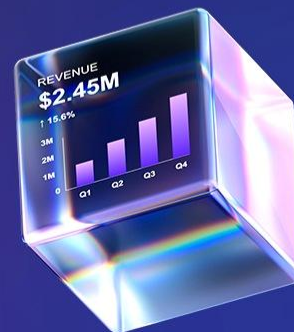




Autonomous Finance Realized

Welcome to the Delegation Era



Prophix Copilot 101: Prompting for Smarter FP&A

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What is this session? And what it isn't?

✔ What This Session *Is*

- A practical guide to prompting Prophix Copilot effectively
- How to think when prompting, not just what to type
- Real FP&A use cases you can apply immediately
- Use case prompts for:
 - Variance Analysis
 - Reporting
 - FP&A Plus Navigation and Support
- Tips and tricks to get better, faster, more reliable output

⊘ What This Session *Isn't*

- A replacement strategy — AI assists your team, it doesn't replace it
- A technical or IT session — no setup, configuration, or code
- A guarantee that every prompt works perfectly — quality prompting matters
- A security risk — Copilot operates within your existing Prophix permissions and data access controls
- A deep dive into AI or machine learning theory

Types of Agents in FP&A Plus

**Task
Assistant**

**Knowledge
Assistant**

**Budgeting
Agent**

**Reporting
Agent**

Task Assistant — The Navigator

What it Does

- Navigate FP&A Plus using natural language
- Execute system-level actions & open tools
- Launch reports, files & platform areas
- Distribute reports without navigating menus
- Accepts many variations of the same command

Best use cases

- Opening tools like Ad Hoc quickly
- Launching reports or specific platform areas
- Distributing reports to stakeholders
- Reducing repetitive manual navigation clicks

Task Assistant Prompts

 Task Assistant

Prompts:

"Launch Ad Hoc"

"Open Detailed Planning Manager"

"Distribute the Q4 financial report to my team"

"Navigate to the budget input form"

Open the Personnel planning model"

"Take me to the Revenue model"

"Launch the variance report for Stark Industries"

"Show me my task list"

Pro Tip: Task Assistant understands natural language — you don't need exact command names. "Please open ad hoc" and "launch the ad hoc analysis" both work just as well.

Knowledge Assistant — The Guide



What it Does

- Answers "how-to" questions about FP&A Plus
- Explains platform features in plain language
- Guides users through processes step by step
- Covers a wide range of platform concepts & terminology



Best use cases

- Learning a new feature or workflow
- Troubleshooting a process question
- Understanding platform terminology
- Onboarding new team members to FP&A Plus

Knowledge Assistant Prompts

 Knowledge Assistant

Prompts:

"How do I create a new filter in FP&A Plus?"

"What are the steps to distribute a report to multiple users?"

"What is InfoFlex and how do I create an InfoFlex process?"

"How do I set up a new budget version?"

"How do I copy values forward across months in a budget?"

"What is the difference between a scenario and a version in FP&A Plus?"

"How do I make a user an administrator?"

"What does unexplained balance mean?"

Pro Tip: Always phrase Knowledge Assistant prompts as questions — starting with "How do I," "What is," or "What are the steps" gets you the clearest, most detailed guidance.

Reporting Agent – The Analyst

What it Does

- Analyze financial & operational data within a model
- Answer business questions in plain language and understandable language
- Build tables & charts automatically
- Generate observations about your numbers, not just the data, but what it means
- Suggest next steps for deeper analysis

Best use cases

- Variance analysis (Actual vs. Budget / Forecast)
- Executive-level reporting & commentary
- Ad-hoc data exploration
- Explaining trends to leadership

Considerations

- Cannot update or write back data -> Budget Agent Will Do This
- Select Agent for the Specific Cube
- Cannot Refer to Line-Item Data, Comments, or Cell History

Budgeting Agent – The Executor

What it Does

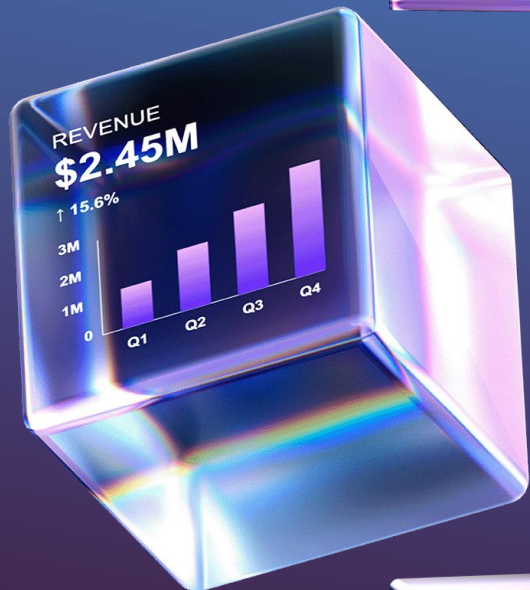
- Update budgets & forecasts within a model
- Adjust headcount, salaries & OPEX
- Spread changes across months or accounts
- Auto-completes based off defaults & suggests prompts for missing values

Best use cases

- Re-forecasting OPEX mid-cycle
- Adjusting salaries by % across departments
- Changing headcount assumptions
- Spreading values forward across time periods
- Adjusting rolling forecast scenarios

Considerations/ Best Practice

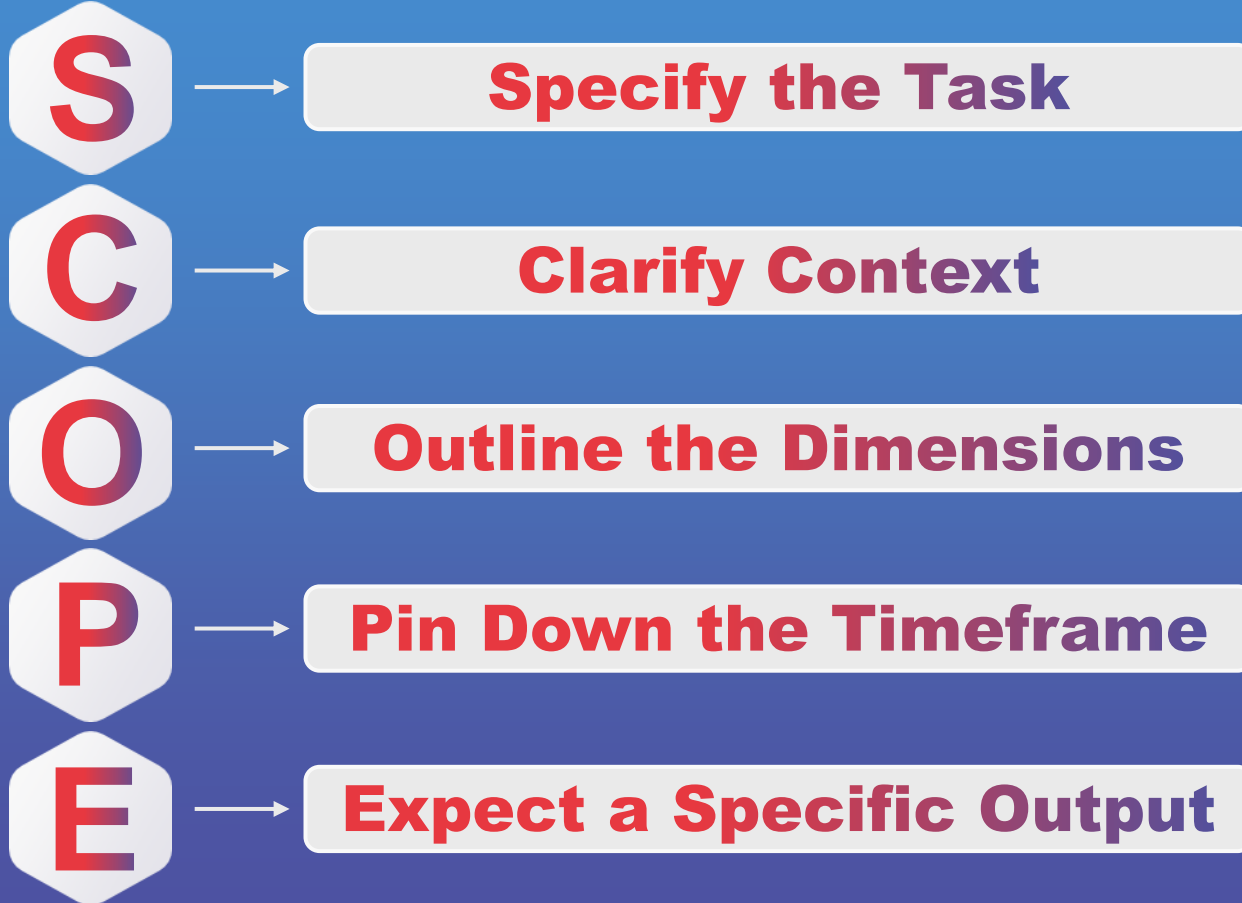
- Requires precise, specific instructions
- Best suited for Teams with small finance teams, not huge group of budget users
- Try out agent on a test version of data first
- Requires Ad Hoc Analysis – Full Access license



SCOPE Method



SCOPE



S - Specify the Task

What are you asking Copilot to do?

- Analyze
- Update
- Compare
- Explain
- Forecast

Choose the right type of task:

Question: insights, trends, explanations

Action: updates, allocations, adjustments

Be explicit, not implied – Don't Make Co-Pilot Guess

“Analyze variance” – WRONG!

“Analyze OPEX variance vs Budget for Q4 2025” – RIGHT!



C - Clarify Context

Define The Business Lens

- Actual vs Budget vs Forecast
- Scenario / Version
- Financial vs Operational

Add meaningful comparison

- Month vs Month
- Actual vs Plan
- Forecast vs Budget

Context Drives Relevance

Without context → generic output

With context → actionable insight



O - Outline the Dimensions

Specify key dimensions

- Account
- Department
- Entity
- Product / Region

Use Exact Member Names

- Match your model naming
- Use keys when possible

Be intentional with hierarchy

- Total vs specific member
- Parent vs child level
- Aggregated vs detailed



P - Pin Down the Timeframe

Always Include The Time Period

- Month
- Quarter
- Year
- Rolling periods

Be precise

- Q4 → Q4 2025
- Last 6 months → Last 6 months From Sept 2025
- FY → FY2026 Forecast



E - Expect a Specific Output

Define how the answer should look

- Summary
- Top drivers
- Ranked list
- Table or chart

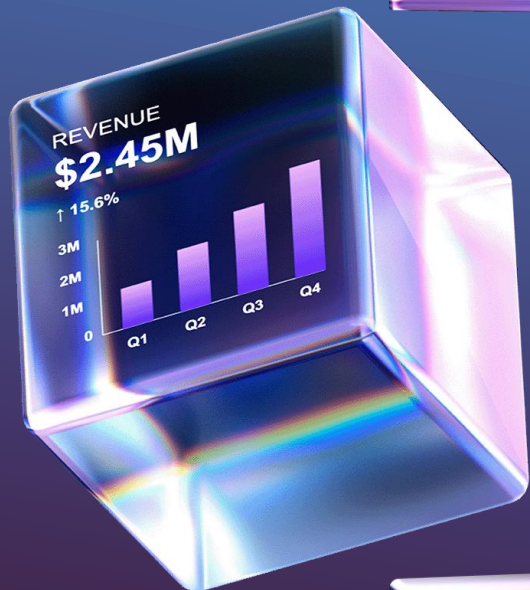
Add structure to results

- Top 5 contributors
- Summarize in 3 points
- Explain key drivers

You control the format of insight

- Not just *what* you get
- But *how* you get it





SCOPE in Action



Scope In Action

Prompt:

"Analyze OPEX variance for Actuals vs Budget for Q4 2025 across all departments in Stark Industries. Highlight the top 5 drivers and explain key changes."

Scope Breakdown:

S

**SPECIFY
TASK**

Analyze variance

Action verb tells Copilot exactly what to do

C

**CLARIFY
CONTEXT**

Actuals vs Budget

Sets the business lens for comparison

O

**OUTLINE
DIMENSIONS**

**OPEX, All Depts,
Stark Industries**

Scopes the data to the right slice

P

**PIN
TIMEFRAME**

Q4 2025

Removes ambiguity on the time period

E

**EXPECT
OUTPUT**

**Top 5 drivers +
explanation**

Defines format and depth of the response

Common Mistake: *"Analyze variance"* — no context, no dimensions, no timeframe. Copilot has nothing to work with and will return a generic or incomplete result.

Scope In Action

Prompt:

"Create a monthly report of net income (Key:NI) comparing Actuals vs Budget for Q1–Q3 2025, broken down by department for Stark Industries. I want departments in the rows and months in the columns with each quarter summed up after each quarter's respective months."

Scope Breakdown:

S

**SPECIFY
TASK**

**Create a monthly
report**

Clear action — build a
structured report

C

**CLARIFY
CONTEXT**

Actuals vs Budget

Sets the business lens for
comparison

O

**OUTLINE
DIMENSIONS**

**Net Income (NI),
Departments, Stark
Industries**

Pinpoints account, org
level & entity

P

**PIN
TIMEFRAME**

**Q1–Q3, 2025,
Monthly, Quarterly**

9 months of granular time
detail

E

**Expect
Output**

**Rows = Depts,
Columns = Months
+ QTR totals**

Exact layout specified —
no guessing needed

Common Mistake: *"Show me net income by department" — no timeframe, no version, no layout. Copilot picks the format for you and it likely won't match what you need.*

Is Your Data Safe With Copilot? Absolutely

Copilot Can See Your Data — Not Take It

- Think of it like a very smart colleague who can read your reports but can't take them home
- Your data never leaves Prophix — ever
- Nothing is shared with outside AI companies

You Control Who Sees What

- Copilot only shows people what they already have permission to see
- If you can't view a report today, Copilot won't show it to you either
- Your existing access rules stay fully in place

Every Action is Logged

- Every question asked and every change made is recorded
- Nothing happens in the background without a trace
- Your organization always stays in full control

Bottom line: Prophix Copilot is not ChatGPT. It doesn't learn from your data, it doesn't share your data, and it doesn't work outside the walls of your Prophix environment. It's AI built specifically for finance — with the controls your team already trust

SALES - Prophix One Intelligence Roadmap (1)



FP&A Insights

- ✓ *Comment Creation*
- ✓ *Variance Analysis*
- ✓ *Predictive Forecasting*



FP&A Plus Copilot

- ✓ *Data Insights*
- ✓ *Knowledge Assistant*



Platform Wide AI

- ✓ *Transaction matching for Account Reconciliation*
- ✓ *Account Reconciliation & Financial Consolidation Knowledge Assistant*
- ✓ *MS Teams & Excel Integration*



Agentic AI For FP&A Plus

- ✓ *Budgeting Agent*
- ✓ *Reporting Agent*
- ✓ *Reconciliation Agent*
- **Logic Tracing**
- **Formatted Report Creation**
- **Agentic Forecasting**
- **Modelling Agent: Create & Maintain Models**



Autonomous Finance

- ✓ *Reconciliation Agent*
- **Consolidation Agent**
- **Board Deck (PPT) Creation**
- **Proactive Anomaly Detection & Insights**
- **Budget Workflow Orchestration**
- **Close Automated**
- **Self-managing integrations**

Capabilities and Features

Additional Sessions on AI

The Future of Finance Workflows: Prophix One Agents in Action – Today 4:15 PM

Gurpreet Chaggar, Prophix

AI-powered agents automate planning cycles, streamline reporting, and surface actionable analysis in seconds. See the Budgeting Agent and Reporting Agent live in action — and be among the first to experience a brand-new Agent unveiled at Prophix Live.

Prophix Copilot in the Microsoft Ecosystem – Tomorrow at 9:15 AM

Dorian Cziriak, Prophix

See how Prophix Copilot extends into the Microsoft environment — Teams, Excel, collaboration tools — to meet finance teams where they work. Integration experiences and a more connected FP&A workflow.

Thank you



Scan the QR code and complete
the course evaluation to earn your
CPE credit

Sameer Iqbal

This is coming. And you can help shape it.

What you saw today isn't available yet — but your voice determines what it becomes.

We're inviting customers to be part of what comes next — not as observers, but as contributors. The experiences you have, the friction you feel, and the outcomes you need are exactly what this product should be built around.

Your experience shapes the product. We're here to listen.

At the conference

Visit the product & design team

Come talk to us directly. Tell us what you need, what's missing, and what would make this indispensable for your team.

Early access group

Influence what gets built next

Join our early access group to give direct input on the roadmap, test new capabilities before general release, and ensure the product is built around how your team actually works.



What you can do next

Each of these steps will move you closer to the experience you saw today.

Expand your platform

Explore FP&A Plus

Unlock advanced driver-based modelling, expanded scenario planning, and deeper workflow automation — built directly on top of what you use today. **Same data. Same team. Significantly more capability.**



[Download the FP&A Plus comparison guide](#)

Expand your platform

Connect your full platform

Prophix connects planning, consolidation, and reporting into a single environment. Each application you add reduces the number of systems your team has to manage.



[Book a call with your account manager](#)

Have a voice

Join the early access group

Give direct input on the roadmap, test new capabilities before general release, and ensure the product is built around how your team actually works.



This week

Visit the product & design team

We're here at the conference. Come find us, share your experience, and tell us what would make this indispensable for your team.

Your feedback directly shapes what we build next.