



# Planful Integrations: Speed, Performance, Flexibility

Data fuels financial and business operations, and the seamless integration of diverse systems and datasets is essential to success. This whitepaper examines the integration capabilities of Financial Performance Management (FPM) systems, showcasing how Planful provides the flexibility and scalability required to tackle complex business demands with confidence.

Recognized for its unmatched array of integration options, Planful leads the industry by delivering fast, secure, and scalable solutions. It gives customers a 360° view of their data and a single source of truth to drive peak financial performance.

In the realm of FPM, the stakes of data integration cannot be overstated. According to a report by BryteFlow (2020), "40% of projects fail due to difficulty integrating different data sets." This starkly highlights the challenges and risks associated with ineffective data integration strategies. Planful's platform is engineered to overcome these challenges, offering a streamlined, user-friendly experience that addresses the complexity of today's financial systems.

Gartner's 2023 Global Software Buying Trends underline the significance of integrations as the third most crucial factor for buyers, trailing only trust and sales flexibility. This highlights the important role integrations play in driving business efficiency and success.

To further stress this point, the 2023 Connectivity Benchmark Report by Salesforce & Deloitte Digital reveals that, on average, only

29% of enterprise applications are integrated, leading many organizations to miss out on substantial opportunities for cost savings, growth, and efficiency. Planful's approach to integration automates and accelerates data exchange between source systems, Planful, and destination platforms securely and reliably. Planful's robust integration capabilities enable bidirectional data flow to help move data quickly and efficiently, ensuring seamless integration processes, consistent quality, and faster decision-making. With thousands of ready-to-go connectors and flexible integration options, Planful supports integrations for importing data from source systems and exporting to destination platforms like Microsoft Power BI, Excel, PowerPoint, Word, Google Sheets, and more. Integrations are streamlined through our intuitive design studio, eliminating complexity and accelerating time-to-value. This comprehensive approach maximizes system flexibility and accelerates ROI to help customers deliver the greatest financial impact for their organizations.

Security remains a top concern in the digital age. Gartner's 2023 report also highlights that

42% of buyers prioritize security as the most crucial factor when investing in new software. Planful addresses this concern head-on, embedding advanced security protocols into every aspect of its integration offerings. This commitment to security ensures data integrity, confidentiality, and compliance, which are non-negotiable requirements for modern financial operations.

At Planful, our philosophy on integrations revolves around giving you speed, reliability, and flexibility. What follows is a guide to take you through the intricacies of Planful's connectivity framework, demonstrating how flexibility, security, and a well-designed integration strategy are beneficial and essential elements for your FPM of choice.

### DATA INTEGRATION NEEDS IN FINANCIAL PERFORMANCE MANAGEMENT

Planful is the pioneer of financial performance management cloud software. It helps organizations ranging from fast-growing startups to large multinationals drive peak financial performance. Planful is designed to be easy to use for the Office of the CFO while delivering a high-performance system that is scalable to support current and future needs.

One of the most critical requirements of an FP&A platform is the ability to integrate financial and non-financial data to and from multiple sources and destinations. For example, loading GL trial balances from the general ledger is required for the financial

consolidation and close process.

In budgeting and planning, the integration of prior year actuals is often needed to “seed” the annual budget process. Many organizations import historical information about their employees to perform headcount and compensation planning. Data integration is also key to performing budget vs. actual analysis of financial or operational results. Historic financial results are needed to support periodic forecasting, as well as rolling forecasts.

Performing complex financial modeling often requires the integration of financial and operational data from applications, as well as information from transactional systems like ERP, HCM, CRM, and data warehouse applications. In addition, there are times when organizations need the integration of data from FP&A processes to flow back into the source transactional systems from which the data originated. So, integrations need to account for both unidirectional (one-way) and bi-directional (two-way) data synchronization.

**29%** of enterprise applications are integrated.

Organizations that fail to prioritize integrations miss out on cost-savings, growth, and efficiency opportunities

(Salesforce & Deloitte Digital, 2023)

## PLANFUL DATA INTEGRATION CAPABILITIES

Planful provides powerful, bi-directional data integration capabilities, allowing access to data from ERP, HCM, CRM, data warehouses, spreadsheets, and other sources, whether they are on-premises or cloud-based. Our platform also supports the integration of a variety of data types, including:

- Trial Balance Summary
- Transaction Detail,
- Statistical/Non-financial Data,
- Employees, Jobs, Compensation Items, and Positions
- Leads and Opportunities,
- Users and User Security,
- Chart of Accounts,
- Dimensional Hierarchies,
- Operational Metrics,
- Currency Rates, and more.

Planful's overall integration capabilities let the system connect to any enterprise-grade solution. In doing so, it ensures the right data is retrieved, transformed, validated, and loaded. This means it is meaningful and stays current at all times. Effective integrations reduce manual effort and enhance data integrity at all times of system use. All this is automated without the need for human intervention or any time-consuming manual processes.

Planful offers customers many ways to integrate data into the platform. These being:

- File Storage options and Manual uploads of flat files or Excel spreadsheets via Data Load Wizard
- Data Integration APIs
- Native SFTP connections
- Automation using cloud ETL Tools with pre-built native connectors
- Microsoft Power Automate iPaaS integrations
- Spotlight for Microsoft Excel, PowerPoint, Word, and Google Sheets
- Integration with advertising platforms: LinkedIn Ads, Facebook Ads, and Google Ads

## FLAT FILES AND DATA LOAD RULES

The Planful Data Load Wizard is ideal for infrequent data loads or for situations when users have a limited chart of accounts (COAs) or new cost centers to load on a monthly basis. Users can upload flat files and Excel spreadsheets through a guided, click-to-load process that moves data from other systems into the Planful platform through defined Data Load Rules.

**FIGURE 1**  
**PLANFUL INTEGRATES WITH THOUSANDS**  
**OF ENTERPRISE-GRADE SYSTEMS**



Google Drive serves as a versatile file storage integration option for the Planful platform, accommodating both manual and automated data load processes. Similar to Box, it can be integrated to automatically synchronize data files, leveraging Google Drive’s cloud storage capabilities. This integration enables users to manage and update data efficiently in real-time. Google Drive’s compatibility with various file formats, including native Google Sheets and Microsoft Excel, ensures a seamless transition of data into Planful. This functionality is particularly beneficial for any organizations that rely on Google’s suite for their daily operations, offering a streamlined approach to data management and synchronization with the Planful platform.



... AND MANY MORE...

A Box integration option automates the data load process into the Planful platform. Planful Data Load Rules can be configured to automatically load data files stored in your cloud-based Box file folders. Users can take advantage of scheduling Data Load Rules to load files during off-work hours automatically.

## PLANFUL FOR MARKETING EXAMPLE

Planful for Marketing is a comprehensive marketing performance management tool that streamlines complex integrations, enabling marketing teams to be truly data-driven. In today's diverse marketing landscape, Planful for Marketing addresses the challenge of integrating varied data sources – from financial to social media to branding data – into actionable insights. Such integrations transform the noise of disparate information channels into strategic knowledge, which is critical for steering marketing campaigns toward positive tactical business outcomes.

Integrating Planful for Marketing with various enterprise-grade systems ensures that marketing metrics, budgets, and controls are always current, reducing manual effort and bolstering data robustness. It supports a wide array of marketing-oriented data types like:

- Lifetime Value (LTV),
- Cost / MQL (Marketing Qualified Lead),
- Cost / SQL (Sales Qualified Lead),
- Campaign creation,
- POs (Purchase Orders), and
- Other similar marketing metrics.

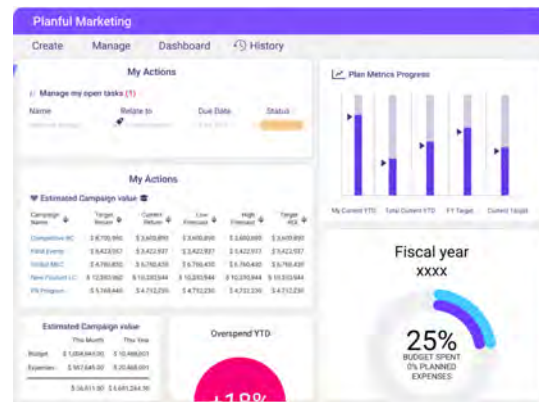
This tool enhances real-time decision-making, letting marketing teams develop solid plans and monitor results instantaneously. Its flexibility and user-friendliness address the complexities of today's integrated marketing control systems, making it an indispensable part of the Planful

platform.

Planful for Marketing's standout integration differentiator comes from its rapid and straightforward integration with key marketing platforms, such as Google Ads, LinkedIn Ads, Facebook Ads, and Salesforce CRM systems. This integration provides a complete view of the marketing efforts, streamlining decision-making. It brings together campaigns, budgets, expenses, and performance metrics in a cohesive system.

With Planful for Marketing, marketing teams gain the agility to pivot strategies quickly, optimize campaigns effectively, and drive tangible business outcomes with greater precision. These integrations enable strategic data management, transforming marketing operations and making teams more agile, insightful, and results-oriented.

**FIGURE 2:**  
Planful for Marketing Example



# 40%

of projects fail due to difficulty integrating different data sets

(Bryteflow, 2020)

## DATA INTEGRATION APIS

Organizations can connect to any source using Planful Data APIs, including homegrown applications, custom databases, and legacy systems. Users can move data from isolated, hard-to-use systems into the Planful platform for broader visibility and use by the entire organization. The Planful Data Integration APIs also allow organizations to use virtually any mainstream integration platform of their choosing to manage the integration process.

## NATIVE SFTP CONNECTOR

Planful has expanded its integration capabilities with the introduction of native SFTP (Secure File Transfer Protocol) connectivity. This direct integration offers a secure and efficient method for transferring large volumes of data, especially suitable for environments where data security and integrity are critical. The SFTP connector simplifies the process of accessing business-critical data by eliminating the need for custom scripting, which can be both time-consuming and prone to errors. With SFTP, users can ensure secure data transmission directly into the Planful platform. The integration streamlines the

data transfer process, allowing for reliable and regular updates with a widely used, fully secure medium. By incorporating SFTP connectivity, Planful provides a robust and secure option for businesses to manage their data transfer needs seamlessly.

Native SFTP integration is ideally suited for straightforward datasets that do not interconnect with multiple sources or need significant transformations or cleanup processing. This method is best applied when the dataset is self-contained and does not need much manipulation. For example, if an integration requires combining rows and columns from one source with data from another or if it involves complex data restructuring, SFTP may not be ideal. In such cases, native ETL (Extract, Transform, Load) integration becomes the preferred option.

## ETL TOOL WITH NATIVE CONNECTORS

An increasingly popular option for customers is to leverage Planful's ETL capabilities to connect data with Planful. The Planful Connector Packs allow organizations to integrate business systems — like an ERP or CRM — directly into the Planful platform. This approach saves time by allowing the configuration of pre-mapped and ready-to-deploy connectors instead of building integrations from scratch. Planful offers thousands of standard connectors for many business systems, including Oracle NetSuite, Intacct, Oracle, SAP, Workday, Salesforce, Microsoft Dynamics AX, Microsoft Dynamics GP, Infor, and many others.

In addition to supporting the integration of data from multiple internal systems, Planful also offers the ability to load metrics and industry benchmarks from external sources. Some organizations measure business performance against industry benchmarks and economic indicators, like the Consumer Confidence Index (CCI) or the Consumer Price Index (CPI). Others need exchange rates to support currency translations of budgets or actual results. Planful connects with external data feeds to automatically collect information to manage key processes to run your analyses.

### MICROSOFT AUTOMATE IPaaS

The Microsoft Power Automate iPaaS (Integration Platform as a Service) connector significantly enhances the connectivity capabilities of the Planful platform with the Microsoft ecosystem. Not only does it ensure compatibility with over 100 Microsoft-related products and partner products, but it also facilitates automated data transfer and synchronization. For example, customers use our native Power BI connector to quickly refresh and visualize their planning data directly within Microsoft Power BI. The strength of Power Automate lies in its ability to handle the most sensitive financial data with robust security features, ensuring data integrity and compliance with industry standards. Moreover, this integration is highly scalable and adaptable, designed to meet the growing and evolving needs of businesses. As organizations expand and their financial processes become

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*"Planful has been great in keeping our planning scenarios organized. Integration with our ERP has really increased the speed of month-end reporting and helps keep finance consistent on which forecast figures are used in comps."*

(G2Crowd Verified Marketing User at an Enterprise Company >1000 employees, 2023)

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more complex, Power Automate maintains its efficiency and effectiveness. This adaptability makes it an invaluable tool for organizations looking to streamline their financial planning and analysis processes, ensuring seamless, secure, and efficient data integration between Planful and the vast array of Microsoft products.

### SPOTLIGHT FOR MICROSOFT EXCEL, WORD, POWERPOINT, & GOOGLE SHEETS

Beyond merely integrating into different systems and platforms, Planful also provides a powerful plugin to leverage your real-time financial data within Microsoft Excel, PowerPoint, Word, and Google Sheets. Planful's Spotlight for Microsoft 365 and Google Sheets is an innovative plugin designed to seamlessly integrate Planful data within the work environment of your choice. This powerful tool lets users dynamically access and analyze data directly within the Google or Microsoft 365 suite. Users can effortlessly zoom in and out, keep or remove,



and pivot on various business categories and segments. It enables in-depth multi-dimensional queries, letting you analyze the right financial data in an environment comfortable to most financial associates. This level of analysis and what-if scenario planning with near real-time financial data is key to timely business decisions.

With the push of a button, data is refreshed, harnessing Google & Microsoft 365's robust capabilities for information presentation while ensuring consistency and reliability from a centralized, secure data store. This ability ensures your data is always current, accurate, and trusted, supported by comprehensive security, data integrity measures, and full audit trails.

Spotlight also significantly reduces the time and effort needed for data preparation and presentation. By automating the data refresh process, Spotlight allows for the creation of reports and presentations that can be updated as needed without additional manual intervention. This automation not only saves hundreds of hours but also eliminates the potential for errors. Teams can present their findings and insights with confidence, knowing that the data they are working with is current, accurate, and reliable. All told, Spotlight streamlines the financial planning and reporting processes, enhances productivity, and ensures timely and accurate financial analyses.

## **INTEGRATION WITH ADVERTISING PLATFORMS: LINKEDIN ADS, FACEBOOK ADS, AND GOOGLE ADS**

Integrating Planful with key advertising platforms like LinkedIn Ads, Facebook Ads, and Google Ads is essential for tracking and measuring the performance of your marketing campaigns. These integrations allow you to analyze crucial metrics such as cost-per-outcome (CPO) and return on investment (ROI) across all your advertising efforts.

Planful achieves these integrations through read-only connections to the respective advertising APIs. This enables Planful to automatically create campaigns based on your configurations in each platform and map important metrics like impressions, clicks, conversions and leads. The system updates these metrics and costs data daily, ensuring that up-to-date information is always available without the need to navigate multiple systems.

By leveraging these integrations, you gain full visibility and management of your advertising strategies in a single location. The hierarchical structuring of campaigns provides a clear perspective on allocations, spending, and metrics, enhancing the accuracy of tracking and evaluating ROI.

## SECURITY AND CONTROLS

Planful Integration leverages a role-based security approach. We also provide the option of two-factor authentication. All activities within the application are logged, including login, metadata, and data add/deletes, so there is a full audit trail of who did what and when.

When data is in motion, 128-bit data encryption is used, as well as VeriSign/Symantec SSL certificates. When data is at rest, data encryption is handled using Microsoft SQL Server Transparent Data Encryption (TDE). The Planful infrastructure has been deemed SSAE16 Type II SOC1, SOC2 compliant as per the audit requirements of the American Institute of Certified Public Accountants.



Planful provides master data management capabilities to support data accuracy, consistency, and quality through validation checks and data mapping capabilities. Our data governance policies and procedures ensure that the data being integrated is valid, protected, and secured. User security allows for strong authentication, and we also provide functionality that segregates duties between who is authorized to run

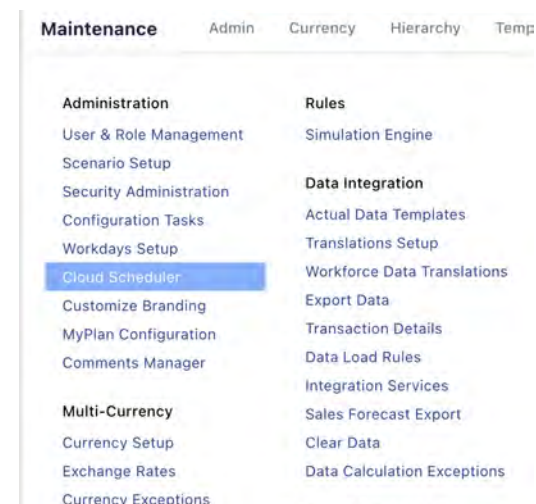
integrations, who can run integrations for master data, and who can run integrations for other data types. Rules built into the integration process flag master data that does not exist (e.g., chart of accounts or customer ID) or will total a trial balance to make sure debits equal credits. All are part of the integration control options provided right out of the box.

## THE FINANCE ADMIN VIEW

Once the data integration connectors are configured, finance admins can manage and run the integrations as needed. Planful makes it easy for finance to manage integrations through automation. This way, integrations can be run on demand or scheduled to run monthly, weekly, daily, or hourly as needed.

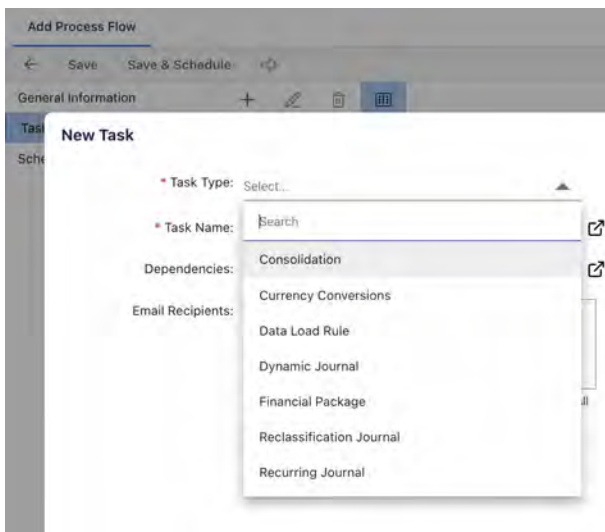
What follows are several examples of what the data integration process looks like. The integration is run from a simple web page by using Cloud scheduler (Figure 2).

FIGURE 2



Only authorized users can execute the integration or set up a schedule. To schedule or run a task, go to the Cloud scheduler page and navigate to add a process flow. You can see (Figure 3) some of the different types of task types that can be loaded via a dropdown list. To ad-hoc run or schedule a data load, select Data Load Rule as the task type and choose the DLR as the Task Name

**FIGURE 3**



Note: The data load can also be scheduled to happen in the background on a regular or scheduled, hands-off basis. IT involvement is not required to run or manage data integrations.

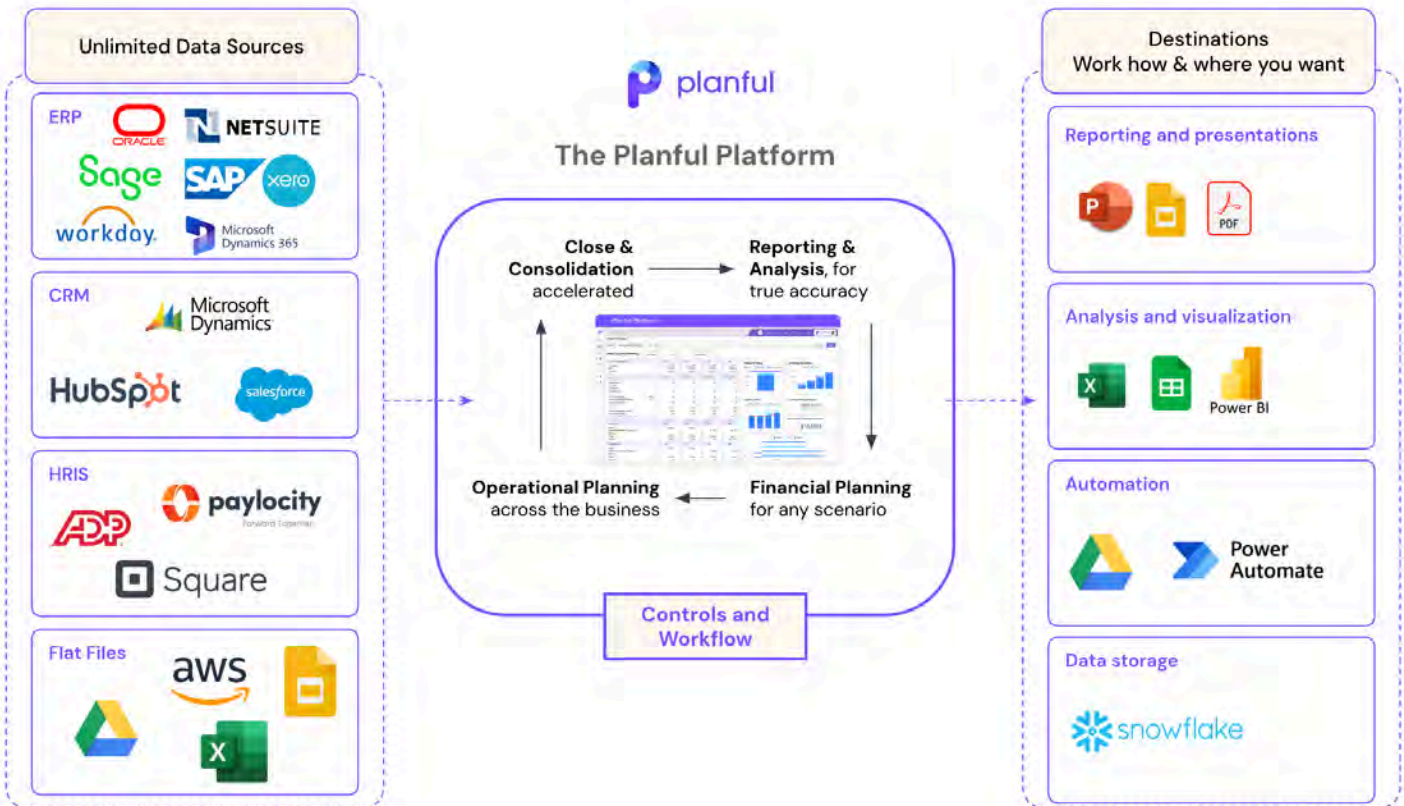
**Figure 4:** After the integration is scheduled and run, the user will receive email notifications with information about the status of the data integration

Data Load Status Rule: WS_Load_Company_Hierarchy	
<b>Web Services Details</b>	
Number Of Records	3
Thousand Separator	Comma(,)
Decimal Separator	Dot(.)
Date Format	MMDDYYYY
<b>Data Load Details</b>	
Member	Allow Move - Checked
Member	Allow Property Change - Checked
Build	Level Based
Number of Levels	1
<b>Default Segment Details</b>	
Segment	Code
ReportingCategory	Default
Data loaded successfully.	

**Figure 5:** Planful then provides an audit trail report with the status of data integrations. In the Cloud Scheduler -> Job Manager page, you can see the list of jobs along with their process type, frequency and last run status. There's also a detailed log available.

Job Name	Process T...	Frequency
March - FC-March - FC	Scenario S...	One Time
Test Dco Preloaded	Financial R...	One Time
Test Dco Preloaded	Scenario S...	One Time
Canada - Edit Translation Name	Translation...	One Time
Canada - Edit Translation Name	Translation...	One Time
Reports List	Reports	One Time
Reports List	Reports	One Time

## PLANFUL INTEGRATION MODEL



The diagram above provides a full picture of Planful’s robust integrations. Data sources on the left connect to the various Planful system solutions through the data integrations shown in the center.

Broadly speaking, the integrations can be characterized as either Native connectivity or as ‘Build-Your-Own’ connections. You have the flexibility to choose which better suits your needs. With a strong in-house IT team, or if you need to connect to a homegrown solution, the ‘Build-Your-Own’ option may be your preference. Within this realm, there are various options, like leveraging the publicly available RESTful APIs, older SOAP integration approaches, or connecting to BOX or Google Drive to download flat files.

Alternatively, the integrations shown in the native connection section are what we consider dynamic options. Besides these, there are an array of options like iPaaS, ETL, SFTP, and so on. All are discussed in the previous sections.

Together, the vast array of systems that Planful integrates and the flexibility of connectivity formats make it one of the most connected financial planning solutions on the market.

## ENSURING CUSTOMER SUCCESS

By embedding a broad set of data integration capabilities into the platform, Planful accelerates time to value, delivers a high degree of value to customers, and saves them from having to acquire or set up their own data integration tools. This approach ensures that data integrations can be configured quickly, support a wide variety of data sources, and can be scheduled to work on your timeline. Users can easily set up daily, weekly, monthly, quarterly, or any customized timelines for your data integration processing frequency.

Engaging with Planful ensures access to unparalleled expertise in data integration, reflecting a commitment to delivering advanced, reliable solutions for complex data management challenges. Planful's dedication to customer success is exemplified through the seamless data integration services offered. This is a cornerstone of expertise within Planful's own professional services team and extensive partner network of systems integrators.

Once your data is integrated and in production, Planful staff maintains and supports the integrations, making minor adjustments when needed to help keep your systems working smoothly. For any large-scale changes, such as adding additional data sources, Planful staff will work with the customer's IT and Accounting/Finance teams to adjust accordingly and even modify the integration when needed.

## CUSTOMER EXAMPLES/CASE STUDIES

Hundreds of customers already leverage Planful's data integrations to support their Continuous Planning processes. Examples include:

### CUSTOMER EXAMPLE: GLOBAL MANUFACTURER

A global manufacturing company pulls summary balances and 2,000,000 transaction details weekly from source systems into Planful. They use their corporate standard, Informatica (integration platform), and wanted to use that specific ETL tool. So, together, the Planful and customer teams built the integration processes to retrieve balances and transactions from SAP ECC using Informatica. This data is then transformed and loaded into Planful using Web Services APIs.

### CUSTOMER EXAMPLE: HEALTHCARE PROVIDER

A healthcare provider pulls balances (every hour), with over 100,000 transactions (1x per day) and five metadata loads (every hour) from Peoplesoft Financials. This volume of information is loaded into Planful on a continual basis. To work with this, the Planful team implemented a custom extract that is scheduled and automated. This data is extracted and uploaded every hour through an SFTP (Secured File Transfer Protocol server) connection.

*"Working with a company that was performing consolidations in Excel. Planful was the best for basic functionality, quick implementation, and non-technical administration."*

(G2Crowd Verified Food & Bev User at an Enterprise Company >1000 employees, Dec 2022)

#### CUSTOMER EXAMPLE: NETSUITE USER

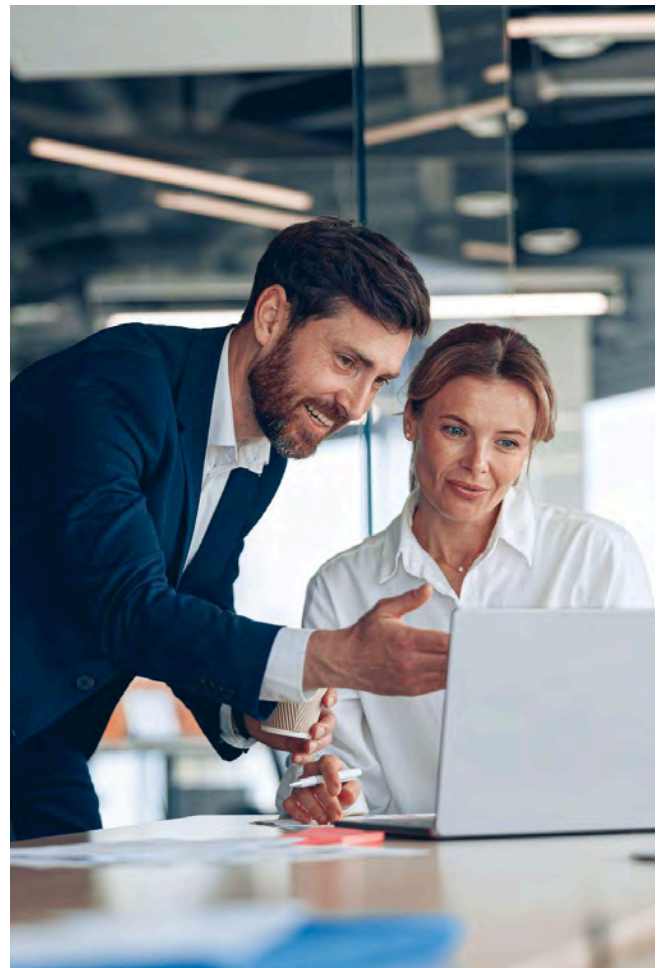
Numerous clients successfully leverage Planful to import critical financial data – including GL balances, transactions, metadata, and FX data from NetSuite Financials. A notable case involves daily automated integrations with increased frequency during pivotal month-end and quarter-end periods. Planful's solution includes a web interface, enabling on-demand data integration. This approach ensures a thorough extraction of data from NetSuite and the adaptability to update actuals in Planful according to specific business needs.

#### CUSTOMER EXAMPLE: TRANSPORTATION COMPANY

A transportation company loads balances and over 300,000 transactions nightly. The customer team wrote BAPI code to pull data out of the relevant tables in SAP. Planful built integration processes leveraging the BAPI code to connect with Planful. Then, Web Services were used to load data into Planful.

#### CUSTOMER EXAMPLE: GROCERY RETAILER

To exemplify volumes, one grocery retail client pulls summary balances and 1,200,000 transaction details out of Sage GL daily. This data load is fed into Planful daily as their standard practice.



#### SUMMARY

The risks to a business of not integrating crucial systems like financial performance management (FPM) systems or marketing planning solutions

are significant. Dependable integrations that provide reliable, high-integrity data are essential for interconnecting your existing sources of truth with your FPM or marketing control systems. In today's fast-paced world, data-driven approaches are core to business success. Operating without them is like driving blindfolded — not advisable. These integrations must offer flexible, dependable options that give you easy choices. That's where Planful helps.

At the heart of this exploration is Planful's state-of-the-art cloud-based integration technology. Engineered to revolutionize data integration from the ground up, it stands as the most integration-flexible solution on the market. Built for speed and performance, Planful offers one of the most comprehensive and extensive options to integrate with other systems for a fully seamless user experience. Options include the use of flat files, native integrations, robust Data Integration APIs, or ETL tool connectivity. This multifaceted approach unifies disparate systems and underscores Planful's commitment to versatility and user-centric design.

Security and control are not merely facets of the Planful platform; they are its cornerstones. With Planful, you gain not just a tool but a fortress. Stringent security measures are embedded within its architecture, ensuring unshakeable data integrity and unwavering

compliance with rigorous regulatory standards. These are not just claims but commitments, vividly illustrated through the experiences of our diverse clientele. Each case study articulates Planful's prowess at navigating complex data challenges across a spectrum of industries.

Planful isn't just part of the FPM narrative; it's redefining it. Not only is Planful a solution provider, but it is also a visionary leader in the FPM and marketing controls domain, giving customers the integration options needed to maximize system utility, core capabilities, and adoption.

In this regard, we extend a warm invitation to you, the reader — to witness and be a part of this transformative journey. Request a personal demo of Planful's capabilities, and let Planful be your guide to a new era of excellence in your financial performance management processes. With Planful's expertly integrated platform, your business data doesn't just work for you; it propels you forward.

*Securely and reliably automate and streamline data exchange to and from Planful. With thousands of ready-to-go connectors and flexible integration options, Planful's robust capabilities ensure fast, efficient, and seamless data flow. Analyze, report, and visualize your data your way—using built-in dashboards and reports within Planful or*



*leveraging native integrations with platforms like Microsoft PowerPoint, Excel, Power BI, Word, Google Sheets, and more.*

For more information, please contact your Planful account representative or visit [www.planful.com](http://www.planful.com).