

Orchestrating An FP&A Agent

Triggers

- **Design:** Triggers define when and how the bot runs — time-based, event-based, or manual
- **Build:** Schedule trigger fires on a set day; Edit Fields node injects the reporting period so every run is self-contained

Data

- **Design:** Agents need boring, reliable data in a clean, repeatable format
- **Build:** Google Drive download pulls 3 datasets automatically; Code node labels and separates P&L, POS, and commentary so

Thinking

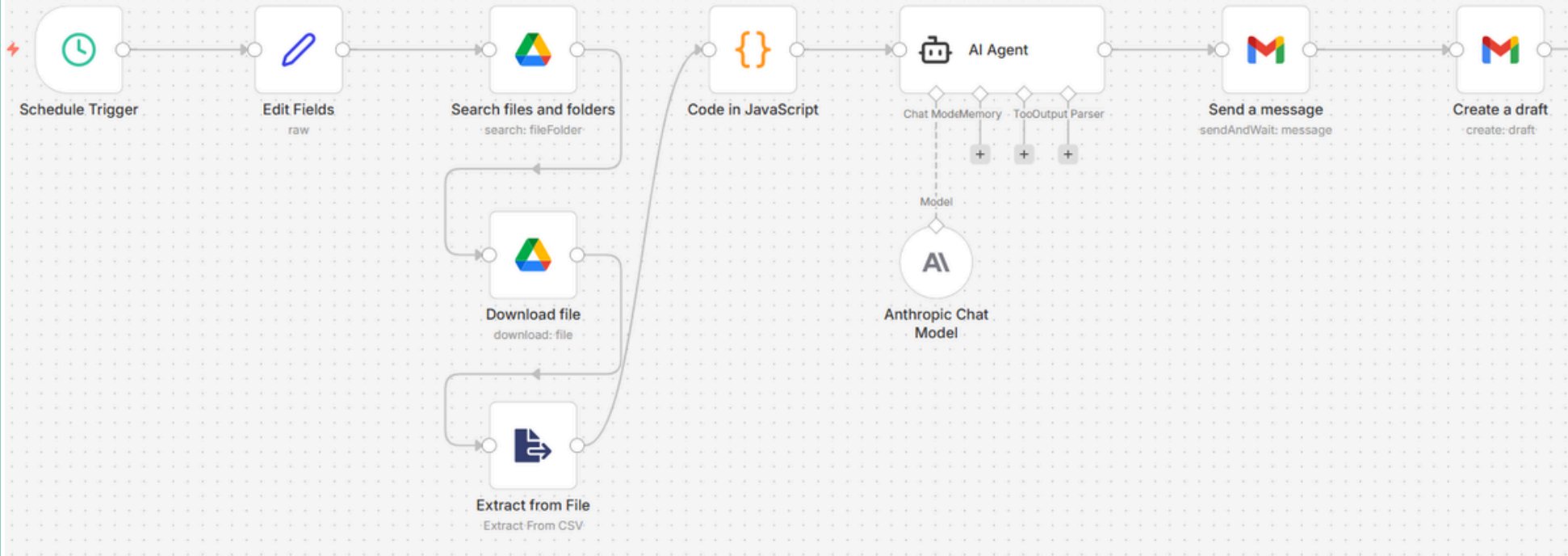
- **Design:** The master prompt is the rulebook — it translates policies and controls into the agent's thinking
- **Build:** System prompt enforces variance calculation rules, materiality language, and output structure

Guardrails

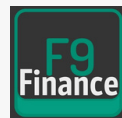
- **Design:** Human-in-the-loop — bot prepares, analyst reviews, manager approves
- **Build:** Draft watermark baked into every email; approval email sent before any draft is created; parse error fallback

Outputs

- **Design:** Outputs must fit real FP&A workflows — format matters more than AI sophistication
- **Build:** Output parser extracts clean subject and HTML; Gmail draft is formatted for direct distribution with no manual cleanup required



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