

The specialists for integrated planning



Connector - Unit4 FP&A Integration in Power BI



Seamless connection - Unit4 FP&A and Power BI

Are you currently using Unit4 FP&A (prevero) and would like to analyze and report your data in Microsoft Power BI? Then we have good news for you: The Power BI Connector from smartPM.solutions is now available. This connector establishes a seamless connection to all structure, transaction and metadata in prevero and gives you live access to it in Power BI.



Expertise from 25 years of market experience

"Our project-experienced consulting team not only adapts the planning solutions to the company's requirements, but also helps to set up smart workflows and optimize processes. Our plus: a wealth of expertise and practice proven solutions from over 25 years of market experience."

Alexander Hein, CEO smartPM.solutions

What customers say about us

"The integration of Power BI by smartPM.solutions has revolutionized our financial planning and given us a completely new perspective on our company data. I would highly recommend MS Power BI technology and working with smartPM.solutions to anyone."

Rolf Herrmann
Head of Subsurface Engineering



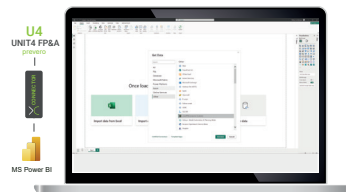
Direct access to Unit4 FP&A source data

With direct access to Unit4 FP&A prevero source data, the Power BI Connector from smartPM.solutions offers a simpler, faster and less error-prone alternative to cumbersome CSV exports. This gives you more time to use your data for analysis and reporting.



FP&A data in Power BI with just a few clicks

You can call up your FP&A data in Power BI with just a few clicks. All the data you require is displayed in the usual structure, with dimension hierarchies and links to the FP&A cubes. The data can be loaded into Power BI as raw data or already structured for further processing.



Top Client Ratings

High Customer Satisfaction

4,9/5 ★ Project Rating

6,8/7 ★ Support Rating



Find the best solution

Our business management experts will be happy to help you find the right solutions for your company. Reliable, structured, organized.

Expert Chat ➡



We are happy to advise you - expert meeting with demo

Get in touch with our experienced consultants and learn more about the Power BI Connector from smartPM.solutions

Simply book an informal, free expert discussion.



Head Office:
Seidengasse 9/2.3
1070 Vienna
Austria

Tel. +43 / (0)13580070
E-Mail: info@smartpm.solutions
Web: www.smartpm.solutions

Contact ➡



in XING YouTube kununu

We look forward to hearing from you!

You can also find us on:

Analysis - Budgeting - Planning
Forecasting - Reporting - Consolidation

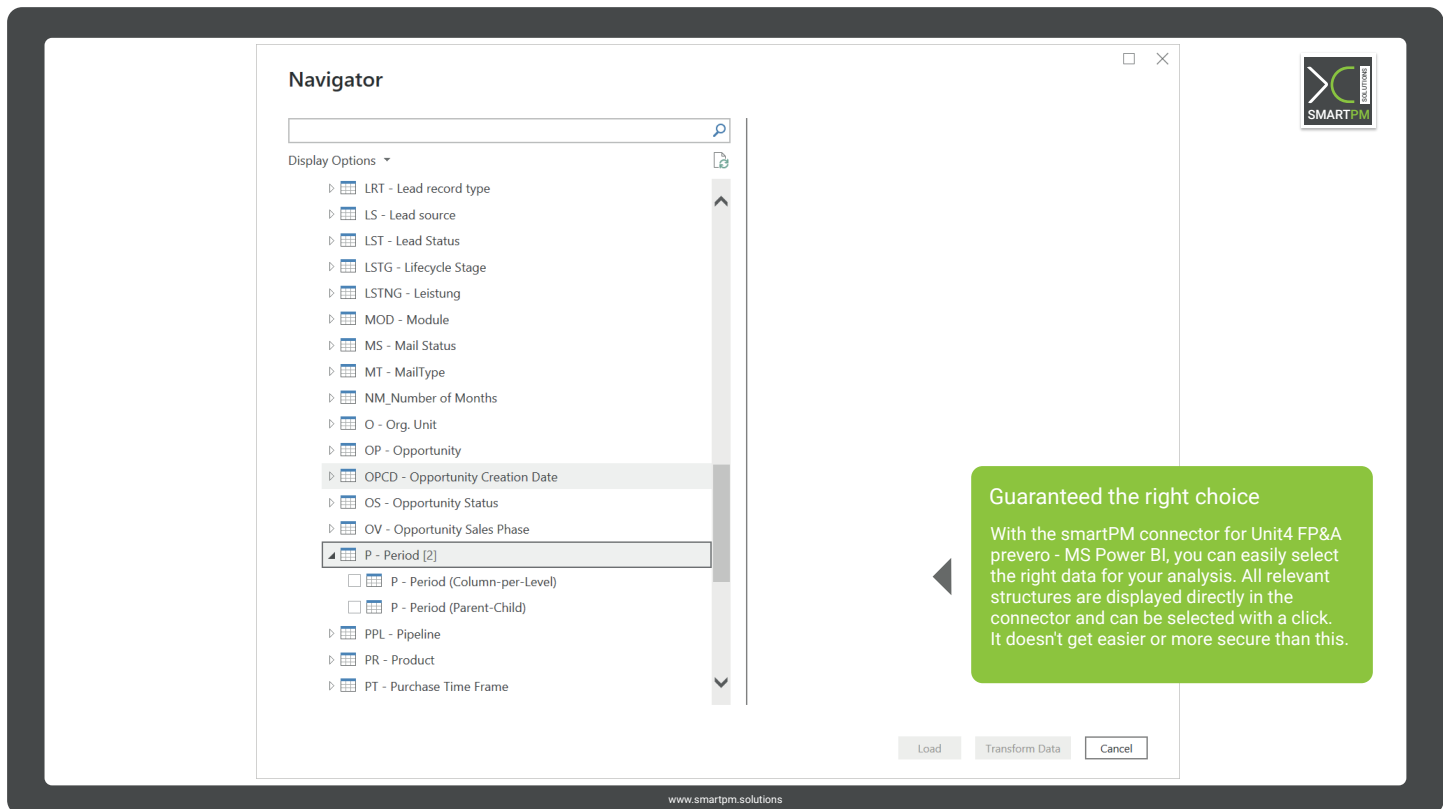
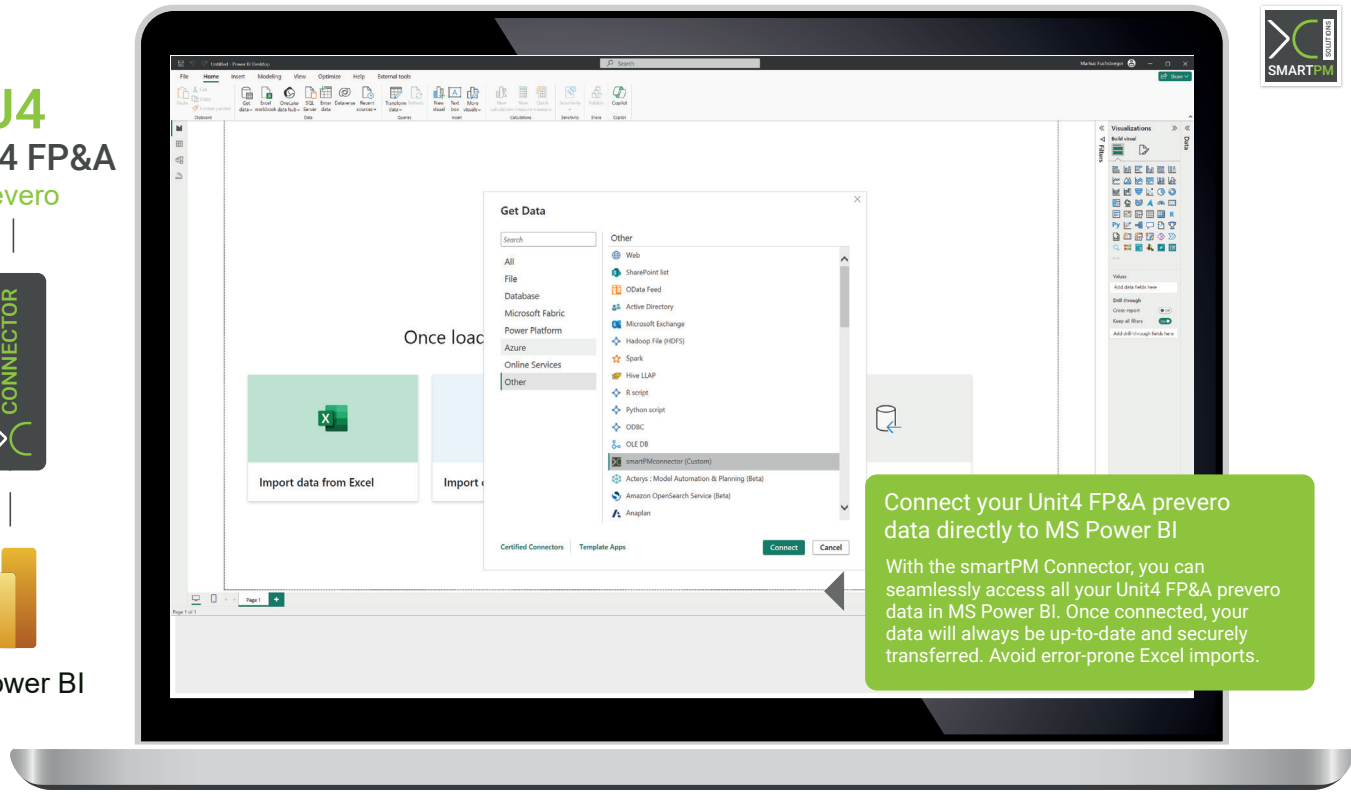
WE THINK CONTROLLING

www.smartpm.solutions

U4
UNIT4 FP&A
prevero



MS Power BI



Navigator



🔍

Display Options 📄

- 📁 Microsoft SQL Server: Driver={ODBC Driver 17 for SQL Server};Server=...
- 📅 2019 [3]
 - 📊 sPM sales analysis
 - 📊 sPM sales analysis - new
- 📅 sPM sales analysis demo [2]
 - 📊 Cubes [96]
 - 📊 Dimensions [68]

Data access in the usual form

With the MS Power BI Connector for Unit4 FP&A prevero, you can access all required data in the usual structure, with dimensional hierarchies and in connection with the FP&A cubes. Work with raw or structured data – entirely according to your preferences.

www.smartpm.solutions

File Home Transform Add Column View Tools Help

Close & Apply Close New Source Recent Enter Data Data source settings Data Sources Manage Parameters Refresh Preview Advanced Editor Manage Choose Remove Columns Keep Remove Rows Sort Split Column Group By Data Type: Whole Number Use First Row as Headers Replace Values Merge Queries Append Queries Combine Files Combine Text Analytics Vision Azure Machine Learning AI Insights

Queries [1]

P - Period (Column-per-Level)

	Y2 ID_1	APC LVL_1	Y2 ID_2	APC LVL_2	Y2 ID_3	APC LVL_3	Y2 ID_4	APC LVL_4
1	2 distinct, 1 unique	2 distinct, 1 unique	9 distinct, 0 unique	9 distinct, 0 unique	33 distinct, 0 unique	33 distinct, 0 unique	97 distinct, 96 unique	9
2	69 Total	69 Total	70 2018	70 2018	70 2018	70 2018	70 2018	70 2018
3	69 Total	69 Total	87 2019	87 2019	87 2019	87 2019	87 2019	87 2019
4	69 Total	69 Total	104 2020	104 2020	104 2020	104 2020	104 2020	104 2020
5	69 Total	69 Total	123 2021	123 2021	123 2021	123 2021	123 2021	123 2021
6	69 Total	69 Total	138 2022	138 2022	138 2022	138 2022	138 2022	138 2022
7	69 Total	69 Total	155 2024	155 2024	155 2024	155 2024	155 2024	155 2024
8	69 Total	69 Total	172 2025	172 2025	172 2025	172 2025	172 2025	172 2025
9	69 Total	69 Total	189 2023	189 2023	189 2023	189 2023	189 2023	189 2023
10	69 Total	69 Total	70 2018	70 2018	70 2018	70 2018	70 2018	70 2018
11	69 Total	69 Total	70 2018	70 2018	70 2018	70 2018	70 2018	70 2018
12	69 Total	69 Total	70 2018	70 2018	70 2018	70 2018	70 2018	70 2018
13	69 Total	69 Total	87 2019	87 2019	87 2019	87 2019	87 2019	87 2019
14	69 Total	69 Total	87 2019	87 2019	87 2019	87 2019	87 2019	87 2019
15	69 Total	69 Total	87 2019	87 2019	87 2019	87 2019	87 2019	87 2019
16	69 Total	69 Total	87 2019	87 2019	87 2019	87 2019	87 2019	87 2019
17	69 Total	69 Total	104 2020	104 2020	104 2020	104 2020	104 2020	104 2020
18	69 Total	69 Total	104 2020	104 2020	104 2020	104 2020	104 2020	104 2020
19	69 Total	69 Total	104 2020	104 2020	104 2020	104 2020	104 2020	104 2020
20	69 Total	69 Total	104 2020	104 2020	104 2020	104 2020	104 2020	104 2020
21	69 Total	69 Total	104 2020	104 2020	104 2020	104 2020	104 2020	104 2020

Analyze data at the push of a button

Access your automatically updated Unit4 FP&A prevero data in MS Power BI securely and easily. This gives you more time for important analyses and data visualization.

www.smartpm.solutions

Cost Center Planning

Period
2025

Legal Entity
11

Cost Center
Administration (Parent) + 113600 - Cafet...

Currency
LC

	ACT PY	ACT	BUD	FC	Δ IST - BUD	Δ IST - BUD %
Personnel Expenses	1,1M	1,2M	980,4K		+174,5K	+17,8%
Salaries & Wages	880,8K	929,1K	908,8K		+20,3K	+2,2%
Other Personnel Expenses	205,8K	225,8K	71,6K		+154,1K	+215,3%
Administrative Expenses	45,0K	47,6K	12,1K		+35,5K	+293,1%
Marketing Expenses	11,5K	12,4K	13,6K		-1,1K	-8,4%
Marketing Expenses	11,5K	12,4K	13,6K		-1,1K	-8,4%
IT Costs	35,8K	36,9K	37,0K		-10,5	0,0%
Rents	190,6K	207,0K	218,7K		-11,7K	-5,3%
Electricity	87,6K	93,2K	94,5K		-1,4K	-1,5%
Depreciation	45,0K	44,5K	45,0K		-495,0	-1,7%
Financial Result	10,5K	9,9K	10,1K		-235,1	-2,3%
Finance Income	9,9K	9,3K	9,5K		-225,0	-2,4%
Finance Costs	587,0	590,0	600,0		-10,0	-1,7%
Other	49,7K	50,7K	50,1K		+615,0	+1,2%
Other Income	22,5K	21,7K	21,0K		+735,0	
Other Expense	22,5K	23,8K	24,0K		-195,0	
Other Gains (Losses)	4,7K	5,2K	5,1K		+75,0	

- Other Personnel Expenses 225,8K ▲ +9,7%
2 departures, 4 new employees
- Marketing Expenses 12,4K ▲ +8,2%
Marketingkosten Februar 1100
- Finance Income 9,3K ▼ -5,6%
Portion of lower Finance Income attributable to lower interest returns
- Other Income 21,7K ▼ -3,3%
3,5% higher than expected, Because
- Other Expense 23,8K ▲ +5,8%
Higher expenses due to persistent inflation rates
- Other Gains (Losses) 5,2K ▲ +10,3%
Other Gains stagnating

Name	Name	Comment
311010	2025-02	
311010	2025-03	
311010	2025-04	
311010	2025-05	
311010	2025-06	
311010	2025-07	

Optimizing and Simplifying Reporting

In combination with the smartPM Reporting Suite, you can optimize your existing reporting or build it anew with ease. With the smartPM Reporting Suite, you gain access to a whole bunch of practice proven and optimized report templates.

Sales Planning

Customer
Customer 1

Year
2024

Scenario
Forecast

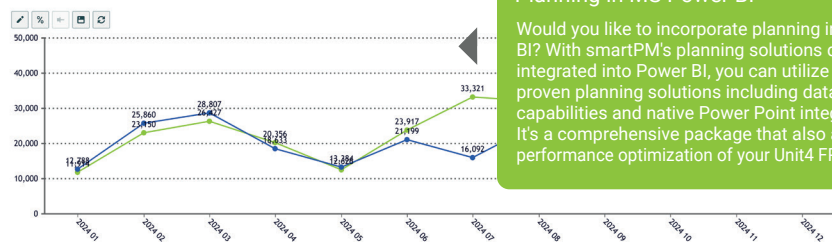
Unit
TU

Product Attributes
Alle

(in pcs.)

Refresh Edit Multiselect Value Save

	2024 01	2024 02	2024 03	2024 04	2024 05	2024 06	2024 07	2024 08	2024 09	2024 10	2024 11	2024 12	Grand Total
Product Group 1	2.371	5.636	7.183	4.812	4.905	5.100	4.600	5.991	5.137	9.148	7.095	5.428	67,406
Actual PY													
Actual & Forecast CY	0	0	5,047	2,658	2,470	2,676	3,154	2,458	2,458	2,458	2,458	2,458	28,292
Product Group 2	3.152	6.274	7.322	5.660	1.828	6.586	3.862	6.748	5.024	9.768	7.040	6.552	69,816
Actual PY													
Actual & Forecast CY	3,922	7,804	2,350	8,000	2,738	9,526	11,456	11,175	6,581	12,038	9,088	8,481	93,159
Product Group 3	2.569	5.445	5.335	4.270	2.922	4.692	4.095	5.766	5.187	11.609	6.192	7.408	65,490
Actual PY													
Actual & Forecast CY	2,826	5,990	16,430	4,698	3,316	6,000	10,046	8,121	5,706	12,203	6,811	8,149	90,296
Product Group 4	4.696	8.505	8.967	3.891	3.729	4.821	3.535	7.346	5.844	9.963	9.195	10.052	80,544
Actual PY													
Actual & Forecast CY	5,166	9,356	2,600	5,000	4,103	5,715	8,666	10,345	6,430	10,473	10,114	11,058	89,026
Grand Total	12,788	25,860	28,807	18,633	13,384	21,199	16,092	25,851	21,192	40,488	29,522	29,440	283,256
Actual PY													
Actual & Forecast CY	11,914	23,150	26,427	20,356	12,626	23,917	33,321						



Planning in MS Power BI

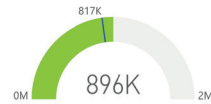
Would you like to incorporate planning into Power BI? With smartPM's planning solutions directly integrated into Power BI, you can utilize predefined, proven planning solutions including data write-back capabilities and native Power Point integration. It's a comprehensive package that also allows for performance optimization of your Unit4 FP&A system.

- Periode
- ☐ 2023
 - ☒ 2024
 - ☐ 2024 01
 - ☐ 2024 02
 - ☐ 2024 03
 - ☐ 2024 04
 - ☐ 2024 05
 - ☐ 2024 06
 - ☐ 2024 07
 - ☐ 2024 08
 - ☐ 2024 09
 - ☐ 2024 10
 - ☐ 2024 11
 - ☐ 2024 12

Name	Email	Teams
Alexander Hein	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Angelika Leopold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Boris Pejic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Christian Konrad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Christian Schopiu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
David Pein	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edgar Avagyan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Emil Tsvetkov	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fabian Gerer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fabian Schauhuber	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Felix Tonaue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Franz Schrattecker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jakob Hohenberger	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Jakob Rabel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Target vs. Forecast

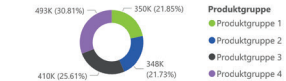
Target	Forecast	Gap
817K	896K	9.8 %



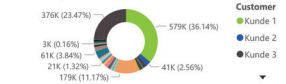
Target & Forecast im Zeitverlauf



Forecast pro Produktgruppe



Forecast pro Kunde



Meine Aufgaben

TaskName	Progress	Start Date	End Date	2020	2021	2022	2023	2024
1. Premises	22	08/04/2020	02/07/2022					
1.1 Chart of accounts	45	08/04/2020	23/12/2020					
1.2 Legal Entities & Business Units	10	21/04/2020	21/04/2021					
1.3 Definition of planning structures	20	11/06/2020	01/07/2021					
1.4 Review	12	04/09/2020	21/01/2022					
1.5 Administration	30	27/09/2020	02/07/2022					
2. Planning	29	09/09/2020	28/06/2022					
2.1 Top Down Sales Planning	49	09/09/2020	09/08/2021					
2.2 Top Down/ Bottom Up (Products)	5	23/09/2020	31/12/2020					
2.3 Loan planning	10	23/09/2020	23/08/2021					
2.4 Cost planning	20	04/10/2020	10/07/2021					
2.5 Asset planning	60	22/03/2021	22/03/2022					
2.6 Personnel planning	10	28/06/2021	28/06/2022					
3. Integration & Consolidation of Subplans	35	24/05/2022	27/08/2023					
3.1 Profit & Loss Statement	15	24/06/2022	24/06/2023					
3.2 Balance Sheet	40	10/08/2022	10/08/2023					
3.3 Cashflow	60	27/08/2022	27/08/2023					

Ad-hoc analysis and better decisions

Conduct ad-hoc analyses with your data and provide decision-makers with the optimal foundation of information. Benefit from easy collaboration with Teams-Integration. Get everything at a glance with the performance dashboard (incl. Gantt-Chart).

This might also interest you:

Expert meeting with live demo

MO. DI. MI. DO. FR. SA. SO.

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31 1 2 3 4

<https://smartpm.solutions/request-live-demo/>

FACTSHEET

Planning solution in MS Power BI

Planning, Analysis & Reporting in MS Power BI

In Microsoft's market-leading platform for data visualization, integrated planning is now possible. We'll show you how it's done!

<https://smartpm.solutions/planning-in-power-bi/>

Learn more in an informal, free expert meeting, on our Power BI knowledge site or in the smartPM factsheet

Get more information about the Power BI Connector and other smartPM solutions for planning, reporting, and analysis in Power BI on the Power BI knowledge page. Read the factsheet or simply have the solutions presented to you in an online meeting.