

Unit4 FP&A for Financials by Coda

Your ledger is unified.
Now make it plan.



You already run your finances on the strongest ledger in the market. Now turn that financial data into trusted planning intelligence with Unit4 FP&A, purpose-built to integrate with Financials by Coda (U4FbC).

The opportunity

Your financial data is unified. Your planning process should be too.

Financials by Coda gives you a single ledger where every entry is made once and accounts are always in balance. But for most finance teams, the planning and forecasting process still lives in multiple spreadsheets. Budgets are assembled manually. Scenarios take days to model. Forecasts drift from actuals because the data feeding them is disconnected from the ledger.

Unit4 FP&A eliminates that gap. When your planning, budgeting, and forecasting engine draws data directly from U4FbC's unified financial model, you gain a single source of truth that spans from transaction to strategy.

FP&A capabilities



Integrated Financial Planning



Reporting, Analysis & Dashboarding



People Planning & Analytics



Financial Consolidation



IFRS 16 Lease Accounting



ESG Reporting Support



AI-Data Storytelling and Contextual Help

Why Unit4 FP&A

Finance teams lose hours every week toggling between disconnected tools — logging in and out, re-orienting across different interfaces, and second-guessing whether the numbers they're looking at are current.

Unit4 FP&A and Financials by Coda eliminates that friction with a natively connected experience:

- **Drill Through** — Explore the transactions behind the numbers without leaving your planning environment. No exports. No tab-switching. Just instant clarity.

- **Post Back** — Write planning data back to your financial system securely and in real time. The closed-loop capability disconnected tools simply can't offer.
- **Data Synchronization** — Pre-configured integration imports financial data, master data, and structures from Coda, and exports planning data back — automatically.

The result: less time navigating systems, more time supporting decisions your business actually trusts.

The integration

One financial foundation. One planning engine

Financials by Coda

- General ledger
- Accounts receivable
- Payable
- Bank reconciliation
- Assets and billing



Financials by Coda

- Planning
- Forecasting
- Reporting
- Analytics
- P&L
- Balance sheet
- Cashflow

Actuals Flow into Plans

U4FbC general ledger data feeds directly into FP&A planning models. No manual exports, no reconciliation. Your plans always start from the current financial truth.

Scenario Planning on Real Data

Model revenue, cost, and workforce scenarios built on actual financial performance from U4FbC. Visualize impacts on P&L, balance sheet, and liquidity in real time.

Self-Service for Finance Teams

Finance teams create reports, dashboards, and forecasts without IT dependency. BARC analyst-ranked #1 for self-service and ease of use. Built for autonomous finance, not technologists.

No Rip-and-Replace

Pre-built connectors integrate with U4FbC and other source systems. Expand your ecosystem without disrupting your ledger.

Combined impact

33%

Faster budgeting cycles

(Unit4 customer)

100%

Achieve integrated planning

(BARC Planning Survey 2025)

8.4/10

Implementation success score

(BARC Planning Survey 2025)

Industry focus

Planning intelligence for large, complex, high-transaction-volume organizations that rely on Financials by Coda.

Ready to turn your ledger into a planning engine?

[Request a demo](#)