

# certinia

## Planning

Say hello to a financial planning and analysis solution that empowers teams to run a connected business – all on one platform.

The screenshot displays the Certinia Planning interface with several overlapping tables and a user interaction overlay.

**Top Table (Actual vs Budget):**

Actual	Actual	Actual	Actual	Budget	Budget
Dual Value	Dual Value	Dual Value	Dual Value	Dual Value	Dual Value
\$9,270.00	\$9,488.00	\$7,527.00	\$11,574.00	\$5,597.00	\$6,556.00
\$9,270.00	\$9,488.00	\$7,527.00	\$11,574.00	\$5,597.00	\$6,556.00
\$3,000.00	\$3,000.00	\$0.00	\$4,300.00	\$3,500.00	\$3,500.00
\$1,000.00	\$1,000.00		\$1,700.00	\$2,000.00	\$2,000.00
\$1,000.00	\$1,000.00		\$2,000.00	\$750.00	\$750.00
				\$750.00	\$750.00
				\$2,097.00	\$3,056.00
				\$1,601.00	\$2,406.00
				\$496.00	\$650.00

**Bottom Table (Hierarchy):**

Financial Period Name	2024/009	2024/010	2024/011	2024/012	2025/001	2025/002	2025/003
Actual	Actual	Actual	Actual	Budget	Budget	Budget	
Dual Value	Dual Value	Dual Value	Dual Value	Dual Value	Dual Value	Dual Value	
\$9,270.00	\$9,488.00	\$7,527.00	\$11,574.00	\$5,597.00	\$6,556.00	\$7,805.00	
\$9,270.00	\$9,488.00	\$7,527.00	\$11,574.00	\$5,597.00	\$6,556.00	\$7,805.00	
\$3,000.00	\$3,000.00			\$3,500.00	\$3,500.00	\$3,500.00	
\$1,000.00	\$1,000.00			\$2,000.00			
\$1,000.00	\$1,000.00			\$750.00			
\$1,000.00	\$1,000.00			\$750.00			
\$6,270.00	\$6,488.00			\$2,097.00			

**User Interaction Overlay:**

A comment box is open, showing a user profile for Matt Byrne and a message: "Our bill is going to go up significantly next year". The overlay includes a "Resolve" button and a "Comment" button.

**Bottom Table (Hierarchy):**

Balance Type	Actual	Actual
Dual Value	Dual Value	Dual Value
\$9,270.00	\$9,488.00	\$9,488.00
\$9,270.00	\$9,488.00	\$9,488.00
\$3,000.00	\$3,000.00	\$3,000.00
\$1,000.00	\$1,000.00	\$1,000.00

## Get a single source of truth for planning

Equipped with a unified, 360-degree view of the business, Certinia Planning provides the enterprise-wide agility and collaboration you need to present most likely business outcomes, avoid endless negotiations, and promote active participation from all corners of the business. In other words, better planning, forecasting and reporting, to speed decision making and business growth.

Reduce  
risks

Future-proof  
planning

Reduce  
risks

## One system for everything

With the planning solution, you see the historical and future health of your entire business. Your teams gain a single source of truth, with core financials and analytics coming from a unified platform. Silos are smashed. Integrations are unnecessary. And trusted, accurate datasets can be connected and shared throughout the organization. That all translates to better collaboration across departments, entities, and regions.

## See around corners

Certinia's Planning solution transforms your organization's traditional budgeting process into a powerful forecasting engine. You can build more dynamic, accurate plans, stress-test scenarios, and better anticipate how much to spend and where. Important business decisions can be made quickly, assumptions can be adjusted on the fly, and corporate strategies can be more realistically tied to financial modeling and planning.

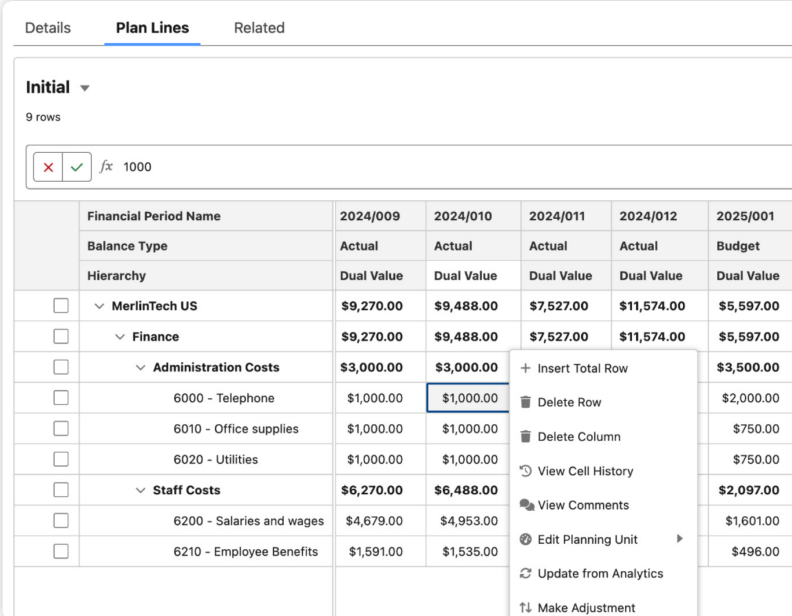
## Greater control over planning

Whether top-down or bottom-up, you can create effective plans without version control issues. Your teams can quickly build multiple what-if scenarios using calculation rules and mass functions. They can define different dimensions and dig into the details that matter. And they can recommend planning options to management with greater confidence.

## It's about time

Your organization's forecasting, planning and reporting doesn't have to take weeks or months. With customer information, core financials and analytics on one secure, simple platform, your teams can spend less time manually collecting, preparing and correcting data from across the organization—and more time analyzing that data to provide forward-looking recommendations that accelerate growth.

Talk to our FM Cloud experts



The screenshot displays the 'Plan Lines' tab in the Certinia Planning solution. It shows a table with 9 rows of financial data. A context menu is open over the '6000 - Telephone' row, offering actions like 'Insert Total Row', 'Delete Row', 'Delete Column', 'View Cell History', 'View Comments', 'Edit Planning Unit', 'Update from Analytics', and 'Make Adjustment'.

Financial Period Name		2024/009	2024/010	2024/011	2024/012	2025/001
Balance Type		Actual	Actual	Actual	Actual	Budget
Hierarchy		Dual Value	Dual Value	Dual Value	Dual Value	Dual Value
<input type="checkbox"/>	MerlinTech US	\$9,270.00	\$9,488.00	\$7,527.00	\$11,574.00	\$5,597.00
<input type="checkbox"/>	Finance	\$9,270.00	\$9,488.00	\$7,527.00	\$11,574.00	\$5,597.00
<input type="checkbox"/>	Administration Costs	\$3,000.00	\$3,000.00			\$3,500.00
<input type="checkbox"/>	6000 - Telephone	\$1,000.00	\$1,000.00			\$2,000.00
<input type="checkbox"/>	6010 - Office supplies	\$1,000.00	\$1,000.00			\$750.00
<input type="checkbox"/>	6020 - Utilities	\$1,000.00	\$1,000.00			\$750.00
<input type="checkbox"/>	Staff Costs	\$6,270.00	\$6,488.00			\$2,097.00
<input type="checkbox"/>	6200 - Salaries and wages	\$4,679.00	\$4,953.00			\$1,601.00
<input type="checkbox"/>	6210 - Employee Benefits	\$1,591.00	\$1,535.00			\$496.00

Certinia empowers the world's best technology and services organizations to deliver customer value with certainty. Our solutions, built on the Salesforce platform, connect all aspects of technology and services businesses. By orchestrating your people and projects around a central account record, Certinia ensures confident decision-making and intelligent delivery across the customer journey. For more information, visit [www.Certinia.com](https://www.Certinia.com).

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