DATA MANAGEMENT FOR CREATIO

Guide to setup and utilization

08.12.2023

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Product description

The **Sales'Up Data Management for Creatio** product is designed to analyze the activity of an enterprise, department or individual groups of employees, taking into account the planned target indicators and the actual results obtained. It helps to effectively manage the financial and quantitative indicators of the enterprise at various levels.

Use cases

- Management of the budget at the level of the entire company with the possibility of saving and comparing versions when moving or changing the amount of funds.

- Strategic planning of medium and large sales departments (with the possibility of planning from the bottom up and vice versa).

- Comparison of the company's planned and actual sales values with the possibility of detailing to a business unit or individual employee.

- Calculation of KPI employees in the mode.

Key features

- Working with individual user periods.

- Use of advanced mathematical formulas and logical operators.

- Export of plan versions in Excel format with the possibility of instant editing of the structure.

- Detailed logging for quick debugging of customized planning reports.

- Work with static mesh filters by roles (record rights, columns).

- Forecasting: implementation of shifts when choosing from another planning and connection with the current period.

- Drag&Drop data tree structure editor.

- Adding manually calculated indicators and the possibility of returning to old values.

- Various formatting options that can be combined (background / text color, bold / italic text, text size).

- Adding and editing profiles for an individual employee within the framework of a single planning: selection of displayed levels and columns, setting of access rights to the profile.

- Output of planning results in the form of a page element using a widget.

- Setting up a hierarchical structure with the ability to change the sequence of levels, including objects that are not directly related to each other.

- Advanced filtering panel in the planning report with the ability to save and share filters with other users.

- Built-in dashboard panel on the planning report.

- Ability to combine work with data from different planning reports (for example, when it is necessary to take data from a column of one report to another).

- Collection of planning data in system objects.

Remarks and limitations

This product works exclusively with numeric data. There is no opportunity to work with text (in the planning registry only the records' titles are displayed), dates, time, images, etc. when setting up the planning.

Technical requirements

The product is compatible with all products on the Creatio platform version 7.16.4 and higher.

Specifics for on-site solutions: in order to quickly and conveniently build reports in the Planning it is recommended to ensure that there is free RAM on the application server. For example, in order to build a report with 3 million calculated items (1 item = 1 calculated field) it is necessary to have at least 8GB of RAM.
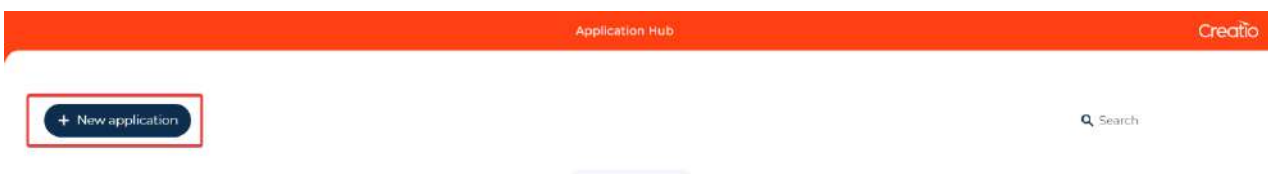
Product installation

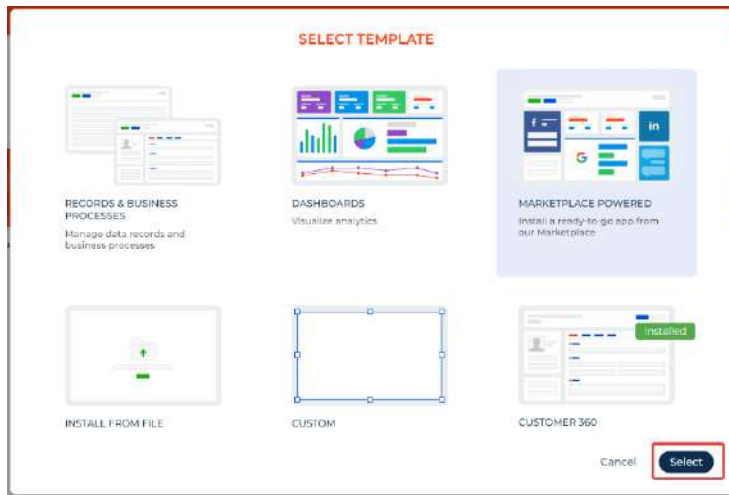To install packages, click the ⚙ button and go to the "Application Hub".
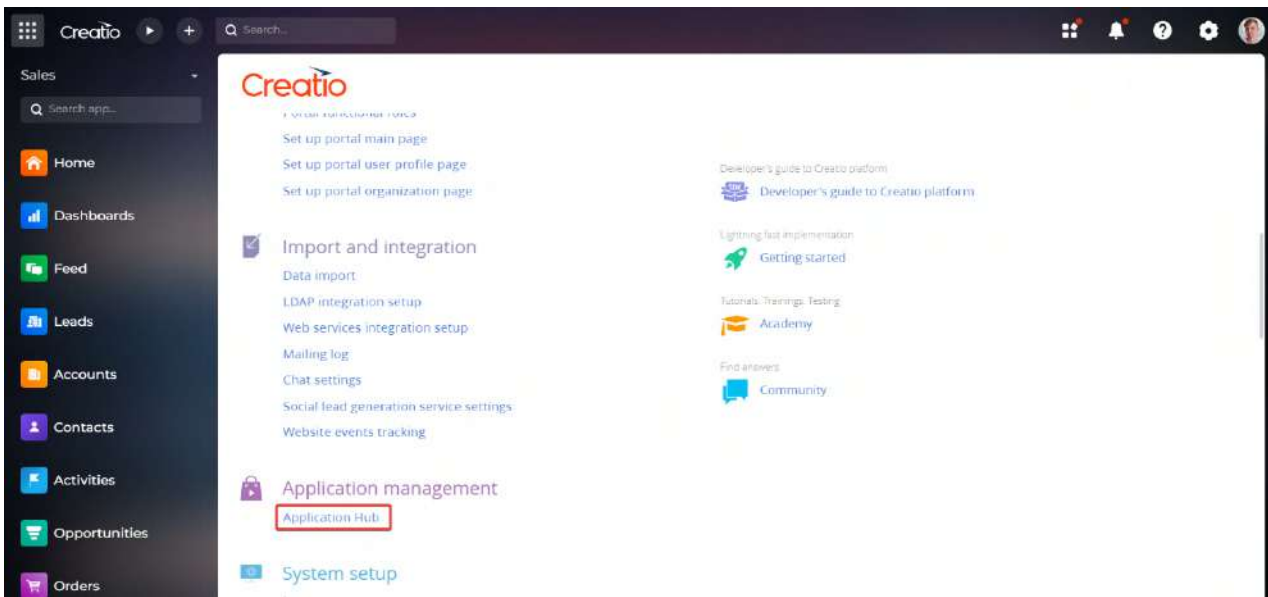
Next, go to the "Application Hub" section.

On the "Application Hub" page, click "New application",
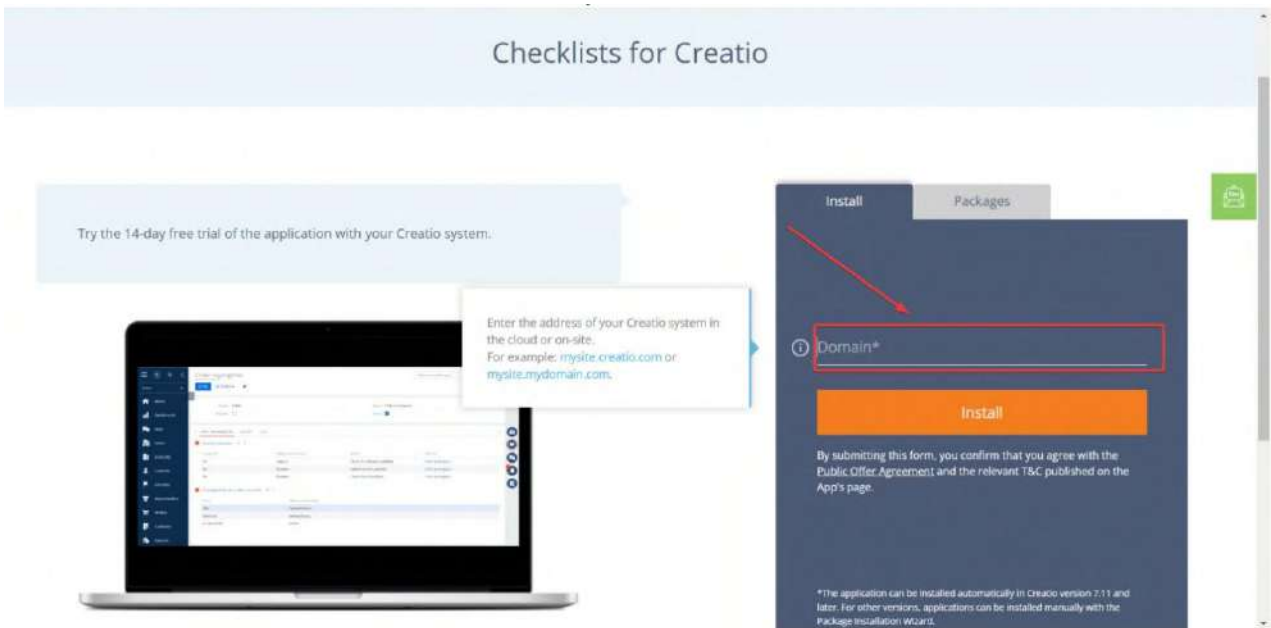

Select the "Marketplace powered" block and click the "Select" button.

Click the "Install" button on the product page.

Enter the address of the Creatio website where you want to install the product.

After the installation is complete, the Creatio website login page will open.

If you are installing a product package from a file, you need to request the latest package from Sales'Up support. Next, on the "Application Hub" page, click "New Application" and select "Install from file", specify the path to the archive with the package and install it.
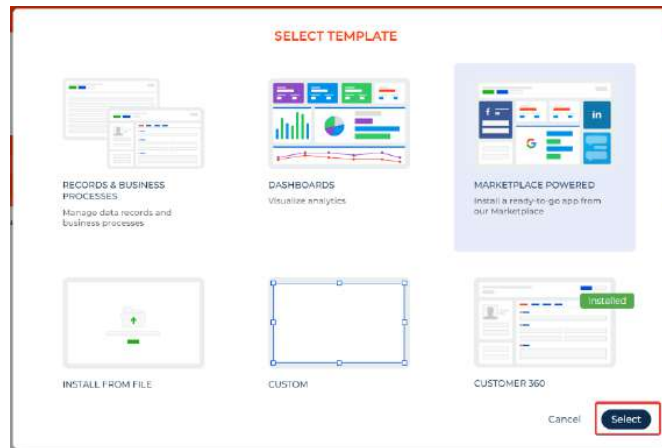
General product setup

Planning section

Open the Planning section page with all available plannings.
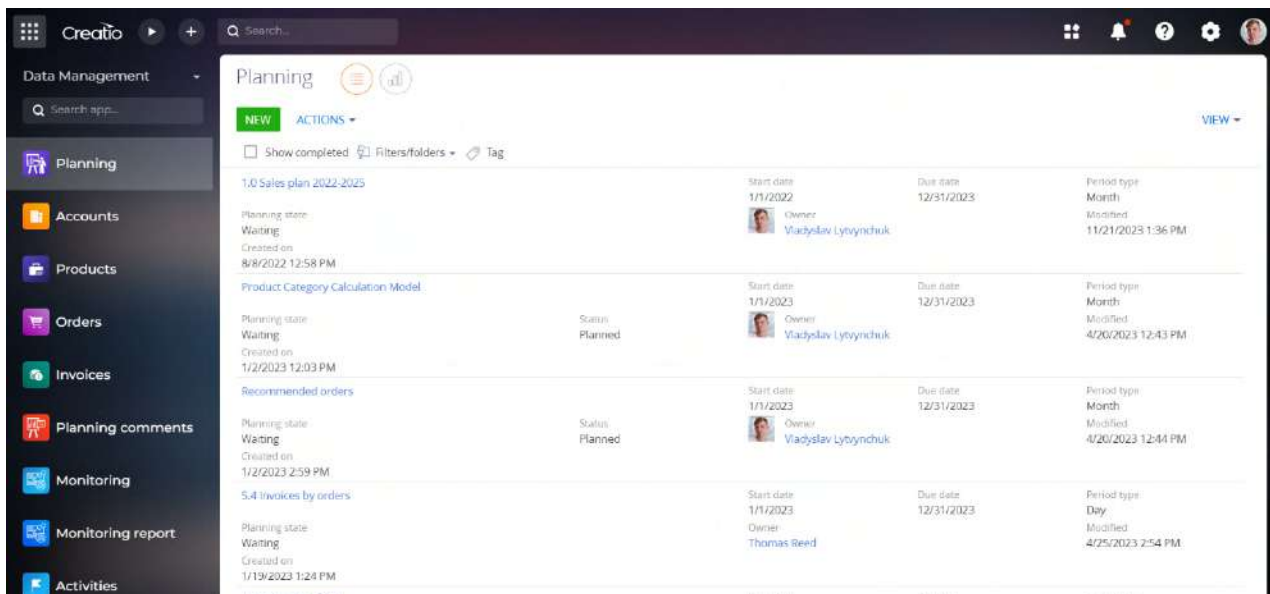
When clicking on a plan, the following actions are available:

- Open – opens the selected planning.

- Copy – copies the selected planning, while the page with data of the copied planning opens. To save, click the "Save" button. At the same time, not only the data of the report page, but also the data of the "Structure" and "Indicators" details are copied.

- Delete – deletes the selected schedule after confirming the deletion action.

- Start the planning process – the following planning actions are available:

  - Make changes - creates a new planning version to make changes to the report.

  - Actualize – updates the data entered in planning.

  - Calculate – calculates planning data.

Creation of a new planning

On the section page, click the "Add" button

At the same time, a mini-card will appear

All mandatory fields must be filled in the planning record mini-card:

- Name – enter the name of the current planning. It is recommended to enter a unique name.

- Start date – specify the exact start date of the period for which the report is being configured.

- End date – specify the exact end date of the period for which the report is being configured.

- Period type – select the required reporting period, planning step. The following options are available: day, month, year, quarter, week, individual period

To save a new record, click the "Save" button.

Control panel

The planning workspace consists of a top control panel, structure, settings, a main workspace with indicator columns, and total rows.

The control panel contains the following elements:

- Close – closes the current planning. Upon closing, you return to the "Planning" section.

- Filtering – configure flexible filtering by levels and columns.

- Conditional formatting – set the visual delimitation of data. With the help of the display, you can adjust the color highlighting of rows and cells.

- Graphs – building analytics in the form of graphs.

- Structure – intended for structure management. It contains the following actions:

    o Build - select if the plan has undergone significant planning level changes (For example, adding or removing major levels). During building, the planning is rebuilt, that is, the previously entered data is deleted and created anew.

    o Actualize – select if you need to update the plan data without rebuilding it (For example, updating calculations, after making changes to indicators, adding new records in the planning system).

    o Add records – select if you need to manually add certain records for each of the levels. There is a possibility of specific records, advanced filters or dynamic groups.

- Calculate - calculates the planning data according to the settings specified in it.

- Formation of objects - allows you to quickly form records of any system objects.

- Versions – management of planning versions.

- Display parameters – configuration of planning display parameters.

- Profiles – manage scheduling profiles.

- Periods – management of planning periods.

- Excel – export and import of Excel data.

- Send planning to email.

- Approval.

Configuration

Settings are available from the main workplace using the "Settings" button.

The following items are included in the settings:

- Planning settings – opens the Setup Wizard data page.

- Levels settings – select to configure planning levels.

- Indicators settings – set up planning indicators.

- Comments settings – select to configure planning comments.

- Rights settings – configure permissions to read, edit and delete the schedule.

- Administrated operations – select the rights settings for the current schedule. If the setting is not filled in, the rights configured in "General Administered Operations" apply.

- Open Task Manager – select to open Task Manager on a specific planning.

- General administrated operations – setting the rights of all administrative operations. For example, the ability to build and update data, create planning versions, manage public Excel reports, etc. This setting applies to all plannings in the system.

Configuration wizard

To go to the Configuration wizard you need to click on "Settings" - "Planning settings"

This will open the settings page

Below is a brief description of the main features:

1 – planning term management fields: start date and end date.

2 – planning status.

3 – selection of the planning period.

4 – lazy loading. It is recommended that you do not disable "Slow Data Download" as this can significantly affect system performance.

5 – tab with planning logs.

6 – tab with setting of planning rights.

7 – a tab with setting the calculation or data update working time.

8 – tab with setting of planning periods.

9 – a tab for viewing logically related plans.

10 – tab with visas according to current planning.

Planning levels configuration

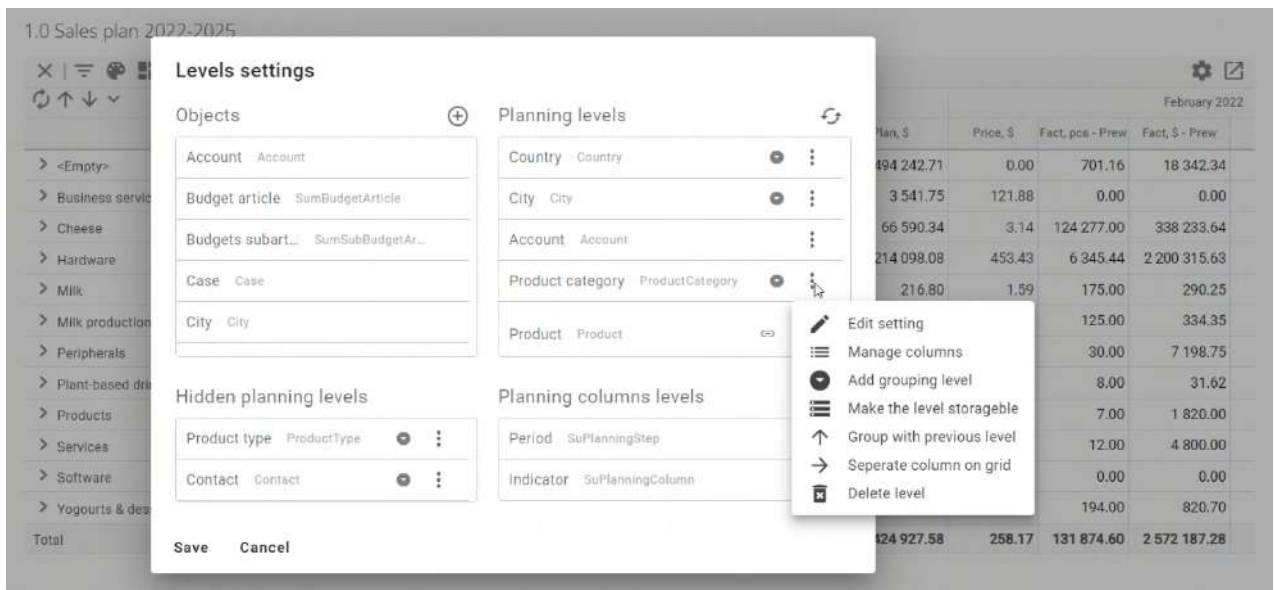To set the level of the planning, go to "Settings" - "Levels settings"
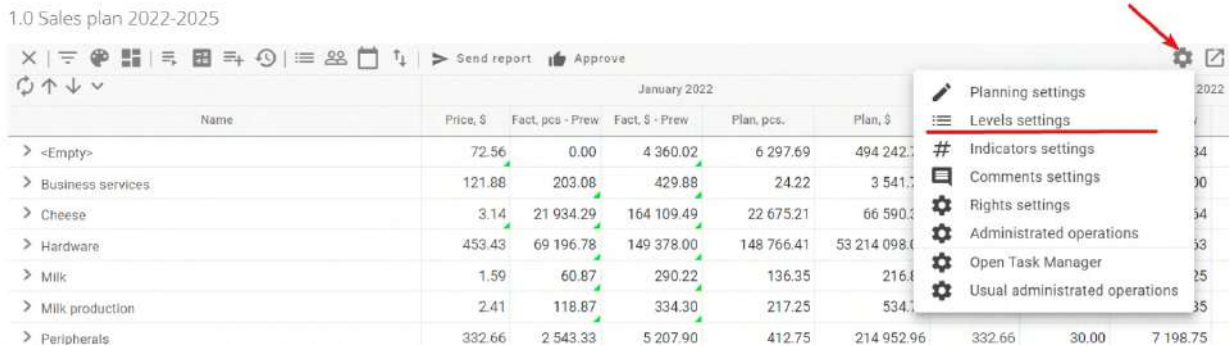

The planning level settings window will open
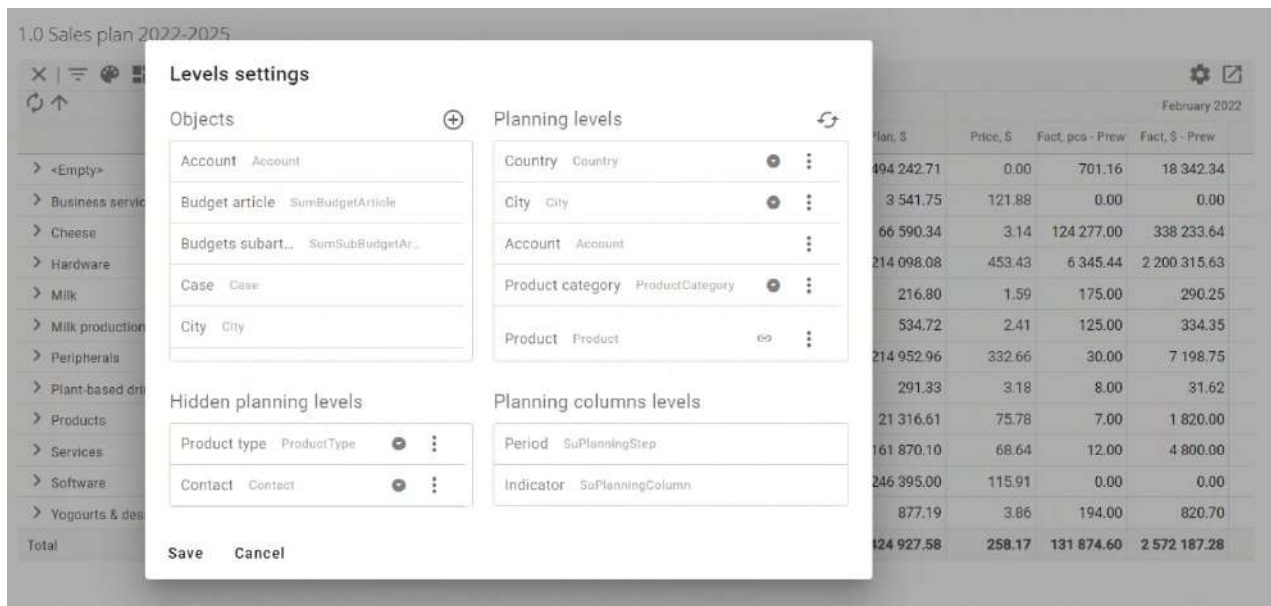
The window contains the following levels adjustment blocks:

- Objects – a list of objects that can be added to planning levels.

- Planning levels – levels of the planning structure displayed by default in the report.

  Sequential list of objects that are displayed in the layout. The icon (⊜) shows that there is a connection of the level with other levels. The icon (⬇) indicates that the level is grouping. Depending on the location of the order of levels, the hierarchy of the report will be built. The icon (→) indicates that the level is displayed in a separate column, like an Excel table structure. Actions on the levels, opened after pressing the button (⋮):

o Edit settings – allows you to change the name of the level, set the filter to the planning level. Shows the number of records that satisfy the filter
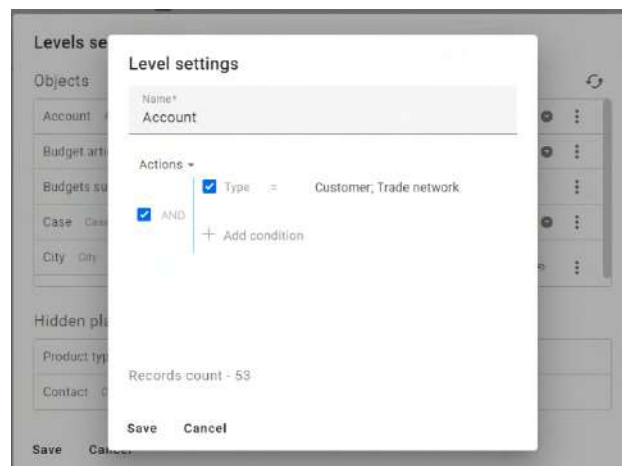
o Add grouping level – allows you to select grouping levels. There is no need to rebuild the tree when adding a grouping level.

o Column configuration – allows you to configure the columns of a specific planning level
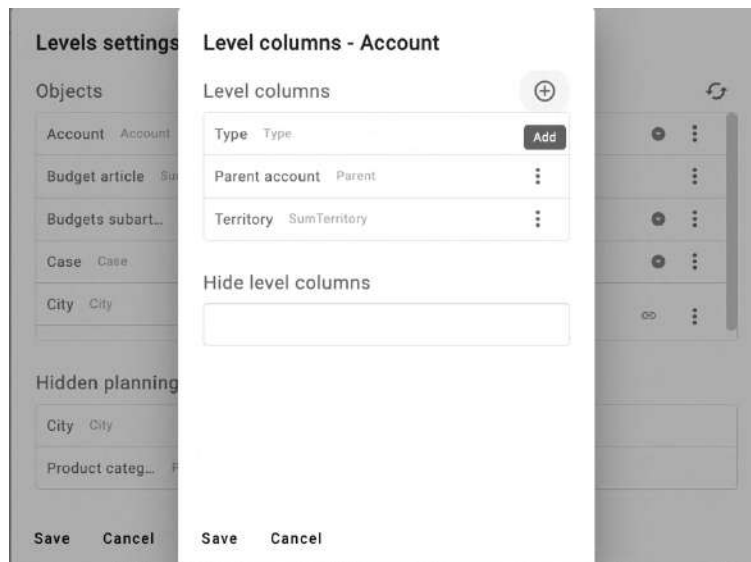
- o Group with Previous Level - groups a level with the previous level from the list.

- o Delete level – delete the planning level.

- o Add connection – allows you to add a connection between the main layers.

- o Separate column on the grid - allows you to display the layer as a separate layout column.

- • Hidden planning levels – planning structure levels that are not displayed by default in the planning.

After making the necessary level settings, you need to click "Save" to save the changes.

Creation of a new level

To add a new level, you need to drag it from the list of main objects of the system (Objects) to the list of levels (Planning levels). It is possible to add the necessary object, if it is not in the list, by clicking on $\oplus$
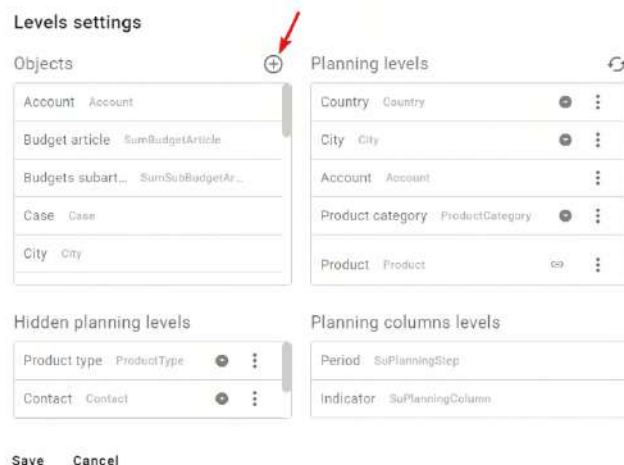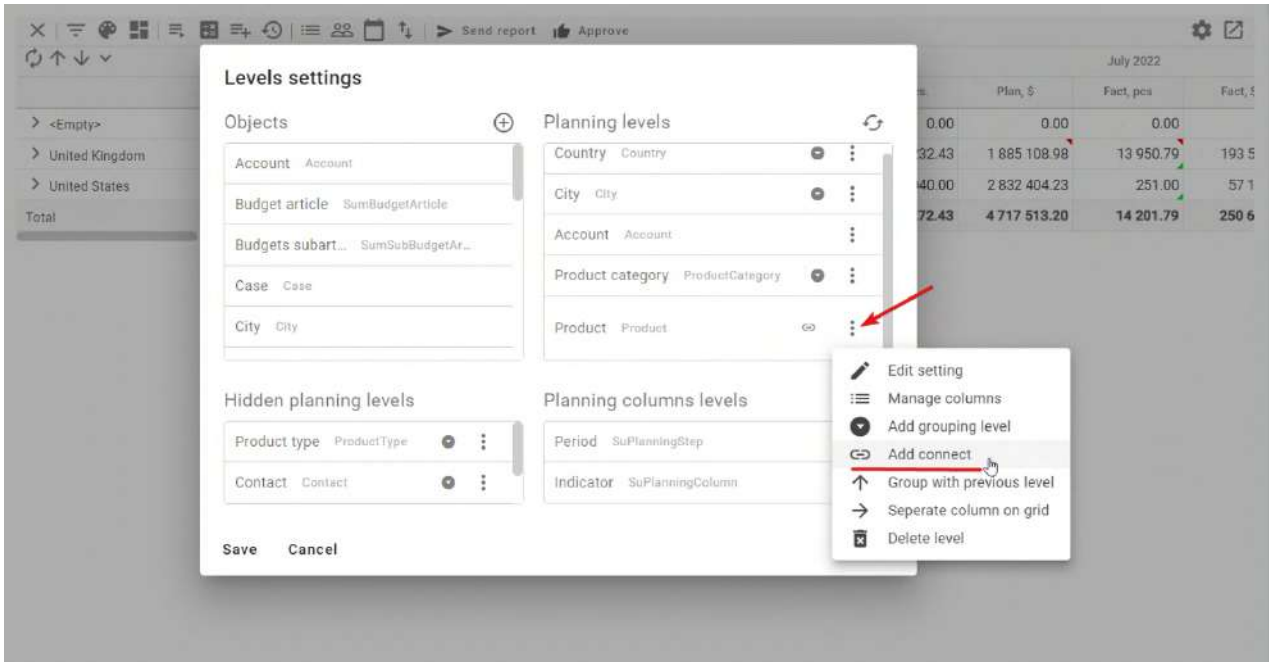

Level connections

If several levels need to be added to the report (for example, grouping of data by accounts and by goods from orders), then it is additionally necessary to indicate the relationship between the levels of the report.

For example, it is necessary to indicate in the report that for each Account, only the Products for which orders were placed for this Account are displayed. Otherwise, all products will be displayed for each Account.

To perform the setting, it is necessary to use the tool of additional filters. Filtering by direct links is necessary when there are links between records of different levels in the system. For example, Accounts-Orders, Employees-Departments - data are linked in the system.

To add a connection, you need to click on the button (⋮) at the level in which you need to enter the connection. Then select the item "Add connection".

In the window that opens, you need to fill in the following columns:
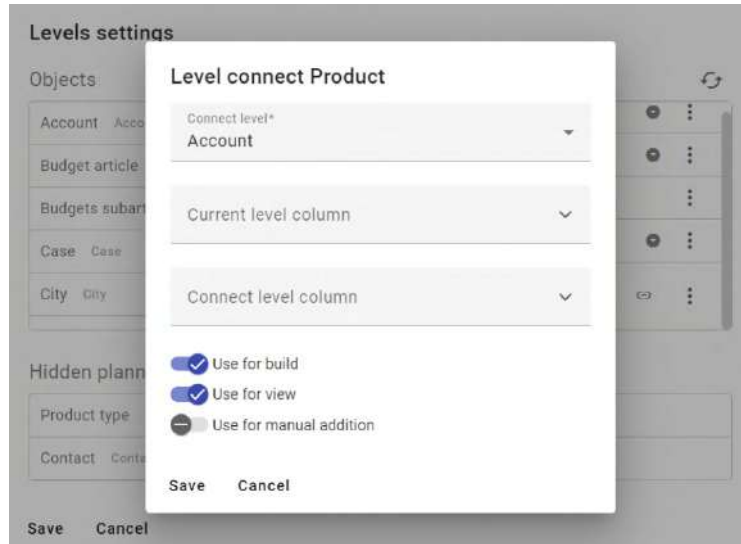
- Connection level – select the connected object by the level at which the action of adding a connection should be performed.

- Column of the current level – select a column from the object of the current level of the report, which contains a reference to data from the object specified in the "Object" field. For the Account-Product relationship, the value "Product in the order by the product column" must be specified in this field (the name of the field of the "Order" object, which contains a reference to the Account). The system automatically converts the selected fields into a formula
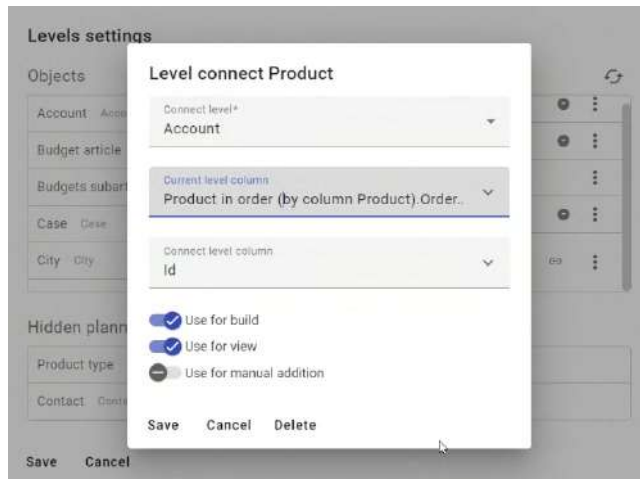
- Link level column – in this field, you must select a column (from the object specified in the "Object" field) that contains the value that links both objects. In other words, such a value must exist both at the top level of the report and at the bottom level. Most often, the role of such a combination is the unique identifier of a record from the top level of the report. For example, the Account ID must be used for the described Account-Product connection.

The following values are also available for settings:

- Use for view – is responsible for displaying the values by connection.

- Use for build – ensures that the connection is taken into account during building.

- Use for manual addition – manual addition of values is possible.

It is recommended to use communication for the main planning levels as it reduces the load on the system.
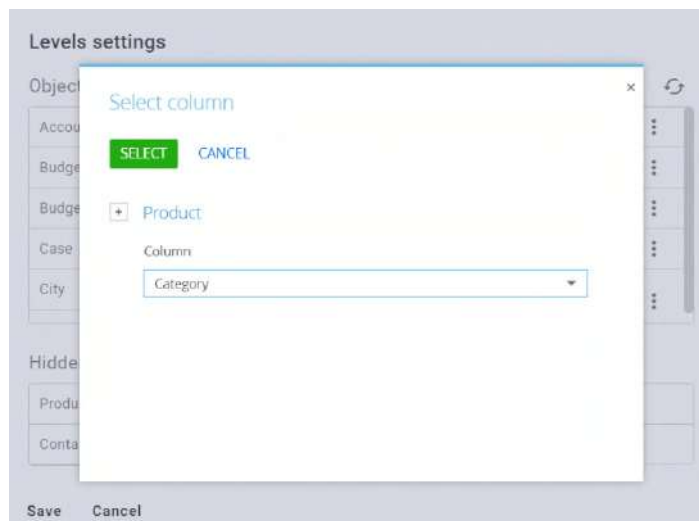
Levels grouping

To group records of the main level object by characteristics, grouping is used. For example, it is necessary to group the Product according to certain characteristics: brand, type, trademark, category, etc. In this case, a grouping level is added to the main level, in which communication with the main level will be automatically configured.

To add a grouping level, click on the button (⋮) on the level in which you need to make a connection. Then select the item "Add grouping level"
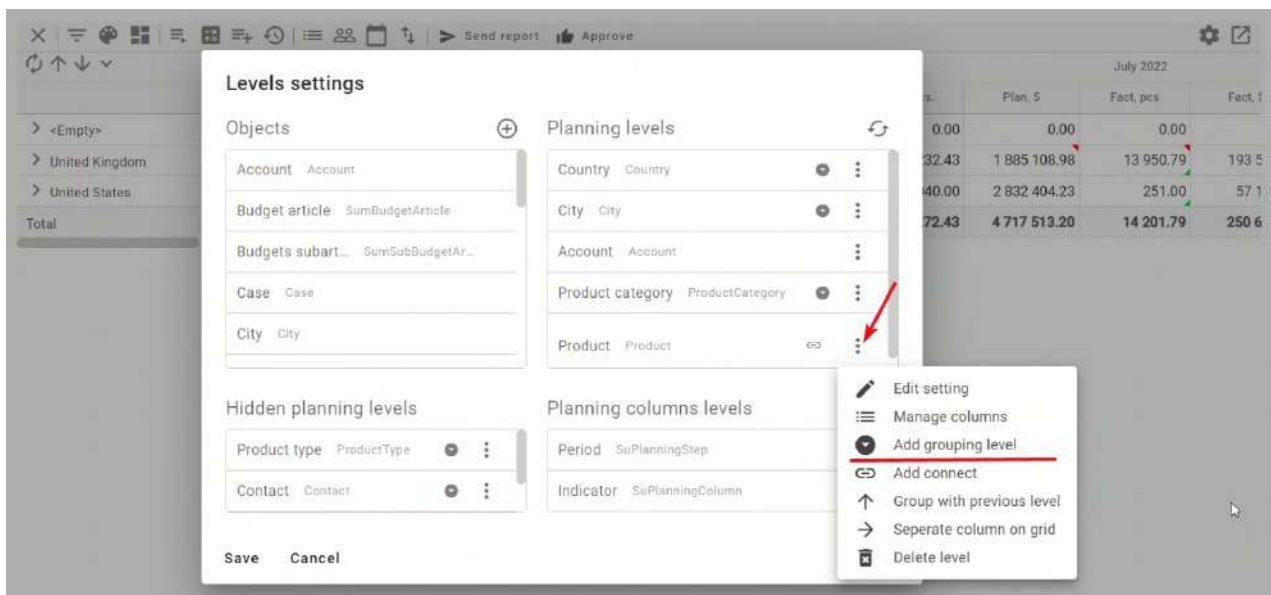
In the window that opens, select the column by which you need to group. For example, select Product category for Product

Adding, removing, hiding the grouping level does not affect the overall grid and does not require updating and rebuilding the structure.

It is also possible to group the selected level with the previous level. To do this, click on the button (⋮) at the level in which you need to make a connection. Then select "Group with previous level"
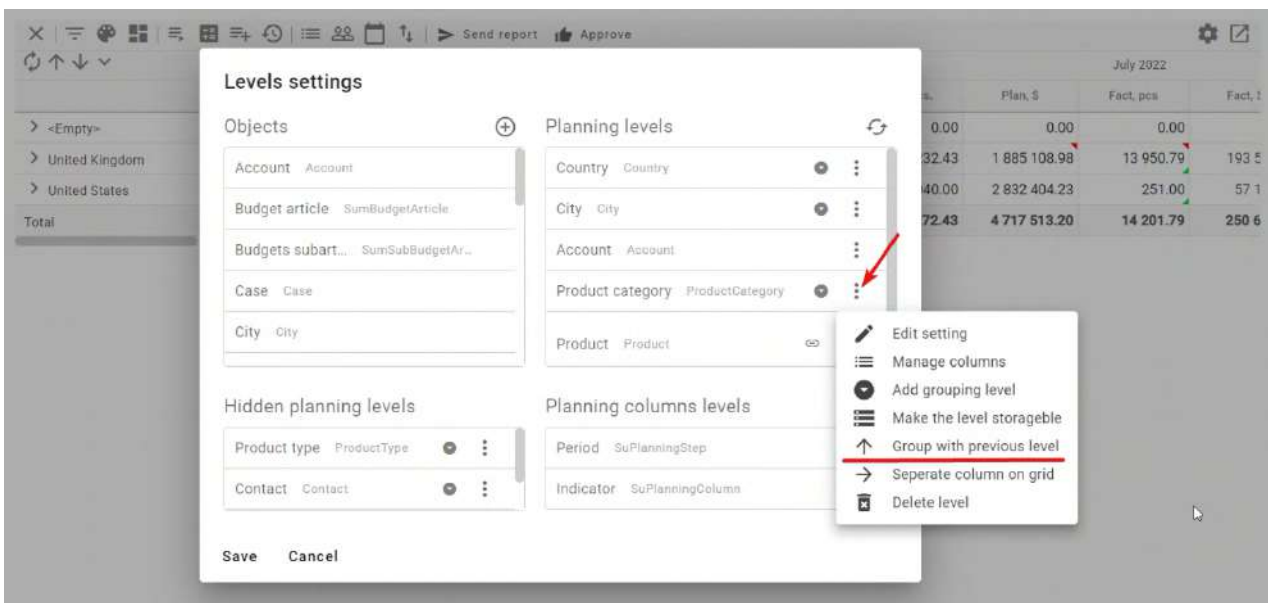

Setting levels in tabular view

This setting is used to reduce the table to a format similar to an Excel file, when planning does not require a hierarchical data structure.

To set levels in this format, you need to click on the button (⋮) on the level in which you need to make a connection. Then select "Group with previous level"
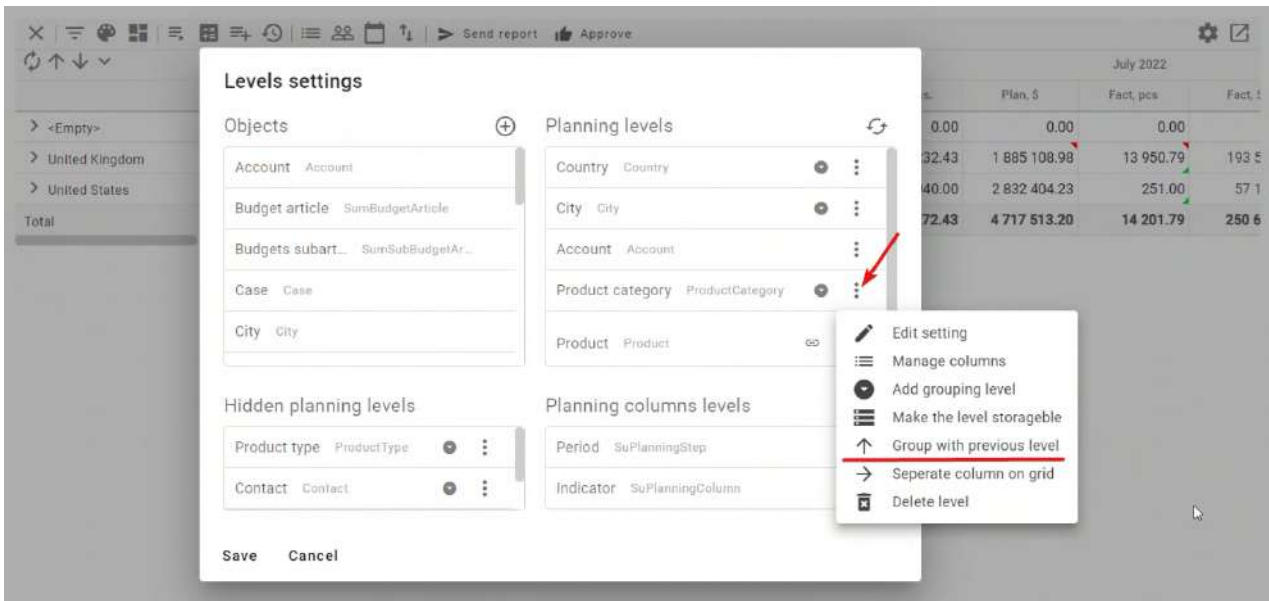
Then select the icon (→), which indicates that the level is displayed in a separate column.
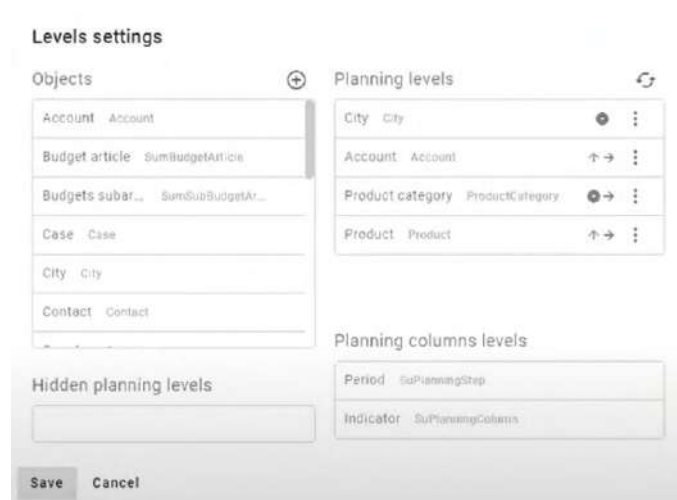
Thus, with the combination of the above groupings, it is possible to turn the planning into an Excel table structure

In the system, it is possible to save the specified planning setting, for this "Profiles" are used. You can familiarize yourself with the detailed setting [here](#).

Levels configuration as columns (DM360)

By using DM360, you can display layout levels as columns and control the order of column levels. For example, delivery conditions or budget items are not in the hierarchy but in the columns of the planning grid.

To set the levels in this format, you need to open the level settings. To move a level to a column, point to the desired level, click the left mouse button and drag the added level to "Column Level Planning" and save the changes

Thus, the above layout will display "Product Categories"

Also, as an example, articles and subarticles of the budget can be brought out in a similar way

In the system, it is possible to save the specified planning setting, for this Profiles are used. Detailed settings can be found in "Profiles". Also, if necessary, it is possible to combine the tabular view and DM360.

Level filter

If it is necessary to display only a certain part of the records of the selected object in the report, then in this case it is recommended to configure the filtering of records.

To do this, open the planning level record in the report; click on the button (⋮) at the level in which you need to set the filter and select "Edit settings"
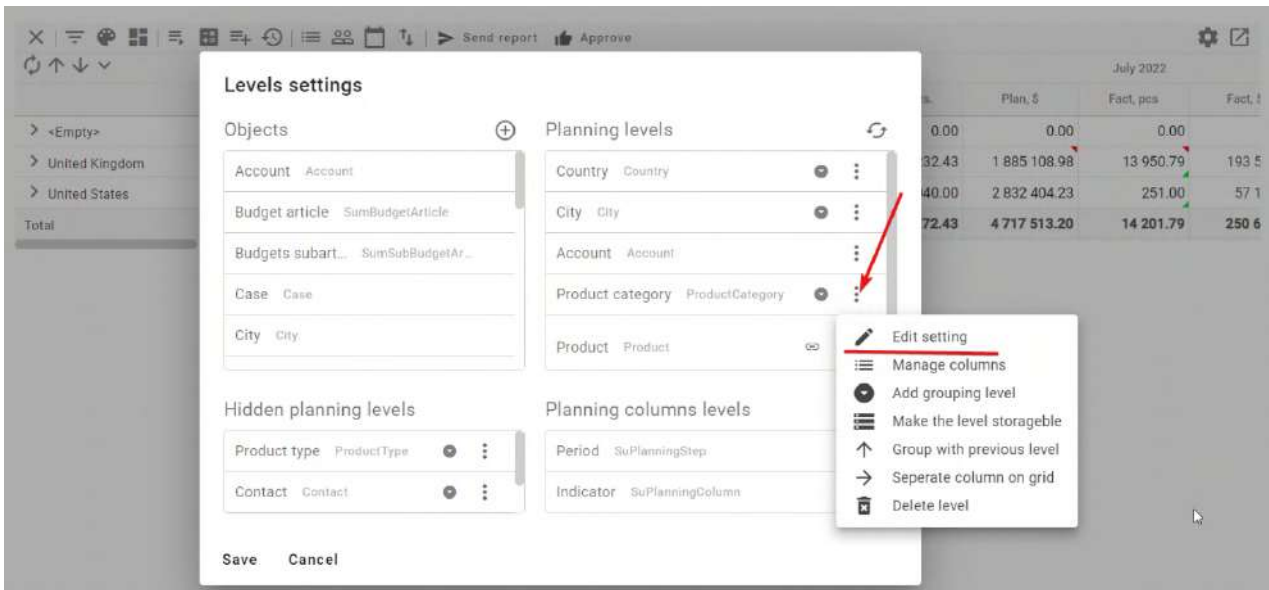
In the window that opens, add the rules for filtering records of the object of the current level.

For example, the plan should display only the Counterparty whose type is "Client" and "Trade network"
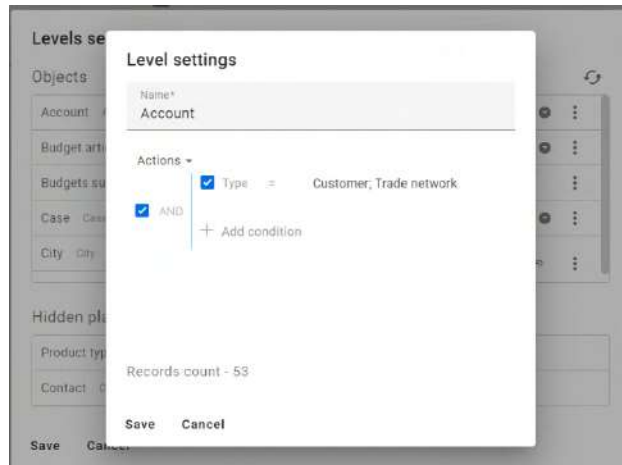
Indicators settings

Indicators are columns of data that form the main workspace. Displayed on the planning report page.

1.0 Sales plan 2022-2025

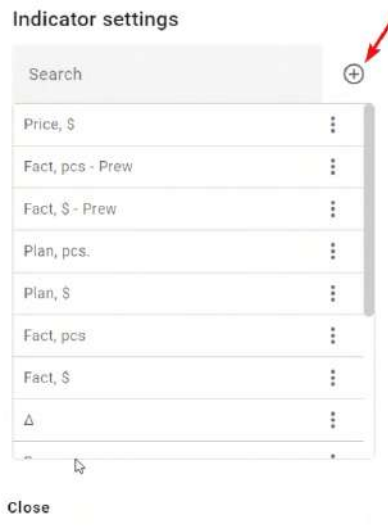| Name	January 2022					February 2022		
	Price, $	Fact, pcs - Prew	Fact, $ - Prew	Plan, pcs.	Plan, $	Price, $	Fact, pcs - Prew.	Fact, $ - Prew
> <Empty>	72.56	0.00	4 360.02	6 297.69	494 242.71	0.00	701.16	18 342.34
> Business services	121.88	203.08	429.88	24.22	3 541.75	121.88	0.00	0.00
> Cheese	3.14	21 934.29	164 109.49	22 675.21	66 590.34	3.14	124 277.00	338 233.64
> Hardware	453.43	69 196.78	149 378.00	148 766.41	53 214 098.08	453.43	6 345.44	2 200 315.63
> Milk	1.59	60.87	290.22	136.35	216.80	1.59	175.00	290.25
> Milk production	2.41	118.87	334.30	217.25	534.72	2.41	125.00	334.35
> Peripherals	332.66	2 543.33	5 207.90	412.75	214 952.96	332.66	30.00	7 198.75
> Plant-based drinks	3.18	40.58	31.60	90.90	291.33	3.18	8.00	31.62
> Products	75.78	600.91	1 272.03	85.23	21 316.61	75.78	7.00	1 820.00
> Services	68.64	1 949.52	8 525.08	2 044.62	161 870.10	68.64	12.00	4 800.00
> Software	115.91	1 496.84	3 039.37	1 932.08	246 395.00	115.91	0.00	0.00
> Yogourts & desserts	3.86	101.45	820.65	227.25	877.19	3.86	194.00	820.70
Total	262.17	98 246.52	337 798.54	182 909.96	54 424 927.58	258.17	131 874.60	2 572 187.28

Adding a new indicator

It is possible to add a new indicator through the main workplace or through Settings.

To add a new indicator through the main workplace - right-click on the title of the main workplace and select the menu item "Settings of indicators"


In the window that opens, click on ⊕

On the indicator record page, you need to make a choice and fill in all the main fields:

- Name – the title of the indicator (column in the report). It is recommended to enter a unique value.

- Data type – selection of the data type by which the column will be created. Available types: Integer, Fractional (1 digit), Fractional (2 digits), Fractional (3 digits), Fractional (4 digits), Fractional (8 digits)
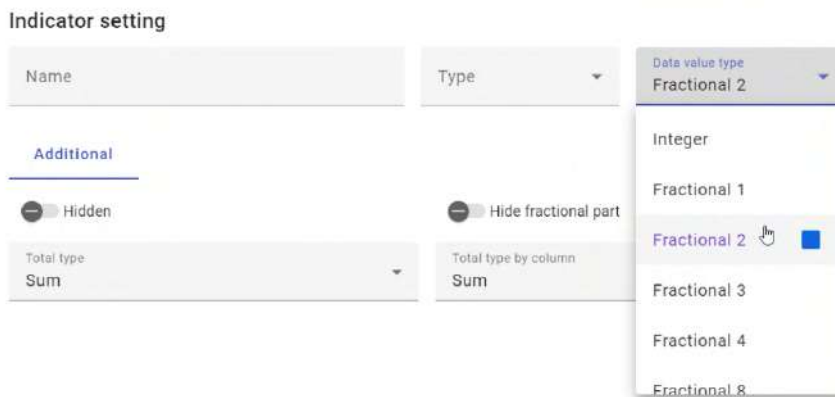
- Type – specifies the type of value that will be displayed in the configurable column. Depending on the selected type, various additional parameter settings will be displayed. The system provides the following types:

  o Editable – data is entered manually by the user. Used for data that is not stored in the Creatio system or cannot be calculated

- o Calculated – used to work with data (extract existing data, perform mathematical operations) stored in Creatio system objects. That is, in such an indicator, you can work with the data of sections and/or details of the system (for example, the amount in the account or contract), system settings, lookups

- o Умовний – використовується за необхідності встановити залежність значення однієї колонки від іншої, у разі відсутності математичної формули

- o Conditional – used when necessary to establish the dependence of the value of one column on another, in the absence of a mathematical formula

Calculated indicator type

Create an indicator of type "Calculated" as described in [Adding a new indicator](#). Alternatively, right-click on an existing indicator with the "Calculated" type and select the "Measure Settings" menu.

On the "Calculation" tab, write the necessary values with variables (if necessary) in the "Formula" field. After, select the variable to edit and click expand

In this field, you must fill in the calculated value for each variable:

- Variable type – a value is selected in this field that indicates the source of the value for this variable. The following values are available for selection:

  o Selection – used if data for a variable is selected from an existing section, part, or other system object. For this type, work with a data array is allowed.

  o System setting – used if the value of the current variable is selected from a system setting.

  o Lookup – used if the data for the variable is selected from an existing lookup. At the same time, the user works with only one lookup record.

  o Planning – used if the data for the variable is selected from an already constructed column of another planning
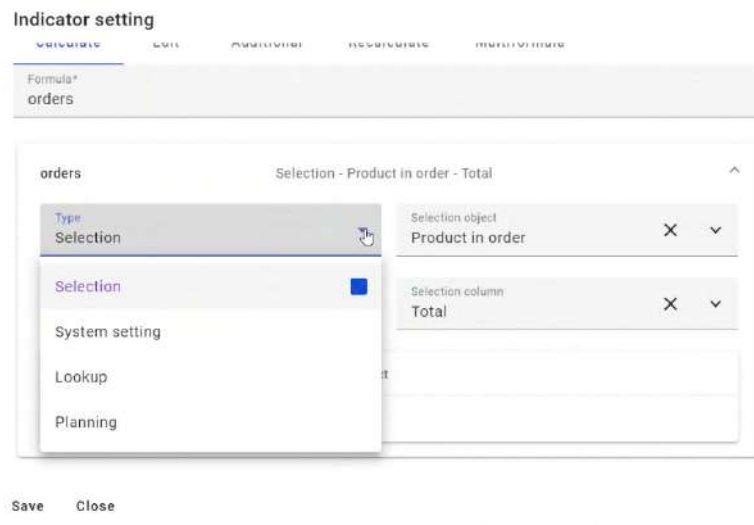
When setting the variable type in the system, the "Variable Settings" detail on the tab of the same name is dynamically changed.

Setting the "Selection" variable type

For a variable with the "Sample" type, the following parameters must also be configured:
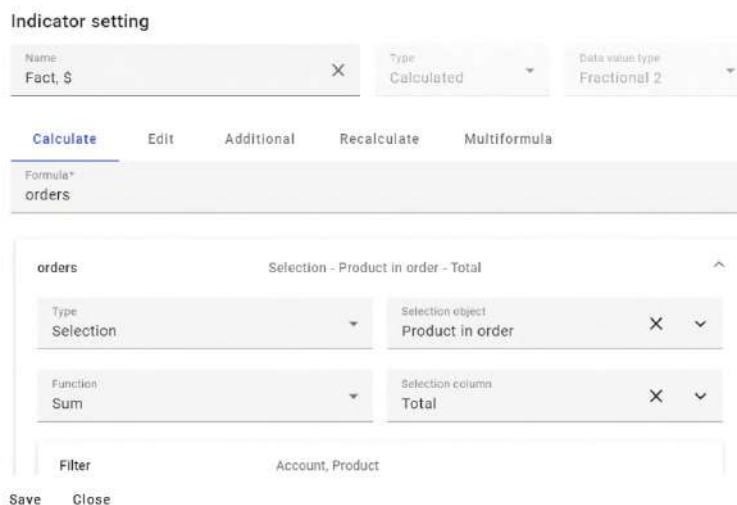
- Selection object – select the object whose data will be used to calculate the value of the current variable.

- Function – choose one of the aggregating mathematical functions: sum, quantity, minimum value, maximum or average. If you choose the value "Quantity", you do not need to specify the name of the column.

- Selection column – the column of the previously selected object is indicated, the data of which will determine the value of the current parameter. Use offset – if this feature is enabled, the data for the sample can be taken not for the current period, but as historical data.

- Offset – when the setting is activated, the following is indicated: the time offset during sampling in relation to the current time period. If it is necessary to take the available historical data, then the value of the offset will be negative. If a positive offset value is used, data from future periods will fall into the sample.

- Offset period type – when setting the offset, you must specify the number of periods and the duration of one period. For example "-1 / year", "3 / month"

Filtering for "Selection" variable type

The data filtering setting is available only for variables with the type "Selection" in the indicator with the type "Calculated". It is used to form an array of records, the data of which should participate in the calculation of the value of such a variable.

To configure filtering, expand the filter settings menu on the "Calculation" tab

When setting up filtering, in addition to the standard filters, the user has the option "Link to level". The connection with the level is recommended to be used in the case when only those records that correspond to the current record of the level should be included in the sample.
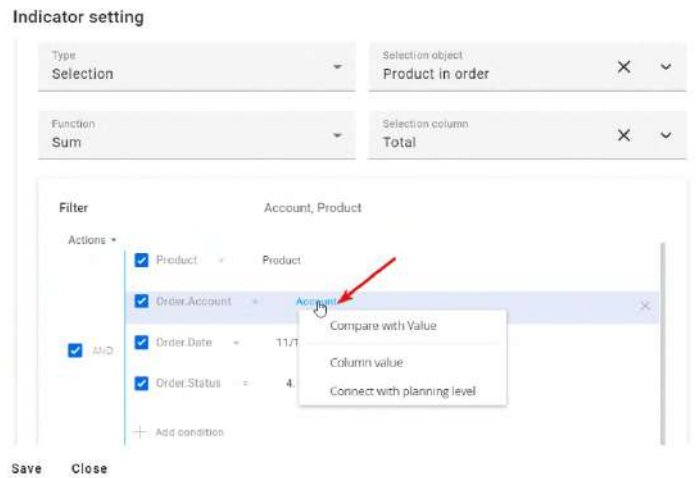
For example, when setting up the relationship of the field "Product" with the planning level "Product", we will get the following: only records related to this product will be selected.

If it is necessary to filter data by the periods displayed in the planning report, it is recommended to use the "Link to planning period" menu item for the date field, which will generate a service macro of the following form: "11.11.1111":
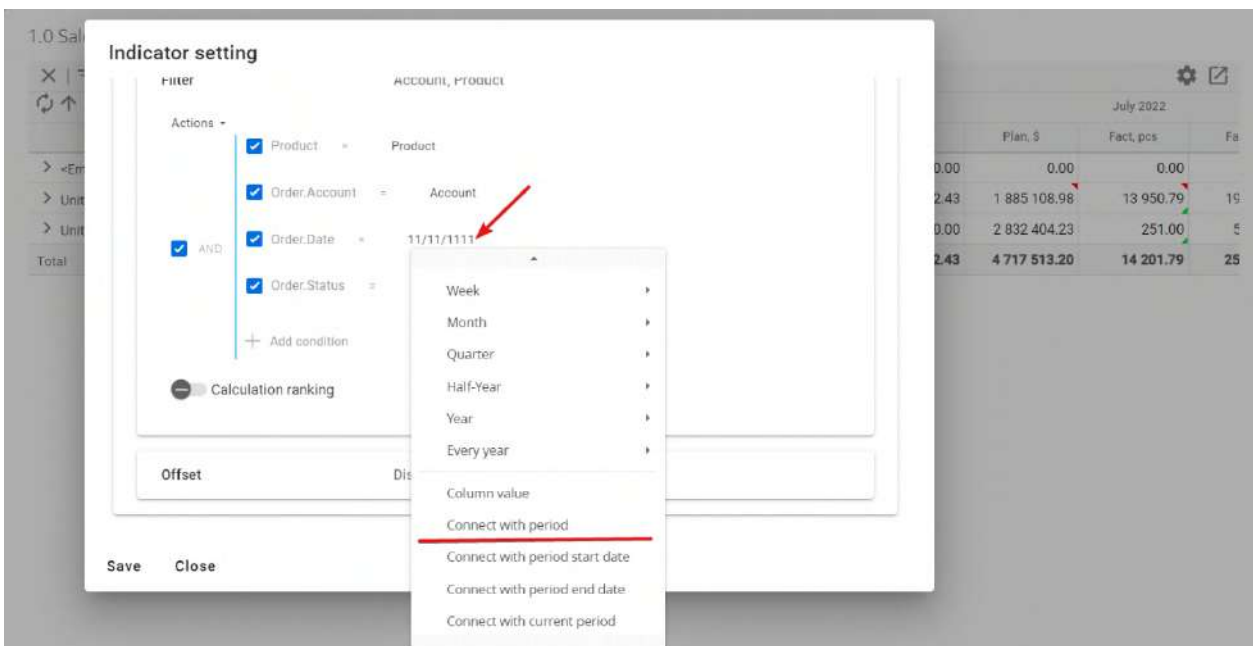
Offset for "Sample" variable type

The data filtering setting is available only for variables with the type "Sample" in the indicator with the type "Estimated". In the case when the value of a variable needs to be calculated based on historical data, but not current period data. For example, the planned sales volume can be set as the sum of actual sales for the same month of the previous year.

To configure filtering, on the "Calculation" tab, expand the "Offset" settings and activate the functionality by dragging the slider to the right

Then the menu is activated. Perform the necessary settings:

- Offset – a time offset during the formation of the selection relative to the current time period. If it is necessary to take the available historical data, then the value of the offset will be negative. If a positive offset value is used, data from future periods will fall into the selection.

- Offset period type – When setting the offset, you must specify the number of periods and the length of one period. For example "-1/year", "3/month".

- Duration – how many periods must be analyzed in the sample to calculate the value of the indicator.

- Duration period type – when setting the offset duration, you must specify the number of periods (previous indicator) and the duration of one period.

For example, planned direct sales can be calculated as an average of actual direct sales over the previous 12 months. In this case, the duration will be indicated as "12 months". If, during the offset, a period similar to the current one is analyzed, then in this block of fields it is recommended to set the value "1 period", where the period is equal to the value of the "Time unit" field of this planning report

Setting the "System Setting" variable type

For a variable of this type, it is additionally necessary to configure the "System setting" parameter. It specifies one of the available system settings

Setting the Lookup variable type

The following parameters must also be additionally configured for a variable of the "Lookup" type:

- Lookup – it is necessary to select one of the available lookups of the system.

- Lookup object – you need to select the object in which the lookup is located.

- Lookup object column – in this field, you must specify the name of the column by which the record will be determined. In other words, the user specifies the name of the field of the selected lookup , the data of which will be displayed below in the field "Record of the lookup".

- Lookup record – in a separate window of lookup values, you need to select the record whose data will be used in the calculations.

Setting the Planning variable type

Users have the ability to take and give data from columns to other planning pieces. There is a "Planning" variable type for this.

To configure this type of variable, follow these steps:

- When creating a variable, select the "Planning" type:

- In the "Function" field, select the data aggregation model: sum, minimum, maximum, or average value.

- Add planning, the data of which should be used. Click Add Planning.

- In the details of the minimap of the indicator, select the required planning pieces


- After that, the planning piece column from which the values will be taken will be available for selection.

- On the "Filters" detail, it is necessary to specify the connections between the levels of the current planning and the one used for data collection for each of the levels of the current planning.
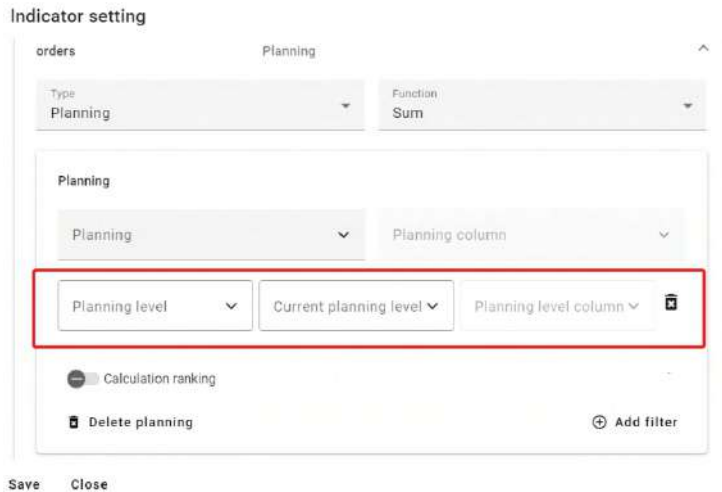
- On the "Offset" setting, after activating the function, you can select an offset when sampling from another layout or the current one. It is also possible to link with the current period (for forecasting).

Edit tab for the Planning variable type

The system has the possibility to edit calculated values in the column. In order for editing to become available, it is necessary to set the "Available for editing" flag: after that, select the condition for filling in the calculated values Ranking (select "Column for ranking") or "Replication".
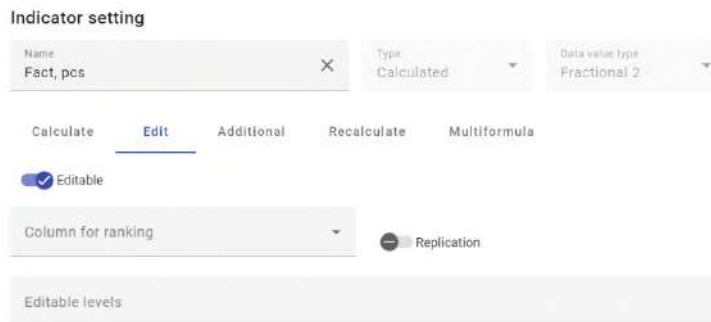
After setting this feature, the recalculation of the column in which revisions will be made will be suspended, and the system will inform the user that changes to this column have been made manually.

In the future, to change the value in the cell, you need to right-click on the cell and select the appropriate menu "Set calculated value".

1.0 Sales plan 2022-2025

Name	Additional	Price, $	Fact, pcs - Prew	Fact, $ - Prew	Plan, pcs.	Plan, $	Fact, pcs	Fa
> <Empty>		0.00	0.00	0.00	0.00	0.00	0.00	
> United Kingdom		249.00	14 679.00	93 167.42	15 232.43	1 885 108.98	13 950.79	19
> United States		265.57	8 148.60	2 310 101.20	10 040.00	2 832 404.23	251.00	5
Total		258.45	22 827.60	2 403 268.62	25 272.43	4			25

Show data
Comments
Set calculated value (235)

Conditional indicator type

Create a measure of type Conditional as described in [Adding a new indicator]. Or, right-click on an existing indicator with the "Conditions" type and select the "Indicator Settings" menu.

In the "Condition" tab, specify a column to define the conditions. Add sets of conditions by clicking the "Add" button

All fields must be filled. If necessary, add additional conditions by clicking the "Add" button again. Unnecessary conditions can be deleted by clicking on the trash can button to the right of the set of conditions.

- Operator 1 – specify the first comparison operator to analyze the value of the field specified as a column for calculating conditional values;

- Value 1 – Specify the first exact value of the field specified as the column for conditional value calculation.

- Operator 2 – Specify a second comparison operator to analyze the value of the field specified as a column to calculate conditional values.

- Value 2 – Specify the second exact value of the field specified as the column for conditional value calculation.

- Result – in this field, you must set a numerical value that corresponds to the condition.

Indicator setting

Name		Type		Data value type	
Fact	×	Conditional	▼	Fractional 2	▼

Conditions   Additional

Column for condition
Plan, $

Operator 1		Value 1	Operator 2 ▼	Value 2	Result	
=	▼	0			0	🗑
1		**2**	**3**	**4**	**5**	

⊕ Add

Save   Close

Conditions   Additional

Column for condition
Plan, $

Operator 1		Value 1	Operator 2 ▼	Value 2	Result	
=	▼	0			0	🗑

⊕ Add

Follow these guidelines when filling out the current page:

- Count how many value options the current indicator can take.

- For example, bonuses may not accrue (0%), or accrue. At the same time, there are 2 bonus schemes depending on the over-fulfilment of the plan: 15% and 25%. Together we have 3 values.

- Add a separate ranking record for each value.

- When describing the conditions, one or two boundary conditions can be specified.

- For example, an employee receives 0% bonuses if the plan overachievement is less than 10,000, for this case we will specify the formula "<=10,000". 15% bonuses - for exceeding the plan in the amount from 10001 to 25000, the formula will consist of two parts ">10000" and "<=25000". 25% bonuses – for exceeding the plan in the amount of 25001 or more, the formula will look like ">25000".

Type of delta indicator

Create a measure of type Conditional as described in [Adding a new indicator](#). Or, right-click on an existing indicator with the "Conditions" type and select the "Indicator Settings" menu.

In the settings, on the "Delta" tab, select a variable and set the values from which planning column will correspond to the values of the variable.

The following configuration tabs are available for the "Delta" type indicator:

- Editing – activation of the ability to edit the fields of this column in the grid.

- Additionally – settings management:

    o   column hiding;

    o   hiding the fractional part of the values in the column;

- o choosing the type of results;
- o choosing the type of summaries for the period.
- Recalculation – entering a formula for recalculation.
- Multiformula – entering a formula with an additional filter.

Filling in the value of indicators

In the Planning section, open an existing report.

You can enter data in any level, while when entering in the lower level, the upper ones are listed as Sum, and when entering in the upper level, the number is ranked downward according to the specified rules (if the ranking settings are set), or distributed equally among all records (if the ranking settings no).

1.0 Sales plan 2022-2025

Name	Additional	Price, $	Fact, pcs - Prew	Fact, $ - Prew	Plan, pcs.	Plan, $	Fact, pcs	Fa
> <Empty>		0.00	0.00	0.00	0.00	0.00	0.00	
⌄ United Kingdom		249.00	14 679.00	93 167.42	15 232.43	1 885 108.98	13 950.79	19
> Birmingham		281.06	0.00	0.00	0.00	0.00	0.00	
> Glasgow		72.72	83.00	10 400.00	66.92	6 697.00	7.80	
> Leeds		482.34	91.00	20 600.00	10 055.17	1 857 207.50	199.99	19
> Liverpool		283.53	0.00	0.00	0.00	0.00	0.00	
> London		164.81	14 505.00	62 167.42	5 110.34	21 204.48	13 743.00	
> United States		265.57	8 148.60	2 310 101.20	10 040.00	2 832 404.23	251.00	
Total		258.45	22 827.60	2 403 268.62	25 272.43	4 717 513.20	14 201.79	25

The entered values are automatically saved in the system. The value of the current indicator on the levels is also immediately calculated. A green flag will appear in the bottom right of the cell - a sign that the cell has been calculated.

In the changed cell, you can see the calculated value, you need to move the cursor to the green flag in the lower right corner of the cell.

1.0 Sales plan 2022-2025

Name	Additional	Plan, $	Fact, pcs	Fact, $	Δ	Bonus	Plan invoices amount, $
> <Empty>		0.00	0.00	0.00	0.00	0.00	0.00
⌄ United Kingdom	:	1 885 108.98	13 950.79	193 554.48	91.59	9 677.72	0.00
> Birmingham	:	0.00	0.00	0.00	0.00	0.00	0.00
⌄ Glasgow	:	6 697.00	7.80	0.00	11.66	0.00	0.00
⌄ Apex Solutions	Customer ;86	6 697.00	7.80	0.00	11.66	0.00	0.00
> Cheese		88.80	5.80	0.00	19.33	0.00	0.00
> Hardware	:	4 999.20	0.60	0.00	2.88	0.00	0.00
> Peripherals	:	0.00	0.40	0.00	100.00	0.00	0.00
> Services	:	1 029.00	0.60	0.00	5.83	0.00	0.00
> Software	:	580.00	0.40	0.00	6.90	0.00	0.00
> Leeds	:	1 857 207.50	199.99	155 963.98	1.99	7 798.20	0.00
> Liverpool	:	0.00	199.99 (Calculated value: 191.99.)	0.00	0.00	0.00	0.00
> London	:	21 204.48	13 743.00	37 590.50	268.93	1 879.53	0.00
> United States	:	2 832 404.23	251.00	57 135.56	2.50	2 856.78	0.00
Total	:	4 717 513.20	14 201.79	250 690.04	56.19	12 534.50	0.00

If grid filtering is configured, the value will be distributed only to those values that fall under the filter.

Upper levels are editable only if totals type = Sum, or totals type = Average and Duplicate attribute = Yes.

Additional options for changing indicators

Multiformula

Allows you to add several formulas with filtering in one column. Rows that fit the formula filters will be calculated by separate formulas (taking into account the priority of the formula), and rows that did not fall under the filters will be calculated by the standard formula.

Editable

This setting allows you to manually change the values in the column:

- In column type "Calculated" locks a specific changed cell for calculation. All other cells (rows, periods) are recalculated by the "Calculate" action when the source data is changed. In the changed cell, you can see the calculated value (Shift+Tab), and if necessary, clear the input manually and return the calculated value;

- In the "Delta" column type, you can make mutually enumerated columns. At the same time, it is necessary to configure the formula for the reverse calculation of the original column in the column settings (for example, the formula for the Sum delta is "Amount = Quantity * Price", then the calculation formula for the Quantity column is "Quantity = Amount / Price"). In fact, the value of the edited or editable calculation column changes, and the delta is calculated according to the usual formula. (There are nuances with rounding).

"Additional" tab

- Calculate the current period

It allows you to specify which current periods (Current Day, Current Week, Current Month) of this column should be calculated during the "Calculate" action and automatic update by timer (for example, during the daily calculation of the daily schedule, it is not necessary to calculate all 365 periods)

- Hidden – the sign is set if any of the indicators is official (for delta calculation) and should not be displayed on the report page.

- Hide fractional part - used to present data in planning pieces in the format of whole numbers, the fractional part will be hidden.

- Type of summaries

  Available for customization in all indicators. This field specifies the data calculation rule for the current indicator for the entire selected period (the last period in the planning report always displays totals for the selected periods, for example, aggregated data for a year). The user can choose the following option of data aggregation of all periods to calculate the indicator of the global period.

  - Sum – summation of indicator data is performed for all time intervals of the report.

  - Average – the average value of the indicator is calculated for all time intervals of the report. Maximum - the maximum value of the indicator according to the records of the lower level is selected.

- o Minimum – the minimum value of the indicator is selected according to the records of the lower level.

- o Maximum – the maximum value of the indicator based on records of the lower level is selected.

- o By formula – the value of the indicator is calculated according to the given formula. At the same time, the system works with all records that were used to calculate the value at lower levels.

- **Type of summaries by column** – this field specifies the rule for calculating data for the upper levels of the report. For example, at the lower level, indicators are calculated for each employee according to a given formula, and at the higher level, the value of the current indicator is summarized for all employees of the department. The following values are available for selection:

  - o Sum – summation of indicator data is performed for all time intervals of the report;

  - o Average – the average value of the indicator is calculated for all time intervals of the report. Maximum - the maximum value of the indicator according to the records of the lower level is selected;

  - o Minimum – the minimum value of the indicator is selected according to records of a lower level;

  - o Maximum – the maximum value of the indicator is selected according to records of a lower level;

  - o According to the formula – the value of the indicator is calculated according to the given formula. At the same time, the system works with all records that were used to calculate the value at lower levels.

When saving a record, all variables from the "Formula" field are automatically added as separate records to the "Planning slice variables" detail.

Formula

The field is available only when selecting the indicator type "Calculated" or "Delta". This field specifies the formula for calculating the value of the current indicator. Features of writing the formula:

- If the value of the current indicator does not need to be calculated, but only selected from a certain object, then a variable, for example "n", is indicated in this field;

- All variables can be specified in both Latin and Cyrillic;

- If a constant must be used in the formula, it is written in the current line as a number;

- When writing a formula, it is allowed to use engineering functions, for example, raising a variable to a power, calculating the square root of a variable, etc.

- New calculation formula values are available: SUMIN, SUMAX, SUAVG

  - o SUMIN – outputs the minimum value from the variables specified in parentheses

  - o SUMAX – outputs the maximum value from the variables specified in parentheses

  - o SUAVG – outputs the average value from the variables specified in parentheses

- For example: SUMIN(a,b)

  - o Available CurrentDate() functions:

  - o CurrentDate - current date

  - o PlanningStartDate - planning start date

- o PlanningEndDate - planning end date

- o PeriodStartDate - period start date

- o PeriodEndDate - period end date

- o IsPrevPeriod - Yes, if the period being calculated has already ended

- o IsCurrentPeriod - Yes, if the calculation period is current

- o IsFuturePeriod - Yes, if the calculation period has not yet arrived

Displaying the report

Adjusting the width of the columns

In the Planning section, open an existing report. The following are available for the main workplace (grid fields):

- The ability to change the width of the columns immediately on the grid (for the name and each indicator, individual width).

- Delete certain rows from the grid. Select the row to be deleted. By right-clicking next to the "Name" row. Select "Delete value" and then confirm the selected action

Comments

On each cell, the user can leave a comment on this indicator, and another user can respond to it:

1.0 Sales plan 2022-2025

- **Responses to comments**

The ability to respond to comments, that is, to make a hierarchy, to better understand what a comment belongs to in a question-and-answer format.

- **User tags**

You can mark users in the comments, and they will receive a message in the communication panel or another communication channel.

- **Comment status**

The ability to close a comment if the question in it has already been resolved to hide it from the grid and from the list of tasks.

- **Comments section**

A separate comments section where you can see all comments from all plans that can be connected to any objects, for example, Account, Manager, Product. These comments can be exported to Excel or another system for analytics or other tasks.

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Construction of the report grid

If the report was not built at the setup stage, the user also has the option to build the report while viewing it.

To do this, you need to perform the following actions:

- Open an existing report in the "Planning" section.

- In the control panel, select the structure and click the "Build" button

1.0 Sales plan 2022-2025

		Additional	Price, $	Fact, pcs - Prew	Fact, $ - Prew	Plan, pcs.	Plan, $	Fact, pcs	F:
> <Empty>			0.00	0.00	0.00	0.00	0.00	0.00	
∨ United Kingdom			249.00	14 679.00	93 167.42	15 232.43	1 885 108.98	13 950.79	1!
> Birmingham			281.06	0.00	0.00	0.00	0.00	0.00	
> Glasgow			72.72	83.00	10 400.00	66.92	6 697.00	7.80	
> Leeds			482.34	91.00	20 600.00	10 055.17	1 857 207.50	199.99	1!
> Liverpool			283.53	0.00	0.00	0.00	0.00	0.00	
> London			164.81	14 505.00	62 167.42	5 110.34	21 204.48	13 743.00	:
> United States			265.57	8 148.60	2 310 101.20	10 040.00	2 832 404.23	251.00	!
Total			258.45	22 827.60	2 403 268.62	25 272.43	4 717 513.20	14 201.79	2!

- Confirm the start of the procedure

Manually entered data will be lost and cannot be recovered. Continue?

Yes   No

- The execution of the procedure takes some time (depending on the number of rows and indicators, the execution time can vary greatly). Upon completion, a message is displayed to the user in the message center.

Update report data

In the process of work, new data is added to the system. For example, a new employee started work, a new product was launched for sale, they started working with a new client. In order for such new data to also be displayed in the planning report, the system provides a procedure for updating the report data.

To update the report data, you must:

- Open an existing report in the "Planning" section.

- In the control panel, select the structure and click the "Update" button

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		Additional	Price, $	Fact, pcs - Prew	Fact, $ - Prew	Plan, pcs.	Plan, $	Fact, pcs	F:
> <Empty>			0.00	0.00	0.00	0.00	0.00	0.00	
∨ United Kingdom			249.00	14 679.00	93 167.42	15 232.43	1 885 108.98	13 950.79	1!
> Birmingham			281.06	0.00	0.00	0.00	0.00	0.00	
> Glasgow			72.72	83.00	10 400.00	66.92	6 697.00	7.80	
> Leeds			482.34	91.00	20 600.00	10 055.17	1 857 207.50	199.99	1!
> Liverpool			283.53	0.00	0.00	0.00	0.00	0.00	
> London			164.81	14 505.00	62 167.42	5 110.34	21 204.48	13 743.00	:
> United States			265.57	8 148.60	2 310 101.20	10 040.00	2 832 404.23	251.00	!
Total			258.45	22 827.60	2 403 268.62	25 272.43	4 717 513.20	14 201.79	2!

- Confirm the start of the procedure

Manually entered data will be lost and cannot be recovered. Continue?

Yes   No

- The execution of the procedure takes some time (depending on the number of rows and indicators, the execution time can vary greatly). Upon completion, a message is displayed to the user in the message center.

Customization of report highlighting

For visual demarcation of data, you can set color highlighting of rows and cells.

To open the backlight settings in the planning report, you need to go to the control panel

After that, the sidebar on the left will open

The following filter options are available to the user:

- Levels – adjustment of the color solution by levels.
- Columns – setting the color solution by columns.
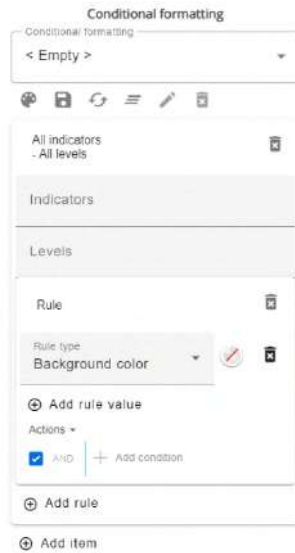
Adjusting the color solution by levels

If you need to add levels that will be highlighted, click on "Add element",

after choosing the level for which you want to adjust the color and expand the "Rule" in which to set the desired color
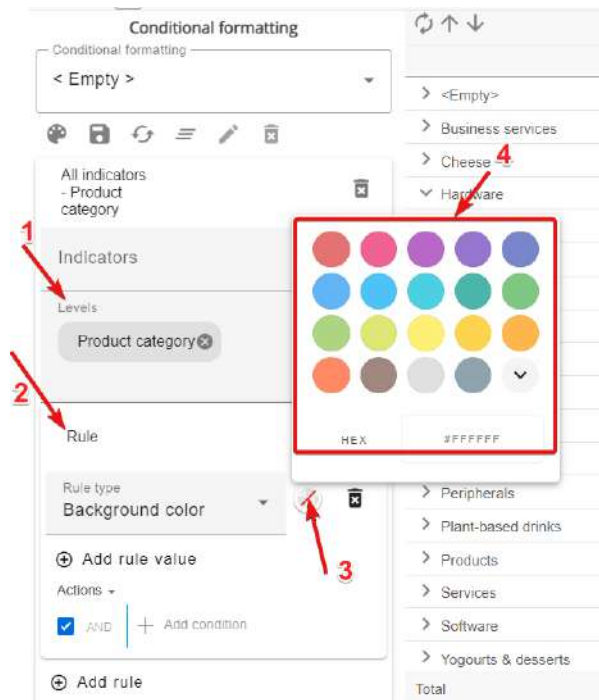
After all settings, in order for the color to be fixed at the level, you need to press the button
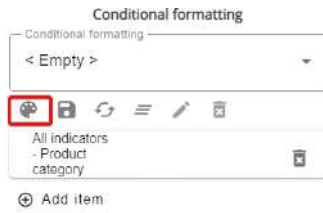
Adjusting the color solution by columns

If you need to add columns that will be highlighted, click on "Add element",
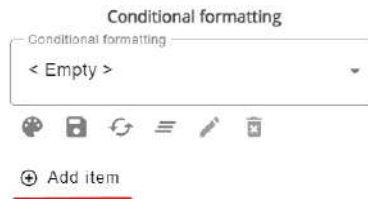
after choosing the column for which you need to adjust the color and expand the "Rule" in which to set the desired color
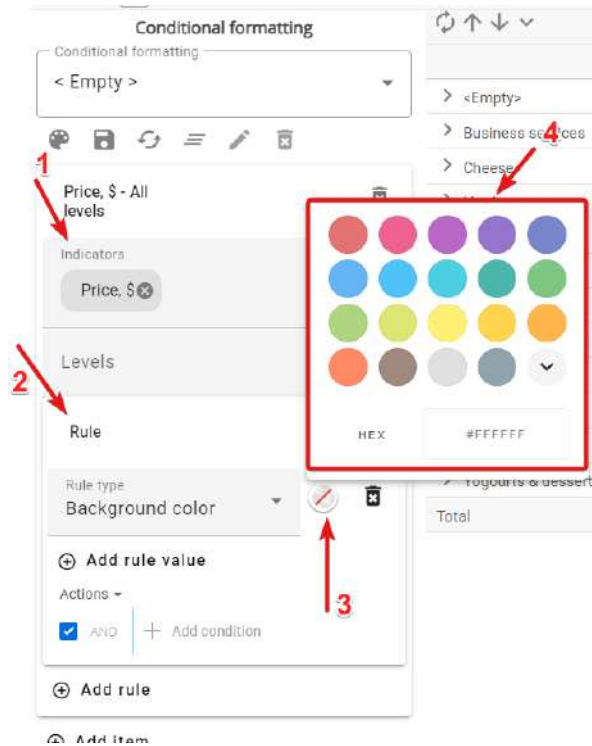
After all the settings, in order for the color to be attached to the column, you need to press the button 🎨
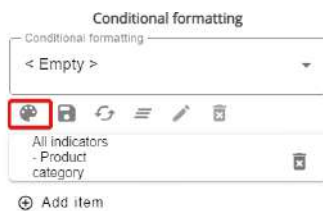
The result of settings by columns and rows:

Saving color settings

To save the settings, press the button

After clicking, the system will offer to choose the name of the color setting, as well as to set the "Common" flag: selecting this flag will allow other users of the system to use this color setting in the future:

After saving, to apply the saved template, you need to select it from the drop-down list in the top menu:
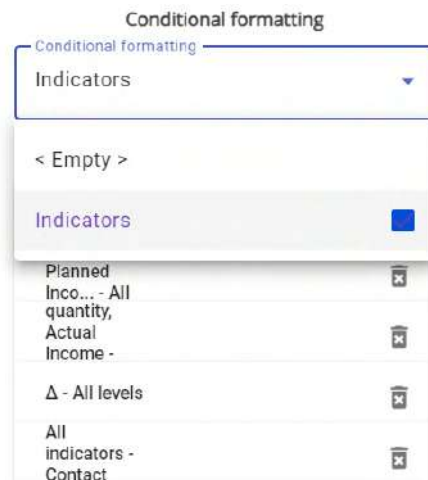
Settings available for management:
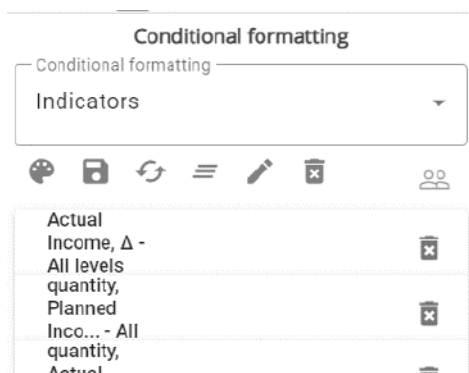
- – apply the current setting.

- – delete the current color setting.

- – change the name and access to the filter to other users.

- – restore the saved template (for example, if you need to return to the initial version of the template after adjustments).

- – save the current setting.

- – clear template data.

- – icon means that this setting is general.

Profiles

When working with the planning report, the user may be able to select the profile that he needs to work at the current time. You can apply settings so that different roles and/or users immediately open the schedule as their personal profile.

Adding a profile

To do this, you need to perform the following actions:

- Open an existing planning in the "Planning" section.

- Select "Profile" on the control panel, click the "Create profile" button

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Name		Plan, $	Fact, pcs	Fact, $	Δ	Bonus	Plan invoices amount, $
> \<Empty>		0.00	0.00	0.00	0.00	0.00	0.00
∨ United Kingdom		1 885 108.98	13 950.79	193 554.48	91.59	9 677.72	0.00
> Birmingham		0.00	0.00	0.00	0.00	0.00	0.00
∨ Glasgow		6 697.00	7.80	0.00	11.66	0.00	0.00
∨ Apex Solutions		6 697.00	7.80	0.00	11.66	0.00	0.00
> Cheese		88.80	5.80	0.00	19.33	0.00	0.00
> Hardware		4 999.20	0.60	0.00	2.88	0.00	0.00
> Peripherals		0.00	0.40	0.00	100.00	0.00	0.00
> Services		1 029.00	0.60	0.00	5.83	0.00	0.00
> Software		580.00	0.40	0.00	6.90	0.00	0.00
> Leeds		1 857 207.50	199.99	155 963.98	1.99	7 798.20	0.00
> Liverpool		0.00	0.00	0.00	0.00	0.00	0.00
> London		21 204.48	13 743.00	37 590.50	268.93	1 879.53	0.00
> United States		2 832 404.23	251.00	57 135.56	2.50	2 856.78	0.00
Total		4 717 513.20	14 201.79	250 690.04	56.19	12 534.50	0.00

- After that, the profile settings window will open, where you will need to set the values:

- o Name – name of the profile.

- o Public - if not selected, this profile will be available only to the user who created it. If the item is selected, the "Access" tab will be added to the profile settings.

- o "Levels" block – the ability to configure the structure of the display of planning levels for this profile:

  - Planning levels – displayed planning levels.

  - Hidden levels of planning – hidden levels of planning.

  - Profile Levels – list of displayed planning levels in this profile. Filled by dragging levels from the Planning Levels and Hidden Planning Levels blocks.

o Columns tab - selection of displayed columns for this profile.
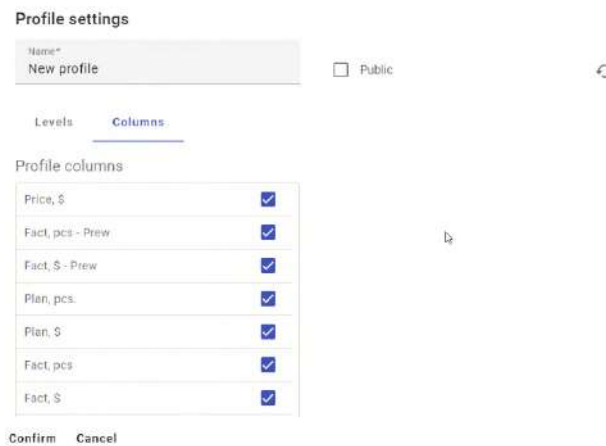
o "Access" tab (available only if the setting is "Public") - selection of system roles or users for

which this profile will be available. You can add roles or users after clicking on the button ⊕
. Access rules work according to standard access settings, where the higher the position,
the higher the priority of rights. Changing positions in the list is carried out by dragging the
object. To delete an unnecessary administration object, you need to click
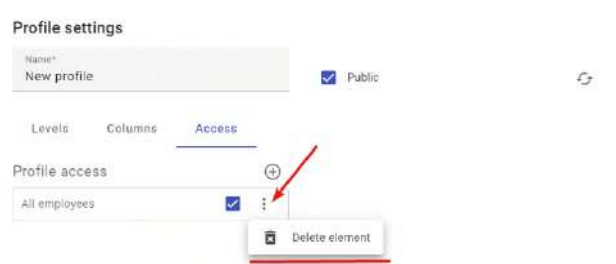
Click "Save" to save the settings.

Editing a profile

To edit, click "Profile" on the control panel and select the profile that will be used for the current build and is
displayed as "grey" in the list of profiles, then click the "Edit Profile" button

After making changes, click the "Save" button. After confirmation, the profile is rebuilt.

Periods

The ability to display planning in an aggregated format (monthly display by quarter), regardless of the configured profile that needs to be displayed at the current time.

Setting display periods

To do this, you need to perform the following actions:

- Open an existing report in the "Planning" section.

- Select "Periods" on the control panel, click the "Type of periods" button

An example of displaying the same layout with the display type Quarter:

For example, when setting the period type "Week" in planning, according to the system settings, the weeks will be specified in the format "36th week of 2023, 37th week of 2023, 38th week of 2023", etc. In order to change the display to dates, it is necessary to make adjustments through lookups

To set up this type of periods, you must first fill in the "Period (SU)" lookup:

We export the necessary records to Excel
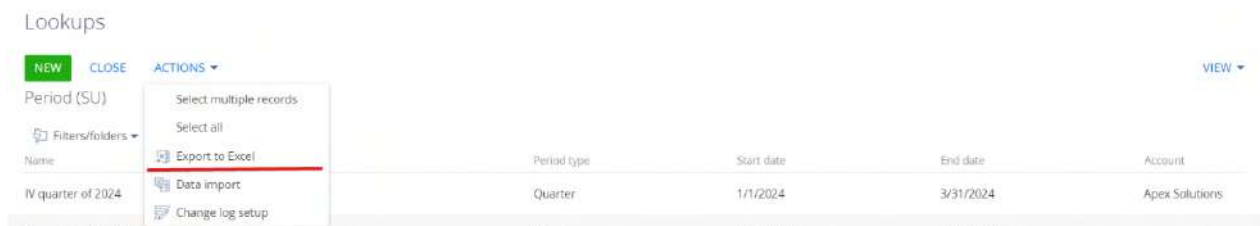
In the downloaded file, change the data in the "Name" column to the ones we need and save.

After that, we import the edited file into the lookup using the standard Creatio functionality.

Thus, the changed period names will be pulled into planning

		10/1/2023 - 10/14/2023				10/15/2023 - 10/28/2023			
Name	План, шт	Знижка, %	Fact	%	Price	План, шт	Знижка, %	Fact	%
> Aerted dessert 3,4% Cherry fusion Dolce	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Asus ATIRADEON 4850	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Asus R9280X-DC2T-3GD5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Battery Back-up System APC Back-UPS ES 700VA (BE700G-RS)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Battery Back-up System APC Back-UPS Pro 900VA (BR900G-RS)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Battery Back-up System APC Smart-UPS C 1500VA LCD (SMC1500I)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Blue-veined cheese Le Blue 50% Président	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Blue-veined cheese Roquefort 52% Société	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> Business analysis	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Attention: in the file in the name column, for example, if we specify the format "01.10.2023" when loading data into the directory, this data will be perceived as "General data type". In order for the data to be loaded correctly in the columns of the Excel file, it is necessary to write the formula for converting the data into text. For example: =TEXT(A3;"dd.mm.yyyy"), where A3 is a column with a date.

Period profile settings

When working with the planning report, the user can select the profile of the period to be displayed at the current time for simplicity.

Adding a period profile requires:

- Open an existing report in the "Planning" section.

- Select "Periods" on the control panel, click the "Create profile" button

- After that, the period profile setting window will open, where you will need to set the values:

o Name – the name of the period profile.

o Public – if disabled, this period profile is considered private, it will be available only to the user who created it. If the option is enabled, this period profile will be available to all users.

o Period – the period interval that will be used in the profile is specified.

o Type of periods – choice in which type the selected periods will be displayed. Choice of values: Month, Quarter, Half Year, Year.

o Periods – you can add records of periods in the selected type using the (+) button to the right of the type. You can also set the display order here, if several periods are selected, using Drag&Drop. (For example, if the selected period type is month, then months can be selected. If the selected type is quarter, then quarters will be available when selecting the period).

The report will be automatically updated, only the selected periods will be displayed on the page. The profile only changes the display of the period grid.
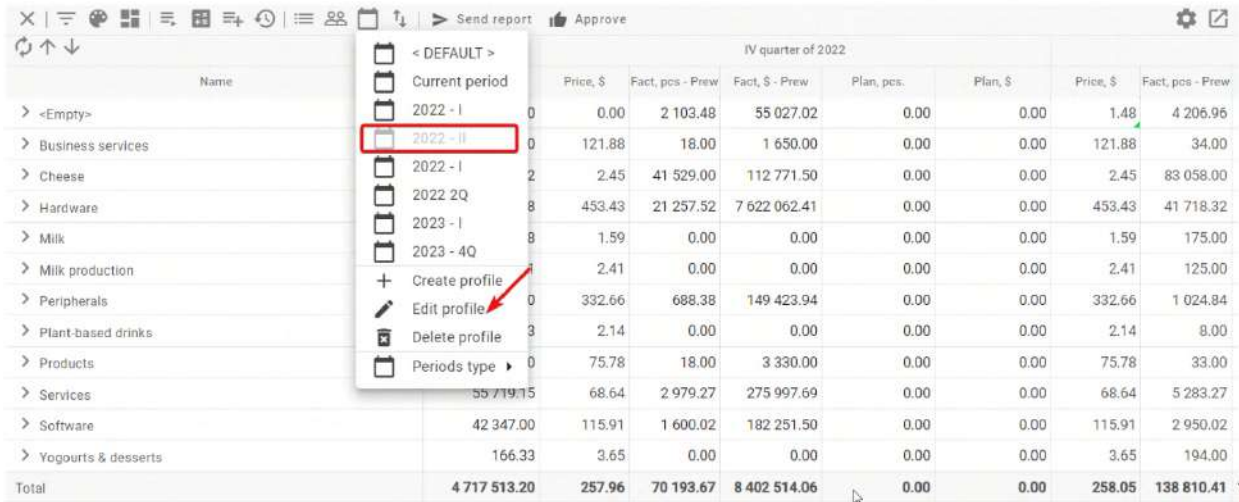
The default profiles are:

• *<DEFAULT>* – standard profile, determined by the settings of the planning itself, namely: Start dates, End dates and Type of period.

• Current period – display of the current period as the type of planning period under which the current date falls.

Editing a period profile

To edit, click "Profile" on the control panel and select the profile that will be used for the current build and is displayed as "grey" in the list of profiles, then click the "Edit Profile" button

After making changes, click the "Confirm" button. After confirmation, the period profile is rebuilt.

Individual planning periods

The system has the option of setting your own periods for those cases when the standard ones (day, quarter, month, year, half-year) are not enough to build the necessary plan.

To start using this option, you must specify the "Custom" period type in the planning. Go to the "Settings Wizard", click on "Settings" - "Scheduling Settings"

This will open the settings page. To change the type of period, select "Custom (Planning)"
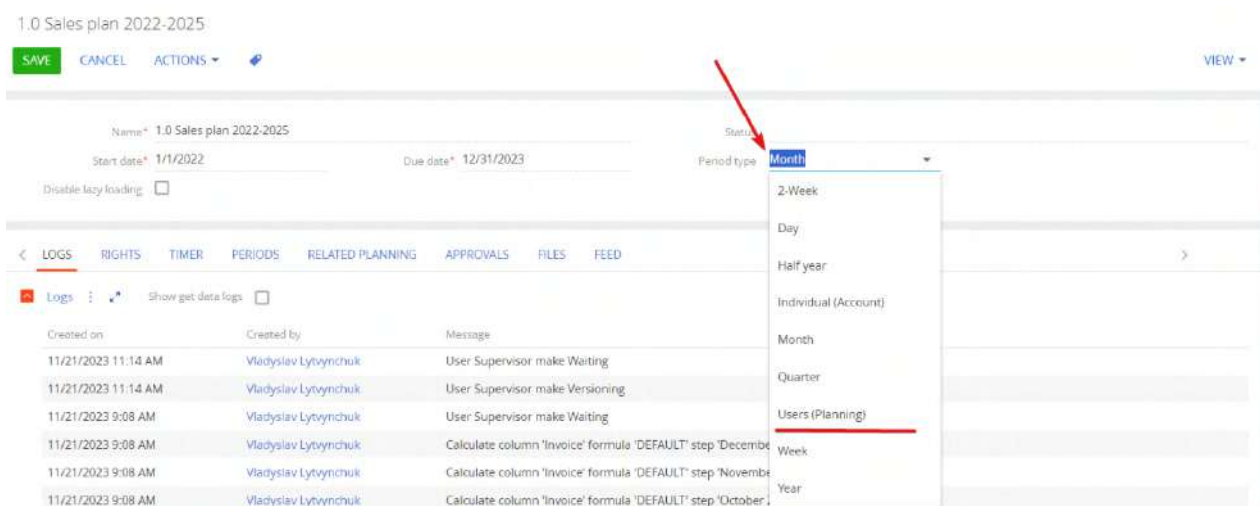
After that, the "Planning step" detail will appear in the "Periods" tab
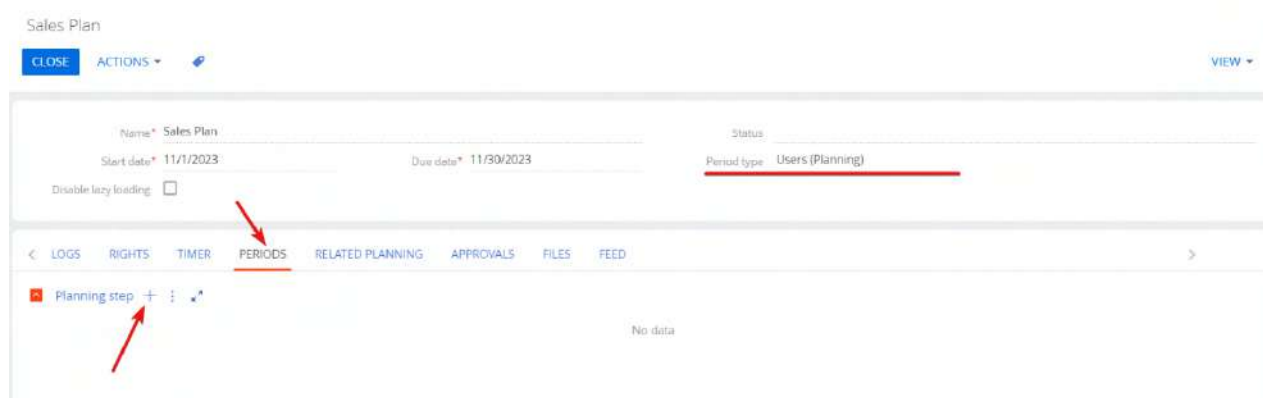
You can delete or add a new period for display with the corresponding buttons on the details.

Custom period settings

This period can be used when custom periods linked to a specific account are configured in the system.

To set up this type of periods, you must first fill in the "Period (SU)" lookup:
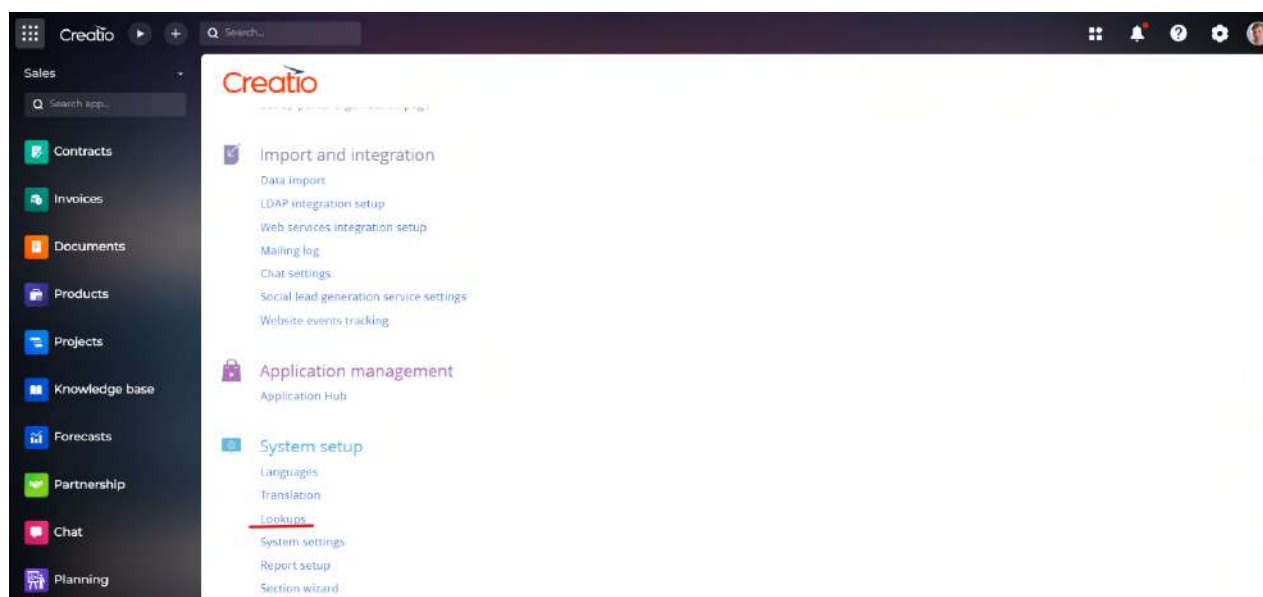
The following data must be filled in the lookup:

- Period start date.

- Period end date.

- Name.

- Account.

After adding all the necessary periods, in the section you need to select the type of periods custom, and also specify the account, according to which the section will be built:

After that, the configured periods will be added to the slice, and the schedule itself will be rebuilt according to these periods.

Rights

Level, user role and level filtering are specified. To a user in this role, only those records that fall under the filter will be displayed. If the user enters several roles that are in the settings, then the filter with the highest priority (the lowest number in the position) will be applied.

Records rights

In the "Settings wizard" on the "Rights" tab, you need to add an entry to the "Statistical filters of the planning grid" detail by clicking on the (+) button

1.0 Sales plan 2022-2025

Name*	1.0 Sales plan 2022-2025		Status	
Start date*	1/1/2022	Due date* 12/31/2023	Period type	Month
Disable lazy loading	☐			

LOGS · RIGHTS · TIMER · PERIODS · RELATED PLANNING · APPROVALS · FILES · FEED

Planning grid static filters + ⋮ ↗

No data

⌄ Show more

Planning column static filters + ⋮ ↗

Planning column	Position	Administration object	Can show	Can edit
— Plan, pcs.	3		Yes	Yes
Plan, pcs.	0	System administrators	Yes	Yes
Plan, pcs.	1	All employees	Yes	Yes

⌄ Show more

The planning grid filter settings will open. The following columns must be filled in:

- Planning level – choose the planning level according to which access rights will be configured.

- Administration object – select the users or roles to which access rights will be granted.

- Advanced filtering – setting the filter that will determine access rights

1.0 Sales plan 2022-2025 / Planning static filter

SAVE   CANCEL   ACTIONS ▾

Planning level   Account
Administration object*   🔍

< FILTER >

Actions ▾

☑ AND + Add condition

Count: 0

- Current contact – the field is available in levels with type Contact or Administration object. Only those levels where the value in level = Current user will be displayed to the user.

1.0 Sales plan 2022-2025 / Planning static filter

SAVE   CANCEL   ACTIONS ▾

Planning level   Contact   Current user   ☐
Administration object*   All employees

< FILTER >

Count: 0

To change the order of rights, you need to highlight the entry of interest to you in the "Statistical filters of the planning grid" detail, which corresponds to the setting of rights with a filter (subordinated to the planning level), and press the up or down arrows.

Column rights

The column, user role, available display and editing are indicated.

In the "Rights" tab, you need to add an entry to the "Statistical filters of planning columns" detail by clicking on the (+) button.

The permission setting for planning columns will open. The following columns must be filled in:

- Planning column – a planning column for which rights must be set.

- Administration object – role or user to which the configured rights will be applied.

- Display Available – if selected, the selected column will be displayed to the selected user or role. If the feature is not selected, this column will not be available to the user.

- Editing available – if this option is selected, editing of the selected column will be available to the selected user or role. If the feature is not selected, the user will not be able to edit the columns.
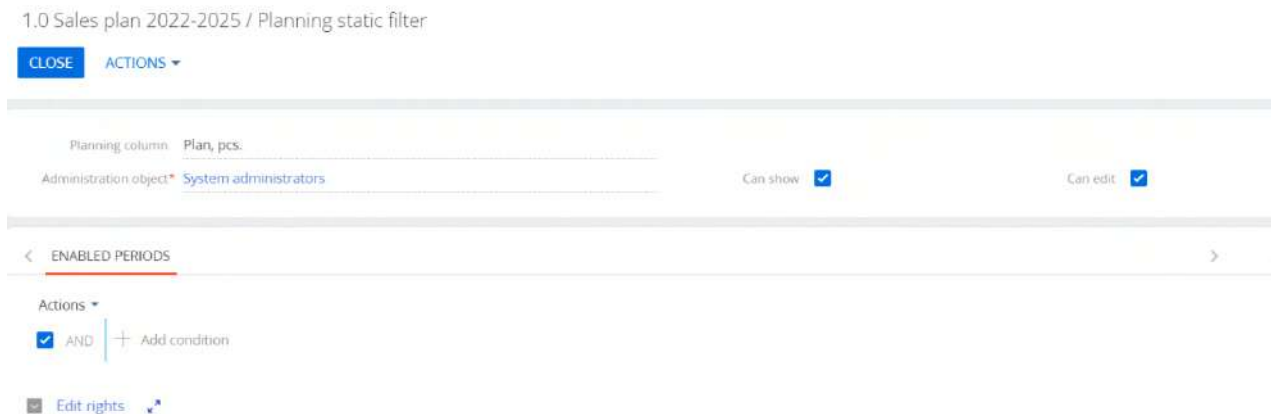
To change the order of rights, it is necessary to highlight the record of interest to the user in the "Statistical filters of the planning grid" detail, which corresponds to the setting of rights with a filter (subordinated to the planning level), and press the up or down arrows. If the user enters several roles that are in the settings, then the filter with the highest priority (the lowest number in the position) will be applied.
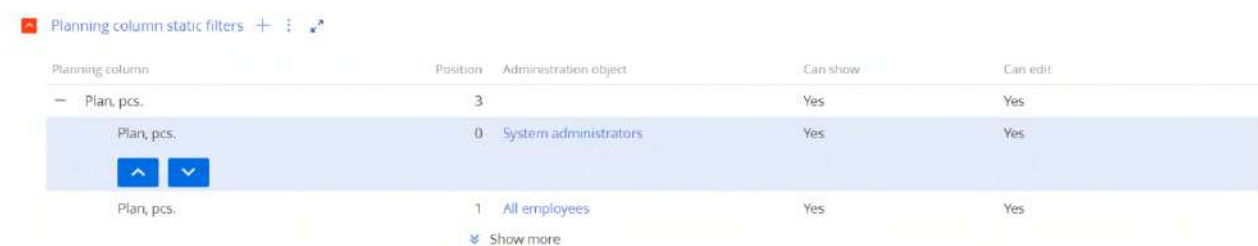
Managing report data

Updating clone data

The data of the constructed plans can be updated using the corresponding buttons on the upper section control panel:

1.0 Sales plan 2022-2025

 – update calculation data without collapsing the planning structure.

 – collapse and reload the report with calculation and data update.

 – deploy all levels of planning.

 – open in full screen mode.

Export and import data from Excel tables

If the data for working with the planning report exists outside the Creatio system, then in such cases you can use the data import tool. The import procedure itself will consist of several steps:

- download the report template;

- fill it with the necessary data, and when finished;

- upload the data file back to the Creatio system.

Excel data export

To download a template for importing data into a planning report, select and click "Export" in the control panel

1.0 Sales plan 2022-2025

Name	Price, $	Fact, pcs - Prew	Fact, $ - Prew	Plan, pcs.	Plan, $	Price, $	Fact, pcs - Prew	Fact, $ - Prew
> <Empty>			4 360.02	6 297.69	494 242.71	0.00	701.16	18 342.34
> Business services	121.88	203.08	429.88	24.22	3 541.75	121.88	0.00	0.00
> Cheese	2.45	21 934.29	164 109.49	22 675.21	66 590.34	2.45	124 277.00	338 233.64
> Hardware	453.43	69 196.78	149 378.00	148 766.41	53 214 098.08	453.43	6 345.44	2 200 315.63
> Milk	1.59	60.87	290.22	136.35	216.80	1.59	175.00	290.25
> Milk production	2.41	118.87	334.30	217.25	534.72	2.41	125.00	334.35
> Peripherals	332.66	2 543.33	5 207.90	412.75	214 952.96	332.66	30.00	7 198.75
> Plant-based drinks	2.14	40.58	31.60	90.90	291.33	2.14	8.00	31.62
> Products	75.78	600.91	1 272.03	85.23	21 316.61	75.78	7.00	1 820.00
> Services	68.64	1 949.52	8 525.08	2 044.62	161 870.10	68.64	12.00	4 800.00
> Software	115.91	1 496.84	3 039.37	1 932.08	246 395.00	115.91	0.00	0.00
> Yogourts & desserts	3.65	101.45	820.65	227.25	830.37	3.65	194.00	820.70
Total	261.96	98 246.52	337 798.54	182 909.96	54 424 880.77	257.96	131 874.60	2 572 187.28

A template configuration window will open where you can configure the upload data

- When exporting to Excel, it is possible to immediately configure the structure of the downloaded document: levels and their order (in particular, Period), columns and their order. By default, the levels and columns visible on the grid (current profile) are selected.

- You can configure the columns that will be downloaded to the file: they can be levels, columns of level records, indicators, period or date of the period. You can also customize the headers of the columns that will be in the file.

- Layers – selection of layers to be exposed in Excel. The ability to display the period as a report level - the period as a separate column in the report, not in the data columns. Ability to display hidden levels.

- Columns – selection of columns to be exposed in Excel.

If the user has previously created templates, you can download data according to a certain template by selecting the desired template ⇅ in the control panel and clicking "Export by template".

An ".xlsx" format file with report data will be automatically downloaded to the computer of the user who called the procedure.

Export settings can be saved as a template (private or public) and in the future you do not have to re-adjust the file format, but download the necessary data in the desired format in 1 click.

1.0 Sales plan 2022-2025

In the downloaded file, all fields have the appropriate type (number, date, text), indents, fonts, colors for better data perception

Excel data import

If the user has previously created templates, you can download data according to a specific template by selecting it in the control panel ↕ and clicking "Import"

1.0 Sales plan 2022-2025

Specify the path to the data file.

The import procedure takes some time (depending on the number of rows and indicators, the execution time can vary greatly). Upon completion, a message is displayed to the user in the message center.

When filling out the template file, it is recommended to follow the following rules:

- It is forbidden to add new columns to the template. Otherwise, data from the file will not be imported into the system;

- If new lines are added to the file, the same values (with correct relationships between levels) must be added to the Creatio system. Otherwise, new records will be created on the new lines in the corresponding system objects, but the connections between them will not be established. Thus, when re-building the planning report, such lines will be deleted;

- It is recommended to enter only values for edited indicators in the file. Indicator data with other types will be replaced by values obtained from the Creatio system.
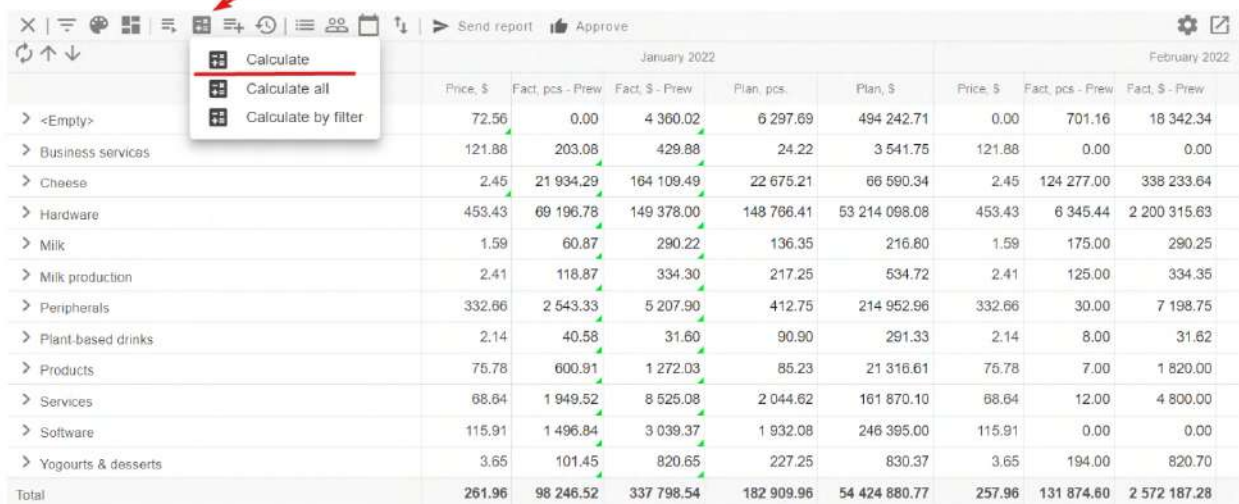
Calculation of the planning section

The calculation of indicators according to the formulas is performed in two stages: first, it is necessary to calculate all calculated indicators, then - indicators with the type "Delta" and "Conditional".

To calculate the values of the estimated indicators, it is necessary:

- Open an existing report in the "Planning" section.

- In the control panel, click on and select "Calculate". The current period is calculated.

The execution of the calculation procedure takes some time (depending on the number of lines and indicators, the execution time can vary greatly). Upon completion, a message is displayed to the user in the message center.

The user is then encouraged to click the refresh button on the report page to see the calculated values.

 – update calculation data without collapsing the planning structure.

 – collapse and reload the report with calculation and updating of data.

To start the calculation of report values, you must:

- Open an existing report in the "Planning" section.

- In the control panel, click on and select "Calculate". The current period is calculated.

The execution of the delta calculation procedure takes some time, the calculation status can be seen in the very planning section on the right side of the main panel:

After completion, a message is displayed to the user in the message center, as well as in the top panel of plan management:

You can also calculate only those values that are currently displayed in the grid, taking into account all applied filters to the rows – "Calculation by filter". Calculates only those columns, periods, rows configured in filtering and displayed on the grid. To do this, you need to set the necessary filter and click the "Apply" button. To start the calculation of report values, you must:

- Open an existing report in the "Planning" section.

- In the control panel, click on [icon] and select "Calculate by filter". The current period is calculated.

Formation of objects

In Planning, the "Formation of objects" function is available, which allows you to quickly form records of any system objects, for example:

- Invoice

- Activity

- Orders

- Monitoring report

Records are created directly from Planning, which is very fast and convenient. Records of the object are formed from the data recorded in the Planning itself.

In order to form a record, you need to select the "Formation of objects" function. Next, select the required object

In the settings window that appears, set the necessary parameters for the object:

- Mapping – the setting of columns where dates are filled, correspondence between planning levels and reference columns of the object, indicators and numerical columns, as well as constants.

- Details – selection of Details, which will be filled with data from Planning.

- Filter – filtering of the data by which this object will be created, for example, if a filter is specified for a specific column, then the object will not be created with those data that do not fall under the filtering.

- Timer – setting of auto-start and periodicity of object formation: Minute/hour, Day, Week, Month, Year, as well as individual periodicity. In the settings window that appears, set the necessary parameters for the object

Налаштування формування об'єктів

Назва*
Invoice

Швидкі фільтри

Фільтр за значеннями

Дії ▾

☑ Fact, pcs   >   0.00

☑ ТА

+ Додати умову

Фільтр по поточному періоді

Зберегти   Відмінити   Видалити   Запустити
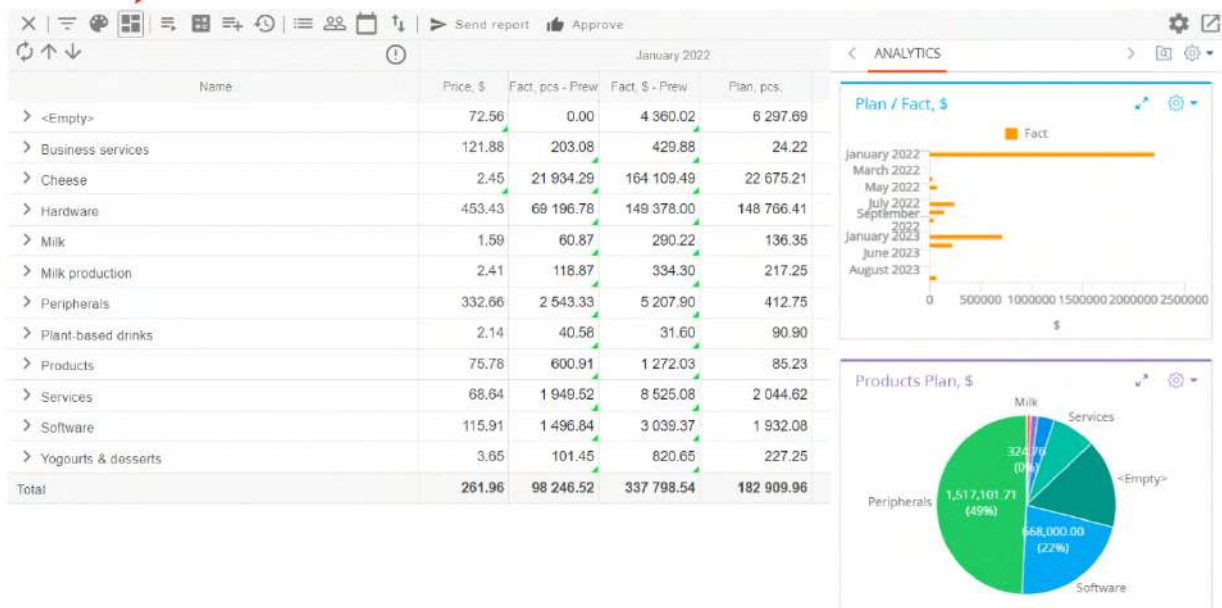
Graphic reports

The product provides an opportunity to build various graphs (dashboards) based on data in planning pieces.

Description of capabilities

To add a dashboard to a planning report, select and click Dashboards in the control panel. After that, dashboards will open in the sidebar.

Dashboard settings

Both options are configured according to the same principle, so the following steps are suitable for configuring each of them.

To work with the dashboard, you need to click on the gear in the upper right corner, and then select the necessary option:

- Add – add a new graphic report tab.

- Change – change the contents of the current tab.

- Copy – copy the contents of the current tab.

- Delete – delete the selected tab.

- Screenshot – download images of graphs from the system.

Adding a new schedule

- To add a new dashboard, click on the gear in the upper right corner, select the Add item

- In the design editing window, fill in the "Title"

- Click on the schedule creation module and select the "Schedule (planning)" item

- In the graph settings window, you need to fill in the "header" and perform the settings. Customization features:
    - The data object for construction is always configured Planning. Select the required built layout
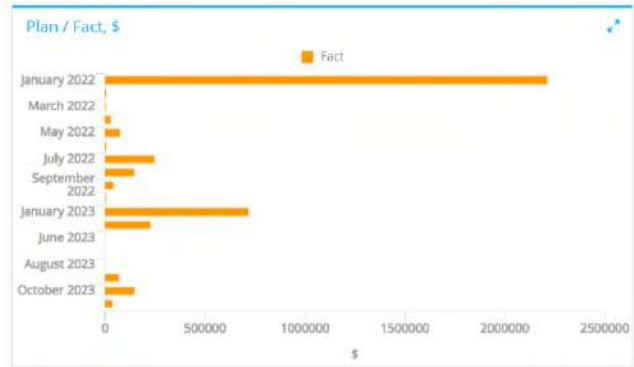
    - In the "Column" you can choose one of the indicators of the above-selected planning
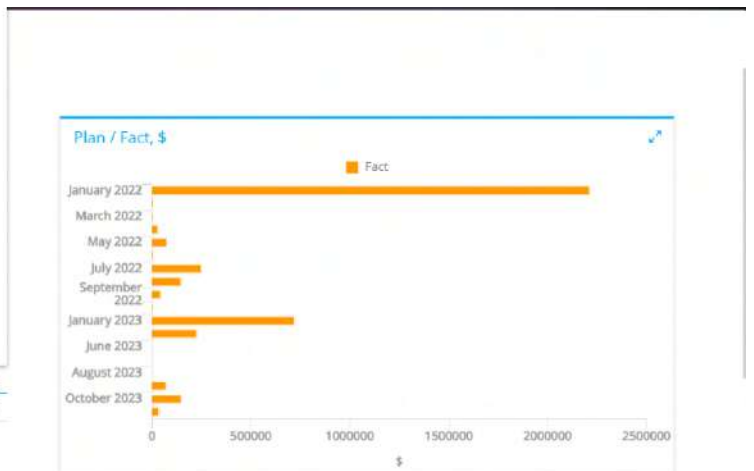
    - Grouping of data is carried out only according to the levels added to the above-selected layout
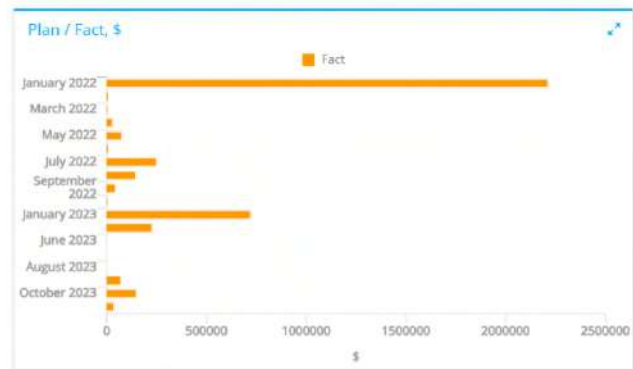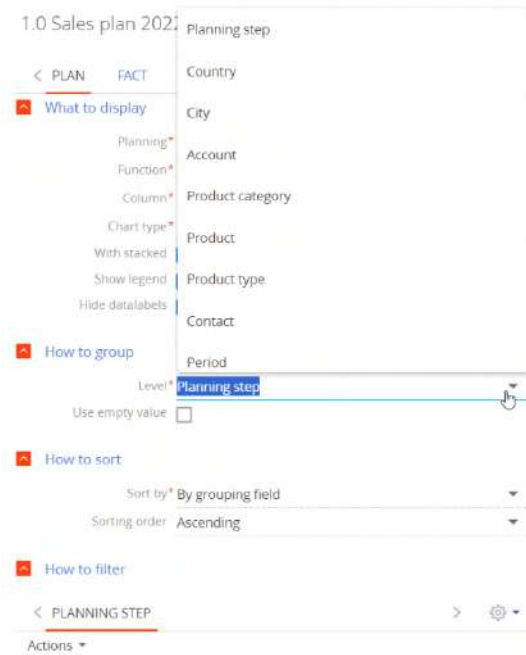
Please note that not all dashboard types (such as sales funnel) are available for a product.

In the option of a separate presentation of the section, when adding a schedule, you must select the "Schedule (planning)" type.

Report version

In the process of working with the planning report, the user has the option to save the report from the moment of operation as historical data. Then the user will be able to return to such a report, compare data for different periods, identify and analyze changes.
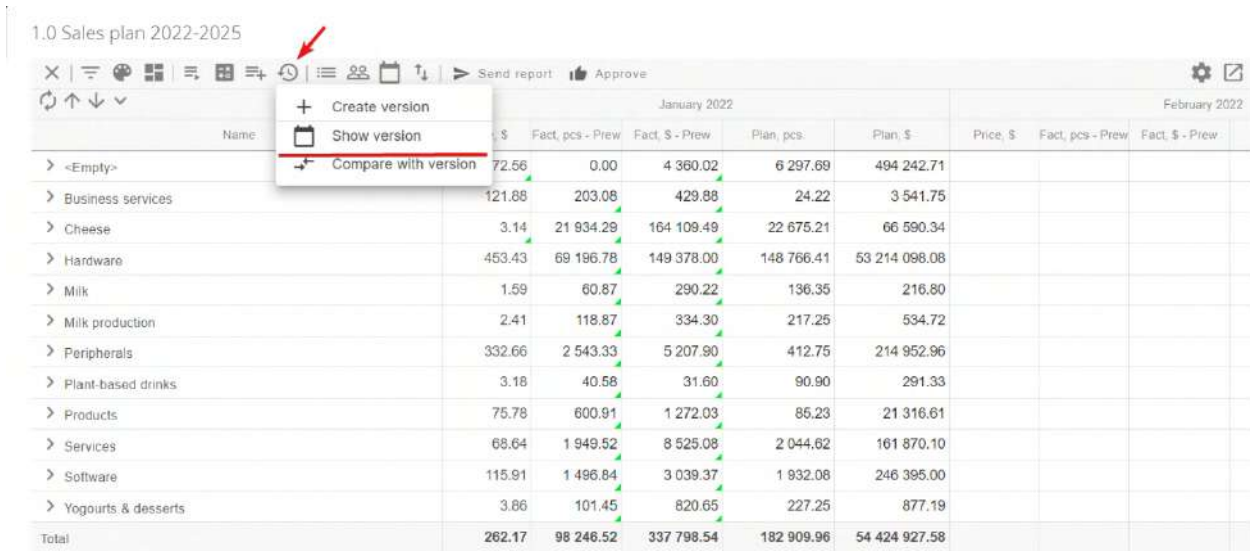
Creating a new version

To add a version of the planning report, you need to select 🕐 and click "Create version" in the control panel

The execution of the procedure takes some time (depending on the number of rows and indicators, the execution time can vary greatly). Upon completion, a message is displayed to the user in the message center.
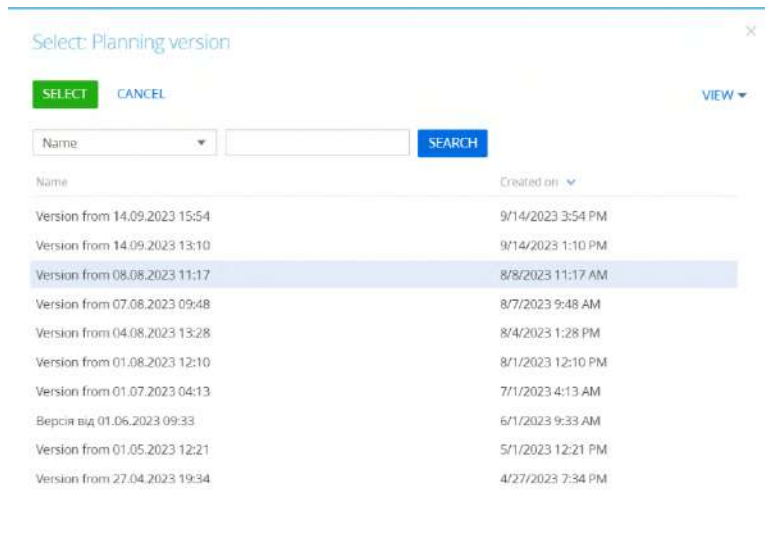
View a previously created version

To view a previously created version of the planning report, select 🕒 and click "Show version" in the control panel

On the page with versions that opens, you need to select the version of the planning report you are interested in. Then press the "Select" button

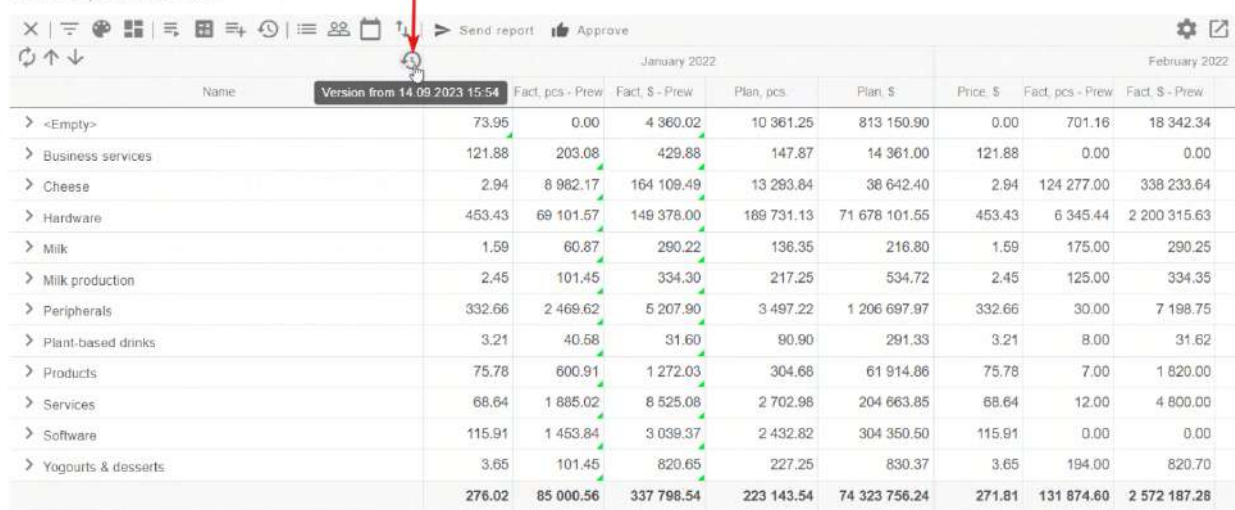The version of the report selected by the user will be opened on the screen. Any changes to the data in such a report cannot be saved.

When viewing a version, the corresponding version icon will be displayed. When you hover over it, you can find out which version is displayed
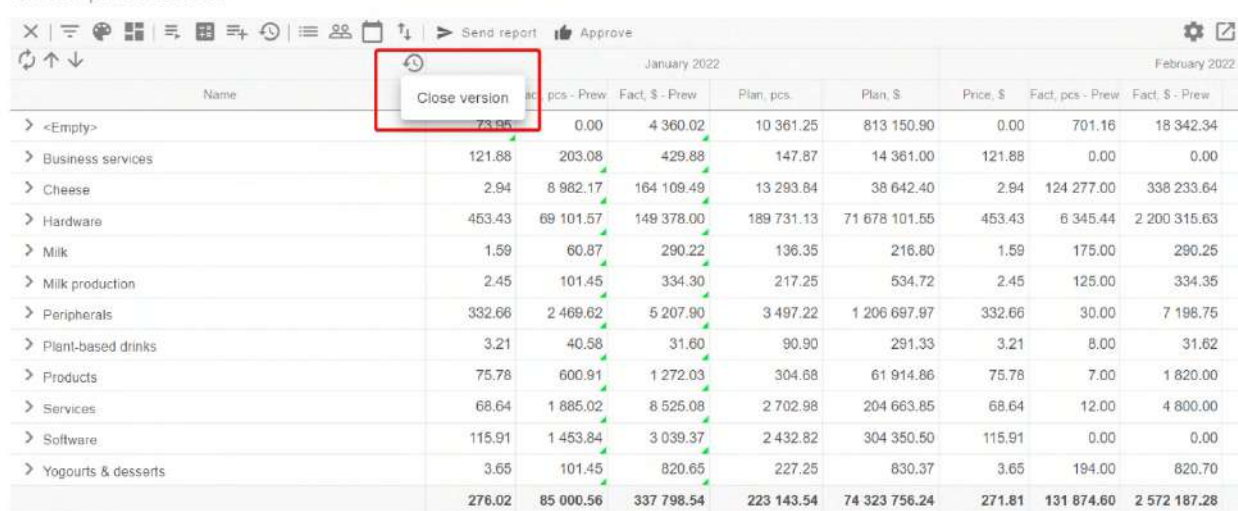
1.0 Sales plan 2022-2025

Name	Version from 14.09.2023 15:54	Fact, pcs - Prew	Fact, $ - Prew	Plan, pcs.	Plan, $	Price, $	Fact, pcs - Prew	Fact, $ - Prew
				January 2022				February 2022
> <Empty>	73.95	0.00	4 360.02	10 361.25	813 150.90	0.00	701.16	18 342.34
> Business services	121.88	203.08	429.88	147.87	14 361.00	121.88	0.00	0.00
> Cheese	2.94	8 982.17	164 109.49	13 293.84	38 642.40	2.94	124 277.00	338 233.64
> Hardware	453.43	69 101.57	149 378.00	189 731.13	71 678 101.55	453.43	6 345.44	2 200 315.63
> Milk	1.59	60.87	290.22	136.35	216.80	1.59	175.00	290.25
> Milk production	2.45	101.45	334.30	217.25	534.72	2.45	125.00	334.35
> Peripherals	332.66	2 469.62	5 207.90	3 497.22	1 206 697.97	332.66	30.00	7 198.75
> Plant-based drinks	3.21	40.58	31.60	90.90	291.33	3.21	8.00	31.62
> Products	75.78	600.91	1 272.03	304.68	61 914.86	75.78	7.00	1 820.00
> Services	68.64	1 885.02	8 525.08	2 702.98	204 663.85	68.64	12.00	4 800.00
> Software	115.91	1 453.84	3 039.37	2 432.82	304 350.50	115.91	0.00	0.00
> Yogourts & desserts	3.65	101.45	820.65	227.25	830.37	3.65	194.00	820.70
	276.02	85 000.56	337 798.54	223 143.54	74 323 756.24	271.81	131 874.60	2 572 187.28

To return to viewing the current version of the report, click on the version sign and click the "Close version" button

1.0 Sales plan 2022-2025

Name	Close version	pcs - Prew	Fact, $ - Prew	Plan, pcs.	Plan, $	Price, $	Fact, pcs - Prew	Fact, $ - Prew
				January 2022				February 2022
> <Empty>	73.95	0.00	4 360.02	10 361.25	813 150.90	0.00	701.16	18 342.34
> Business services	121.88	203.08	429.88	147.87	14 361.00	121.88	0.00	0.00
> Cheese	2.94	8 982.17	164 109.49	13 293.84	38 642.40	2.94	124 277.00	338 233.64
> Hardware	453.43	69 101.57	149 378.00	189 731.13	71 678 101.55	453.43	6 345.44	2 200 315.63
> Milk	1.59	60.87	290.22	136.35	216.80	1.59	175.00	290.25
> Milk production	2.45	101.45	334.30	217.25	534.72	2.45	125.00	334.35
> Peripherals	332.66	2 469.62	5 207.90	3 497.22	1 206 697.97	332.66	30.00	7 198.75
> Plant-based drinks	3.21	40.58	31.60	90.90	291.33	3.21	8.00	31.62
> Products	75.78	600.91	1 272.03	304.68	61 914.86	75.78	7.00	1 820.00
> Services	68.64	1 885.02	8 525.08	2 702.98	204 663.85	68.64	12.00	4 800.00
> Software	115.91	1 453.84	3 039.37	2 432.82	304 350.50	115.91	0.00	0.00
> Yogourts & desserts	3.65	101.45	820.65	227.25	830.37	3.65	194.00	820.70
	276.02	85 000.56	337 798.54	223 143.54	74 323 756.24	271.81	131 874.60	2 572 187.28

Comparison of report versions

If users need to track changes in the planning report, it is recommended to use the version comparison tool to solve this task.

In order to compare two versions of the report, you must perform the following actions:

- In the "Planning" section, open an existing report (at least one version must be created in such a report beforehand, see Creating a new version).

- To view a previously created version of the planning report, select and click "Compare with version" in the control panel

1.0 Sales plan 2022-2025

	Name							January 2022						February 2022	
		$	Fact, pcs – Prew	Fact, $ – Prew	Plan, pcs.	Plan, $				Price, $	Fact, pcs – Prew	Fact, $ – Prew		
>	<Empty>	72.56	0.00	4 360.02	6 297.69	494 242.71								
>	Business services	121.88	203.08	429.88	24.22	3 541.75								
>	Cheese	3.14	21 934.29	164 109.49	22 675.21	66 590.34								
>	Hardware	453.43	69 196.78	149 378.00	148 766.41	53 214 098.08								
>	Milk	1.59	60.87	290.22	136.35	216.80								
>	Milk production	2.41	118.87	334.30	217.25	534.72								
>	Peripherals	332.66	2 543.33	5 207.90	412.75	214 952.96								
>	Plant-based drinks	3.18	40.58	31.60	90.90	291.33								
>	Products	75.78	600.91	1 272.03	85.23	21 316.61								
>	Services	68.64	1 949.52	8 525.08	2 044.62	161 870.10								
>	Software	115.91	1 496.84	3 039.37	1 932.08	246 395.00								
>	Yogourts & desserts	3.86	101.45	820.65	227.25	877.19								
Total		262.17	98 246.52	337 798.54	182 909.96	54 424 927.58								

Next, you need to select the version with which you need to compare the current planning

The report will be displayed on the screen as follows: each column of the report will be displayed three times. The first column is a display of column data from the main version (it was configured on the left in the version comparison window). The second column, with the tag "V2" is a display of column data from the additional version (it was configured on the right in the version comparison window). The third column, with the tag "D" is the delta, namely the difference between the data of the current version and the additional one

1.0 Sales plan 2022-2025

Name	Price, $	Price, $-V2	Price, $-D	Fact, pcs - Prew	Fact, pcs - Prew-V2	Fact, pcs - Prew-D	Fact, $ - Prew	Fact, $ - Prew-V2	Fact, $ - Pre
> <Empty>	72.56	73.95	-1.39	0.00	0.00	0.00	4 360.02	4 360.02	
> Business services	121.88	121.88	0.00	203.08	203.08	0.00	429.88	429.88	
> Cheese	3.14	2.94	0.20	21 934.29	8 982.17	12 952.12	164 109.49	164 109.49	
> Hardware	453.43	453.43	0.00	69 196.78	69 101.57	95.21	149 378.00	149 378.00	
> Milk	1.59	1.59	0.00	60.87	60.87	0.00	290.22	290.22	
> Milk production	2.41	2.45	-0.04	118.87	101.45	17.42	334.30	334.30	
> Peripherals	332.66	332.66	0.00	2 543.33	2 469.62	73.71	5 207.90	5 207.90	
> Plant-based drinks	3.18	3.21	-0.03	40.58	40.58	0.00	31.60	31.60	
> Products	75.78	75.78	0.00	600.91	600.91	0.00	1 272.03	1 272.03	
> Services	68.64	68.64	0.00	1 949.52	1 885.02	64.50	8 525.08	8 525.08	
> Software	115.91	115.91	0.00	1 496.84	1 453.84	43.00	3 039.37	3 039.37	
> Yogourts & desserts	3.86	3.65	0.21	101.45	101.45	0.00	820.65	820.65	
Total	262.17	276.02	-13.85	98 246.52	85 000.56	13 245.96	337 798.54	337 798.54	

Automatic calculation and updating of data (Timer)

The functionality is designed to obtain up-to-date data in the planning report for a certain time. The timer sequentially calls the execution of the following procedures: Update, Calculation of initial data, Calculation of settlement data.

Automatic planning calculation

It is necessary to open the "Settings Wizard", for this click on "Settings" - "Planning Settings"

At the same time, a page with settings will open, on which you need to go to the "Timer" tab

1.0 Sales plan 2022-2025

The "Timer" tab presents two details for configuration: for updating (updating the structure and recalculation) of the plan itself and a timer for automatically creating versions in the system.

Both details have the following mandatory attributes:

- Frequency of the timer start – selection of the timer launch period. It is possible to select all standard periods from day to calendar year, as well as use your own periods.
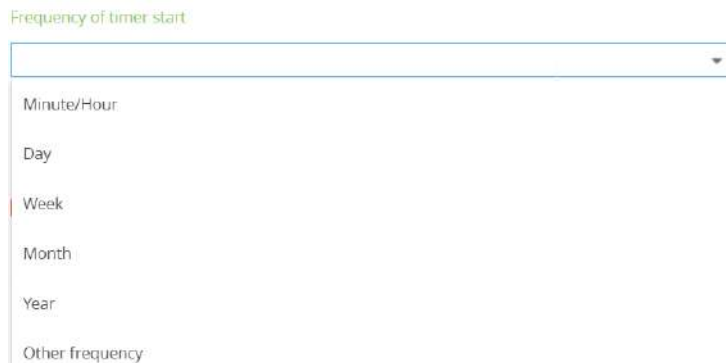
- Run every – quantitative indicators that indicate the conditions for starting the update
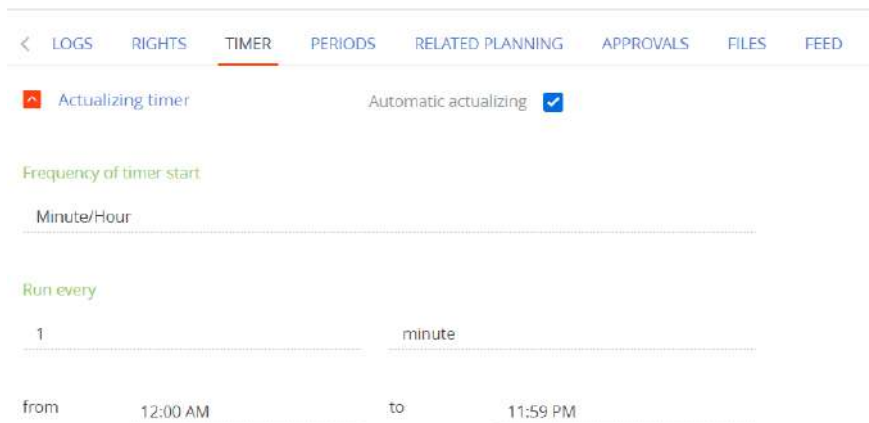
Automatic creation of planning versions

This functionality is designed to create and store versions of plans in the system.

It is necessary to open the "Settings Wizard", for this click on "Settings" - "Planning Settings"

At the same time, a page with settings will open, on which you need to go to the "Timer" tab

Both details have the following mandatory attributes:

- Frequency of the timer start – selection of the timer launch period. It is possible to select all standard periods from day to calendar year, as well as use your own periods.

- Run every – quantitative indicators that indicate the conditions for starting the update

Filtration

The system offers the possibility of flexible filtering by levels and columns.

To open the planning report filtering settings, you need to select ▼ in the control panel, after which a sidebar will open on the left

The following filter options are available to the user:

- Advanced filters – allows you to filter records in planning levels according to user-defined conditions.

- Quick Filters – allows you to select level records to display.

- Values filter – allows you to set filtering by values in the columns.

Setting advanced filters

In the settings sidebar, click on "Advanced filters" and then "Add filter"
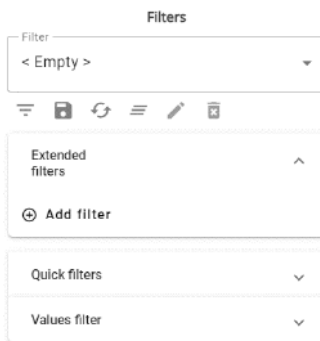
Select the planning level for filtering
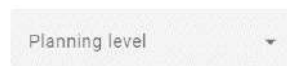
After adding to the details, the selected level will be displayed and it will be possible to configure the filter using the basic Creatio filtering configuration methods:
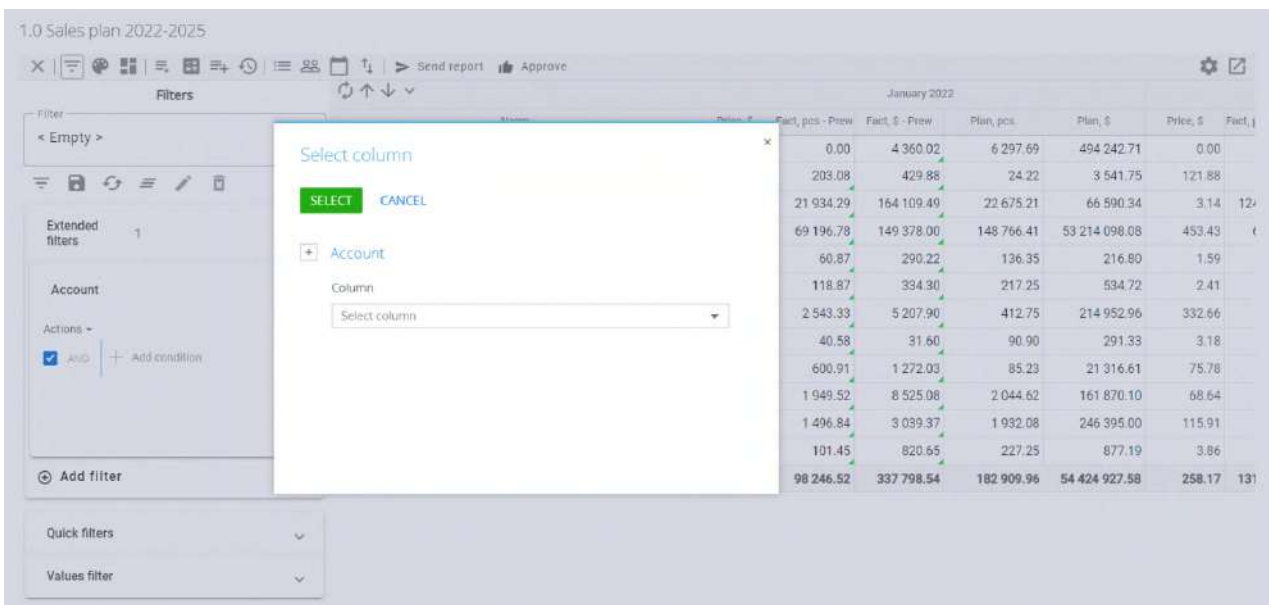
If it is necessary to filter several levels, in this case the user can add additional levels to the same detail, while they will be displayed sequentially:
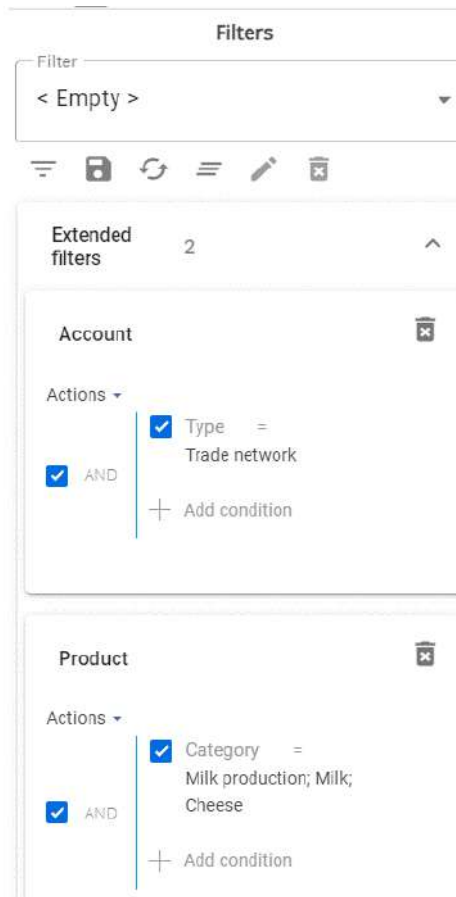
To remove the filter, click on
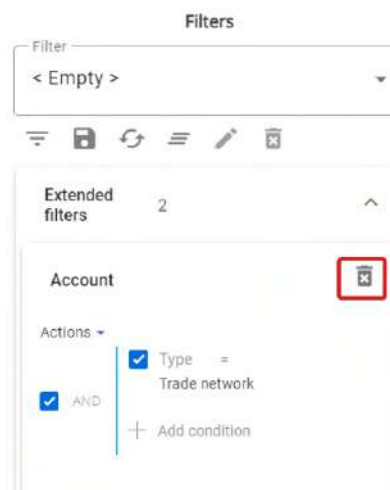
Setting up quick filters

With the help of quick filters, it is possible to configure the level records required for display
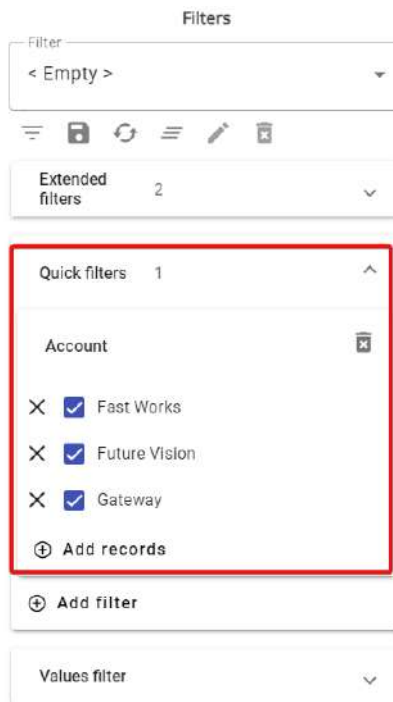
In the settings sidebar, click on "Quick filters" and then "Add filter"
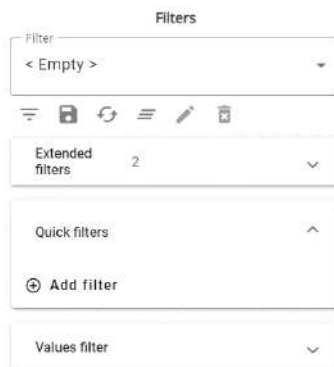
Select the planning level for filtering
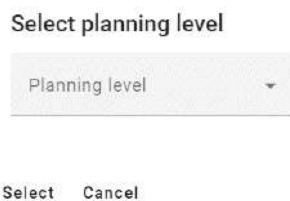
After adding to the details, the selected level will be displayed and it will be possible to select records of the level from the report:
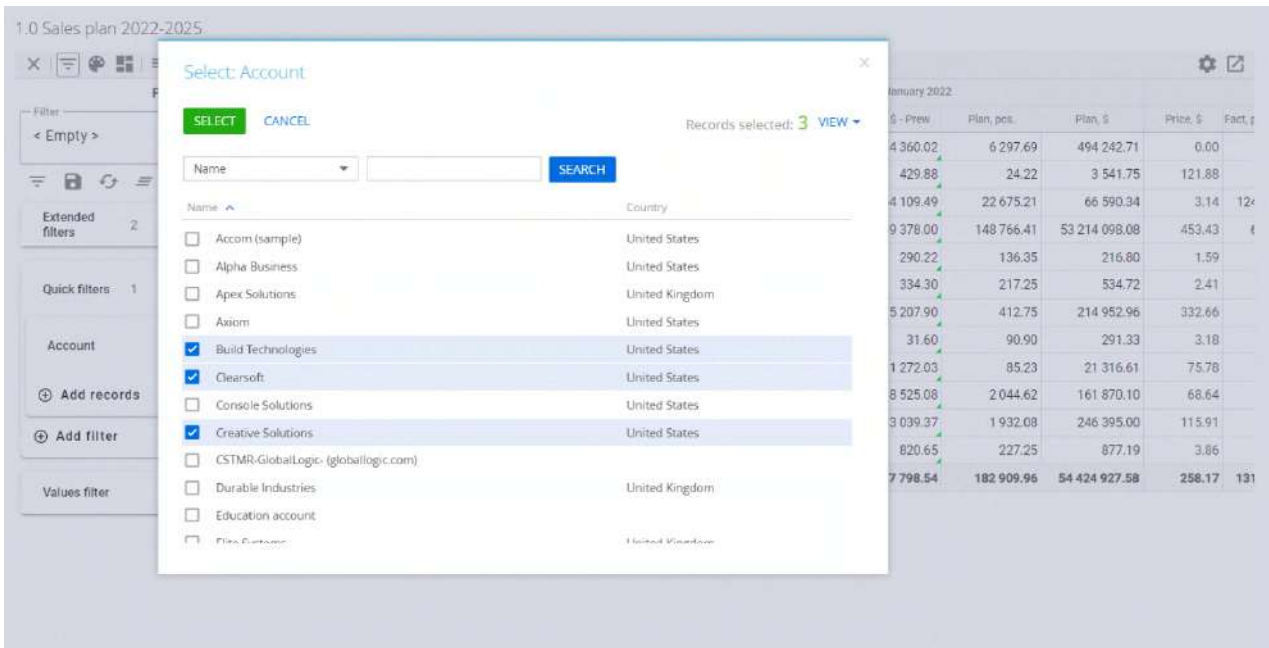
The functionality allows you to add quick filters at multiple levels. To do this, it is necessary to repeat the first step, choosing a different level of planning. Records in this case will be displayed sequentially.

After adding level records to the part, the selected levels can be turned on/off from the slice by setting the appropriate flags:
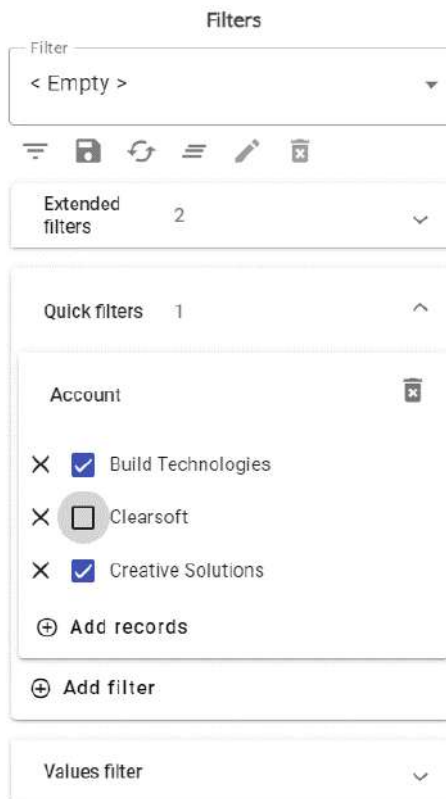
Setting filters by values

This setting allows you to filter data in columns using Creatio's basic filter tool:
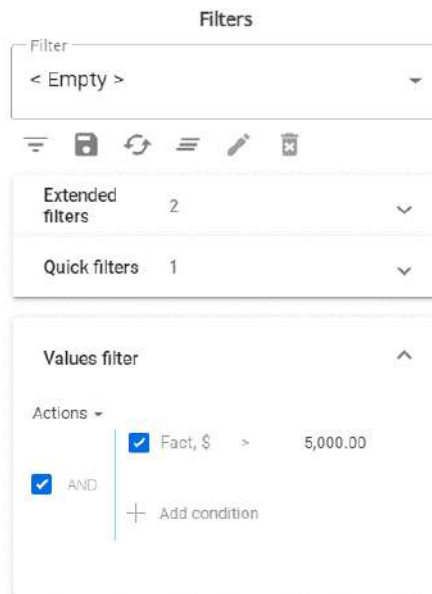
Saving the filter template

To save the filtering settings, click the "Save" button at the top of the sidebar:
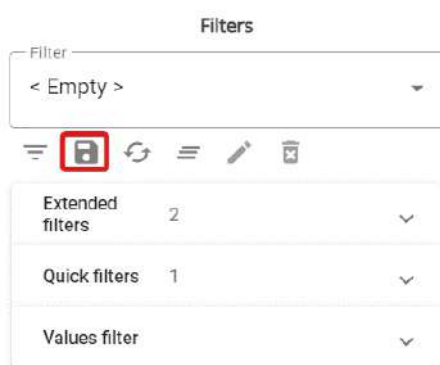
After clicking, the system will offer to choose the name of the setting, as well as to set the attribute "General": selecting this attribute will allow other users of the system to use this filtering in the future:

After saving, to apply the saved template, you need to select it from the drop-down list in the top menu
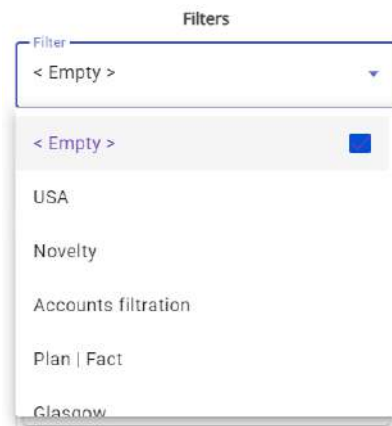
For the template management, you have the following options:
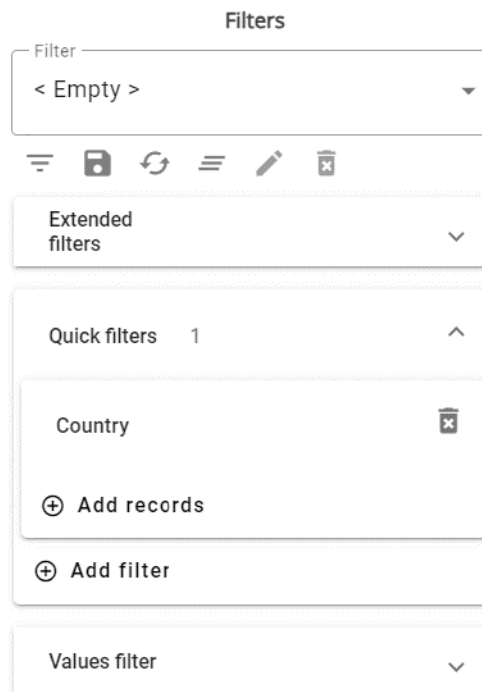
- – apply the current setting.

- – delete the current color setting.

- – change the name and access to the filter to other users.

- – restore the saved template (for example, if you need to return to the initial version of the template after adjustments).

- – save the current setting.

- – clear template data.

- – icon means that this setting is general.

Monitoring

During product installation, two new sections Monitoring and Monitoring report appear. These sections are intended to store reports that are configured and generated in the main planning.

Monitoring is part of the Data Management product, which automatically generates reports and in which it is possible to monitor any data of the master plan with the help of flexible settings.
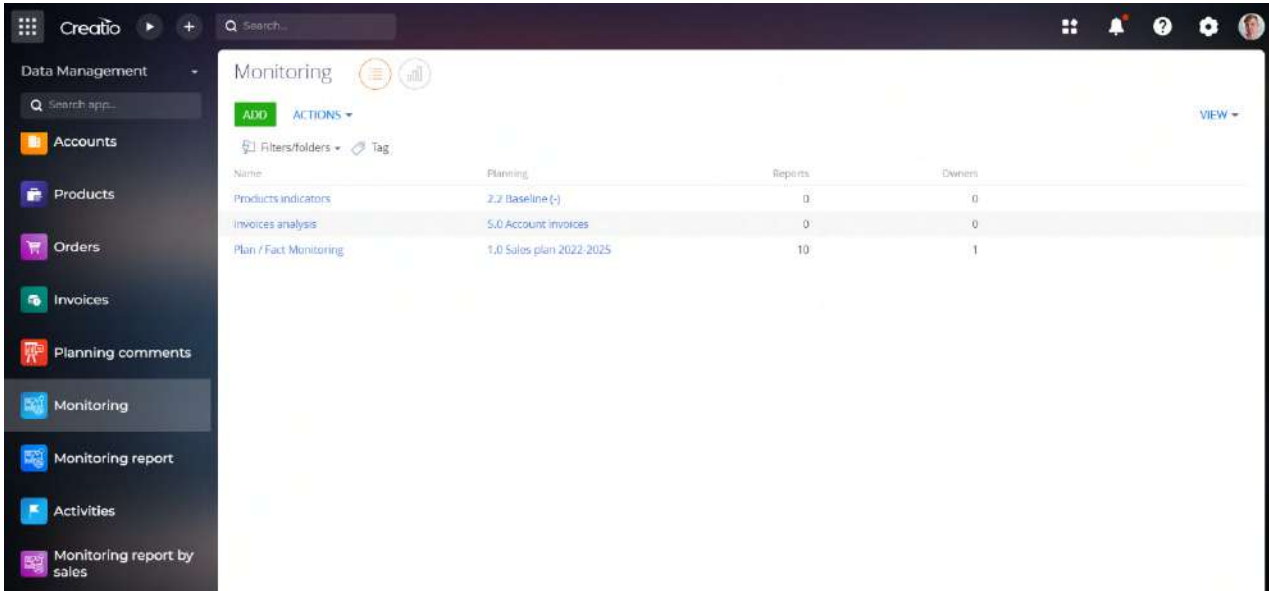
This function is intended to monitor and notify an employee, manager, etc. about specific data, or their change from the main planning report.

For example, there is a case when the manager needs to track the data if the sales plan is less than 70% fulfilled. Then, in the main planning, in the settings for a specific level of the grid, a filter by columns is configured. You can also set a timer, with which frequency to monitor the given data.

After saving the settings, once a week (as a set timer), the system will create a report for the manager only on those data where the sales plan is less than 70% fulfilled.
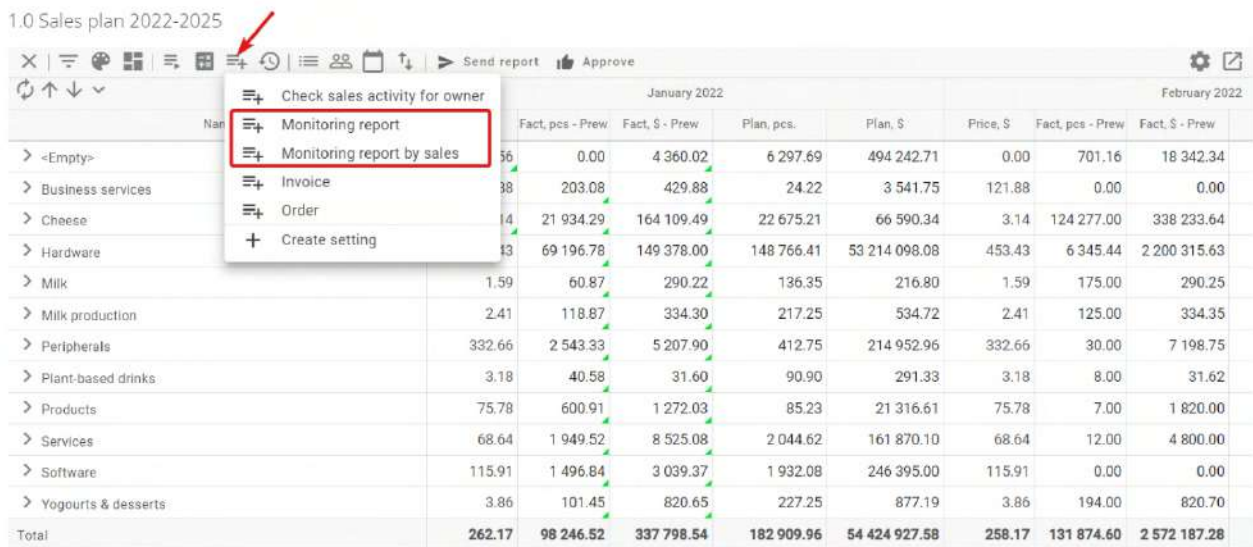
Description of settings

In the configuration of standard monitoring, it is necessary to create records of the Monitoring response object, it is necessary to specify the Constant Monitoring = Records of the monitoring section, specifying the filtering of records (description below), and the timer (description below).

Mapping: Detailing of the period, grid levels and columns for which the Monitoring Report must be built

Details: When creating records of a custom section, you can configure the filling of reference fields and numerical indicators in the mapping

Filter: detailing by columns and grid levels, filtering indicators that need to be monitored

Timer: setting the frequency, time and day of the week when it is necessary to automatically create a monitoring report

Also, using the basic section wizard, you can create a new custom Monitoring section with any name, for example, Monitoring report by sales, where only those monitoring reports related to sales data will be stored.

For reports with other indicators, you can create a separate section, and thus divide the reports according to their purpose.

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