FP&A Lite for Unit4 Financials by Coda

FACTSHEET

UNIT4
In business for people

Why FP&A Lite and Unit4 Financials by Coda?

FP&A Lite helps transform Unit4 Financials by Coda into a more strategic platform, with better dashboarding for analysis. You can be up and running with the integrated offering in as little as five days.

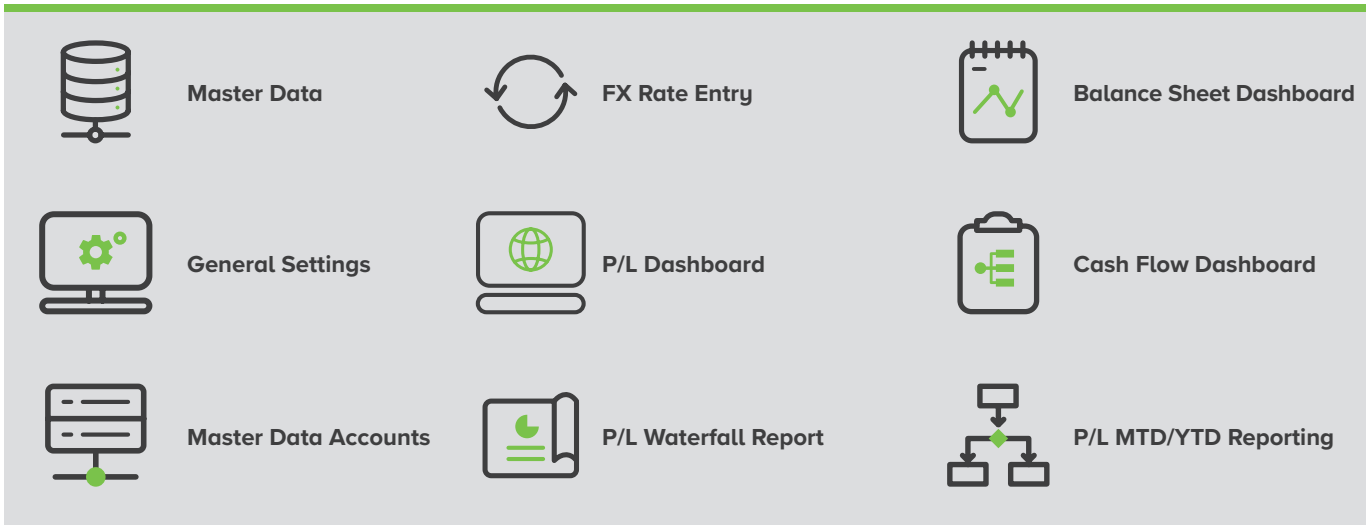
Unit4 Financials (U4F) by Coda is financial management software for accounting, procurement, billing, asset management, general ledger, accounts payable, receivable, and projects. **FP&A Lite** gives you the power to perform self-service analysis on financial profit & loss, balance sheet, and cash-flow statements enabling users to discover and understand financial information behavior through a single lens for a **seamless user experience.** It helps:

- Accelerating transformation through a single source of truth with reduced data handling.
- Increasing transparency for more structured analysis of financial data.
- Improving insights and collaboration, helping identify opportunities easier.
- Provides devolved self-explanatory, easy-to-access reporting.
- Simplifies complex data into meaningful insight for better decision-making.

FP&A Lite is a cloud-only option with a Unit4 Financials for Coda cloud environment as a prerequisite to set up.

What are the benefits?

The solution enables better data visualization, with different views supporting improved financial analysis. Access the following U4F by Coda data and FP&A dynamic, interactive visualizations that support native drill-through to the underlying transaction detail:



How does FP&A Lite work?

All system users can create their own dashboards for greater insights into organizational financial data. These can be shared as a public dashboard for increased collaboration and to support decision-making.

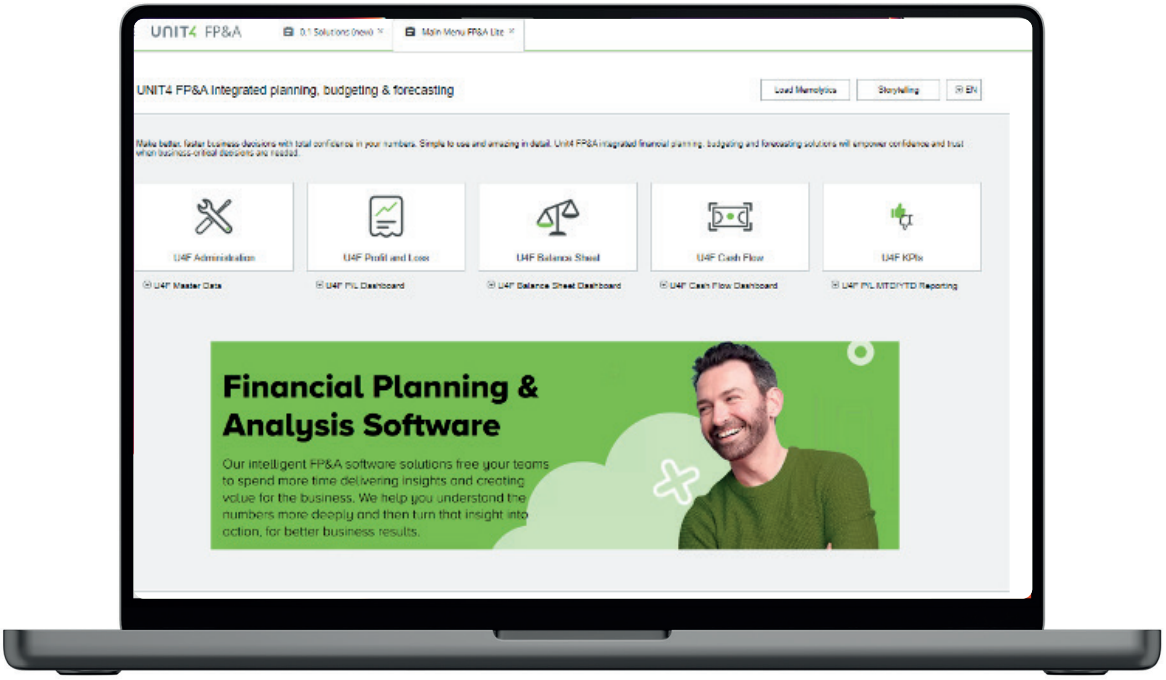
FP&A Lite can be integrated to U4F by Coda in as little as five days via four steps: Engage, Onboard, Test and Deploy. These steps begin by understanding best practices and delivery approach and how these align with the business objectives. Next, all activities working towards a final roll-out concept, project deliverables, technical requirements, and planning are scheduled. All functions are then tested as a part of the integrated system tests and the user acceptance tests before the solution is up and running. Post-go-live support is available for two weeks after go-live by the project team.

Unit4 FP&A is divided into a classic three-layer cloud architecture at the database level, in-memory application level, and client layer. Data integration starts with the extraction process of relevant source data, which is then prepared and transformed at this intermediate level for transfer to the cloud.

Transactional data such as actuals and budgets from U4F by Coda are loaded into FP&A Lite on a Year-To-Date basis. To drill down to a transactional level from the FP&A solution, our superior native integration and single offering is used, meaning seamless drill-through to the underlying transaction comes as standard. This enables users to discover and understand financial information behavior through a single lens for a seamless user experience.

Each customer gets a maximum of 20 users in total:

- 5 are Storytellers who can create new public & private Dashboards and edit or delete existing Dashboards.
- 15 are Analytics Users who can view public Dashboards and create, edit, or delete private Dashboards.



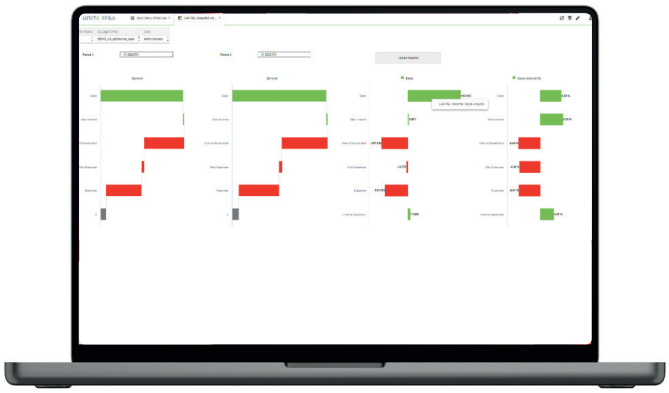
Requirements

FP&A Lite is a **cloud-only option** with a Unit4 Financials cloud environment as a prerequisite to set up.

Unit4 Financials by Coda

U4F by Coda is of strategic importance to Unit4, with significant future investment and product enhancements.

A continuous release every quarter will ensure longevity and innovation delivered via the people platform that meets the needs of the Unit4 Financials by Coda community.



"87% of organizations are challenged by the processes that underpin financial management. These challenges include the speed and agility of processes, a lack of access to data and outdated processes and systems."

Unit4 Business Index 2022

For more information go to:

unit4.com

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