人力资源部认证培训师
  HRD Corp Trainer
- 企业社会和可持续发展管理专家
  Certified CSR & Sustainability Management Professional
- 特许金融建模专家
  Chartered Financial Modeling Professional
- 认证理财规划顾问
  Certified Financial Planner
- 执业持牌公司秘书
  Practicing Licensed Company Secretary
- 会计工会和雇主协会学院培训师
  ACCA, MIA and MEF Academy Trainer
- ACCA 获奖者讲师
  Prize Winner ACCA Lecturer
- 大马零售连锁协会学院委员会会员
  Member of MRCA Academy

主讲导师 Trainer Profile



王美薇 老师

Ms Meldy Ong

- 王美薇是一位资深的高级软件顾问和培训教练，在SQL会计软件领域拥有十多年的丰富经验。她致力于通过提供全面的培训和指导，帮助专业人士和教育工作者掌握SQL软件，实现高效的数据管理和深度分析。她的专业领域涵盖SQL会计软件的应用、设计和实施高效的培训课程、优化会计数据管理流程，以及从财务数据中提取可执行的洞察。

- 在职业生涯中，王美薇培训了超过1,000名会计师、企业主管和行政人员掌握SQL在会计领域的应用，主导了多场由LHDN组织的电子发票研讨会。她的贡献还延伸至学术界，曾指导UITM、UUM、Unitar、UMS、KDU、Sunway和MMU等知名高校的讲师，将SQL培训融入课程教学中。凭借清晰的表达和支持性的教学风格，王美薇善于将复杂的技术概念转化为浅显易懂的语言，为学习者营造包容且鼓励的学习环境。