ARTIFICIAL INTELLIGENCE (AI) FOR TAXATION, SAP & MICROSOFT COPILOT INTEGRATION



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GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com

Introduction

Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration Training Course prepares tax and finance professionals to apply AI inside the systems they already use. Tax work depends on large volumes of transactional data held in ERP platforms, and AI now supports data extraction, anomaly detection, and document drafting within those environments. Integrating it properly, however, requires understanding both the tax logic and the system architecture. This course covers that combination. It explains AI concepts, SAP data structures, and Microsoft Copilot capabilities. Furthermore, it applies automation to tax compliance, indirect tax analysis, and reporting. In addition, it develops governance, accuracy controls, and tax risk monitoring. As a result, participants use AI in tax with control and confidence.

Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration Course Objectives

- Explain AI, machine learning, and generative AI concepts relevant to tax work.
- Interpret SAP data structures relevant to tax determination and reporting.
- Apply AI tools to tax data extraction, validation, and reconciliation.
- Automate indirect tax analysis including VAT and withholding tax checks.
- Use Microsoft Copilot for tax research, drafting, and document review.
- Apply prompt design techniques for reliable tax outputs.
- Automate tax reporting preparation and disclosure checklists.
- Detect tax anomalies, duplicates, and compliance exceptions with AI.
- Apply accuracy verification and evidence retention for AI-assisted tax work.
- Apply governance, controls, and regulatory standards to AI use in tax.

Course Methodology

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- Interactive lectures with practical tax, SAP, and Copilot cases.
- SAP tax data extraction and validation workshops.
- Copilot prompt design and document drafting exercises.
- Tax anomaly detection and reconciliation automation practice.
- Structured peer review with facilitator feedback on AI tax workflow design.

Who Should Take This Course

- Tax managers and tax accountants.
- Indirect tax and VAT compliance specialists.
- Finance professionals working in SAP environments.
- Tax technology and automation analysts.
- Internal auditors reviewing tax controls.
- Finance professionals adopting Microsoft Copilot.

Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration Course Outlines

Day 1: AI Foundations and the Tax Technology Landscape

- AI, machine learning, and generative AI in tax operations.
- Tax technology landscape: ERP, tax engines, and e-invoicing.
- SAP architecture overview: modules, tables, and master data.
- Tax-relevant master data and configuration in SAP.
- Data quality requirements for tax AI applications.

- AI suitability assessment for tax processes.
- Case study: mapping a tax process for AI enablement.

Day 2: SAP Tax Data and AI-Assisted Extraction

- Locating tax-relevant data in SAP tables and reports.
- Extracting transactional data for tax analysis.
- AI-assisted data validation and cleansing routines.
- VAT determination logic and exception identification.
- Withholding tax data extraction and verification.
- Reconciliation between SAP data and tax returns.
- Workshop: extracting and validating a VAT dataset.

Day 3: Microsoft Copilot for Tax Work

- Microsoft Copilot capabilities in Office applications.
- Copilot in Excel for tax data analysis and reconciliation.
- Copilot in Word and Outlook for tax drafting and correspondence.
- Tax research and summarising legislative updates.
- Prompt design for accurate and specific tax outputs.
- Verification protocols for AI-generated tax content.
- Workshop: drafting a tax memo with Copilot assistance.

Day 4: Automation, Anomaly Detection, and Reporting

- Automating recurring tax compliance routines.
- Anomaly detection for tax misstatements and duplicates.
- Risk scoring and prioritisation of tax exceptions.

- Automated preparation of tax reports and disclosures.
- Digital audit trails and evidence retention.
- Handling edge cases and escalation to specialist review.
- Workshop: building a tax anomaly detection routine.

Day 5: Governance, Controls, and Compliance Standards

- AI governance framework for tax functions.
- Data privacy, confidentiality, and security in tax AI use.
- Accuracy controls and human review points.
- Documentation standards for AI-assisted tax positions.
- Regulatory expectations and audit readiness.
- Monitoring, review cycles, and capability building.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration, participants will gain a thorough understanding of AI foundations in tax, SAP data structures and extraction, Microsoft Copilot capabilities for tax work, tax automation and anomaly detection, and AI governance and compliance controls. They will also acquire practical skills in SAP tax data extraction and validation, Microsoft Copilot application for tax research and drafting, tax automation and anomaly detection, and AI governance, accuracy controls and audit readiness. In addition, the course prepares them to integrate AI into tax processes with accuracy and proper control. Gentex Training Center delivers this programme with a strong focus on applied tax technology practice and responsible AI adoption.

LEARN BOLD. **LEAD BEYOND**
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FAQs for Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration course

Q1 What is the "Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration" course about?

It is a five-day programme on applying AI to tax work inside SAP and Microsoft environments. It covers AI concepts for tax, SAP tax data structures and extraction, Copilot use for tax research and drafting, tax automation and anomaly detection, and AI governance, accuracy controls, and audit readiness.

Q2 What are the key benefits of the "Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration" course?

Participants cut manual tax effort while strengthening control. The course improves tax data extraction and validation, speeds VAT and withholding tax analysis, improves Copilot output reliability through prompt discipline, automates reporting preparation, surfaces tax anomalies earlier, reduces error and penalty exposure, and builds documentation that supports audit.

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Q3 What skills will I gain from the "Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration" course?

Participants gain SAP tax data extraction and validation, Microsoft Copilot application for tax research and drafting, tax automation and anomaly detection, and AI governance, accuracy controls and audit readiness. These four skills cover the practical core of AI-assisted tax work.

Q4 What tools, methods, or standards are covered in the "Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration" course?

The course covers AI, machine learning and generative AI concepts for tax, the tax technology landscape including ERP, tax engines and e-invoicing, SAP module, table and master data structure, tax-relevant master data and configuration, data quality requirements, AI suitability assessment for tax processes, SAP tax table and report navigation, transactional data extraction, AI-assisted validation and cleansing, VAT determination logic, withholding tax extraction and verification, SAP to tax return reconciliation, Microsoft Copilot in Excel, Word and Outlook, tax research and legislative summarisation, prompt design for tax outputs, verification protocols for AI-generated content, recurring compliance automation, anomaly detection for misstatements and duplicates, risk scoring of tax exceptions, automated report and disclosure preparation, digital audit trails and evidence retention, escalation design for edge cases, AI governance frameworks, data privacy and confidentiality, accuracy controls and human review points, documentation standards, and regulatory expectations and audit readiness.

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Q5 How is the "Artificial Intelligence (AI) for Taxation, SAP & Microsoft Copilot Integration" course applied in real-world practice?

Participants apply the methods to their own tax operations. They locate and extract tax data from SAP, validate and reconcile it against returns, use Copilot for analysis and drafting with verification steps, automate recurring compliance routines, run anomaly detection on VAT and withholding tax data, prepare tax reports and disclosure checklists, maintain audit trails, and document AI-assisted tax positions for review. Many leave with an SAP tax extraction checklist, a Copilot prompt library for tax, and an AI tax governance framework ready to use.