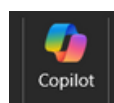


# 7 FINANCE USE CASES FOR COPILOT IN EXCEL

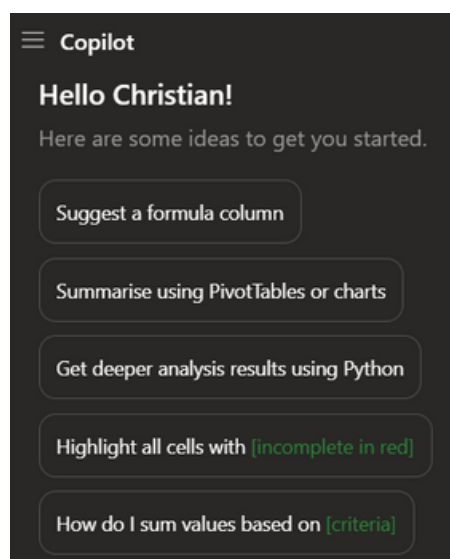


by Christian Martinez

## What is Copilot in Excel?

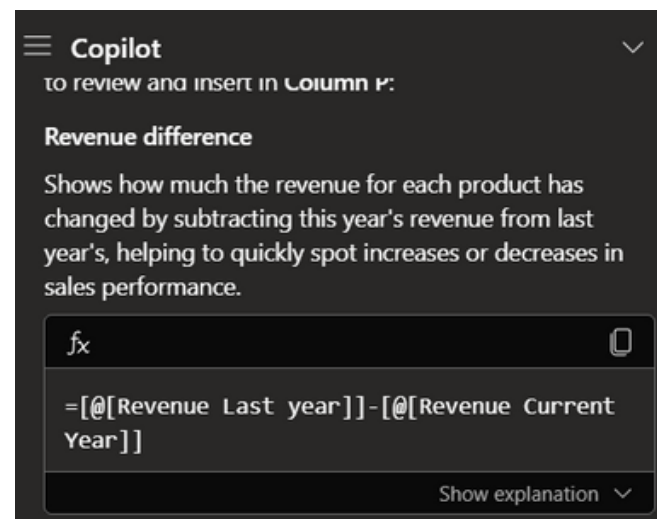


Microsoft Copilot in Excel is no longer just about simple formulas and charts—it can now use Python to help FP&A teams, analysts, and business users analyze, visualize, and automate data tasks with natural language.



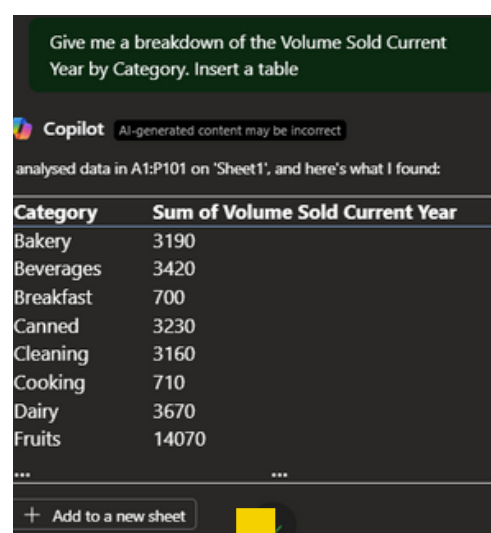
## 1) Variance Analysis

Prompt: Compare Revenue Last year and Revenue Current Year



## 2) SKU Level Analysis

**Prompt:** Give me a breakdown of the Volume Sold Current Year by Category. Insert a table

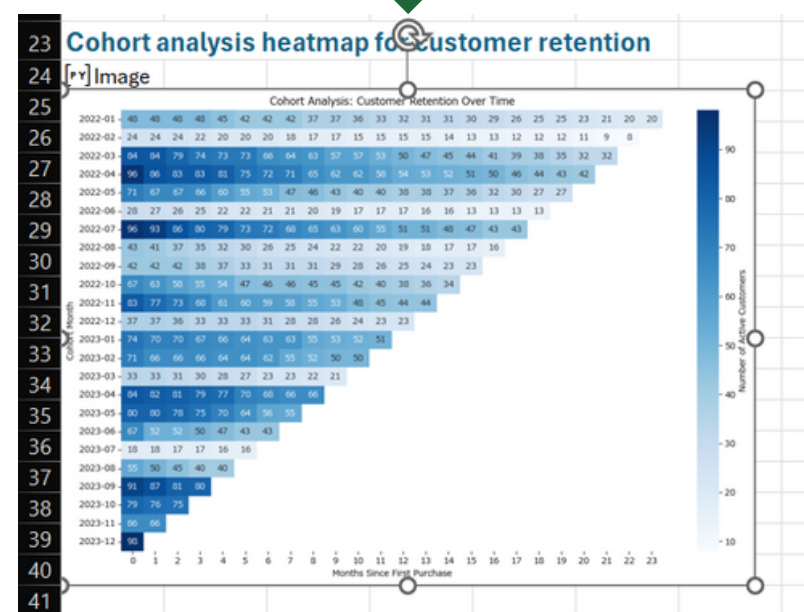
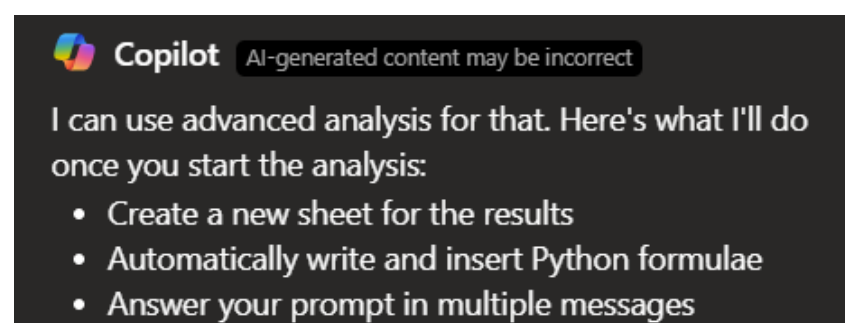


You can add this new analysis into a new sheet →

Category	Sum of Volume Sold Current Year
Bakery	3190
Beverages	3420
Breakfast	700
Canned	3230
Cleaning	3160
Cooking	710
Dairy	3670
Fruits	14070
Grains	15010
Hygiene	6220
Meat	3350
Nuts	1250
Seafood	3920
Snacks	840
Vegetables	19610
Grand Total	82350

## 3) Cohort Analysis

**Prompt:** Use Python and do a cohort analysis heatmap visualization from this data



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# 7 FINANCE USE CASES FOR COPILOT IN EXCEL

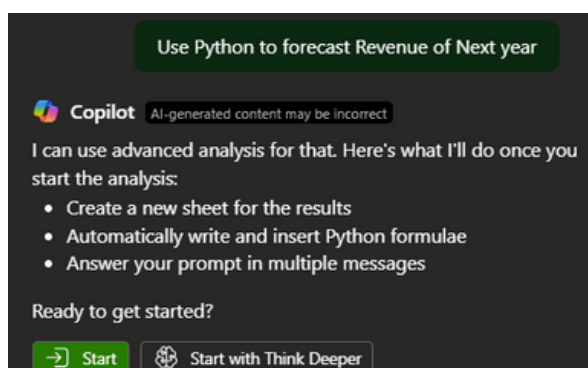


by Christian Martinez

## 4) Forecasting

**Prompt:** Use **Python** to forecast Revenue of Next year

Pro Tip: By telling it to use Python, it will 10x improve its performance



First, Copilot will propose you a plan for you to approve

It will explain its approach for forecasting (e.g. time series models)

A time series forecasting approach will be used to predict the revenue for next year. Since the data contains 'Revenue Last year' and 'Revenue Current Year' for each product, the total revenue for each year can be calculated. With only two years of data, traditional time series models may not be reliable, but a simple linear trend or percentage change can be used to estimate next year's revenue. The next step is to aggregate the total revenue for each year and fit a simple model to forecast the next year's revenue.

23	Forecast total revenue for next year using linear trend		
24	[*] DataFrame		
25			
26	Preview		
27	Year	Forecasted Revenue	
28	0 Next Year	234417.8	
29			

```
# Fit a linear model (polyfit degree 1)
coeffs = np.polyfit(years, revenues, 1)

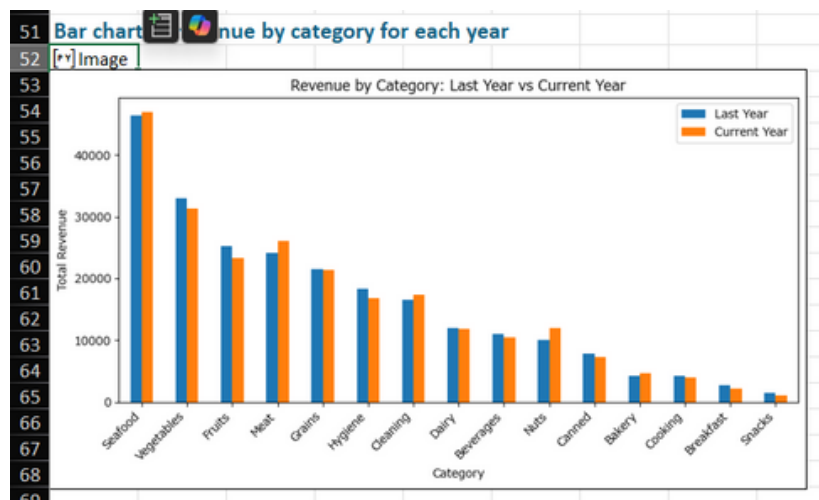
# Forecast for next year (year 3)
revenue_next_year = np.polyval(coeffs, 3)

# Output as DataFrame for Excel compatibility
forecast_df = pd.DataFrame({'Year': ['Next Year'],
                             'revenue': [revenue_next_year]})
```

It will show you the result but also show you what happens “under the hood” (the Python code used)

## 5) Quick Data Visualizations

**Prompt:** Show a bar chart comparing revenue by category for each year



## 6) Generate Insights

**Prompts:**

Generate insights,  
Add all insights to  
grid

Add all insights to grid

**Copilot** AI-generated content may be incorrect  
Done! I added all insights from Table2 to a new sheet.  
To continue analysing with more prompts, go back to the source table.



Pro Tip: You can then customise all of these native Excel charts as you like

## 7) Conditional Formatting

**Prompt:** Apply conditional formatting to show me all products with higher promotion this year than last year

**Copilot** AI-generated content may be incorrect  
Sure! Looking at A1:P101 on 'Sheet1', here's 1 conditional formatting rule to review and apply:

- **Customised Formula:** Apply a conditional format on cells in Table2 body using the formula below
  - Fill colour: green
  - Font colour: black

AaBbCc

	Product	Unit Price	Volume Sold	Volume Sold	Margin %	Revenue	Revenue	Square	Square	Promotion	Promotion
1	SKU	Item	Category	Last Year	Current	Last Year	Current	Last Year	This Year	Last Year	This Year
2	1	Apple	Fruits	\$ 0.50	\$ 0.45	1000	1010	20%	22%	\$ 500.00	\$ 454.50
3	2	Banana	Fruits	\$ 0.30	\$ 0.25	1100	900	18%	19%	\$ 330.00	\$ 225.00
4	3	Milk	Dairy	\$ 1.20	\$ 1.30	900	820	25%	26%	\$ 1,080.00	\$ 1,066.00
5	4	Cheese	Dairy	\$ 5.00	\$ 4.25	800	670	30%	31%	\$ 4,000.00	\$ 2,825.00
6	5	Bread	Bakery	\$ 2.00	\$ 2.25	1200	1000	15%	16%	\$ 2,400.00	\$ 2,250.00
7	6	Eggs	Dairy	\$ 3.00	\$ 3.22	1300	1160	23%	24%	\$ 3,900.00	\$ 3,777.00
8	7	Chocolate	Snacks	\$ 1.50	\$ 1.29	950	840	28%	29%	\$ 1,425.00	\$ 1,086.00
9	8	Chicken	Meat	\$ 7.00	\$ 6.64	650	720	32%	33%	\$ 4,550.00	\$ 4,780.80
10	9	Beef	Meat	\$ 8.00	\$ 6.72	600	640	34%	35%	\$ 4,800.00	\$ 4,300.80
11	10	Potato	Vegetables	\$ 0.60	\$ 0.69	900	980	21%	22%	\$ 540.00	\$ 678.20
12	11	Tomato	Vegetables	\$ 0.70	\$ 0.78	850	740	20%	22%	\$ 595.00	\$ 577.20
13	12	Onion	Vegetables	\$ 0.40	\$ 0.43	950	870	19%	21%	\$ 380.00	\$ 372.10
14	13	Carrot	Vegetables	\$ 0.50	\$ 0.53	900	890	22%	24%	\$ 450.00	\$ 471.70
15	14	Green Peas	Vegetables	\$ 0.80	\$ 0.81	800	680	20%	22%	\$ 640.00	\$ 552.80
16	15	Butter	Dairy	\$ 4.00	\$ 4.33	750	820	28%	30%	\$ 3,000.00	\$ 3,558.00
17	16	Cereal	Breakfast	\$ 3.50	\$ 3.10	780	700	25%	27%	\$ 2,730.00	\$ 2,170.00
18	17	Olive Oil	Cooking	\$ 6.00	\$ 5.67	700	710	30%	32%	\$ 4,200.00	\$ 4,025.70

by Christian Martinez