

AUTOMATE

Intermediate

30 MIN

• UPDATED 2026-10-01

Optimize financial operations with a Copilot-written Python script.

Ask Copilot to write the Python script that automates a tedious recurring finance task instead of doing it by hand every cycle.

MICROSOFT 365

Excel

WORKS WITH

Copilot

Business Outcome

A reusable script that replaces a manual data-collection or reconciliation step every reporting cycle.

Workflow Steps

Step 1: Describe the manual task in plain language

Excel

Write out exactly what you currently do by hand — which files you open, what you copy, what you calculate — as if explaining it to a new analyst. Vague requests produce scripts that miss edge cases your manual process already handles.

Step 2: Ask Copilot to write the Python script

Copilot in Excel

Give it the task description and a sample of the input data, and ask for a Python script using Excel's built-in Python integration rather than a macro – it's easier to read and debug later.

PROMPT

Here's how I currently reconcile these two exports by hand: [steps]. Write a Python script I can run in Excel that does the same thing, and flag any row it can't confidently process instead of guessing.

Step 3: Test it against a cycle you've already reconciled manually

Excel

Run the script against last month's data, where you already know the correct answer, before trusting it on new data.

Step 4: Save it as the new standard process

Excel

Save the script in the workbook's Python cell with a short comment block above it explaining what it does and which files it expects as input, and note in your team's process documentation where to find it – without that pointer, the next person doing this task defaults back to the familiar manual version instead of discovering the script exists.

Source: [Microsoft Copilot Scenario Library – Optimize your financial operations (2026)] (<https://adoption.microsoft.com/en-us/scenario-library/finance/optimize-your-financial-operations/>)

✓ Check the work

- The script's output matches a manually-reconciled prior period exactly.
- Every flagged/skipped row is reviewed, not silently ignored.
- The script is saved somewhere the next person doing this task will actually find it.



Expected Outcome

A working Python script, run from Excel, that produces the same output the manual process did – in minutes instead of hours.

Want help rolling this out across your team? **[Go to Liminals.Tech](#)** ■