

Playbook: AI-Enabled  
Finance Ops

SWIPE



# How to Automate Your Monthly Budget Review with AI

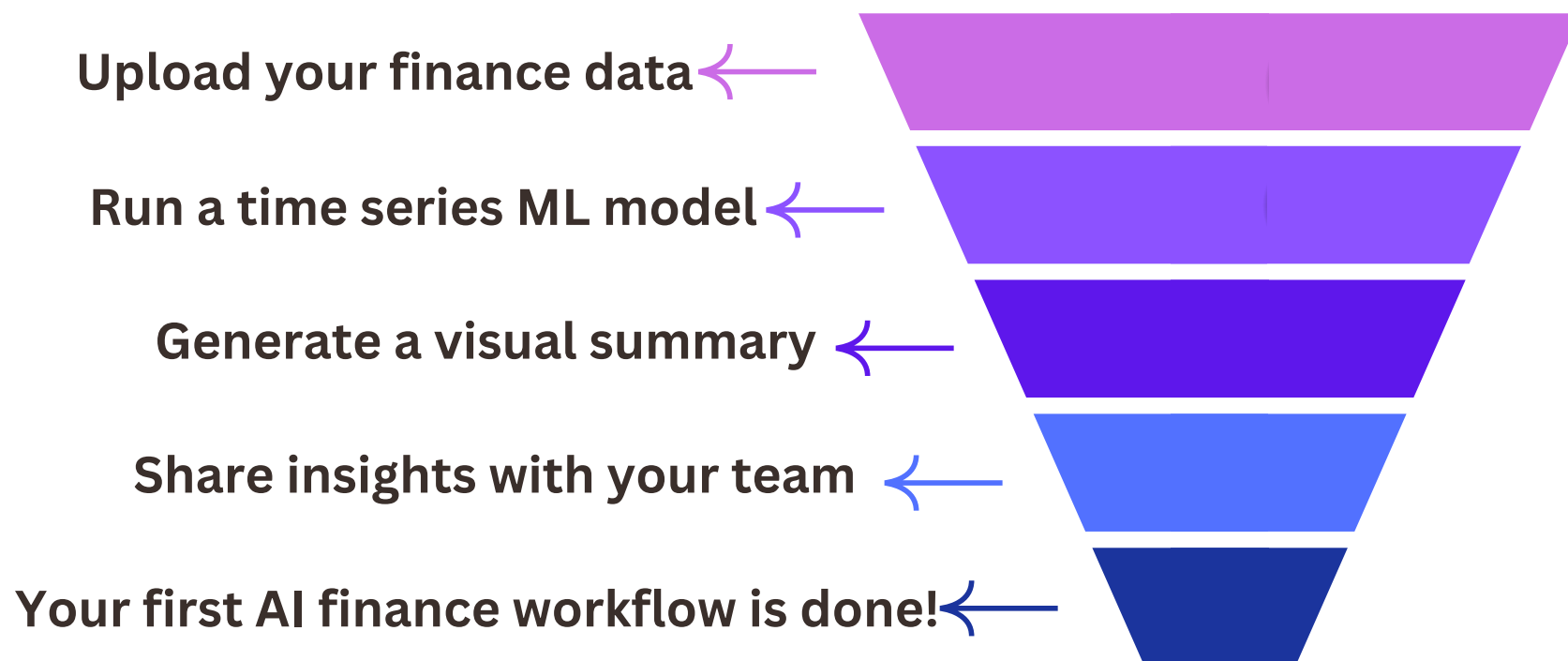
Practical steps to go from  
spreadsheets to smart insights

@Fintellect AI



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## What's Happening Here?

This AI-powered finance workflow helps you turn raw financial data into smart, actionable insights — faster than ever.

By uploading your monthly data and applying a time series model (even via a code interpreter), you automate what used to take hours: visual summaries, key trends, and insights. You can now share those insights instantly with your team and make decisions backed by data, not guesswork.

✨ Whether you're a CFO, a founder, or a financial consultant — this is your first step toward AI-enabled finance operations.



## Step 01

# Upload your monthly finance data

CSV, Excel, or data from your accounting software.

*Sidenote: Keep it simple – just revenues, expenses, and dates.*



## Step 02

# Run a time series ML model

**Detect trends, seasonality, and unusual spend patterns.**

*You can do this with a finance-trained AI or a code interpreter –  
no coding needed.*



## **Step 03**

# **Generate a visual summary**

### **Charts + key insights:**

- **Biggest spend category**
- **Deviations from the plan**
- **Forecast for next month**



## Step 04

# Share insights with your team

**Automated summary + visuals = better  
decisions, faster**



## Step 05

**You just built your  
first AI finance  
workflow**



**No data scientist needed.**

**Next up: Forecasting, dashboards & KPI  
tracking!**



# Was this helpful?

Ask any questions in the comments.

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