



How finance teams can use Codex

Use Codex to turn close workbooks, revenue dashboards, support folders, and Slack threads into a month-end close deck.

Why Codex for finance

Finance teams need to move fast without losing the trail. Close workbooks, dashboards, support folders, and Slack threads all hold pieces of the story. Codex can draft review materials, explain movements, and keep assumptions, source tabs, and backup files visible for the human check.

Sample prompt set for a close deck

Use the April revenue dashboard, April close workbook, April close support folder, March close deck, and #finance-close Slack thread. Refresh the April month-end close deck. List assumptions, missing sources, and tabs to check before review.

Explain the biggest movements in revenue, operating expense, and headcount with source tabs.

Draft speaker notes for the updated April month-end close deck.

Write likely CFO questions and the backup file or tab for each one.

Create an audit support checklist from the April close support folder.

Turn the April close steps into a checklist the team can reuse next month.



Additional use cases

- Explain metric movements
- Prepare forecast variance
- Prep CFO questions
- Build audit checklist
- Compare vendor invoices
- Build board metric glossary
- Clean planning inputs
- Trace support files