Commenting in MS Power BI

With the commenting and direct editing functions of smartPM in Power BI, you can increase the efficiency of your planning, analysis and reporting processes.

Seamless integration: Write back data into your FP&A system.

Benefit from easy real-time collaboration, high data integrity and fast decision making - All in a single, user-friendly environment - **Microsoft Power BI**.

➡ **Comment:** Add comments to reports, dashboards and data points. Assign user names to comments directly in Power BI reports.

➡ **Direct data editing:** Edit and correct data points directly in a report to ensure all financial reports are up-to-date and accurate.

➡ **Writeback functionality:** Changes made in the report are written back to the data source.

All benefits at a glance

Improved collaboration
Team members can discuss and resolve comments and to-dos directly in the report, improving communication and decision making. Input from other departments (e.g. sales, HR) can also provide valuable insights.

Approval workflows
Comments can be part of an approval workflow where financial data and reports are reviewed, commented on and approved by various stakeholders within the organization.

Efficiency
Reduces the need for email correspondence or meetings by keeping all feedback and edits within the Power BI environment.

Direct editing in PowerPoint
For example, during a meeting or presentation.

Real-time updates
Direct editing enables immediate changes and updates, which can be important for timely decision making.
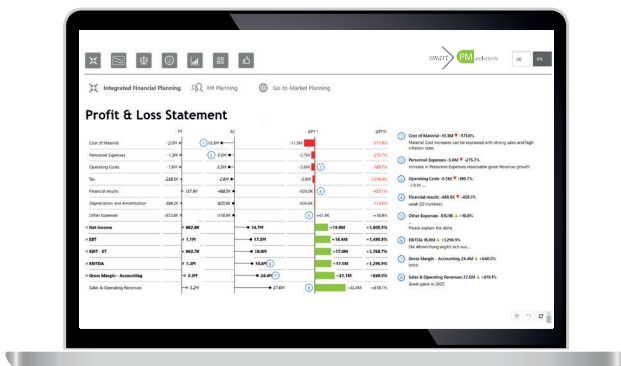
Documentation of changes
Comments and direct edits allow changes to financial data to be tracked. This is particularly important for compliance and transparency, especially during audits.

Collaborative forecasting
Teams can work together on financial forecasts directly in Power BI, adjusting assumptions and projections in real time and discussing possible outcomes through comments.

Quick adjustments
Finance leaders can quickly make necessary adjustments to rolling forecasts or scenario models based on stakeholder feedback to ensure forecasts are always in line with the latest insights. Software with access to global online resources.

25 years of performance management know-how

smartPM is your reliable partner with over 25 years of project experience and business expertise.

Learn more about how smartPM's solutions can drive business decisions. Experience the system live in an expert talk.

Free expert chat ⇨

We look forward to talking to you!

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Expert ⇨
Chat

You can also find us at:

in LinkedIn   XING   YouTube   kununu

7 good reasons to choose smartPM

Why we are the right partner for your company!

- A single point of truth: upstream systems seamlessly and automatically networked

- Flexible, Excel-like controlling technology combined with business management content

- Integrated financial planning, analysis, budgeting, forecasting and reporting from a single source

- User-friendly, innovative solutions with artificial intelligence

- Certified technology partner of Jedox, Acterys MS Power BI, SAP SAC, Unit4 FP&A

- Competent and experienced team with a performance management background; 4.9/5 project rating

- Your reliable partner for digitalization in performance management before, during and after the project

Topics that might also interest you...

Planning, analysis & reporting in MS Power BI
Integrated planning is now also possible in Microsoft's market-leading platform for data visualization. We'll show you how it works!

You can find out everything about this topic here

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

Reporting Suite for Power BI
Simplify and accelerate your reporting in MS Power BI with the integrated best-practice analysis paths and report templates from smartPM.

You can find out everything about this topic here

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

Unit4 FP&A (prevero) Connector for Power BI
Seamlessly integrate Unit4 FP&A data into Power BI to get direct access to all your data. Now new: with optional write-back function for comments.

Learn more about this topic here

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

Power User Suite for Unit4 FP&A (prevero)
Optimize your Unit4 FP&A model landscape and increase performance with the Power User Suite from smartPM.solutions.

Further information on this topic can be found here

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

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Analysis - Budgeting - Planning
Forecasting - Reporting - Consolidation

WE THINK CONTROLLING

www.smartpm.solutions