



Configuration Guide | CONFIDENTIAL
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Common Configuration Guide for SAP Trade Management, Version for SAP BW/4HANA 1.0 Feature Package 2

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1 Configuration Settings for SAP CRM

This section lists the various configuration settings which you must perform in your SAP CRM system to be able to use SAP Trade Management, version for SAP BW/4HANA.

1.1 General Configuration Settings

1.1.1 Activating Business Functions

Context

The following business functions are delivered with the SAP Trade Management, version for SAP BW/4HANA software component TMAC and must be activated in your SAP CRM system based on the relevant product license you have purchased:

Product License	Activate Business Function	Description	Mandatory/Optional
SAP Trade Promotion Planning and Management, version for SAP BW/4HANA	/JBPC/TPM_1	Trade Promotion Planning and Management (Reversible)	Mandatory if you are using software component CBPC 200 (or higher) or TMAC 300 (or higher)
	CRM_TPM_1	Trade Promotion Management	Mandatory
	CRM_TPM_CCS_1	Trade Promotion Management Integration to Condition Contract Settlement (Reversible)	Optional
	CRM_CLA_CPM	Claims Management	Optional
	CRM_CF_1	Claims and Funds Management	Optional
SAP Customer Business Planning, version for SAP BW/4HANA	/JBPC/CBP_1	Customer Business Planning	Mandatory

Product License	Activate Business Function	Description	Mandatory/Optional
SAP Advanced Trade Management Analytics, version for SAP BW/4HANA	/JBPC/ANA_1	Advanced Trade Management Analytics	Mandatory

These business functions should be activated using transaction SFW5.

In addition, you can activate the business function CRM_LST_CPM (Listings) if you are using *Listings*.

1.1.2 Preparing Master Data

[Prepare Sales Area \[page 6\]](#)

[Prepare Account Hierarchy \[page 7\]](#)

[Prepare Product Hierarchy \[page 8\]](#)

[Prepare Products \[page 9\]](#)

[Prepare Listings \[page 10\]](#)

[Prepare Fiscal Year Variant \[page 10\]](#)

1.1.2.1 Prepare Sales Area

Context

A sales area is a combination of the following attributes:

- Sales organization
- Distribution channel
- Division

A sales area is a mandatory attribute for SAP Trade Management, version for SAP BW/4HANA and is used for the following:

- Validating the account assigned to the responsibility area
- Retrieving sales area-dependent attributes from the product master data (such as sales category, sales unit)
- Maintaining business configurations

In SAP Trade Management, version for SAP BW/4HANA, you create a customer business plan or a trade promotion for a given customer in a sales area. This sales area is assigned to a responsibility area. Customer

business planning and trade promotion planning is always done in the context of a responsibility area, and therefore for a specific sales area.

Procedure

1. Define sales areas in your SAP CRM system.
If you are using SAP ECC as the source system for maintaining sales areas, you can use the standard transaction `CRMC_R3_ORG_GENERATE` to replicate the sales area from your ECC system to your CRM system. The transaction creates a sales structure for the replicated sales areas using Organization Management within SAP CRM.
2. After you have maintained the sales area in your CRM system, you should extract this information to the BW/4HANA system to the InfoObject `0CRM_SALORG/0ORGUNIT` using the DataSource `0CRM_ORGUNIT_SALES_ATTR`.

Related Information

[Setting Up Responsibility Area \[page 44\]](#)

[Organizational Objects](#)

[Maintaining the Organizational Model in CRM](#)

1.1.2.2 Prepare Account Hierarchy

Context

The account hierarchy allows you to map complex organizational structures of a business partner (for example, buying group, co-operative or chain of retail outlets).

In SAP Trade Management, version for SAP BW/4HANA, a node from an account hierarchy is assigned to a responsibility area.

An account hierarchy node is a mandatory attribute of the responsibility area and is used for the following:

- Denoting the customer hierarchy node for which customer business planning or trade promotion planning is carried out.
- Defining assortments in Customer Business Planning.
An assortment is a list of products that can be sold to your customer in the defined time frames.
- Defining listings for TPM-only scenarios.
A listing is a list of products that can be sold to your customer in the defined time frames.

Procedure

1. Maintain an account hierarchy in your SAP CRM system.

i Note

If you are using the ECC customer hierarchy, integration with pricing will not work unless the account hierarchy is a pricing hierarchy. For more information, you can refer the standard help documentation to replicate the account hierarchy to your SAP CRM system.

2. Maintain the account hierarchy in the configuration in Customizing for *Customer Relationship Management* under ► *Trade Promotion Management* ► *Basic Data* ► *Assign Planning Account Hierarchies* ►.
3. Extract the account hierarchy to the BW/4HANA system using InfoObject 0BP_GRP.

Related Information

[Setting Up Responsibility Area \[page 44\]](#)

[Replicating ERP Customer Hierarchies to SAP CRM](#)

[Prepare Listings \[page 10\]](#)

1.1.2.3 Prepare Product Hierarchy

Context

A product hierarchy is a multi-level structure that is used to group together product categories. This hierarchy is used for trade promotion planning and customer business planning.

Product hierarchies are used for the following purposes in SAP Trade Management, version for SAP BW/4HANA:

- You assign multiple product categories from the defined product hierarchy to your responsibility area.
- You create a customer business plan or a trade promotion in the context of a responsibility area.
- The planning product hierarchy in a customer business plan can contain only products from product categories assigned to your responsibility area. An assortment within a customer business plan displays only those products that are part of the planning product hierarchy.

Procedure

1. If you are using SAP ECC as the source system for product hierarchies, refer to the standard help documentation to replicate a product hierarchy to your SAP CRM system.

- Maintain the hierarchy in Customizing for *Customer Relationship Management* under [Trade Promotion Management](#) > [Basic Data](#) > [Products](#) > [Assign Product Hierarchies](#).

The following settings are delivered in the standard solution:

Hierarchy Usage	Hierarchy	Sales Flag
Product Hierarchy 1	R3PRODHIER	X
Product Hierarchy 2	R3MATCLASS	

By default, SAP Trade Management uses product hierarchies defined under *Product Hierarchy 1*. In case you wish to use a different hierarchy, you must configure the hierarchy in Customizing for *Customer Relationship Management* under [Trade Management](#) > [General Settings](#) > [Assign Product Hierarchy](#).

- Extract this hierarchy to your BW/4HANA system to the hierarchy of InfoObject `0CRM_PROD` using the DataSource `0PRODUCT_HIER`.

Related Information

[Setting Up Responsibility Area \[page 44\]](#)

[Replicating Product Hierarchies from SAP ERP to SAP CRM](#)

1.1.2.4 Prepare Products

Context

SAP Trade Management, version for SAP BW/4HANA uses products for the following:

- Defining planning product hierarchy.
In Customer Business Planning, the products are structured in a hierarchy called a planning product hierarchy. In this hierarchy, products are displayed at the lowest level.
- Defining assortments in Customer Business Planning.
An assortment is a list of products that can be sold to your customer in the defined time frames. In Customer Business Planning, you can plan for the products from this list in the defined time frames.
- Defining listings for TPM-only scenarios.
A listing is a list of products that can be sold to your customer in the defined time frames.
- Customer business plan and trade promotion data is created and stored for a combination of account hierarchy node, product, and time frame.

Procedure

1. You maintain your products in your SAP CRM system.
If you are using SAP ECC as the source system for products, you can refer to the standard help documentation to replicate products to your CRM system.
2. After you have maintained the products in your CRM system, extract them to the InfoObject `ØCRM_PROD` in the BW/4HANA system using the DataSource `ØCRM_PRODUCT_ATTR`.

Related Information

[Prepare Product Hierarchy \[page 8\]](#)

[Defining Assortments](#)

[Replicating Product Hierarchies from SAP ERP to SAP CRM](#)

[Prepare Listings \[page 10\]](#)

1.1.2.5 Prepare Listings

A listing is a list of products that can be sold to your customer in the defined time frames.

- Listings are used to prepare the assortments in Customer Business Planning
- Listings are used to validate the products planned in Trade Promotion Planning for TPM-only scenarios.

Related Information

[Listing](#)

1.1.2.6 Prepare Fiscal Year Variant

Context

You use the fiscal year variant to define your calendar for planning. You must define your fiscal periods in a way that they do not destroy the composition of the calendar week (with the exception of the month end). This means that the fiscal period can either consist of full calendar weeks or a split portion of the calendar week if the calendar week falls between two months.

For instance, let's take calendar week CW35 in 2017 that starts on a Monday. This is a split week, so if you define a fiscal period X, you can include CW35 completely. Alternatively, if you want to include only a portion of this week in the fiscal period, you have the following two options:

1. August 28 to August 31, 2017
2. September 1 to September 3, 2017

This also means that when you define the fiscal period, you cannot include August 28 to August 30, 2017 in one fiscal period and August 31 to September 3 in another fiscal period because it destroys the composition of the calendar week.

Procedure

1. Define the fiscal year variant in Customizing for *Customer Relationship Management* by choosing ► [Trade Management](#) ► [General Settings](#) ► [Internal Calendar](#) ► [Define Fiscal Year Variant](#) ►.
2. Assign the fiscal year variant to a sales area in Customizing for *Customer Relationship Management* by choosing ► [Trade Management](#) ► [General Settings](#) ► [Internal Calendar](#) ► [Assign Fiscal Year Variant to Sales Organization](#) ►. This fiscal year variant must match the one used in Funds Management. The system uses the fiscal year variant based on the sales area assigned to your responsibility area.

For more information on the setup of the data model for SAP BW/4HANA, kindly refer to [Fiscal Support \[page 118\]](#) under *Configuration Settings for SAP BW/4HANA* in this guide.

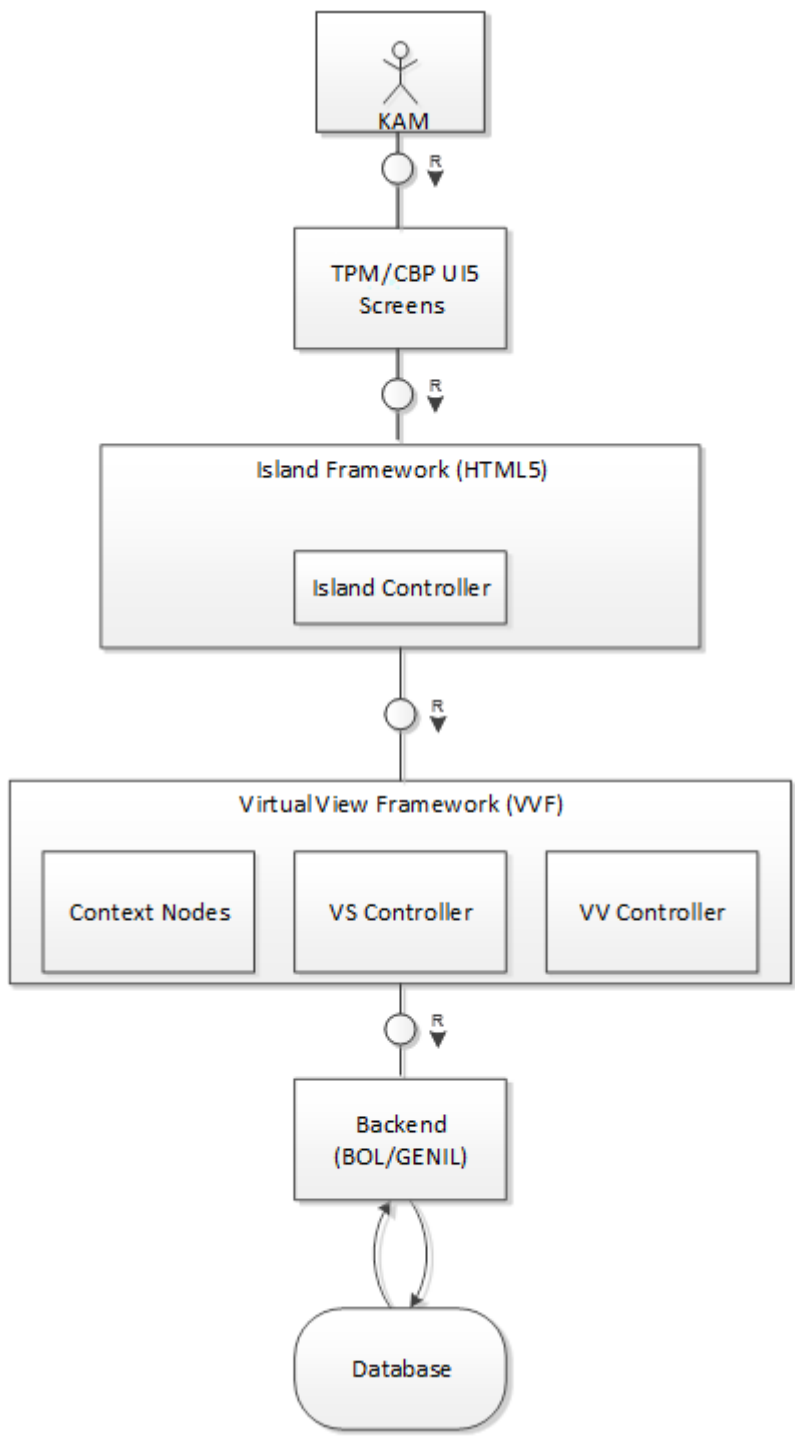
Related Information

[JBP Sales Org to Fiscal Variant Map: \(/JBPB/SAFV_M\) \[page 111\]](#)

1.1.3 Setting Up Virtual View Framework

The Virtual View Framework (VVF) is the basis used to build the Customer Business Planning and the SAPUI5 Trade Promotion Planning and Management interface. This is an intermediate layer between SAPUI5 (Island Layer) and the Business Object Layer (BOL).

The Virtual View Framework (VVF) handles interaction between the BOL and Island Framework/SAPUI5 screens. The following diagram shows how the Trade Promotion Planning and Management/Customer Business Planning screens interact with the back end using VVF (that is, BOL/Generic Interaction Layer (GenIL)).



[Virtual View Framework Building Blocks \[page 13\]](#)

[Integration Between Virtual View Framework and SAP BW/4HANA \[page 24\]](#)

1.1.3.1 Virtual View Framework Building Blocks

Details are provided here on the building blocks of the Virtual View Framework (VVF). All the settings are delivered as part of the standard content.

[Maintain Island Views \[page 13\]](#)

[Map Virtual Screens \[page 14\]](#)

[Maintain Virtual Views \[page 16\]](#)

[Assign Virtual View Usage \[page 17\]](#)

[Configure General Virtual Views \[page 18\]](#)

[Define Menu Bar Navigation Links \[page 20\]](#)

[Map Physical Context Nodes \[page 21\]](#)

[Map Logical Context Nodes \[page 23\]](#)

1.1.3.1.1 Maintain Island Views

Context

An Island View in VVF is a mapping of an actual BSP component and page.

Proceed as follows to maintain the Island View ID:

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose **Trade Management** **General Settings** **System Settings** **Maintain Virtual View Framework Customizing**.
2. Choose the *Maintain Island Views* subdialog.

The following Island View is delivered in the standard application:

Island View ID	Component Name	Page	Island View Description
CBP-ISLAND	/ JBPC / CBP_APPL	/ JBPC / CBP_APPL / ISLANDVIEW	One Island for Customer Business Planning and Trade Promotion Planning and Management

1.1.3.1.2 Map Virtual Screens

Context

A Virtual Screen is a container of Virtual Views that has its own controller class with all the features of a Virtual View. Each screen is defined by a screen number (for example, 7.0.2 represents the promotion search screen and 3.2.0 represents the *Plan* screen in Customer Business Planning). The screen number is used as a navigation target to navigate from one screen to another. During navigation, the system checks whether or not navigation to a certain screen is possible and decides whether a data loss popup is required. New screens cannot be defined in customer implementations.

The following Virtual Screens are delivered in SAP Trade Management, version for SAP BW/4HANA:

Screen Number	Screen Description
2.0.0	Plan Overview
2.3.0	Plan Setup
2.4.0	Assortment
3.0.0	New Planning Timeframe
3.0.1	Templates
3.2.0	Plan
3.2.1	Scenario Planning
3.2.7	Version Comparison
6.0.0	Retailer View
7.0.0	Web UI Navigation Screen (used to navigate to the WebClient UI, for example Fund Plan, and so on)
7.0.1	Promotion Details Screen
7.0.2	Promotion Search Screen
9.0.0	Plan Optimization
9.0.1	Promotion Optimization
3.1.0	Baseline Volume

Virtual Screens are characterized by the following attributes:

- **Controller Class:** You can configure the Virtual Screen controller class for a specific business purpose (which is not met by the standard screen controller class delivered) by providing a class in the customer namespace that inherits the delivered screen controller class.
You can configure the screen controller class in Customizing for *Customer Relationship Management* by choosing ► *Trade Management* ► *General Settings* ► *System Settings* ► *Maintain Virtual View Framework Customizing* ►.
Select an Island View (for example CBP-ISLAND) and click on the node *Maintain Virtual Screens*. Here, you can maintain the screen controller class.
- **Transaction Context ID:** Specifies the transaction context ID. All the screens should have the same transaction context ID if the data changes for them are to be saved together.
- **Default Outbound Plug:** The default outbound plug to be called during navigation from one screen to another.
- **Log Navigation History:** This flag specifies that a navigation history is to be maintained during navigation.

Proceed as follows to map the Virtual Screen to an Island View.

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose ► *Trade Management* ► *General Settings* ► *System Settings* ► *Maintain Virtual View Framework Customizing* ►
2. Choose the *Maintain Island Views* node and the *Map Virtual Screens* subdialog.

The following Virtual Screen/Island View mappings are delivered:

Island View ID	Screen Number	Default Active	Screen Description
CBP-ISLAND	2.0.0		Plan Overview
	2.3.0		Plan Setup
	2.4.0		Assortment
	3.0.0		New Planning Timeframe
	3.0.1		Templates
	3.2.0		Plan
	3.2.1		Scenario Planning
	3.2.7		Version Comparison
	6.0.0		Retailer View
	7.0.0		Web UI Navigation Screen

Island View ID	Screen Number	Default Active	Screen Description
	7.0.1		Promotion Details Screen
	7.0.2		Promotion Landing/Search Screen
	9.0.0		Plan Optimization
	9.0.1		Promotion Optimization
ITP-ISLAND	8.0.0	X	Internal Target Planning

X signifies "selected".

The default active flag specifies which screen should be opened when the application is launched for the first time in a session. This is not set for the screens mapped to CBP-ISLAND because the Virtual Screen to be opened for the first time is fetched based on the user personalization settings. The logical links (for example *Plan Overview*, *Plan Setup*, *Assortment*, *Plan*, and so on in the Customer Business Planning work center) have an associated screen number that indicates which screen is to be opened when a specific logical link is clicked on.

Related Information

[Maintain Virtual Views \[page 16\]](#)

1.1.3.1.3 Maintain Virtual Views

Context

A Virtual View defines which attributes are to be transferred from the Island View to the UI. The Virtual View has its own controller class that can register events of a specific Virtual View that are triggered from the UI. It is also used to register the event handlers on the focus change of a BOL (Business Object Layer) entity in a context node collection.

You configure the Virtual View controller class for a specific business purpose (which is not met by the standard Virtual View controller class delivered) by providing a class in the customer namespace that inherits the delivered Virtual View controller class.

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose [Trade Management](#) [General Settings](#) [System Settings](#) [Maintain Virtual View Framework Customizing](#), then select the *Maintain Virtual Views* node .
2. Map the logical context nodes to the Virtual View in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [General Settings](#) [System Settings](#) [Maintain Virtual View Framework Customizing](#) In the *Maintain Virtual Views* node, select a specific Virtual View and choose *Select Context Nodes Used*.
3. Map the list of attributes of the logical context node to the logical context node in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [General Settings](#) [System Settings](#) [Maintain Virtual View Framework Customizing](#) In the *Select Context Nodes Used* subdialog, select a specific context node and choose *Select Context Node Attributes Used*. You should not change the delivered mapping of the context nodes to the Virtual View or the mapping for the list of context node attributes. You can configure new context nodes in an existing Virtual View. You can also add new attributes to existing context nodes depending on your requirements. The Virtual Views can be mapped to the screen by providing a Virtual View Usage. A Virtual View can also be mapped to the Island if the Virtual View is to be available on all Virtual Screens. This Virtual View is called the General Virtual View.

Related Information

[Modify Query Filter and Map Query Response \[page 35\]](#)

[Maintain BW/HANA Modules \[page 31\]](#)

[Maintain BW/HANA Integration Mode \[page 32\]](#)

1.1.3.1.4 Assign Virtual View Usage

Context

Once you have defined the Virtual View, you need to assign it to a Virtual Screen. This assignment is characterized by a unique ID called a Virtual View Usage.

Proceed as follows to assign a Virtual View to a Virtual Screen:

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose ► *Trade Management* ► *General Settings* ► *System Settings* ► *Maintain Virtual View Framework Customizing* .
2. Choose the *Maintain Virtual Screens* node and the *Map Virtual Views* subdialog.

1.1.3.1.5 Configure General Virtual Views

Context

A General Virtual View is a special Virtual View because its instances are the same during navigation (that is, the instances are not destroyed and are created during navigation, and the context node data from these Virtual Views can be accessed at any time). A Virtual View may be required on one or more screens of an Island View, which is why the view's instance should not be destroyed and created again (as is the case with other Virtual Views). The Virtual Views that must be present on all screens should be marked as General Virtual Views.

For example, in a Customer Business Planning scenario, the customer business plan context node data should be available on all screens. The customer business plan context node is, therefore, mapped to a General Virtual View.

Proceed as follows to configure a General Virtual View:

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose ► *Trade Management* ► *General Settings* ► *System Settings* ► *Maintain Virtual View Framework Customizing* .
2. Choose the *Maintain Island Views* node and the *Map General Virtual Views* subdialog. The following general Virtual Views are delivered:

Island View ID	Virtual View Usage	Virtual View Name	Virtual View Usage Description
CBP-ISLAND	HEADER_INPUT	HEADER_INPUT	Header Input

Island View ID	Virtual View Usage	Virtual View Name	Virtual View Usage Description
	HEADER_VARIANT	HDRVARIANTS	Header Variants
	JBP_PLAN	JBP_PLAN	CBP Plan
	PLAN_CM	PLAN_CM	Plan Content Management
	PROMO_KPIS	PROMO_KPIS	Promotion KPIs
	PROMO_RA_PICKER	RA_PICKER_PROMO	RA Picker for Promotion Search
	PROMO_SEARCH	PROMO_SEARCH	Promotion Search
	RA_PICKER	RA_PICKER	Responsibility Area Picker
	RA_PLAN_PICKER	RA_PLAN_PICKER	Responsibility Area and Plan Picker
	TIME_SELECTOR	TIME_SLIDER	Time Selector
	UNI_PROD_PICKER	UNI_PRODUCT_PICKER	Unified Product Picker
	ALL_PROMO_LIST	PROMO_LIST	All Promotions List
	REPORT_LINKS	REPORTLINKS	Manage Private Report Links

You can maintain the following attributes when a General Virtual View is mapped to an Island View:

- **Active:** This indicator specifies whether or not the General Virtual View mapped is active in the application.
- **Activation Priority:** This indicates the sequence in which the General Virtual Views are initialized.
- **History:** This indicator specifies whether a navigation history needs to be maintained during navigation.
- **Invoke IP:** This indicator specifies whether the inbound plug is called during navigation.

Note

It is not advisable to change the above attributes for the delivered General Virtual Views because the application may behave unexpectedly.

1.1.3.1.6 Define Menu Bar Navigation Links

Context

You define a navigation link to navigate to a target Virtual Screen from a source Virtual Screen.

Proceed as follows to define a navigation link:

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose [Trade Management](#) [General Settings](#) [System Settings](#) [Maintain Virtual View Framework Customizing](#).
2. Go to the *Maintain Island Views* node and choose *Maintain Menu Bar Navigation Links*.

The delivered links should not be changed otherwise navigation in the application will be affected. The following standard settings are delivered for Customer Business Planning and Trade Promotion Planning and Management:

Island View ID	Target Screen Number	Target Screen Description	Navigation Reason	Inbound Plug ID
CBP-ISLAND	2.0.0	Plan Overview Screen	TO_200	IP_200
CBP-ISLAND	2.3.0	Plan Setup Screen	TO_230	IP_230
CBP-ISLAND	2.4.0	Assortment Screen	TO_240	IP_240
CBP-ISLAND	3.2.0	Plan Screen	TO_320	IP_320
CBP-ISLAND	3.2.1	Scenario Planning Screen	TO_321	IP_321
CBP-ISLAND	7.0.0	Web UI Navigation Screen	TO_700	IP_700
CBP-ISLAND	7.0.1	Promotion Detail Screen	TO_701	IP_701
CBP-ISLAND	7.0.2	Promotion Planning Screen	TO_702	IP_702
CBP-ISLAND	9.0.0	Plan Optimization Screen	TO_900	IP_900

Island View ID	Target Screen Number	Target Screen Description	Navigation Reason	Inbound Plug ID
CBP-ISLAND	3.1.0	Baseline Volume	TO_310	IP_310

1.1.3.1.7 Map Physical Context Nodes

Context

The physical context nodes within the Island View are the actual context nodes present in the Island View within the BSP component.

These logical context nodes have the list of fields and other properties of a field that need to be sent to the UI. The physical context node can be mapped to a logical context node name within VVF, which can have a different name. To make things easier to understand, it is recommended that the names of both the physical and logical contexts are the same. The data of the logical context node is sent to the UI and is represented using a UI data source.

The following table shows example entries delivered for CBP-ISLAND:

Logical Context Node Name	Physical Context Node Name	UI Data Source Name
ACCOUNT	ACCOUNT	ACCOUNT
ASSORTMENTH	ASSORTMENTH	assortmenth
ASSORTMENTFILTERED	ASSORTMENTFILTERED	assortmentfiltered
ASSORTMENTLISTING	ASSORTMENTLISTING	assortmentlisting
BUYER	BUYER	buyer
BUYERTARGETS	BUYERTARGETS	buyertargets
BWUSERSETTING	BWUSERSETTING	bwusersettings
CPHBUYER	CPHBUYER	cphbuyer
CPHIERHEADER	CPHIERHEADER	cphierheader
CPHIERNODE	CPHIERNODE	cphiernode
CREATEPLAN	CREATEPLAN	createplan
CREATEVERSION	CREATEVERSION	createversion

Logical Context Node Name	Physical Context Node Name	UI Data Source Name
CRITERIA	CRITERIA	criteria
DATE	DATE	date
ECCHIERNODE	ECCHIERNODE	ecchiernode
EXTERNALTARGETSFILTERED	EXTERNALTARGETSFILTERED	externaltargetsfiltered
INTERNALTARGETS	INTERNALTARGETS	internaltargets
KPILIST	KPILIST	kpilist
PLAN	PLAN	plan
PLANNINGFUNCTIONS	PLANNINGFUNCTIONS	planningfunctions
PLANYEAR	PLANYEAR	planyear
PRODUCTPICKER	PRODUCTPICKER	productpicker
QUERYINFO	QUERYINFO	queryinfo
QUERYRESULT	QUERYRESULT	queryresult
RALIST	RALIST	ralist
RAPLANLIST	RAPLANLIST	raplanlist
SCENARIO	SCENARIO	scenario
TIME	TIME	time
TIMSELECTOR	TIMSELECTOR	timeSelector
TPMTPOHEADRUN	TPMTPOHEADRUN	tpoheaderrun
TPOATTRIBUTE	TPOATTRIBUTE	tpoattribute
VERSION	VERSION	version
HEADERINPUT	HEADERINPUT	headerInput

Proceed as follows to map physical context nodes to logical context nodes and to maintain the UI DataSource name:

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose [Trade Management](#) [General Settings](#) [System Settings](#) [Maintain Virtual View Framework Customizing](#).

2. Choose the *Maintain Island Views* node and the *Map Physical Context Nodes* subdialog.

i Note

It is not advisable to change the standard Customizing delivered. You can, however, create entries for mapping new context nodes in customer implementations.

1.1.3.1.8 Map Logical Context Nodes

Context

You can see a complete list of logical context nodes in Customizing for *Customer Relationship Management* which is where you also map the context node attributes.

Proceed as follows to map logical context nodes:

Procedure

1. Choose **Trade Management** > **General Settings** > **System Settings** > **Maintain Virtual View Framework Customizing**.
2. In the *Maintain Logical Context Nodes* node, select a context node to display all of the attributes under the *Map Logical Context Node Attributes* node.

The following list contains an example for one of the context nodes:

Logical Context				
Node Name	Attribute Name	UI Attribute Name	I Getter	V Getter
CPHIERNODE	BUYER_ID	BUYERID		
CPHIERNODE	GUID	GUID		
CPHIERNODE	IS_DUMMY_PROD	IS_DUMMY_PROD- UCT		
CPHIERNODE	LINK_GUID	LINKGUID		
CPHIERNODE	NODE_TEXT	NODETEXT		
CPHIERNODE	NODE_TYPE	NODETYPE		

Logical Context				
Node Name	Attribute Name	UI Attribute Name	I Getter	V Getter
CPHIERNODE	PARENT_GUID	PARENTGUID		
CPHIERNODE	PROCESS_MODE	PROCESSMODE		

The checkboxes for I Getter and V Getter are selected when data from I Getter and V Getter is exchanged with the UI.

i Note

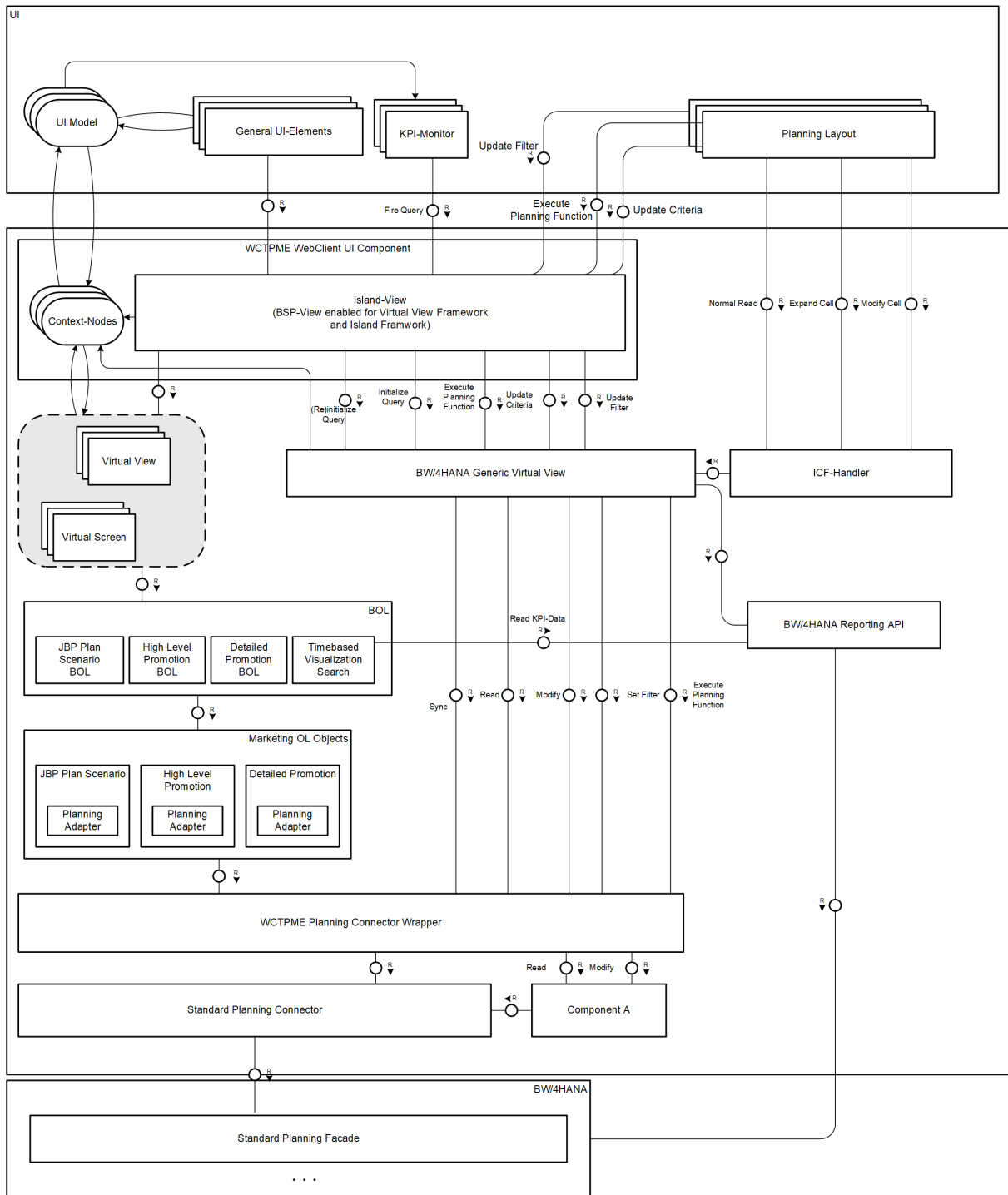
It is not advisable to change the entries delivered for the context nodes or the list of context node attributes. In customer implementations, however, you can add new context nodes and new attributes to existing and new context nodes, based on your requirements.

1.1.3.2 Integration Between Virtual View Framework and SAP BW/4HANA

The BW/4HANA planning data is accessed via VVF with a Generic Virtual View, `BW_GENERIC_VV`, and is then sent to the UI via XML/context node. The basic functions of this Virtual View are as follows:

- Determine the BW/4HANA query based on the various criteria (for example, screen) selected
- Apply filters to the BW/4HANA query based on the criteria selected
- Trigger the BW/4HANA query using the in-memory planning façade or the SAP BW Reporting API
- Enhance the query result (for example, for the KPI Monitor and Budget Monitor in Customer Business Planning and Trade Promotion Planning and Management)
- Send the result back to the UI in XML/context node form

The following diagram shows how the request is made from the UI to VVF and then to BW/4HANA where the query is executed. The query result is then sent back to VVF where it is enhanced and then sent to the UI for display.



[Define BW/4HANA-Relevant Criteria \[page 26\]](#)

[Configure Default Values for BW/HANA Criteria \[page 31\]](#)

[Maintain BW/HANA Modules \[page 31\]](#)

[Maintain BW/HANA Integration Mode \[page 32\]](#)

[Configure BW/HANA Query Determination \[page 33\]](#)

[Map Query Profile to Sales Area \[page 34\]](#)

Related Information

[Modify Query Filter and Map Query Response \[page 35\]](#)

1.1.3.2.1 Define BW/4HANA-Relevant Criteria

Context

You define the criteria to determine the SAP BW query and map criteria to the Virtual View Usage in Customizing for *Customer Relationship Management* under [Trade Management](#) > [General Settings](#) > [System Settings](#) > [Maintain BW-Relevant Criteria for VVF](#).

Proceed as follows to configure the criteria and related Customizing settings:

Procedure

1. Define SAP BW/HANA-Relevant Criteria

You need to maintain all the criteria that can be used to determine BW/HANA queries.

2. Assign Criteria Values

Calendar, Profit & Loss, Product Tree, and Summary) available in the customer business plan and trade promotions. The following table shows an example of the SA BW/4HANA-relevant criteria delivered with the standard solution:

Criteria ID	Criteria Description	Criteria Value	BW Relevant
TREE_PNL	Tree/P&L/Calendar/Overview	CALENDAR	
TREE_PNL	Tree/P&L/Calendar/Overview	OVERVIEW	X
TREE_PNL	Tree/P&L/Calendar/Overview	PNL	X

Criteria ID	Criteria Description	Criteria Value	BW Relevant
TREE_PNL	Tree/P&L/Calendar/Over-view	TREE	X
TC	Unit	AU	X
TC	Unit	TU	X
TC	Unit	CU	X
TF	Time Frame	QM	X
TF	Time Frame	W	X
VIEW TYPE	Layout View Type	GRAPH	X
VIEW TYPE	Layout View Type	TABLE	X
PROMO_VIEW	PnL Sell-In/PnL Sell-Out/Summary	SELL_IN	X
PROMO_VIEW	PnL Sell-In/PnL Sell-Out/Summary	SELL_OUT	X
PROMO_VIEW	PnL Sell-In/PnL Sell-Out/Summary	SUMMARY	X

X denotes that the criterion is BW/4HANA relevant.

3. Assign Criteria to Virtual View Usage

Once you have defined the BW/4HANA criteria, you need to assign all the valid criteria for a given Virtual View Usage.

The criteria are classified as follows:

- **Query Relevant:** This flag needs to be set if the criteria are used for query determination.
- **XML Relevant:** This flag needs to be set if the criteria are used for XML enhancements.
- **Filter Relevant:** This flag needs to be set if the criteria are used to set filters in the BW/4HANA query.

The table below shows an example for the *Plan* screen in Customer Business Planning:

Virtual View Usage	Criteria ID	Query Relevant	XML Relevant	Filter Relevant
320_PLANNING_LAY- OUT	CAL	X		X
320_PLANNING_LAY- OUT	PROMOTIONS			

Virtual View Usage	Criteria ID	Query Relevant	XML Relevant	Filter Relevant
320_PLANNING_LAY- OUT	TC	X	X	X
320_PLANNING_LAY- OUT	TF	X		X
320_PLANNING_LAY- OUT	TREE_PNL	X	X	X
320_PLANNING_LAY- OUT	VALUE_TYPE			
320_PLANNING_LAY- OUT	VIEW_TYPE		X	
320_EXTERNAL_LAY- OUT	CAL	X		
320_EXTERNAL_LAY- OUT	PROMOTIONS			
320_EXTERNAL_LAY- OUT	TABLE_VIEW	X	X	
320_EXTERNAL_LAY- OUT	TC	X	X	X
320_EXTERNAL_LAY- OUT	TF	X		X
320_EXTERNAL_LAY- OUT	TREE_PNL	X	X	X
320_EXTERNAL_LAY- OUT	VALUE_TYPE	X		
320_EXTERNAL_LAY- OUT	VIEW_TYPE		X	

X denotes that the criterion is XML relevant

Virtual View usage 320_PLANNING_LAYOUT is used to read the planning related data.

Virtual view usage 320_EXTERNAL_LAYOUT is used to read the external data from various comparison options (*Reference*, *Previous Year*, *Latest Estimate*, *Version*) and configured scenarios.

4. Define Criteria Profile

You need to define a criteria profile for the corresponding *Virtual View Usages*. The number of criteria profiles for a *Virtual View Usage* depends on the number of criteria assigned to a *Virtual View Usage* and its criteria value combinations. Only the criteria that are relevant for query determination are considered

when a criteria profile is created. Criteria value combinations are a set of characteristics that define the view. The combination generally consists of *Criteria IDs*, such as *Calendar Type (Retailer or Internal)*, *Unit (TU/CU/NU)*, time frame (weekly/quarterly), *View Type (Tree/P&L/Summary)*, and *Value Type (Reference, Previous Year, Latest Estimate, Version, Scenarios)* for the various comparison options configured to read the external data depending on the criteria profile. For example, the criteria profile for reference data is a combination of the criteria IDs with different values.

This is a mandatory activity for the system to be able to map the BW/4HANA query to the UI.

5. Define possible criteria values to *Criteria Profiles*.

You need to assign the criteria and the corresponding values to a criteria profile.

Example

The following table shows example Customizing entries for the *Profit & Loss* view in Customer Business Planning. The table only lists the entries for the monthly view.

Criteria Profile ID	Virtual View Usage	Description	Criteria ID	Criteria Value
PL_UTMP	320_PLAN-NING_LAYOUT	Plan TU Monthly P&L	CAL	INT_CAL
PL_UTMP	320_PLAN-NING_LAYOUT	Plan TU Monthly P&L	CAL	RET_CAL
PL_UTMP	320_PLAN-NING_LAYOUT	Plan TU Monthly P&L	TC	TU
PL_UTMP	320_PLAN-NING_LAYOUT	Plan TU Monthly P&L	TF	QM
PL_UTMP	320_PLAN-NING_LAYOUT	Plan TU Monthly P&L	TREE_PNL	PNL

To compare the reference data with planning data, the following criteria IDs are configured with these values:

- *View Type*: **Profit&Loss**
- *Unit*: **TU**
- *Granularity*: **Monthly**
- *Calendar Type*: **Retailer** and **Internal**
- *Value Type*: **LE_VS_REF** (defines the comparison option to compare plan data with reference data)

The query for this *Criteria Profile ID*, defined in the Customizing *BW Query Determination*, returns the relevant reference data for this combination of criteria IDs and its values. Similarly, for every *Unit*, *Granularity Level*, *Calendar Type*, and *View Type* there are different criteria profiles for which different queries can be configured.

Likewise, all the other comparison options, such as Plan versus Previous Year/Scenario/Version data have the above combinations defined for their corresponding value types configured (LE_VS_PREV_YEAR, LE_VS_SCENARIO(1/2/3), LE_VS_VERSION).

Criteria Profile ID	Virtual View Usage	Description	Criteria ID	Criteria Value
SM_PMTUR	320_EXTERNAL_LAY- OUT	Simplified Data Model- PnL - Monthly - TU - Reference	CAL	INT_CAL
SM_PMTUR	320_EXTERNAL_LAY- OUT	Simplified Data Model- PnL - Monthly - TU - Reference	CAL	RET_CAL
SM_PMTUR	320_EXTERNAL_LAY- OUT	Simplified Data Model- PnL - Monthly - TU - Reference	TC	TU
SM_PMTUR	320_EXTERNAL_LAY- OUT	Simplified Data Model- PnL - Monthly - TU - Reference	TF	QM
SM_PMTUR	320_EXTERNAL_LAY- OUT	Simplified Data Model- PnL - Monthly - TU - Reference	TREE_PNL	PNL
SM_PMTUR	320_EXTERNAL_LAY- OUT	Simplified Data Model- PnL - Monthly - TU - Reference	TABLE_VIEW	TREE
SM_PMTUR	320_EXTERNAL_LAY- OUT	Simplified Data Model- PnL - Monthly - TU - Reference	VALUE_TYPE	LE_VS_REF

i Note

It is not advisable to change the delivered entries because this could affect the application behavior. You can, however, add new criteria and map them to a *Virtual View Usage* and criteria profile based on your requirements.

Related Information

[Configure BW/HANA Query Determination \[page 33\]](#)

[Assign Virtual View Usage \[page 17\]](#)

[Customer Business Planning Basics](#)

1.1.3.2.2 Configure Default Values for BW/HANA Criteria

Context

A default value for a BW/HANA criterion for a given Virtual View Usage helps to determine the criteria value when the application is launched for the first time.

Proceed as follows to configure a default value:

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose [Trade Management](#) [General Settings](#) [System Settings](#) [Define Default Value for BW Criteria](#).
2. Enter the default criteria values. You can change the default values for the criteria for a given Virtual View Usage based on your business requirements. However, the default criteria values are overridden by the user's personalization settings in the application.

Related Information

[Define BW/4HANA-Relevant Criteria \[page 26\]](#)

1.1.3.2.3 Maintain BW/HANA Modules

Context

A set of filters is required to execute a BW/HANA planning query. If the planning query is to be executed via the Planning Synchronization Manager (PSM), the corresponding CRM marketing object must be synchronized. These scenarios can be handled with filter modules and synchronization modules respectively.

It is not advisable to change the delivered settings because this could affect the application behavior.

The filter module and synchronization module are attached to the Virtual View Usage in Customizing for *Customer Relationship Management* under [Trade Management](#) [General Settings](#) [System Settings](#) [Maintain BW Modules](#).

In this Customizing activity, you can configure the following settings:

Procedure

1. Define Synchronization Module

You configure the synchronization module and its corresponding class or interface. The synchronization module is used to synchronize the CRM marketing objects to the Planning Synchronization Manager buffer.

2. Define Input Module

You configure the input module and its corresponding class or interface. The input module provides input parameters such as variables, filters, and so on to the BW/HANA query.

3. Define Input Profile

You configure the input module profile for a group of input modules.

4. Assign Input Module to Input Profile

You assign the input module to an input profile.

5. Map Modules to Virtual View Usages

You configure the Virtual View Usages and assign corresponding input profile and sync modules to the Virtual View Usage.

1.1.3.2.4 Maintain BW/HANA Integration Mode

Context

The SAP BW/HANA Integration mode provides a way of integrating with BW/HANA to read the relevant data. This can be done in three ways:

- PSM via XML: In this mode, the query is executed via PSM and the result is sent to the UI as an XML
- PSM via context node (buffer): In this mode, the query is executed via PSM and the result is sent to the UI in the context node
- Direct via context node: In this mode, the query is executed via the BW/HANA Reporting API
- Relevant for plan field: Checks if the query getting executed is planning relevant, and if the particular object for which the query is being executed (for example, promotion) consists of all planning attributes. If all the relevant planning attributes are not present in the object, then the query is not executed.

It is not advisable to change the delivered entries because this could affect the application behavior.

Procedure

Map the integration mode to the Virtual View Usage in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [System Settings](#) > [Maintain BW Integration Mode](#).

1.1.3.2.5 Configure BW/HANA Query Determination

Context

To determine the BW/HANA query, you assign a BW/HANA query to a query profile along with a corresponding criteria profile. The criteria profile contains the different criteria and criteria values that are mapped to a Virtual View Usage. The query profile is a container for the queries and criteria profile that can be mapped to a sales area.

The criteria profile is mapped to a query profile in Customizing for *Customer Relationship Management* under [Trade Management](#) > [General Settings](#) > [System Settings](#) > [BW Query Determination](#).

In this Customizing activity, you can configure the following settings:

Procedure

1. KPI Grouping

You maintain the groupings corresponding to the screen areas that show KPIs. If the grouping and Virtual View Usage correspond one to one, it is advisable to use the Virtual View Usage name as the grouping name. This activity is relevant for the KPI Monitor and Budget Monitor queries in Customer Business Planning.

2. Maintain Query Profile

In this step, you maintain a query profile. The query profile is used to group queries. In the case of overlapping planning, the plan level indicator specifies whether the query profile is intended for a higher-level plan or a lower-level plan. The *InfoObject Profile* defines the row and column InfoObjects in a profile, which is passed to BW/HANA to execute the queries when the query simplification feature is switched on.

Query Profile ID	Query Profile Description	Plan Level Indicator	InfoObject Profile
QR_WEEKLVL	KAM Week Level, No Overlapping Plan	No Overlap	
QR_NAM	NAM Week Level, Overlapping Plan PnL 1	Higher-Level Plan	

Query Profile ID	Query Profile Description	Plan Level Indicator	InfoObject Profile
QR_KAM	KAM Week Level, Overlapping Plan PnL 1	Lower-Level Plan	

3. Assign Criteria Profile and Query ID

You assign a criteria profile and corresponding BW/HANA query ID to a query profile.

- Assign Criteria Profile and Query ID
You assign a criteria profile and corresponding BW/HANA query ID to a query profile.
- Maintain KPIs for Query
You maintain the technical names of the relevant BW/HANA key figures for each combination of Virtual View Usage, criteria profile, and BW/HANA query. You can choose the KPIs from the input help associated with the field. In the *UI Position* field, you need to enter the relative position on the UI at which the KPI should be displayed. This activity is relevant for the KPI Monitor and Budget Monitor queries. In the *KPI Area* field, you can map the key figures to areas, such as Event Planned Value KPI, Event Budget, and Available.
- Maintain KPI Aspects (optional)
You can maintain the KPI aspects, if any, in the SAP BW query layout. Technically speaking, KPI aspects are also BW/HANA key figures but are used to assign an aspect to a KPI. For example, for a KPI called Volume, Actual and Planned can be two aspects that indicate the actual and planned values for the KPI. For the *Type* field, you can choose the correct value from the dropdown list.

The queries maintained in Customizing can be modified in customer implementations based on your requirements. New query profiles can be created, which can then be mapped to the sales area.

1.1.3.2.6 Map Query Profile to Sales Area

Context

The query profile determines the planning layout for a customer business plan or promotion.

For promotions, the planning layout can be dependent on promotion type and sales area. For example, long-term agreements will have a different set of key figures as compared to a short-term promotion. In Customer Business Planning, overlapping plans have a different planning layout than a single customer business plan.

Proceed as follows to map the query profile to a sales area:

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose **Trade Management** **General Settings** **System Settings** **Map Query Profile to Sales Area**.

2. Modify or add the query profiles to the sales area based on your requirements.

1.1.3.2.7 Modify Query Filter and Map Query Response

Context

Execution of the query can be split into three steps:

- Define the settings to determine the query
- Provide inputs to the query for selection
- Map the query response to represent it on the UI

Proceed as follows to set the query inputs and map the query response:

Procedure

1. Go to Customizing for *Customer Relationship Management* and choose [Trade Management](#) [Customer Business Planning](#) [CBP Planning](#) [Key Figure Planning](#) [Business Add-Ins \(BAdIs\)](#) [BAdI: Modification of Query Filter and Mapping of Query Response](#).
2. Define the query filters.
These contain a set of keys and values for execution.
3. Specify the query variables.
These contain a set of keys and values for execution
4. Specify key figure visibility.
Controls visibility of the key figures
5. Define the hierarchy variable.
Holds the information of the hierarchy tree and nodes of the product hierarchy used for selection.

After the query has been executed for a Virtual View Usage, for which the integration mode is *PSM via context node (buffer)* or *Direct via context node*, the query result can be mapped to the VVF query result structure (used by the UI for data representation) via the above BAdI (for example, KPI Monitor, Budget Monitor).

Two sample implementations are provided; one for Customer Business Planning and one for Trade Promotion Planning and Management.

BADI Implementation	Description
/JBPC/VVF_BW_QUERY_FILTER	Customer Business Planning Query Filter Change
/JBPC/VVF_BW_QRY_CHANGE_PROMO	Promotion Planning Query Filter Change

Related Information

[Configure BW/HANA Query Determination \[page 33\]](#)

[Maintain BW/HANA Integration Mode \[page 32\]](#)

1.1.4 Integration with Planning in SAP BW/HANA

[Integration with In-Memory Planning \[page 36\]](#)

1.1.4.1 Integration with In-Memory Planning

SAP Trade Management, version for SAP BW/4HANA uses the in-memory planning infrastructure powered by SAP HANA. The activities here describe the common configuration and setup steps to integrate the in-memory-based planning infrastructure between the SAP CRM and SAP BW/HANA systems.

[Define Target System \[page 37\]](#)

[Define BW/HANA Queries \[page 37\]](#)

[Define Integrated Planning Profile Group \[page 38\]](#)

[Pass CRM Application Data to BW/HANA \[page 39\]](#)

1.1.4.1.1 Define Target System

Prerequisites

- You have defined your RFC destination using transaction **SM59**. This Customizing activity is mandatory. If you do not maintain the RFC destination, the system will not allow you to perform customer business planning.
- You have maintained the same RFC destination for the following middleware parameters:

<i>Parameter Key</i>	MKTPLBW
<i>Parameter Name</i>	MKTPLBWRFC

Context

In this Customizing activity, you define the connection between the SAP CRM system and SAP BW/4HANA system.

Procedure

Configure the settings in Customizing for *Customer Relationship Management* by choosing **Trade Management** > **General Settings** > **System Settings** > **Define BW Target System**.

1.1.4.1.2 Define BW/HANA Queries

Prerequisites

You have defined your queries in your SAP BW/HANA system using BW Modeling Tools.

Context

In this Customizing activity, you specify the queries that you want to use for Customer Business Planning and Trade Promotion Planning. You can define the following types of queries in your SAP BW/HANA system:

- Planning query: To access and update the planning data in SAP BW/HANA
- Read query: To retrieve the planning data from SAP BW/HANA

Procedure

Maintain the queries in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [General Settings](#) [System Settings](#) [Define BW Queries](#).

1.1.4.1.3 Define Integrated Planning Profile Group

Context

In this Customizing activity, you define an integrated planning profile group. An integrated planning profile group is a collection of queries that you want to use for planning.

Procedure

Define an integrated planning profile group for trade promotion planning in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [Trade Promotion Planning and Management](#) [Key Figure Planning with the Planning Applications Kit](#) [Define Integrated Planning Profile Groups](#).

❖ Example

The following example planning profile group is delivered with the standard solution.

Integrated Planning Profile Group	Integrated Planning Profile Group Description
TPM7	CBP Planning on Prd&BPHN STA-Shipment

You can also define an integrated planning profile group for customer business in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [Customer Business Planning](#) [CBP Planning](#) [Key Figure Planning](#) [Define Integrated Planning Profile Groups](#).

Related Information

[Define Integrated Planning Profile Groups](#)

[Maintain Settings for Integrated Planning Profile Group in CRM](#)

[Defaulting Planning Profile Group Based on Promotion Types](#)

1.1.4.1.4 Pass CRM Application Data to BW/HANA

Context

You can implement the BAdI CRM_IMP if you need to send additional CRM application data to SAP BW/HANA. This additional data can be used to enhance the query or planning function filters in the SAP BW/HANA system.

Procedure

Implement BAdI CRM_IMP.

The system calls the method SEND_APP_DATA_TO_BW (BAdI CRM_IMP) before customer business plan or trade promotion data is synchronized in the CRM system.

1.1.5 Maintain Marketing Object Prefix (Optional)

Context

In this Customizing activity, you define the marketing object prefix. Each marketing object identifier starts with the prefix defined in this activity. The system uses this prefix in addition to the number range that you defined in the system to formulate the unique identifier. For example, customer business plans start with J (J-00000001) and trade promotions start with T (T-00000001).

Procedure

Maintain the object prefix in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [System Settings](#) > [Maintain Marketing Object Prefix](#).

1.1.6 Setting Up Business Roles, Themes, and Extensions

[Set Up Business Roles for SAP Trade Management, Version for SAP BW/4HANA \[page 40\]](#)

[Set Up Themes \[page 42\]](#)

[Setting Up UI Extension \[page 42\]](#)

1.1.6.1 Set Up Business Roles for SAP Trade Management, Version for SAP BW/4HANA

Context

Access to the applications of SAP Trade Management, version for SAP BW/4HANA is controlled via business roles in the SAP CRM system.

The following are examples of business roles delivered with the solution:

Business Role	Description	Use
/JBPC/ADMIN	Administrator	This role is used to access the user interface for the Responsibility Area and other standard applications (Territory, Org Model, Account Hierarchies).
/JBPC/KAM	Key Account Manager	This role is used to access the Customer Business Planning and Promotion Planning application user interfaces.

Procedure

Configure the business roles in Customizing for *Customer Relationship Management* by choosing [► Trade Management ► General Settings ► UI Configuration and Personalization ► Maintain Settings for User Interface](#), then *Business Role*.

[Settings for Virtual Screens for Business Role \[page 41\]](#)

1.1.6.1.1 Settings for Virtual Screens for Business Role

Context

In this Customizing activity, you can make the following settings:

- Control access to different screens and their elements within a Trade Management application.
A screen is a section of the UI within a Trade Management application. For example, Customer Business Planning consist of the following screens:
 - Plan Overview
 - Plan Setup
 - Assortment
 - Plan
 - Scenario Planning
 - Version Comparison
 - Retailer View
 - Promotion Detail
- Mark a screen as hidden/displayed.
A screen is a collection of entities called controls. For example, the *Plan* screen includes the following controls:
 - Promotion fast emtry table
 - TU-CU switch
 - Tree and Flat view
 - Promotion Power switch
- Mark a control as hidden/displayed.
A control is a collection of entities called elements. For example, the TU-CU switch control consists of the following elements:
 - TU switch
 - CU switch
 - NU switch
- Configure the following properties of an element:
 - Mark an element as default: Specifies whether the element is set when the control is loaded

- Define the order of element: Defines the position of an element within a control
- Mark the element as hidden: Defines the visibility of an element within a control

Procedure

Configure the settings in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [General Settings](#) [UI Configuration and Personalization](#) [Maintain Settings for User Interface](#), then [Business Role](#) [Maintain Screens](#).

1.1.6.2 Set Up Themes

SAP Trade Management, version for SAP BW/4HANA screens are built using SAPUI5 technology. You can define a new theme that is different from the delivered default theme using UI Custom Theme Designer. You can also change the color schemes and font-related styling of various screen elements.

You can maintain settings for the custom themes that have been created for your company, in Customizing for *Customer Relationship Management*, by choosing [Trade Management](#) [General Settings](#) [UI Configuration and Personalization](#) [Maintain Themes](#).

Related Information

[UI Custom Theme Designer – User Guide](#)

1.1.6.3 Setting Up UI Extension

You can extend the UI controls of SAP Trade Management, version for SAP BW/4HANA to:

- Add new functionality
 - Enhance existing functionality
- [Maintain Extension Namespace \[page 43\]](#)
- [Define View Extension Points \[page 43\]](#)
- [Extend UI Controller \[page 43\]](#)
- [Maintain Post Load File \[page 44\]](#)
- [Maintain i18n Properties Extension URL \[page 44\]](#)

Related Information

[UI Extension Framework – User Guide](#)

1.1.6.3.1 Maintain Extension Namespace

You can deploy the extension project in an ABAP Repository, and the deployment path must be provided in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [General Settings](#) [UI Extension](#) [Maintain Extension Namespace](#).

Related Information

[UI Extension Framework – User Guide \(Namespace Table \[extnamespaces\] section\)](#)

1.1.6.3.2 Define View Extension Points

You can extend SAP-delivered views using the UI Extension Framework.

You maintain the view-related mapping of the extension points and the extension file in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [General Settings](#) [UI Extension](#) [Define View Extension Points](#).

Related Information

[UI Extension Framework – User Guide \(View Extension Table \[extviewextpoints\] section\)](#)

1.1.6.3.3 Extend UI Controller

You can extend the SAP-delivered View Controller using the UI Extension Framework.

You maintain your Extended Controller file mapping with that of the SAP View Controller in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [General Settings](#) [UI Extension](#) [Extend UI Controller](#).

Related Information

[UI Extension Framework – User Guide \(Controller Extension Table \[extcontroller\] section\)](#)

1.1.6.3.4 Maintain Post Load File

In addition to SAPUI5 standard controls, SAP Trade Management, version for SAP BW/4HANA also delivers SAPUI5 custom controls as standard controls in cases where standard controls do not fulfill your requirements.

An example of where these can be used is the planning grid area in SAP Customer Business Planning, version for SAP BW/4HANA.

You can extend SAP-delivered SAPUI5 custom controls as well.

You maintain your Extended JavaScript file mapping with that of the SAP Custom Controls JavaScript file in Customizing for *Customer Relationship Management* by choosing **Trade Management** **General Settings** **UI Extension** **Maintain Post Load File**.

Related Information

[UI Extension Framework – User Guide \(Post-Load Extension Table \[extpostloadfiles\] section\)](#)

1.1.6.3.5 Maintain i18n Properties Extension URL

You can change SAP-defined labels of the screen elements defined using the UI Extension Framework.

You define your own URL for extending the SAP-delivered i18n.properties file in Customizing for *Customer Relationship Management* by choosing **Trade Management** **General Settings** **UI Configuration and Personalization** **Maintain i18n Properties Extension URL**.

Related Information

[UI Extension Framework – User Guide \(Walkthrough – i18n Extension section\)](#)

1.1.7 Setting Up Responsibility Area

Responsibility areas are used in SAP Trade Management, version for SAP BW/4HANA to define combinations of customers and products in a sales area for which a key account manager (KAM) is responsible. A KAM

should be assigned to a responsibility area to carry out customer business planning and trade promotion planning. Responsibility areas are also used to control access to customer business plans and promotions, and to assign various configuration settings that are required for creating plans and promotions.

Key Attributes

A responsibility area is uniquely identified by the following key attributes:

- *Sales area* (1)
- *Account hierarchy node* (1)
- *Product categories* (1..n)
- *Shop format* (1)

Using this attribute, you can define separate responsibility areas and henceforth, separate customer business plans for the same customer that operates under different shop formats, such as hypermarkets and supermarkets. If your business process does not distinguish between different shop formats, define and use a default value.

i Note

The *Shop Format* attribute is optional in a responsibility area. If you are using shop format, you must ensure to include it in your BW/4HANA data model.

The *Shop Format* field is available on the responsibility area only after you activate it for a sales area in Customizing for *Customer Relationship Management* by choosing **Trade Management** > **General Settings** > **Activate Trade Management Features**. If shop format is not available in the BW/HANA content, you can deactivate it for your sales area in the same Customizing. Once deactivated, the *Shop Format* field is disabled while creating a responsibility area.

You assign the users responsible, such as KAMs, to responsibility areas. This assignment is time-dependent so that changes in responsibility over time can be reflected. This can be achieved in the following ways:

- Assign user's position to responsibility area from / JBPC / ADMIN role.
- Assign user ID to responsibility area.

i Note

The attributes **sales area**, **account hierarchy node**, and **shop format** cannot be changed once the responsibility area is active. However, the **product category** attribute can be added by setting the responsibility area status to **Inactive**.

In addition to these attributes, you can maintain the following important parameters that the system requires for creating plans and promotions. These attributes cannot be changed once a plan has been created for the respective responsibility area.

Integrated Planning Profile Group for Customer Business Planning (Mandatory for Single Customer Plan)

By assigning the integrated planning profile group to a standard customer business plan or overlapping plans, you can use the corresponding planning query to synchronize the data.

i Note

SAP Customer Business Planning, version for SAP BW/4HANA uses only master queries for synchronizing customer business plans to BW/HANA. Read queries or input-ready queries, which can be specified in the integrated planning profile group's Customizing, are not used here. Instead, the query profiles described here are used to read the planning data.

Before assigning an integrated planning profile group to a responsibility area, you must maintain it in Customizing for *Customer Relationship Management* by choosing **Trade Management > Customer Business Planning > CBP Planning > Key Figure Planning > Define Integrated Planning Profile Groups**. You must assign an integrated planning profile group to each responsibility area.

Query Profile (Mandatory for Single Customer Plan)

Query profiles group related BW/HANA planning queries that are used for displaying and entering the planning data in customer business plans.

In SAP Customer Business Planning, version for SAP BW/4HANA, plan data is presented to the user in different views.

Examples include:

- The *P&L* view that shows the complete P&L in the rows and the time dimension in the columns for a selected product category.
- The *Product* view that shows the product planning hierarchy in the rows and the time dimension in the columns for a given KPI from the P&L structure.

Additionally, you can plan for trading units as well as consumer units within a selected view.

The planning data in the selected view is retrieved from the BW/HANA system using a query. In order to support planning in multiple views with optimal performance, separate queries are defined in the BW/HANA system. The query for a particular view is determined at runtime based on criteria specified in the query profile.

Before assigning a query profile to a responsibility area, you must maintain it in Customizing for *Customer Relationship Management* under **Trade Management > General Settings > System Settings > BW Query Determination**. Once it has been defined, you must assign a query profile to each responsibility area.

Time Profile ID for Customer Business Planning (Optional)

Use this attribute if you want to assign a different planning calendar for a customer. SAP Customer Business Planning, version for SAP BW/4HANA allows you to view plan data using your own calendar as well as the calendar of your customer. You can define a customer calendar in the system using a time profile. A time profile is a collection of periods that constitute a year in the customer calendar. You only need to define a customer calendar if it is different from your internal calendar.

You define the time profile in Customizing for *Customer Relationship Management* by choosing **Trade Management > Customer Business Planning > Basic Settings > Planning Period > Maintain Flexible Time Periods**. After you have maintained your time profile in Customizing, you can assign it to the responsibility area.

Hierarchy Expansion Level for Customer Business Planning (Optional)

Maintain this attribute if you are setting up Customer Business Planning. You use this attribute to define the level at which the product hierarchy is expanded by default in the *Product Tree* view. However, the

hierarchy expansion level of the *Product Tree* view can also be personalized by users. In such a case, the user's personalization settings take precedence over the value defined in the responsibility area.

TPO Type (Optional)

You use this attribute if you want to leverage Trade Promotion Optimization to perform predictions in customer business plan or trade promotion.

From the TPO type assigned to the responsibility area, the system determines the connected Demand Data Foundation (DDF) with Unified Demand Forecast (UDF) system in which the prediction is triggered. If this attribute is not set, the predictions for the plan and promotion cannot be run.

Before you maintain a TPO type in this attribute, you must define it in Customizing for *Customer Relationship Management* under [Trade Management](#) > [Advanced Trade Management Analytics](#) > [Basic Settings](#) > [Define TPO Types](#).

Customer Business Plan Profile for Each Employee (Optional)

You use this attribute to assign a customer business plan profile to a responsibility area. A customer business plan profile is a collection of access rights to different screens in SAP Customer Business Planning, version for SAP BW/4HANA and Trade Promotion Planning and Management.

Note

If you do not assign a customer business plan profile, the system grants access to all screens.

Before assigning a customer business plan profile, you must maintain it in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [Customer Business Planning](#) > [Basic Settings](#) > [Maintain Customer Business Planning Profiles](#).

Example

The following are example Customizing values:

CBP Profile ID	Profile Description
DISPLAY_MODE	Display Mode (Read Only)
PLANNING_ACCESS	Planning Access
PLANNING_READONLY	Planning Read Only
READ_ONLY	Read Only

Excluded Planning Items (Optional)

Maintain this attribute if you are setting up Customer Business Planning. You use this attribute to assign planning items that are not relevant for the customer business plan for a responsibility area. The planning items assigned here are excluded from display and maintenance in the customer business plan.

You can use this feature if the planning items you use in your responsibility areas differ only slightly. In this case, you can set up a common set of queries with all planning items used in all responsibility areas and then exclude the planning items that are not necessary for a particular responsibility area using this setting. If, for example,

you are planning a particular discount for most of your customers but not all, you can set up your queries with the necessary key figures for that discount. For the customers that you do not grant this discount to, you define the planning item as excluded.

i Note

If you do not maintain any planning items, the system displays all planning items.

Before you assign a planning item to the responsibility area, you must maintain it in Customizing for *Customer Relationship Management* by choosing **Trade Management > Customer Business Planning > CBP Planning > Trade Terms > Maintain Trade Terms**, and also assign it to the sales area by choosing *Assign Planning Item Profile to Sales Area*.

Responsibility Area Type

This is a mandatory attribute and must be maintained to define a responsibility area. There can be three types of responsibility area:

- *Single Customer Plan*: This is the default responsibility area type that is set when a responsibility area is created. This value is relevant when you want to use responsibility area for creating a customer business plan.
- *TPM Only RA*: This responsibility area type is relevant when you want to perform only trade promotion planning without customer business planning.
- *Overlapping Plans*: This responsibility area type is relevant when you want to create overlapping plans.

! Restriction

It is mandatory to choose an RA type when using overlapping planning with the simplified data model.

Specifically for indirect planning with wholesalers and indirect accounts, following are the relevant RA types:

- *Wholesaler Plannable*
- *Wholesaler Non-Plannable*
- *Indirect Plannable*
- *Indirect Non-Plannable*

[Define Responsibility Area \[page 49\]](#)

[Customize Responsibility Area Status Profile \[page 52\]](#)

You use this procedure to define a status profile for a responsibility area.

[Set Up RA With Default Implementation and Territory Management \[page 53\]](#)

You use this procedure if you want to leverage Territory Management to maintain responsibility areas and use the solution delivered out of the box.

[Set Up RA Without Default Implementation and With Territory Management \[page 55\]](#)

[Set Up RA Without Territory Management \[page 58\]](#)

You use this procedure if you want to define your responsibility area without Territory Management.

[Create Multiple Responsibility Areas \[page 62\]](#)

[Enable Users to Access Application Without Organization Assignment \[page 63\]](#)

[Deleting Product Category from Active Responsibility Area \[page 63\]](#)

Related Information

[Enable Users to Access Application Without Organization Assignment \[page 63\]](#)

[Set Up RA With Default Implementation and Territory Management \[page 53\]](#)

1.1.7.1 Define Responsibility Area

You define your responsibility area in the form of a hierarchy. A responsibility area hierarchy is a representation of responsibility areas starting from a root node that is termed the 'root responsibility area.'

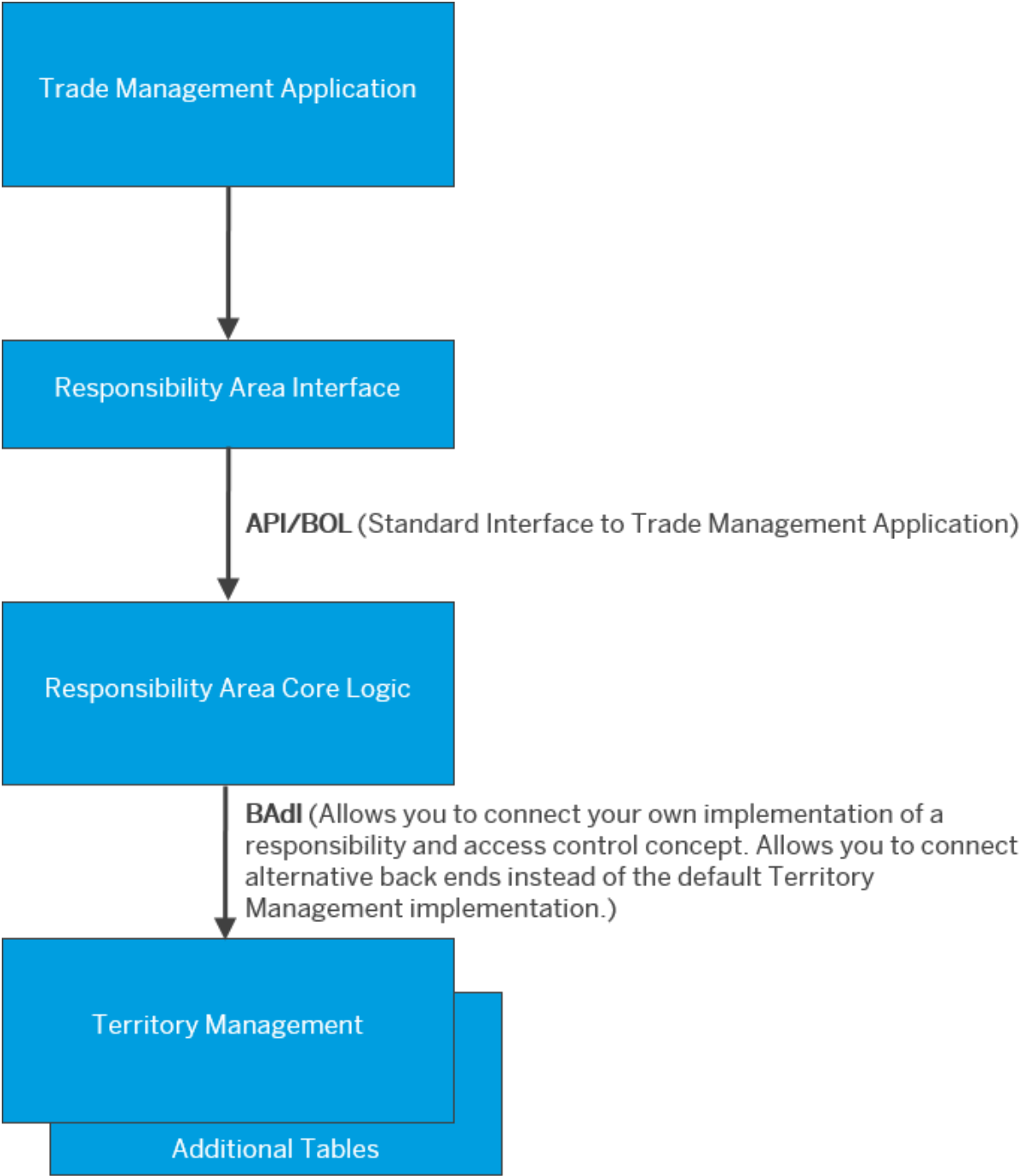
A responsibility area hierarchy can be used for the following purposes:

- You can use the responsibility area hierarchy for overlapping plan scenarios. The system supports both bottom-up and top-down planning.
- You can implement the responsibility area using Territory Management.

After you have defined your responsibility area, the system allows you to carry out customer business planning and trade promotion planning. In customer business planning, you can create only one plan for each responsibility area.

If you have your own means to model responsibilities as well as the required parameters for customer business planning, you can use your external source instead of setting up responsibility areas. The responsibility area object has been designed in such a way that it allows you to replace the standard implementation with your own.

Responsibility Area Interface



Responsibility Area Interface

The responsibility area interface is provided by the following means:

- Responsibility Area Business Object Layer (BOL) Interface
The responsibility area offers its own Generic Interaction Model (JBP_RA) that is consumed by SAP Customer Business Planning, version for SAP BW/4HANA in its Business Object Layer.
- Responsibility Area Service Class
The responsibility area offers its own service layer and the corresponding methods can be accessed using the class /JBPC/CL_CRM_JBP_RESP_AREA_SRV.

SAP Customer Business Planning, version for SAP BW/4HANA consumes the APIs from this service class in the back-end layers.

The methods in the service class / JBPC/CL_CRM_JBP_RESP_AREA_SRV comprise a BAdI and a default implementation that is provided with the solution.

In the example implementation, the responsibility area leverages Territory Management to store sales areas, account hierarchy nodes, product categories, shop formats, and user assignments. The additional attributes described above are stored in further CBP-specific tables.

Users with the *Administrator* role can maintain responsibility areas and assign them to users who create customer business plans and promotions.

The following navigation bar profile and business role are delivered with the solution. When you access your SAP CRM system with this business role, you should be able to access the responsibility area.

Navigation Bar Profile and Business Role

Navigation Bar Profile	Business Role
/ JBPC/ADMIN	/ JBPC/ADMIN

If you do not want to use the delivered business role to access the responsibility area user interface, you must assign the following logical links to your defined business role:

Logical Links

Logical Link	Purpose
CBP-ADM-RA	Search Responsibility Area
CBP-CRE-RA	Create Responsibility Area

You must define a responsibility area otherwise the system will not allow you to create a customer business plan or a trade promotion.

Related Information

[Set Up RA With Default Implementation and Territory Management \[page 53\]](#)

[Set Up RA Without Default Implementation and With Territory Management \[page 55\]](#)

1.1.7.2 Customize Responsibility Area Status Profile

You use this procedure to define a status profile for a responsibility area.

Context

A status profile is required to use the responsibility area. The status profile provides a list of possible status that can be maintained for the **Responsibility Area Status** attribute.

Proceed as follows to define a status profile for a responsibility area:

Procedure

1. Maintain the status profile in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Define Status Profile for User Status](#).

The status profile / JBPC / RA is delivered with the solution as an example.

2. If you want to define your own status profile, you must ensure to map your user status to the following transactions:

Map User Status to Transaction

User Status	Transaction	System Status	Description
Draft	BNNE	I8961	Initial status of the responsibility area that is set when you create a responsibility area
Active	BNAC	I8962	This status is set manually by the user when a responsibility area is activated. The system activates the responsibility area and also calls the BAdI / JBPC / CRM_RESP_AREA, method ACTIVATE_RESP_AREA
Inactive	BNIA	I8963	This status is set manually by the user to change a responsibility area after it was activated

Next Steps

After you have defined your status profile, you must assign it to your responsibility area in Customizing for *Customer Relationship Management* by choosing ► [Trade Management](#) ► [General Settings](#) ► [Responsibility Area \(RA\)](#) ► [Assign Status Profile to Responsibility Area](#) ►.

1.1.7.3 Set Up RA With Default Implementation and Territory Management

You use this procedure if you want to leverage Territory Management to maintain responsibility areas and use the solution delivered out of the box.

Prerequisites

You must ensure that Territory Management is already set up in your SAP CRM system. For more information, see the SAP CRM help documentation for Territory Management.

⚠ Caution

Use the [Responsibility Area](#) UI rather than the [Territory Management](#) UI to maintain the attributes because the system does not replicate the changes from Territory Management to the responsibility area.

Procedure

1. Validate rules in Territory Management.

You can leverage the out-of-the-box solution to define responsibility areas. The solution uses the [Rule Policy Type ID TM](#) (Territory Management) delivered as standard. The condition group **SHFRMT** is delivered with the solution to store the shop format as a rule in Territory Management.

If you use a different rule policy type, it must contain the following condition groups. You can find these in Customizing for *Customer Relationship Management* under ► [Trade Management](#) ► [General Settings](#) ► [Responsibility Area \(RA\)](#) ► [Settings for Territory Management](#) ► [Define Rule Policy Types](#) ►.

Condition Groups

Condition Group	Purpose
BP	Used for storing the account hierarchy node assigned to the responsibility area

Condition Group	Purpose
PR	Used for storing the product categories assigned to the responsibility area
SA	Used for storing the sales area assigned to the responsibility area
SHFRMT	New condition group delivered with the solution to store the shop format assigned to the responsibility area

2. Customize territory levels.

To define responsibility area hierarchy levels, maintain the territory levels in Customizing for *Customer Relationship Management* by choosing [Master Data](#) > [Territory Management](#) > [Define Territory Hierarchy Levels](#).

While creating the responsibility area hierarchy, the system reads level information from Territory Management using the GET_RESPONSIBILITY_AREA_LEVELS method of BAdI / JBPC / CRM_RESP_AREA. You can find this BAdI in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Responsibility Area \(RA\)](#) > [RA User Interface](#) > [BAdI: Responsibility Area Operations](#).

i Note

A default implementation of the GET_RESPONSIBILITY_AREA_LEVELS method is delivered with the solution that reads the level information from Customizing for territory hierarchy levels.

- If Territory Management is set up for the first time in the system, you must create the rule policy and rule set as mentioned in the SAP CRM help documentation for Rule Builder Setup.
- Extract territory from SAP CRM to SAP BW/HANA.

After you have created your responsibility areas and activated them, you must replicate them to the connected BW/HANA system because the responsibility area information is also required on the BW/HANA side for SAP Customer Business Planning, version for SAP BW/4HANA.

As the solution leverages Territory Management to store responsibility area attributes, you must extract the responsibility area information using the `0CRM_TR_ATTR` DataSource.

Related Information

[Territory Management](#)
[Rule Builder Setup](#)

1.1.7.4 Set Up RA Without Default Implementation and With Territory Management

Prerequisites

You have assigned a status profile to your responsibility area as described in [Customize Responsibility Area Status Profile \[page 52\]](#).


Context

You use this step if you want to leverage Territory Management to maintain responsibility areas but do not want to use the solution delivered out of the box.

⚠ Caution

Use the [Responsibility Area](#) UI rather than the [Territory Management](#) UI to maintain the attributes because the system does not replicate the changes from Territory Management to the responsibility area.


Procedure

1. Customize rules in Territory Management in Customizing for [Customer Relationship Management](#) by choosing [Trade Management](#) > [General Settings](#) > [Responsibility Area \(RA\)](#) > [Settings for Territory Management](#) > [Define Rule Policy Types](#) .

You can use rules in Territory Management to store the following attributes in the responsibility area:

- Sales area
 - Account hierarchy node
 - Shop format
 - Product categories
2. Define the territory levels as explained in [Set Up RA With Default Implementation and Territory Management \[page 53\]](#).
 3. Maintain rules in Territory Management by implementing the following BAdIs.

i Note

All BAdIs mentioned in this and the following steps can be found in Customizing for [Customer Relationship Management](#) under [Trade Management](#) > [General Settings](#) > [Responsibility Area \(RA\)](#) > [RA User Interface](#) .

BADIs for Responsibility Area

BAdI	Purpose
<i>BAdI: Sales Area for Responsibility Area</i> (/ JBPC / CRM_RESPAREA_SALES_AREA)	Assign sales area to responsibility area.
<i>BAdI: Responsibility Area Account Hierarchy</i> (/ JBPC / CRM_RESPAREA_ACNT_HIER)	Assign account hierarchy to responsibility area.
<i>BAdI: Shop Format for Responsibility Area</i> (/ JBPC / CRM_RESPAREA_SHOP_FORMAT)	Assign shop format to responsibility area.
<i>BAdI: Responsibility Area Product Category</i> (/ JBPC / CRM_RESPAREA_PRODUCT_CAT)	Assign product categories to responsibility area.
<i>BAdI: Employee Details of Responsibility Area</i> (/ JBPC / RESP_AREA_EMP)	Assign employees to responsibility area.

4. Implement *BAdI: Responsibility Area Operations* to save the territory when saving the responsibility area.

Whenever a responsibility area is saved, the system calls the BAdI / JBPC / CRM_RESP_AREA, method SAVE_RESPONSIBILITY_AREA in the background.

Note

An example implementation of the SAVE_RESPONSIBILITY_AREA method is delivered with the solution. In this implementation, the system saves the territory and all the rules created for the sales area, account hierarchy, product categories, and shop format attributes.

The system also saves all the other attributes maintained for the responsibility area and stores these in a separate DataSource as listed below:

Responsibility Area Attributes

Attributes	Table
Integrated planning profile group, query profile, related responsibility area, time period profile, hierarchy expansion level, and TPO type	/ JBPC / MCRM_RAATT
Customer business planning profile	/ JBPC / DRA_EMP
Excluded planning items	/ JBPC / MCRM_RA_TT

5. Implement *BAdI: Responsibility Area Operations* to release rules in Territory Management upon activation of the responsibility area.
6. Release all the rules that you have created for the attributes in your responsibility area.

You do this by changing the responsibility area status from *draft* to *active*.

i Note

This step is mandatory. If the rules are not released, the system cannot use the responsibility area for customer business planning.

Whenever the responsibility area status is changed from *draft* to *active*, the system calls BAdI / JBPC/ CRM_RESP_AREA, method ACTIVATE_RESPONSIBILITY_AREA in the background.

i Note

An example implementation of the ACTIVATE_RESPONSIBILITY_AREA method is delivered with the solution. In this implementation, the system releases all the rules created for the sales area, account hierarchy, product categories, and shop format attributes in Territory Management.

7. Extract territory from SAP CRM to SAP BW/HANA.

After you have created your responsibility areas and activated them, you must replicate them to the connected BW/HANA system because the responsibility area information is also required on the BW/HANA side for SAP Customer Business Planning, version for SAP BW/4HANA.

i Note

As the solution leverages Territory Management to store responsibility area attributes, you must extract the responsibility area information using the `ØCRM_TR_ATTR` DataSource.

8. (Optional) Implement *BAdI: Responsibility Area Operations* to display the change history.

You can display the history of changes made to the responsibility area attributes by implementing this optional step.

The solution tracks changes to the following attributes in the responsibility area and displays them in the *Change History* assignment block on the responsibility area user interface:

- Query profile
- Integrated planning profile group
- Related responsibility area
- Time profile
- Hierarchy expansion level
- Excluded planning items

Since the solution leverages Territory Management to store the following attributes, it relies on Territory Management to provide the change history for these attributes:

- Sales area
- Account hierarchy
- Shop format
- Product categories
- Employees

The following attributes cannot be changed once you have activated your responsibility area and created a customer business plan:

- Sales area
- Shop format

- Account hierarchy node
- Query profile
- Integrated planning profile group
- Responsibility area type
- Related responsibility area

You must implement the `GET_RA_CHANGE_HISTORY` method of BAdI / JBPC / CRM_RESP_AREA to retrieve the change history.

After you have implemented the BAdI, the system shows the change history of the territory attributes in the *Change History* assignment block of the responsibility area user interface.

1.1.7.5 Set Up RA Without Territory Management

You use this procedure if you want to define your responsibility area without Territory Management.

Context

If you already have your own means to maintain the required parameters for SAP Trade Management, version for SAP BW/4HANA, you can use your external source when you define the responsibility area.

The responsibility area object has been designed with a standard interface that is leveraged by SAP Trade Management, version for SAP BW/4HANA. Decoupling to your external source can be done in the back-end layers by implementing BAdIs, as explained in this procedure.

The responsibility area interface is offered by the following means:

- Responsibility Area Business Object Layer (BOL) Interface
The responsibility area offers its own Generic Interaction Model (JBP_RA) that is consumed by SAP Customer Business Planning, version for SAP BW/4HANA in its Business Object Layer.
- Responsibility Area Service Class
The responsibility area offers its own service layer and the corresponding methods can be accessed using the class / JBPC / CL_CRM_JBP_RESP_AREA_SRV. SAP Customer Business Planning, version for SAP BW/4HANA consumes the APIs from this service class in the back-end layers. The methods in the service class / JBPC / CL_CRM_JBP_RESP_AREA_SRV comprise a BAdI hook in the background and a default implementation is provided with the solution.

i Note

All BAdIs mentioned in this procedure can be found in Customizing for *Customer Relationship Management* under [Trade Management](#) > [General Settings](#) > [Responsibility Area \(RA\)](#) > [RA User Interface](#).

Procedure

1. Obtain level information for creating responsibility area hierarchy by implementing *BAdI: Responsibility Area Operations*.

The system allows you to create a responsibility area hierarchy with a defined number of levels. The node at each level in the responsibility area hierarchy is denoted using an identifier called a responsibility area ID.

The node ID can be designated with a defined number of characters at different levels in the hierarchy. The node IDs from different levels are concatenated to form a path, which is called a responsibility area path ID.

To create a node in the responsibility area hierarchy, the responsibility area hierarchy creation module requires the following parameters:

- **Level ID**
A two-digit identifier of a level. The lowest number (for example, '00') denotes the highest node and the highest number '99' denotes the lowest node in the hierarchy.
When a responsibility hierarchy is created, a level is pre-selected from the lowest value to the highest value starting from the root.
- **Offset**
Determines the starting point in the responsibility area path ID to start reading the value.
- **Length**
Number of characters allowed for a responsibility area ID at a certain level.

When the responsibility area hierarchy is created, the above parameters are supplied to the system using the `GET_RESPONSIBILITY_AREA_LEVELS` method of `BAdI / JBPC / CRM_RESP_AREA`.

Note

If you do not want to use Territory Management but still want to create a responsibility area hierarchy using the responsibility area UI, you must implement this method with your own logic.

2. Create responsibility area hierarchy by implementing *BAdI: Responsibility Area Operations*.

The root responsibility area forms the highest level in the hierarchy. Starting from the root, you can create the hierarchy with a defined number of levels.

The `CREATE_RESPONSIBILITY_AREA` method of `BAdI / JBPC / CRM_RESP_AREA` is called in the system when you create a node within the hierarchy.

The following options are available for creating a responsibility area hierarchy:

- Option 1: Using the responsibility area UI with an external source
In this case, you must implement all the methods in the `BAdI / JBPC / CRM_RESP_AREA`.
- Option 2: Using your own UI for maintaining the hierarchy
In this case, you must implement the `GET_RESP_AREA_TREE_HIERARCHY` and `GET_RESP_AREA_ATTRIBUTES` methods in the `BAdI / JBPC / CRM_RESP_AREA`.

3. Maintain responsibility area attributes by implementing BAdIs.

You can maintain the following parameters in the responsibility area without using Territory Management:

- Sales area
- Account hierarchy node
- Shop format

- Product categories
- Employees

These attributes can be retrieved from an external source by implementing the following BAdIs:

BAdIs for Responsibility Area

BAdI	Purpose
<i>BAdI: Sales Area for Responsibility Area (/ JBPC / CRM_RESPAREA_SALES_AREA)</i>	Assign sales area to responsibility area.
<i>BAdI: Responsibility Area Account Hierarchy (/ JBPC / CRM_RESPAREA_ACNT_HIER)</i>	Assign account hierarchy to responsibility area.
<i>BAdI: Shop Format for Responsibility Area (/ JBPC / CRM_RESPAREA_SHOP_FORMAT)</i>	Assign shop format to responsibility area.
<i>BAdI: Responsibility Area Product Category (/ JBPC / CRM_RESPAREA_PRODUCT_CAT)</i>	Assign product categories to responsibility area.
<i>BAdI: Employee Details of Responsibility Area (/ JBPC / RESP_AREA_EMP)</i>	Assign employees to responsibility area.

You can choose between the following options to maintain these attributes:

- Option 1: Use the responsibility area UI
In this case, you must implement all the methods of the BAdIs listed above.
- Option 2: Use your own UI
If you want to use own UI to maintain these attributes, you must implement the following methods:

BAdI Methods

BAdI	Methods to Be Implemented
<i>BAdI: Sales Area for Responsibility Area (/ JBPC / CRM_RESPAREA_SALES_AREA)</i>	GET_ASSIGNED_SALES_AREA_NODE
<i>BAdI: Responsibility Area Account Hierarchy (/ JBPC / CRM_RESPAREA_ACNT_HIER)</i>	GET_ASSIGNED_ACCOUNT_HIER_NODE
<i>BAdI: Shop Format for Responsibility Area (/ JBPC / CRM_RESPAREA_SHOP_FORMAT)</i>	GET_ASSIGNED_SHOP_FORMAT
<i>BAdI: Responsibility Area Product Category (/ JBPC / CRM_RESPAREA_PRODUCT_CAT)</i>	GET_ASSIGNED_PRODUCT_CATEGORY
<i>BAdI: Employee Details of Responsibility Area (/ JBPC / RESP_AREA_EMP)</i>	GET_EMPLOYEE

4. Implement your own logic to maintain additional responsibility area attributes.

If you use the responsibility area UI to maintain additional attributes, the system stores them in the data sources listed below.

DataSources for Attributes

Attributes	Table
Integrated planning profile group, query profile, related responsibility area, time period profile, hierarchy expansion level, and TPO type	/JBPC/MCRM_RAATT
Customer business planning profile	/JBPC/DRA_EMP
Excluded planning items	/JBPC/MCRM_RA_TT

If you want to maintain additional attributes externally using your own user interface, rather than the responsibility area UI, you have the following options:

- Option 1: Leverage the responsibility area Generic Interaction Model (JBP_RA).
 - Option 2: Implement your own logic to supply the required parameters to the DataSources listed above.
5. (Optional) Implement *BAdI: Responsibility Area Operations* to activate a responsibility area.

You can activate your responsibility area by changing the responsibility area status from *draft* to *active*.

Whenever you access a customer business plan, the system shows only responsibility areas that have *active* status. If the responsibility area is not active, you cannot use it for customer business planning.

Whenever a responsibility area status is changed from *draft* to *active*, the system calls BAdI /JBPC/CRM_RESP_AREA, method ACTIVATE_RESPONSIBILITY_AREA in the background. You must implement this method if you want to perform any operations that are required during activation of a responsibility area.

Before you perform this step, you must assign a status profile to your responsibility area as described in [Customize Responsibility Area Status Profile \[page 52\]](#).

6. Implement *BAdI: Responsibility Area Operations* to save a responsibility area.

You use this step to save the responsibility area when the user clicks the *Save* button on the responsibility area user interface.

Whenever a responsibility area is saved, the system calls BAdI /JBPC/CRM_RESP_AREA, method SAVE_RESPONSIBILITY_AREA in the background. You must implement this method to store the required responsibility area attributes in your own DataSource.

7. Implement *BAdI: Search for Responsibility Area* to search for a responsibility area based on selected parameters.

The system provides a search user interface that enables you to search for and navigate to a responsibility area for maintenance.

You must implement the SEARCH_RESP_AREA method of BAdI /JBPC/CRM_RESP_AREA_SEARCH to retrieve the following attributes from your external source:

- Sales area
- Account hierarchy

- Shop format
- Product categories
- Employees

8. (Optional) Implement *BAdI: Responsibility Area Operations* to display change history.

You can display a history of the changes made to the responsibility area attributes by implementing this optional step. The solution tracks changes to the following attributes in the responsibility area and displays them in the *Change History* assignment block on the responsibility area user interface:

- Query profile
- Integrated planning profile group
- Related responsibility area
- Time profile
- Hierarchy expansion level
- Excluded planning items


The system relies on your external source to deliver the change history for the following attributes:

- Sales area
- Account hierarchy
- Shop format
- Product categories
- Employees

Whenever the change history is displayed, the system calls the `GET_RA_CHANGE_HISTORY` method of the BAdI `/JBPC/CRM_RESP_AREA`. If you want to display the change history, you must implement this method.

1.1.7.6 Create Multiple Responsibility Areas

Context

You can create multiple responsibility areas from the *SAP Easy Access* menu by choosing [Customer Business Planning](#) > [Upload Data](#) > [Responsibility Area](#) . Under this path, choose *Guide* to see the detailed procedure for mass creation of responsibility areas.

1.1.7.7 Enable Users to Access Application Without Organization Assignment

Context

Users can access plan or promotion planning screens without assigning them to a responsibility area as an employee. This is primarily to support the Administrators.

Procedure

1. Assign the user to a responsibility area in the *SAP Menu* by choosing ► *Customer Business Planning* ► *Administrator* ► *Maintain users without employee assignment to access Plan* ⌵.
2. Assign the role / JBPC/TMA_ADMN_WITHOUT_EMPASGN to the administrator so that this configuration can be maintained.
3. Assign the role / JBPC/TMA_WITHOUT_EMP_ASSIGN to the users so that they can access the Trade Management solution.

1.1.7.8 Deleting Product Category from Active Responsibility Area

You can delete a product category from an active responsibility area. This process covers the following cases:

- **Case 1: Delete product category from an active responsibility area that has no customer business plan.**
In this case, an active product category is deleted from the responsibility area without any extra check.
- **Case 2: Delete product category from an active responsibility area that has a customer business plan but no planning product hierarchy or assortment.**
In this case, an active product category is deleted from the responsibility area without any extra check.
- **Case 3: Delete product category from an active responsibility area that has a customer business plan and an active planning product hierarchy, but no assortment.**
In this case, an alert of alert category RA_PC_MARKED_FOR_DELETION is raised for the processing user, and the selected category is marked for deletion. When the responsibility area is saved, the corresponding planning product hierarchy also gets adjusted with the deletion of the product category, and an alert of alert category PROD_CAT_DELETED_FROM_RA is raised to the KAM assigned to the responsibility area. If for any reason the product category is not deleted on save, you may run the *Update Product Category for PPH and Responsibility Area* (/ JBPC/PH_AUTO_UPDATE_DEL_PC_RA) report from the *SAP Easy Access* menu under ► *Customer Business Planning* ► *Administrator* ⌵. You run this report offline to manually delete product categories marked for deletion. You can check the error messages in the log.

- **Case 4: Delete product category from an active responsibility area that has a customer business plan, an active planning product hierarchy, and an assortment.**

This case is handled with the following conditions:

- If the assortment exists in a past date (that is, less than or equal to today's date), then neither the planning product hierarchy is adjusted nor the product category is deleted from the responsibility area.
 - If the assortment exists in a future date, then the planning product hierarchy, assortment, and related plan data are all adjusted, and handled exactly like case 3.
- **Case 5: Delete product category from an active responsibility area that has a promotion.**
If a promotion exists for the selected product category, this case is handled with the following conditions:
 - If the promotion status is maintained in Customizing for *Customer Relationship Management* under **Trade Management > General Settings > Responsibility Area (RA) > Maintain Promotion Statuses to be Excluded During Product Category Deletion** (view / JBPC/VTP_STATUS), then this case is handled as case 4.
 - If the promotion status is not maintained in Customizing for *Customer Relationship Management* under **Trade Management > General Settings > Responsibility Area (RA) > Maintain Promotion Statuses to be Excluded During Product Category Deletion** (view / JBPC/VTP_STATUS), then the product category cannot be deleted, and an error message is recorded in the log.

1.1.8 Setting Up Integration of Actuals Data in Planning

In SAP Customer Business Planning, version for SAP BW/4HANA, aDSOs are provided to store the actuals data loaded from any external/internal source. The actuals loaded into these staging aDSOs are then joined with customer business plan data using a BW/HANA query to build the latest estimates.

[Integrating Actuals with Plan Data \[page 64\]](#)

1.1.8.1 Integrating Actuals with Plan Data

Latest estimates are built using a combination of actuals and plan data. This data is combined using a BW query. As actuals data is in the past, you cannot edit this data. However, the plan data can be edited and is displayed for future periods.

You can enable the *CBP Actual* feature in Customizing for *Customer Relationship Management* under **Trade Management > General Settings > Activate Trade Management Features**.

The query / JBPB/C_VERS_PROD_PICK_TU is used to fetch the products which have actuals data but are not listed in CRM. If the query is not configured, then only the products which are listed in CRM are considered for showing actuals data.

The query takes as input, the products assigned in the *Responsibility Area*. The result from the above query is then used to build the product picker. Also, the products listed in the result are set as filters in the planning queries on the *Plan* screen.

For more information on setting up actual data in SAP BW/4HANA, kindly refer to [Actual Data](#) in the Configuration Guide for SAP Customer Business Planning, version for SAP BW/4HANA.

Related Information

[Define BW/HANA Queries \[page 37\]](#)

1.1.9 Setting Up Product Picker

The product picker is essentially a product value help that can be used across SAP Trade Management, version for SAP BW/4HANA. The product picker has the following features:

- Product display in *Tree* and *Flat* view
- Node selection in single-select or multi-select mode
- Hierarchy level indicators to expand the hierarchy to the required level in *Tree* view or to display the hierarchy nodes of that level in *Flat* view
- Two separate views to display all products or selected products respectively
- Specific configurable attributes of the product nodes
- Hierarchy (planning product hierarchy or ECC product hierarchy) selection from dropdown
- Search for all product attributes in displayed view with a free text field
- Global user-specific personalization to define the default view in which the product picker opens at the selected level

[Maintaining Product Attributes \[page 65\]](#)

Related Information

[Maintaining Product Attributes \[page 65\]](#)

1.1.9.1 Maintaining Product Attributes

Product attributes such as list price, sales category, sales unit, consumer unit, normalized unit, and so on, are displayed in the product picker. These attributes are configurable. You can also maintain your own custom attributes that you want displayed in the product picker.

If the functionality for alternative assortments is switched on for your sales area, scenario attributes are also shown in the product picker. You can see columns with the scenario description in the product picker. These columns will be marked **X** if the product is listed in the alternative assortment assigned to the scenario for even one day in the focused year.

[Define Custom CRM Attributes \(Optional\) \[page 66\]](#)

[Define Custom BW/HANA Attributes \(Optional\) \[page 66\]](#)

[Define Product Picker Attribute Profiles \[page 66\]](#)

[Assign Product Attribute Profile to Sales Area \[page 68\]](#)

1.1.9.1.1 Define Custom CRM Attributes (Optional)

Procedure

Configure the custom CRM attributes for the product picker in Customizing for *Customer Relationship Management* by choosing ► *Trade Management* ► *General Settings* ► *Product Picker* ► *Maintain Product Picker Attribute Profiles* ►, then *Custom CRM Attributes*.

1.1.9.1.2 Define Custom BW/HANA Attributes (Optional)

Procedure

Configure the custom BW/HANA attributes for the product picker in Customizing for *Customer Relationship Management* by choosing ► *Trade Management* ► *General Settings* ► *Product Picker* ► *Maintain Product Picker Attribute Profiles* ►, then *Custom BW Attributes*.

1.1.9.1.3 Define Product Picker Attribute Profiles

Context

To display the custom attributes in the product picker, you also need to configure an attribute profile that contains the relevant custom attributes.

Procedure

1. Configure the attribute profile in Customizing for *Customer Relationship Management* by choosing ► [Trade Management](#) ► [General Settings](#) ► [Product Picker](#) ► [Maintain Product Picker Attribute Profiles](#) ► [Attribute Profile](#) ►.

The following attribute profile is delivered with the standard solution for the simplified data model:

Attribute Profile	Attribute Description
SIMP_DM	Profile for simplified data model

In the attribute profile, you can configure the custom CRM attributes and custom BW attributes.

2. Maintain a sequence of the attributes assigned to the profile under [Attributes Sequence Assignment](#).

In the standard delivered profile, the following sequence is maintained:

- [Product ID](#)
- [Operational Plan](#)
- [Scenario1](#), [Scenario2](#), [Scenario3](#)
- [Structure Products](#)
- [Category Description](#)
- [Category ID](#)
- [CU](#)
- [TU](#)
- [Innovation Products](#)
- [GTIN for CU](#)
- [GTIN for TU](#)
- [Product Group](#)
- [Product Group Description](#)
- [Sales Area Dependent Category ID](#)
- [Sales Area Dependent Category Description](#)
- [Retailer Shelf Price](#)
- [Regular Shelf Price](#)

→ Remember

Attributes [Scenario1](#), [Scenario2](#), and [Scenario3](#) will only be shown if the alternative assortment feature is enabled for your sales area. The attributes of these scenarios will be replaced by the corresponding scenario description in the product picker.

1.1.9.1.4 Assign Product Attribute Profile to Sales Area

Context

In this Customizing activity, you assign the attribute profile you have defined to the sales area.

Procedure

1. Configure the setting in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Product Picker](#) > [Assign Attribute Profile to Sales Area](#).
2. Assign the attribute profile to a combination of:
 - Business role
 - Sales organization
 - Product picker context

A generic value can be assigned for components of the sales area and product picker context. A product picker instance in the application derives concrete values of the sales area, business role, and screen. The search for a matching profile starts with the most specific one and continues with a generic value search. A matching profile is mandatory to display the product attributes in the product picker.

The product picker context is a pre-delivered set of context keys that can be used to display different product attributes in the product picker in different screens. For example, the attribute TU/CU can be displayed in the *Profit & Loss* screen of the customer business plan but not in the filters in the promotion fast entry table.

Related Information

[Define Product Picker Attribute Profiles \[page 66\]](#)

1.1.9.1.5 Populate Custom Product Picker Attribute

If you define custom CRM attributes or custom BW/HANA attributes, you need to implement the BAdI / JBPC / CRM_PROD_PICKER to populate the values of the custom attributes.

BAdI	Purpose
/JBPC/CRM_PROD_PICKER	The BAdI is called to populate custom CRM attributes and custom BW/HANA attributes.

BAdI method: GET_ADDITIONAL_ATTR

Parameter	Type	Purpose
IS_SALES_AREA	Importing	Sales area
IT_PROD_GUIDS	Importing	Product GUID for which attribute to be read
IT_CUST_ATTR	Importing	Custom attributes to be read
RT_ADDL_PROD_ATTR	Exporting	Attribute values

Related Information

[Define Custom CRM Attributes \(Optional\) \[page 66\]](#)

[Define Custom BW/HANA Attributes \(Optional\) \[page 66\]](#)

1.1.10 Setting Up Authorization and Roles

Please refer to the Administration Guide.

1.1.11 Setting Up Fiori Launchpad (Optional)

You have the option of launching applications within SAP Trade Management, version for SAP BW/4HANA from a Fiori launchpad.

[Enable Access to Delivered Fiori Tiles \[page 70\]](#)

[Configure Sales Management Console \[page 70\]](#)

[Maintain Basic Settings for Sales Management Console \[page 71\]](#)

[Maintain Report Configurations for Sales Management Console \[page 73\]](#)

[Fiori Launchpad BW/HANA Queries \[page 75\]](#)

Related Information

[SAP Fiori Launchpad](#)

1.1.11.1 Enable Access to Delivered Fiori Tiles

To access the delivered Fiori tiles, you need to add the catalog `/TMAUI/SAP_TRADEMANAGEMENT`.

You can also use the standard groups Trade Management, Master Data, and Targets.

The catalogs and groups can be assigned to your users using the delivered PFCG role `/TMAUI/FIORI_TILES`.

1.1.11.2 Configure Sales Management Console

Context

You must configure the Fiori Launchpad to view the KPI tiles in the [Sales Management Console](#).

Procedure

1. Assign the role `/TMAUI/SALED` to the user.

This role contains a catalog named [Sales Director KPIs](#), which contains 11 KPI tiles for the [Sales Management Console](#), and a group named [Business Insights](#).

2. Customize the URLs of the KPI tiles.
 - a. Open the [Sales Director KPIs](#) catalog in the [Fiori Launchpad Designer](#) in Customization scope.

Example URL: `https://<systemHost: Port>/sap/bc/ui5_ui5/sap/arsrvc_upb_admn/main.html?sap-client=400&sap-language=EN&scope=CUST`

- b. Click any tile shown in the catalog. The configuration section shall be displayed with options to configure the tiles section.
 - c. In the [Service URL](#) field, change the URL of the respective tile. You can also customize the fields [Title](#), [Subtitle](#), and [Refresh Interval in Seconds](#) for any of the tiles.
3. Show or hide a tile from a group.

An example of adding tiles to a new group is as follows:

1. In the [Fiori Launchpad Designer](#), click on an available group and add a catalog in it. This shall show all the available tiles inside the group.

2. Select the tiles that you want displayed inside the group on the Fiori Launchpad. All the selected tiles are visible by default on the Fiori Launchpad inside that group.

The user can add or remove tiles using *FLP > App Finder*.

For details about the standard process, see [Adding Tiles to and Removing Tiles from Group](#).

4. Maintain connections to SAP BW/HANA and DSIM systems.

In Customizing for *Customer Relationship Management*, choose:

- [Trade Management](#) > [General Settings](#) > [System Settings](#) > [Define BW Target System](#) >
- [Trade Management](#) > [General Settings](#) > [System Settings](#) > [Define DSIM Target System](#) >

Related Information

[Adding Tiles to and Removing Tiles from Group](#)

1.1.11.3 Maintain Basic Settings for Sales Management Console

Context

The tiles on the *Sales Management Console* show the information related to the latest estimate and target. For the *Budget Monitor*, the total budget, available, planned, and overspent budget are displayed on the tiles for all the plans under the Sales Manager by configuring the query ID and key figures.

Procedure

1. Define and configure different types of report tiles in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Sales Management Console](#) > [Maintain Basic Settings for Sales Management Console](#) >.
2. Select the report tile node to be configured and maintain entries.

The standard delivered Customizing entries are as follows:

Report Tile Name	Query ID	RFC Sys Name	Report URL ID
BUD_MON	/ JBPB/ C_PLN_FLP_BUD_MONITOR	BW System	BUDGET_MONITOR_RE- PORT
INT_MARGIN	/ JBPB/ APLN_FLP_KPI_MONITOR	BW System	MONTHLY SALES REVIEW
INT_TTO	/ JBPB/ APLN_FLP_KPI_MONITOR	BW System	MONTHLY SALES REVIEW
INT_USG	/ JBPB/ APLN_FLP_KPI_MONITOR	BW System	MONTHLY SALES REVIEW
KPI_BG	/ JBPB/ APLN_FLP_KPI_MONITOR	BW System	MONTHLY SALES REVIEW
KPI_ROI	/ JBPB/ APLN_FLP_KPI_MONITOR	BW System	MONTHLY SALES REVIEW
KPI_UG	/ JBPB/ APLN_FLP_KPI_MONITOR	BW System	MONTHLY SALES REVIEW
MS_QUARTER	/ DDF/ C01_GMRD_TILE_P3M	DSIM System	MARKET_SHARE_QUAR- TER
MS_YEAR	/ DDF/ C01_GMRD_TILE_MAT	DSIM System	MARKET_SHARE_YEAR
RET_PROFIT	/ JBPB/ APLN_FLP_KPI_MONITOR	BW System	MONTHLY SALES REVIEW
RET_USG	/ JBPB/ APLN_FLP_KPI_MONITOR	BW System	MONTHLY SALES REVIEW

For each *Report Tile Name*, corresponding entries are maintained by selecting the sub node *Report Tiles and Key Figures*.

Report Tile Name	Key Figure
BUD_MON	JBPB_FLP_BUDG_GSV JBPB_FLP_BUDG_PIT
INT_MARGIN	JBPB_CBP_INT_MARGIN
INT_TTO	JBPB_CBP_NNVT_01
INT_USG	JBPB_CBP_GSV_CHNG

Report Tile Name	Key Figure
KPI_BG	JBPB_APLN_CBP_CHNG_BVOL
KPI_ROI	JBPB_CBP_ROI_01
KPI_UG	JBPB_CBP_CHNG_UPLIFT
MS_QUARTER	DDF_P3M_CY_MARKET_SHARE DDF_P3M_DIFF_MARKET_SHARE DDF_P3M_PY_MARKET_SHARE
MS_YEAR	DDF_MAT_CY_MARKET_SHARE DDF_MAT_DIFF_MARKET_SHARE DDF_MAT_PY_MARKET_SHARE
RET_PROFIT	JBPB_CBP_CUST_PROF_TOT
RET_USG	JBPB_APLN_CBP_CRG_01

1.1.11.4 Maintain Report Configurations for Sales Management Console

Context

You can maintain settings for opening reports from the KPI tiles in the *Sales Management Console* in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) [General Settings](#) [Sales Management Console](#) [Maintain Report Configuration for Sales Management Console](#).

The following URL ID of the report link being used in FLP is delivered as an example:

URL ID	URL
MONTHLY SALES REVIEW SDM	https://<host>/sap/fpa/ui/tenants/030/bo/story/8AB1C25ADC07D85AE10000000A4E740E?mode=present

Note

In the *URL*, replace <host> with the reverse proxy server or the cloud server depending on the connection setup. For more information, see [Live Data Connection](#).

The report link is grouped in a *Report Group* under the node *Sales Management Report Group*.

Rep. Grp	Group Description
FLP	FLP group

Procedure

1. Select the report group **FLP** and assign the URL link of the report to the group by choosing the node *Associate Link with Group*.

Report Group: **FLP**

Associate Link with Group

URL ID	Description
MONTHLY SALES REVIEW	Monthly Sales Review (SAC)

2. Select the entry and choose *Parameter Mapping* to maintain parameters.

Report Group: **FLP**

URL ID: **MONTHLY SALES REVIEW**

Report Parameter	Parameter Value
f01Dim	OCALYEAR
f01Model	t.S:SAP__TM_GEN_LH_PLAN_PROFITLOSS
f01Val	OCALYEAR
f03Dim	OCRM_PROD_CRM
f03Val	OCALYEARP
v01Model	t.S:SAP__TM_GEN_LH_PLAN_PROFITLOSS
v01Par	PL_ID
v01Val	EXTERNAL_ID
v02Par	LE01_WEEK_PL_WF
v02Val	WEEKFROM
v03Par	LE01_WEEK_PL_WT

Report Parameter	Parameter Value
v03Val	WEEKTO
v04Par	Version
v04Val	GUID
v05Model	t.S:SAP__TM_GEN_LH_PLAN_TRANSPOSE
v05Par	PL_ID
v05Val	EXTERNAL_ID
v06Par	LE01_WEEK_PL_WF
v06Val	WEEKFROM
v07Par	LE01_WEEK_PL_WT
v07Val	WEEKTO
v08Par	Version
v08Val	GUID

- Assign the sales management report groups to a sales area in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Sales Management Console](#) > [Assign Report Groups to Sales Area](#).

The sales area can have a generic value, which means that the assigned report group is applicable for all sales areas. The generic value for the sales organization is <*>. The generic value for the distribution channel and division is <>.

- You can implement the *Sales Management Console* BAdI to update the report URL and BW/HANA query filters.

BAdI: /JBPC/SALES_MGMNT_CONSOLE

Interface Class: /JBPC/IF_SALES_MGMNT_CONSOLE

The following example implementation has been delivered:

BAdI Implementation	Details
/JBPC/EX_SALES_MGMNT_CONSOLE	Sales Management Console BAdI

1.1.11.5 Fiori Launchpad BW/HANA Queries

The following query is defined in the BW/HANA system for the tile to be shown on the Fiori Launchpad.

BW Query	Description
/JBPB/APLN_FLP_KPI_MONITOR	Sales Management console KPI Monitor

The following KPIs from query *Sales Management Console KPI Monitor* (/JBPB/APLN_FLP_KPI_MONITOR) are exposed to Fiori. This query is built on aggregate level /JBPB/APLN, which pulls the data from composite provider /JBPB/C_PLN. This composite provider combines the data from Plan, Promotion, Actual, Target, and Factors aDSO.

KPI Name/ Tile Name	KPI Technical Name
Customer Revenue Growth	JBPB_APLN_CBP_CRG_02
Baseline Growth	JBPB_APLN_CBP_CHNG_BVOL
Uplift Growth	JBPB_CBP_CHNG_UPLIFT
Net Net Total	JBPB_CBP_NNVT_01
Internal Margin	JBPB_CBP_INT_MARGIN_1
ROI %	JBPB_CBP_ROI_01
Customer Profit Total	JBPB_CBP_CUST_PROF_TOT_1
GSV Growth	JBPB_CBP_GSV_CHNG

FLP Budget Monitor Query

In the delivered content, the query /JBPB/C_PLN_FLP_BUD_MONITOR is used to display the KPIs on the different FLP tiles.

KPI Name/Tile Name	KPI Technical Name
Gross Sales Value	JBPB_FLP_BUDG_GSV
Promo Investment Total	JBPB_FLP_BUDG_PIT

1.1.12 Setting Up Alerts (Optional)

Context

You use this business process to manage alerts in SAP Trade Management, version for SAP BW/4HANA.

Alerts are notifications that inform users of critical changes that affect planning.

❖ Example

- You have changed the product category of a product after planning it in Customer Business Planning.
- You have changed the product hierarchy and new sub-categories are introduced in an existing category.
- You have changed the validity of the products.
- A KPI in your customer business plan exceeds a defined threshold.

Alerts are displayed in an *Alert Inbox*. You can mark alerts as completed after performing the necessary actions.

The following steps describe the necessary setup activities required to manage alerts.

Procedure

1. Define alert classification in Customizing for *Customer Relationship Management* by choosing ► *Trade Management* ► *General Settings* ► *Alerts* ► *Maintain Alert Categories* ►.

→ Tip

An example classification **CUSTOMER_BUSINESS_PLANNING** is delivered and can be taken as a reference.

2. Define your own alert category to raise your own alert, which is not delivered with the solution.

An alert category contains various properties and other specifications that define the alerts within that category. The category defines the conditions when a specific alert is sent.

You can define the alert categories in Customizing for *Customer Relationship Management* by choosing ► *Trade Management* ► *General Settings* ► *Alerts* ► *Maintain Alert Categories* ►.

→ Tip

You can use the example categories delivered under the classification 'Customer Business Planning' as a reference.

3. Customize those alerts that you want to prevent from being raised immediately at the time a change occurs that affects the customer business plan.

In this case, the system stores the change and raises an alert in a background process, which can be scheduled to run at a defined interval. You can define deferred alerts in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Alerts](#) > [Maintain Deferred Alert Categories](#).

4. Customize the key figure thresholds to raise alerts.

While planning, a KAM often changes the values of various key figures. If these changes cause certain key figures to be outside a defined threshold, an alert is raised.

In this step, you define thresholds for key figures that you use in the customer business plan and for which an alert is raised if the value in the key figure exceeds the defined threshold. You maintain this setting in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Alerts](#) > [Maintain Threshold for Planned versus Predicted Key Figures](#).

5. Assign the threshold profile to sales area in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Alerts](#) > [Assign Planned versus Predicted Key Figure Threshold Profiles to Sales Area](#).
6. Implement the BAdI for target object determination.

In this step, you can define your own logic to determine the target objects that are impacted by a change.

Example

If a product validity is changed in the assortment, you want to make this change known to the customer business plan as well as its promotions. In this case, the customer business plan and promotion are the target objects for the *Product Validity* change alert.

You can find the BAdI in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [Alerts](#) > [BAdI: Target Object Determination](#).

The following table contains the example implementations delivered with the solution:

Example Implementations

BAdI Implementation	Details
/JBPC/IM_AMS_KF_DEVIATE_ALERT	Alert for key figure deviation
/JBPC/IM_AMS_TAROBJ_PROMO	Implementation for promotion changes
/JBPC/IM_AMS_TAROBJ_DTR_PRDCAT	Determine target object for product category alert
/JBPC/IM_AMS_TPMPRD_DETER	BAdI implementation for TPM determination for product & category
/JBPC/IM_AMS_TPMPRD_STS_CHG	TPM product status change
/JBPC/IM_AMS_TPO_FORECAST_ALRT	Forecast alerts
/JBPC/IM_AMS_TRG_OBJ_DTR_ASRT	Determine target objects for assortment

BAdI Implementation	Details
/ JBPC / IM_AMS_PPH_PLAN_ALERT	Determine target objects for alert when PPH update in BW/HANA fails

Alerts under categories maintained in the Customizing activity for deferred alerts are reserved for a future run. You can find a report for raising alerts in the *SAP Easy Access* menu under [▶ Customer Business Planning ▶ Alerts ▶ Process Deferred Alerts ▶](#).

i Note

You must maintain only the required sales areas in Customizing to indicate that these are active for customer business planning. Alerts are generated for plans with generic sales area in the system.

If a product was not valid for a sales area earlier, but now it is valid, then no alert is raised.

1.1.13 Mass Upload Pricing Reference Data (Optional)

Context

You can upload pricing reference data from the *SAP Easy Access* menu by choosing [▶ Customer Business Planning ▶ Upload Data ▶ Pricing ▶](#). Under this path, choose *Guide* to see the detailed procedure for mass upload of pricing reference data.

You can use a BAdI for pricing data upload and download template in Customizing for *Customer Relationship Management* by choosing [▶ Trade Management ▶ General Settings ▶ Upload Data ▶ BAdI: Download Template ▶](#).

1.1.14 Configuring the Product Replacement Tool

This section provides you with the information you need to technically implement and configure the *Product Replacement Tool* and describes all the activities necessary to do so.

The configuration settings are required in both CRM and BW/4HANA systems.

In the SAP CRM system, you configure the *Product Replacement Tool* in Customizing for *Customer Relationship Management* by choosing [▶ Trade Management ▶ General Settings ▶ Product Replacement Tool ▶](#).

For information on the setup of the BW/4HANA data model, kindly refer to *Product Replacement Tool* under [Configuration Settings for SAP BW/4HANA \[page 91\]](#) in this guide.

[Setting Up Authorization to Use Product Replacement Tool \[page 80\]](#)

[Define Queries in CRM System \[page 80\]](#)

[Maintaining Configurations for Processing Customer Business Plans \[page 81\]](#)

[Maintaining Configurations for Processing Promotions \[page 85\]](#)

[Disable Usage of Product Replacement Tool for Customer Business Plan or Trade Promotion \(Optional\) \[page 89\]](#)

[Change Job Processing Logic \(Optional\) \[page 89\]](#)

1.1.14.1 Setting Up Authorization to Use Product Replacement Tool

In order to use the *Product Replacement Tool*, you must assign the following authorization objects to the respective users:

- */JBPC/PRT*: Using this authorization object you can provide users access to the following activities in the *Product Replacement Tool*:
 - Add new products
 - Replace products
 - Delete or delist products
- */JBPC/ADMN*: Using this authorization object you can provide users access to process a Customer Business Plan or a Trade Promotion from the *Product Replacement Tool*. You grant access to a defined sales area in your SAP CRM system.

1.1.14.2 Define Queries in CRM System

Context

In this Customizing activity, you maintain the BW/4HANA queries used to read the key figure values in the Product Replacement Tool for customer business plans and trade promotions. You do this in Customizing for *Customer Relationship Management* by choosing [Trade Management](#) > [General Settings](#) > [System Settings](#) > [Define BW Queries](#).

The standard entries delivered for this Customizing activity are as follows:

Query ID	Query Description
/JBPB/APLN_M_PRT_PLAN	Query for PRT Plan
/JBPB/APRM_PL_PRT_PROMO	Query for PRT Promo/LTA

Related Information

[Define Queries in SAP BW/4HANA System \[page 114\]](#)

1.1.14.3 Maintaining Configurations for Processing Customer Business Plans

The following configuration settings must be maintained to define the Customer Business Plan key figures to be used by the *Product Replacement Tool*.

[Define Plan KPI Adjustment Profiles \[page 81\]](#)

[Assign Plan KPI Adjustment Profile to Customer Business Plan Type \[page 82\]](#)

[Assign Key Figures to Plan KPI Adjustment Profiles \[page 83\]](#)

[Assign Plan KPI Adjustment Profiles to Sales Area \[page 83\]](#)

[Change Logic to Add Products to Planning Product Hierarchy \[page 84\]](#)

1.1.14.3.1 Define Plan KPI Adjustment Profiles

Context

A KPI adjustment profile is a group of key figures for a BW/4HANA query that can be maintained via the *Product Replacement Tool* for a Customer Business Plan. The system uses this definition to prepare the possible list of key figures that are available for adjustments in the *Product Replacement Tool*.

In addition, a *Report ID* and *Default Job Name* must be assigned to the *KPI Adjustment Profile*. It is advised to copy the same report ID and default name as delivered with the standard content.

i Note

You should change the *Report ID* and *Default Job Name* only if you want to change the processing logic delivered by standard solution.

Procedure

1. In Customizing for *Customer Relationship Management*, choose [Trade Management](#) [General Settings](#) [Product Replacement Tool](#) [Define Plan KPI Adjustment Profiles](#).

2. Choose [Adjustment Profile for Plan](#) and create a new adjustment profile.

The following profile is delivered with the solution:

KPI Adjustment Profile	Adjustment Profile Description	BW Query ID	Report ID	Default Job Name
SM_PLAN	Simplified Data Model - Plan	/ JBPB / APLN_M_PRT_PLAN	/ JBPC / R_MASS_CHANGE_PR OD_JBP	PRT_PLAN_PROC- ESSING

1.1.14.3.2 Assign Plan KPI Adjustment Profile to Customer Business Plan Type

Context

The [Product Replacement Tool](#) provides the feature to have different KPI profile types for different Customer Business Plan types.

In this Customizing activity, you assign KPI profiles to a Customer Business Plan object type.

Procedure

1. In Customizing for [Customer Relationship Management](#), choose [Trade Management](#) > [General Settings](#) > [Product Replacement Tool](#) > [Define Plan KPI Adjustment Profiles](#).
2. Choose [Link KPIs for CBP](#) to assign the adjustment profile to a Customer Business Plan object type.

The following Customizing entries are delivered with the standard solution:

KPI Adjustment Profile	Object Type	Description
SM_PLAN	JBPC	Customer Business Plan

1.1.14.3.3 Assign Key Figures to Plan KPI Adjustment Profiles

Context

In this Customizing activity, key figures that need adjustment using the *Product Replacement Tool* are assigned to a combination of the key figure profile and customer business plan type.

Procedure

1. In Customizing for *Customer Relationship Management*, choose *Trade Management**General Settings**Product Replacement Tool**Define Plan KPI Adjustment Profiles*.
2. Choose *Define Adjustable KPIs* and map the key figures that need to be adjusted with the adjustment profile.

The following Customizing entries are delivered with the standard solution:

KPI Adj.Profile	Object Type	Adjustment KPI Tech Name	InfoObject Mapping
SM_PLAN	JBPC	JBPB_CBP_PLAN_AVINV_T	/JBPB/AVINV_T
SM_PLAN	JBPC	JBPB_CBP_PLAN_AVSOB_T	/JBPB/AVSOB_T
SM_PLAN	JBPC	JBPB_CBP_PLAN_RCOGS	/JBPB/RCOGS
SM_PLAN	JBPC	JBPB_CBP_PLAN_REFFD	/JBPB/REFFD
SM_PLAN	JBPC	JBPB_CBP_PLAN_RLIST	/JBPB/RLIST
SM_PLAN	JBPC	JBPB_CBP_PLAN_RRSP	/JBPB/RRSP

1.1.14.3.4 Assign Plan KPI Adjustment Profiles to Sales Area

Context

In this Customizing activity, you assign the *KPI Adjustment Profile* to a sales area.

The system uses this configuration to prepare the possible list of values for the key figure drop down in the *Product Replacement Tool*. The list of KPIs is retrieved for the sales area assigned to the Customer Business Plan.

Maintain the entries for the sales organization, distribution channel, division, and the KPI adjustment profile; you may also use wildcards.

Procedure

Configure the setting in Customizing for *Customer Relationship Management* by choosing **Trade Management** > **General Settings** > **Product Replacement Tool** > **Assign Plan KPI Adjustment Profiles to Sales Area**.

The following Customizing entry is delivered in the standard solution:

Sales Organization ID	Dis. Chan.	Division	KPI Adj Profile
<*>	<>	<>	SM_PLAN

Related Information

[Define Plan KPI Adjustment Profiles \[page 81\]](#)

1.1.14.3.5 Change Logic to Add Products to Planning Product Hierarchy

Context

To add product(s) to the *Planning Product Hierarchy* (PPH), you must implement the Business Add-In (BAdI) / JBPC / CRM_PRODUCT_REPLACE, method UPDATE_PPH. In this method you implement the logic to add the products to the PPH and replicate the PPH to the BW/4HANA system.

You can access the BAdI in Customizing for *Customer Relationship Management* by choosing **Trade Management** > **General Settings** > **Product Replacement Tool** > **BAdI: Product Replacement Tool**.

An example Implementation is delivered with the solution. The implementation logic is as follows:

Procedure

1. Create a new node in the Planning Product Hierarchy and add all the newly added products to this node.
2. Extract the Planning Product Hierarchy to the SAP BW/4HANA system.

1.1.14.4 Maintaining Configurations for Processing Promotions

The following configuration settings must be maintained to define the Trade Promotion key figures to be used by the *Product Replacement Tool*.

[Define Promotion KPI Adjustment Profiles \[page 85\]](#)

[Assign Promotion KPI Adjustment Profiles to Trade Promotion Object Type \[page 87\]](#)

[Assign Key Figures to Plan KPI Adjustment Profiles \[page 87\]](#)

[Assign Promotion KPI Adjustment Profiles to Sales Area \[page 88\]](#)

1.1.14.4.1 Define Promotion KPI Adjustment Profiles

Context

A *KPI Adjustment Profile* is a group of key figures for a BW/4HANA query that can be maintained via the *Product Replacement Tool* for Trade Promotions. The system uses this definition to prepare the possible list of key figures that are available for adjustments in the *Product Replacement Tool*.

In addition, *Report ID* and *Default Job Name* must also be assigned to the *KPI Adjustment Profile*. It is advised to copy the same report ID and default name as delivered with the standard content.

i Note

You should change the *Report ID* and *Default Job Name* only if you want to change the processing logic delivered by the standard solution.

Procedure

1. In Customizing for *Customer Relationship Management*, choose **Trade Management** > **General Settings** > **Product Replacement Tool** > **Define Promotion KPI Adjustment Profiles**.
2. Choose **Define Promotion KPI Adjustment Profiles** and create a new adjustment profile.

The following profile is delivered with the solution:

KPI AdjProf	Adjustment Profile Description	BW Query ID	Report ID	Default Job Name
SM_PROM	KPI Adjustment Profile for Promotions	/JBPB/ APRM_PL_PRT_PROM 0	/JBPC/ R_MASS_CHANGE_PR OD_TP	PRT_PROMO_PROC- ESSING

3. Choose **Link KPIs for Trade Promotions** and assign the adjustment profile to a trade promotion *Object Type*.

Different adjustment profiles can be assigned to different object types.

The *Exclude Product* option, if set, excludes the product from the promotion instead of completely deleting it. The *Exclude Product* option is set for a product in the promotion when the product is deleted or replaced.

The following Customizing entries are delivered with the standard solution:

KPI Adjustment Profile	Object Type	Exclude Product
SM_PLAN	LTAS	X
SM_PLAN	STAC	X
SM_PLAN	STAS	X

4. Choose **Define Adjustable KPIs** and map the key figures that need to be adjusted with the adjustment profile.

The following Customizing entries are delivered with the standard solution:

KPI Adj.Profile	Object Type	Adjustment KPI Tech Name	InfoObject Mapping
SM_PROM	LTAS	JBPB_CPRM_EDPL_REBATE_PU	/JBPB/REDLP_R
SM_PROM	LTAS	JBPB_CPRM_EDPL_REBAT_PERC	/JBPB/PEDLP_R
SM_PROM	STAC	JBPB_STP_UPLIFT	JBPB_STP_UPLIFT

KPI Adj.Profile	Object Type	Adjustment KPI Tech Name	InfoObject Mapping
SM_PROM	STAS	JBPB_STP_UPLIFT	/JBPB/AVOLU_T

1.1.14.4.2 Assign Promotion KPI Adjustment Profiles to Trade Promotion Object Type

Context

The *Product Replacement Tool* provides the feature to have different KPI profile types for different Trade Promotion *Object Types*.

In this Customizing activity, you must assign the KPI profiles to the Trade Promotion object types.

Procedure

1. In Customizing for *Customer Relationship Management*, choose **Trade Management** > **General Settings** > **Product Replacement Tool** > **Define Promotion KPI Adjustment Profiles**.
2. Choose *Link KPIs for Trade Promotions* and assign the adjustment profile to trade promotion *Object Type*.

Different adjustment profiles can be assigned to different object types.

The *Exclude Product* option, if set, excludes the product from the promotion instead of completely deleting it. The *Exclude Product* option is set for the product in the promotion when the product is deleted or replaced.

1.1.14.4.3 Assign Key Figures to Plan KPI Adjustment Profiles

Context

In this Customizing activity, key figures that need adjustments using the *Product Replacement Tool* must be assigned to the key figure profile and trade promotion object type.

Procedure

1. In Customizing for *Customer Relationship Management*, choose ► *Trade Management* ► *General Settings* ► *Product Replacement Tool* ► *Define Promotion KPI Adjustment Profiles* ►.
2. Choose *Define Adjustable KPIs* and map the key figures that need to be adjusted with the adjustment profile.

1.1.14.4.4 Assign Promotion KPI Adjustment Profiles to Sales Area

Context

In this Customizing activity, you assign the *KPI Adjustment Profile* to a sales area.

The system uses this configuration to prepare the possible list of values for the key figure drop down in the *Product Replacement Tool*. The list of KPIs is retrieved for the sales area assigned to the Trade Promotion.

Maintain the entries for the sales organization, distribution channel, division, and the KPI adjustment profile; you may also use wildcards.

Procedure

Configure the setting in Customizing for *Customer Relationship Management* by choosing ► *Trade Management* ► *General Settings* ► *Product Replacement Tool* ► *Assign Promotion KPI Adjustment Profiles to Sales Area* ►.

The Customizing entry delivered is as follows:

Sales Organization ID	Dis. Chan.	Division	KPI Adj Profile
<*>	<>	<>	SM_PROM

Related Information

[Define Promotion KPI Adjustment Profiles \[page 85\]](#)

1.1.14.5 Disable Usage of Product Replacement Tool for Customer Business Plan or Trade Promotion (Optional)

Context

The *Product Replacement Tool* provides the following actions on the user interface:

- Add product, copy trade spend, and copy KPIs with adjustment
- Replace source product with target product(s) and copy KPIs
- Delete/De-list product

You can disable access to any of these actions in Customizing for *Customer Relationship Management* by choosing ► *Trade Management* ► *General Settings* ► *Product Replacement Tool* ► *Define Disabled Actions* ►.

1.1.14.6 Change Job Processing Logic (Optional)

Context

The *Product Replacement Tool* (PRT) uses the standard CRM Batch Processing Framework for processing product replacement in the given Customer Business Plans and Trade Promotions.

To process the product replacement, the tool uses the following *Job Types*, which are provided in the standard solution:

- PROD_REPL_TOOL_JBP: Job Type for Customer Business Plan
- PROD_REPL_TOOL_TP: Job Type for Trade Promotion

The corresponding logic for processing operations in PRT is implemented in a class that is maintained for the newly defined job types.

If you want to change the job processing logic in PRT, you can overwrite the standard delivered class by an own class in Customizing for *Customer Relationship Management* by choosing ► *Basic Functions* ► *Define Job Types* ►.

The standard entries delivered for this Customizing activity are as follows:

Job Type	Class/Interface	Key Structure Name
PROD_REPL_TOOL_JBP	/JBPC/CL_PRT_MASS_PLAN_BAT_JOB	/JBPC/S_PRT_MASS_PLAN_BATCH

Job Type	Class/Interface	Key Structure Name
PROD_REPL_TOOL_TP	/JBPC/CL_PRT_MASS_TP_BATCH_JOB	/JBPC/S_PRT_MASS_PROMO_BATCH

1.1.15 Displaying Product ID in Planning Grid

Context

You can switch on this feature to display the *Product ID* in planning grids, along with the product description. This feature will show product IDs for the TU/NU view and flat view on the following screens:

- *Plan Screen*
 - *Product Tree Screen*
 - *Summary Screen*
- *Scenario Planning Screen*
 - *Product Tree Screen*
- *Detailed Promotion Screen*
 - *Summary Screen*
- *Version Comparison Screen*
 - *Product Tree Screen*

Procedure

In the Customizing for *Customer Relationship Management*, choose ► *Trade Management* ► *General Settings* ► *Activate Trade Management Features* ► and activate on the *Display Product ID* feature.

2 Configuration Settings for SAP BW/4HANA

This section lists the various configuration settings which you must perform in your SAP BW/4HANA system to be able to use SAP Trade Management, version for SAP BW/4HANA.

[Planning Context \[page 113\]](#)

[Fiscal Support \[page 118\]](#)

[Activating BW/4HANA Content \[page 125\]](#)

[Installing BW/4HANA Content \[page 125\]](#)

2.1 Basic Settings

2.1.1 Enable HANA-related Planning Operations

You must activate the ABAP planning applications kit to switch on HANA related planning operations.

Procedure

The table view RSPLS_HDB_ACT in **SM30** is the main switch to activate the planning applications kit.


If this view is not yet available, you can create a new entry *Deep HANA Integration Active* (HANA_ACT) and select the checkbox *Function Active* in order to activate the kit.

2.1.2 Maintain Interval for Possible Planning Periods in RSADMINS Table

Context

You maintain an interval for possible planning periods to define the time limit for which planning in BW/4HANA is to be allowed.

Procedure

Maintain the interval in the SAP BW/4HANA system in Customizing for *SAP BW/4HANA* under [► Analysis](#)
[► Set F4 Help and Hierarchies for Time Characteristics/OLAP Settings](#) .

2.1.3 Create Source System for CRM

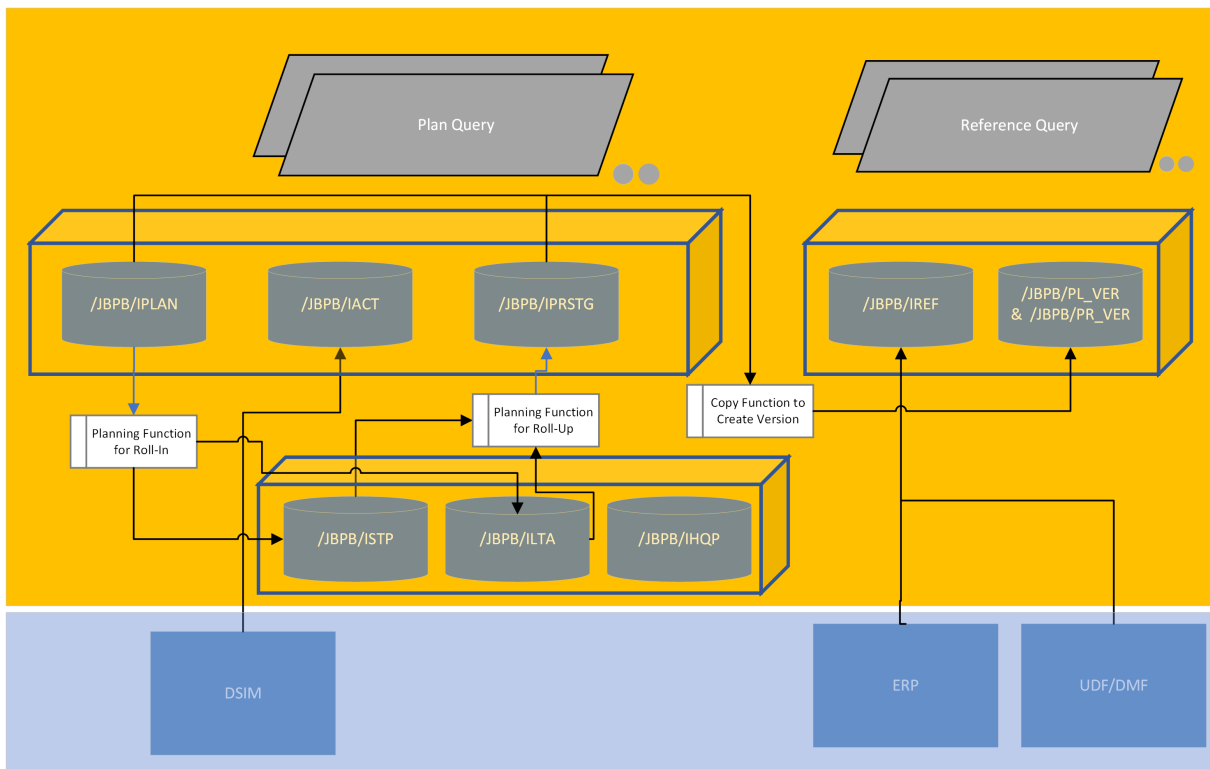
Procedure

1. Create a transactional RFC connection between the SAP BW/4HANA and CRM systems using transaction SM59.
2. Create a source system by specifying destination parameters and background user credentials using transaction RSA1.

2.1.4 BW/4HANA Data Model

The plan data for SAP Trade Management, version for SAP BW/4HANA is stored in Advanced DataSource Objects (aDSOs) in your SAP BW/4HANA system.

The following BW data model is delivered with the solution:



This figure depicts the advanced DSOs that are used in SAP Customer Business Planning, version for SAP BW/4HANA. The following table explains the purpose of each advanced DSO.

Advanced DSOs in SAP Trade Management, version for SAP BW/4HANA

aDSO	Purpose
/ JBPB/ IPLAN	<p data-bbox="805 481 989 510">CBP Planning Data</p> <p data-bbox="805 533 1157 562">Stores customer business plan data</p> <p data-bbox="805 584 1380 752">This aDSO uses the InfoObject <code>ØBP_GRP</code> to store the Business Partner Group. The aDSO also contains the InfoObject / JBPB/ SCINDIC to store the source indicator. This helps identify the source of the data; for example, the latest estimate, scenario-specific data.</p> <p data-bbox="805 775 1396 909">The time characteristics <code>ØCALMONTH</code> and <code>ØCALWEEK</code> are necessary in this aDSO, as SAP Customer Business Planning, version for SAP BW/4HANA allows for planning at weekly granularity.</p> <p data-bbox="805 931 1380 1099">The aDSO also contains the key figures required for planning. The master and other planning queries must have the key figures <code>ØKEY_IND</code> and <code>ØDISTRATIO</code>. These are populated by the TPM in-memory planning framework and are required for planning.</p> <p data-bbox="805 1122 1396 1357">When the plan is created, combinations must first be generated in SAP BW/4HANA. This is done using the master query / JBPB/ APLN_M_PNL_MASTER. CRM sends the value of the scenario ID, products, validity for each product, BP group and source indicator. BW/4HANA then uses this information to generate the relevant combinations in the plan aDSO.</p> <p data-bbox="805 1379 1380 1682">Once the combinations have been generated, the data is displayed on the plan UI using different planning queries depending on the layout. The different data views on the UI are the <i>Profit & Loss</i> view, <i>Product Tree</i> view, and <i>Summary</i> view. These are all built using different queries. The key figure structures remain the same except for minor changes between the TU, CU, and NU views. These queries display one or more of the following characteristics, depending on the view in which they are used:</p> <ul data-bbox="805 1704 1380 1928" style="list-style-type: none"> • <code>ØCALMONTH</code> (monthly queries) • <code>ØCALWEEK</code> (weekly queries) • Product (Product Tree view queries) • Key figure structure in columns and characteristic in rows (Summary view)

aDSO	Purpose
/JBPB/IREF	<p>CBP Reference Data</p> <p>Stores the reference volumes and reference prices that are displayed as a comparison on the customer business plan screens</p>
/JBPB/IACT	<p>CBP Actuals Data</p> <p>Stores the actuals that are retrieved from the internal and external source</p> <p>For example, sell-in total, sell-out total, EDLP discount/rebate total, promo discount/rebate total, and so on</p>
/JBPB/ITARGET	<p>CBP Target Data</p> <p>Stores internal target data</p>
/JBPB/PL_VER	<p>CBP Plan Version Data</p> <p>Stores version data for the plan</p>
/JBPB/PR_VER	<p>CBP Promotion Version Data</p> <p>Stores version data for the promotion</p>
/JBPB/SAFV_M	<p>Sales Area to Fiscal Variant Mapping</p> <p>Stores data related to the mapping between sales area and fiscal variants</p>
/JBPB/TUCUNU	<p>TU/CU/NU Factors</p> <p>Stores trading and consumer unit master data for products together with the conversion factors between trading and consumer units</p> <p>This aDSO also stores normalized unit conversion factors for the products.</p>
/JBPB/UCF	<p>UOM Conversion for TUCUPRD</p> <p>Stores the UOM conversion factor for TU CU products</p>
/JBPB/ISTP	<p>TPM Short-Term Promotions Data</p> <p>Stores the data for short-term promotions</p>
/JBPB/ILTA	<p>TPM Long-Term Agreements Data</p> <p>Stores the data for long-term agreements</p>

aDSO	Purpose
/ JBPB/ IPRSTG	<p>TPM Promotions Staging Data</p> <p>In the delivered content, the plan data in the promotion is saved at the product or product category level. In the customer business plan, however, the data is stored at the TU CU and source indicator (scenario) level. This means that the product dimension must be converted to TU CU and should have volumes and discounts calculated at each scenario level.</p> <p>Also, the promotional discounts for long-term agreements are calculated on the short-term uplift volumes; and as a plan can contain multiple promotions, you must combine the data from all the promotions within your promotion time duration. The staging aDSO / JBPB/ IPRSTG is used for this purpose.</p>
/ JBPB/ SRCIND	<p>Scenario Source Indicator Data</p> <p>Stores the source indicators of the scenario options created in the plan for each planning year</p>

2.1.5 Install BW/4HANA Content

Refer to [2981084](#) for the list of BW/4HANA objects which are required for SAP Trade Management, version for SAP BW/4HANA installation.

2.1.6 Master Data

2.1.6.1 Replicate and Extract Important DataSources and BW/4HANA InfoObject Mappings

To perform planning, you must replicate the required master data from your SAP CRM system to your SAP BW/4HANA system.

Details or required DataSources are provided here that must be extracted before you start planning.

[Sales Organization CRM \(OORGUNIT\) \[page 96\]](#)

[Product \(OCRM_PROD\) \[page 96\]](#)

[Product Hierarchy \[page 97\]](#)

[Product Category \(OPROD_CATEG\) \[page 98\]](#)

[Territory: \(OCRM_TR\) \[page 101\]](#)

[BP: Business Partner Group \(from Hierarchy\): \(OBP_GRP\) \[page 103\]](#)

[CRM Marketing Element \(Campaign and Marketing Plan\): \(OCRM_MKTELM\) \[page 106\]](#)

[CBP Scenario: \(/JBPB/SCEN\) \[page 108\]](#)

[Customer Business Plan: \(/JBPB/IPLAN\) \[page 110\]](#)

[JBP Sales Org to Fiscal Variant Map: \(/JBPB/SAFV_M\) \[page 111\]](#)

2.1.6.1.1 Sales Organization CRM (OORGUNIT)

You use this DataSource to extract CRM organization information from your SAP CRM system to your SAP BW/4HANA system. It is loaded into the BW/4HANA infoobject `0OORGUNIT`.

2.1.6.1.2 Product (OCRM_PROD)

[Product Texts Extraction \[page 96\]](#)

[Product Attributes \[page 97\]](#)

2.1.6.1.2.1 Product Texts Extraction

You use this DataSource to extract the product descriptions from your SAP CRM system to your SAP BW/HANA system.

Extractor: `0PRODUCT_TEXT`

Source Fields	Target Fields	Mapping Rule
PRODUCT_GUID	OCRM_PROD	Direct
LANGU	OLANGU	Direct
SHORT_TEXT	OTXTSH	Direct
SHORT_TEXT	OTXTMD	Direct
SHORT_TEXT	OTXTLG	Direct

2.1.6.1.2.2 Product Attributes

You use this DataSource to extract product attributes from your SAP CRM system to your SAP BW/HANA system.

Extractor: 0CRM_PRODUCT_ATTR

Source Fields	Target Fields	Mapping Rule
PRODUCT_GUID	0CRM_PROD	Direct
SRV_ESCAL	0CRM_SRVESC	Direct
SRV_SERWI	0CRM_SRVSWI	Direct
DIVISION	ODIVISION	Direct
DURATION	ODURATION	Direct
DURATION_UOM	ODUR_UNIT	Direct
LOGSYS	OLOGSYS	Direct
PRODUCT_ID	OPROD_ID	Direct
OBJECT_FAMILY	OPROD_OBJFA	Direct
PRODUCT_TYPE	OPROD_TYPE	Direct
CAT_PUR	OPR_CAT_PUR	Direct
CAT_SAL	OPR_CAT_SAL	Direct

2.1.6.1.3 Product Hierarchy

You use this DataSource to extract a product hierarchy from your SAP CRM system to your SAP BW/HANA system. The hierarchy consists of product categories at all higher levels and products as the leaf nodes.

Extractor: 0PRODUCT_HIER

Source Fields	Target Fields	Mapping Rule
OBJECTID	OOBJECTID	Direct
HIENM	OH_HIENM	Direct
OBJECTID	OOBJECTID	Direct

Source Fields	Target Fields	Mapping Rule
LANGU	OLANGU	Direct
TXTSH	OTXTSH	Direct
TXTMD	OTXTMD	Direct
TXTLG	OTXTLG	Direct
OBJECTID	OOBJECTID	Direct
NODEID	OH_NODEID	Direct
IOBJNM	OH_IOBJNM	Direct
PARENTID	OH_PARENTID	Direct
CHILDID	OH_CHILDID	Direct
NEXTID	OH_NEXTID	Direct
TLEVEL	OH_TLEVEL	Direct
LINK	OH_LINK	Direct
NODENAME	OH_HIERNODE	Direct
NODENAME	OCRM_PROD	Hierarchy Split
NODENAME	OPROD_CATEG	Hierarchy Split
OBJECTID	OOBJECTID	Direct
LANGU	OLANGU	Direct
NODENAME	OH_HIERNODE	Direct
TXTSH	OTXTSH	Direct
TXTMD	OTXTMD	Direct
TXTLG	OTXTLG	Direct

2.1.6.1.4 Product Category (OPROD_CATEG)

[Product Category Texts \[page 99\]](#)

[Product Category Attributes \[page 99\]](#)

[Product Hierarchy \[page 99\]](#)

2.1.6.1.4.1 Product Category Texts

You use this DataSource to extract product category texts from your SAP CRM system to your SAP BW/HANA system.

Extractor: ØPROD_CATEG_TEXT

Source Fields	Target Fields	Mapping Rule
CATEGORY_GUID	OPROD_CATEG	Direct
LANGU	OLANGU	Direct
CATEGORY_TEXT	OTXTSH	Direct
CATEGORY_TEXT	OTXTMD	Direct
CATEGORY_TEXT	OTXTLG	Direct

2.1.6.1.4.2 Product Category Attributes

You use this DataSource to extract product category attributes from your SAP CRM system to your SAP BW/HANA system.

Extractor: ØPROD_CATEG_ATTR

Source Fields	Target Fields	Mapping Rule
CATEGORY_GUID	OPROD_CATEG	Direct
CATEGORY_ID	OPRCA_ID	Direct
HIERARCHY_ID	OPRCA_KID	Direct
RESP_PERS_BPNR	OPRCA_RESP	Direct
PRODUCT_TYPE	OPROD_TYPE	Direct
OBJECT_FAMILY	OPROD_OBJFA	Direct

2.1.6.1.4.3 Product Hierarchy

You use this DataSource to extract product categories for a hierarchy.

Extractor: ØPROD_CATEG_HIER

Source Fields	Target Fields	Mapping Rule
OBJECTID	OOBJECTID	Direct
HIENM	OH_HIENM	Direct
DATETO	ODATETO	Direct
DATEFROM	ODATEFROM	Direct
OBJECTID	OOBJECTID	Direct
LANGU	OLANGU	Direct
TXTSH	OTXTSH	Direct
TXTMD	OTXTMD	Direct
TXTLG	OTXTLG	Direct
OBJECTID	OOBJECTID	Direct
NODEID	OH_NODEID	Direct
IOBJNM	OH_IOBJNM	Direct
PARENTID	OH_PARENTID	Direct
CHILDID	OH_CHILDID	Direct
NEXTID	OH_NEXTID	Direct
TLEVEL	OH_TLEVEL	Direct
LINK	OH_LINK	Direct
NODENAME	OH_HIERNODE	Direct
NODENAME	OCRM_TR	Hierarchy Split
OBJECTID	OOBJECTID	Direct
LANGU	OLANGU	Direct
NODENAME	OH_HIERNODE	Direct
TXTSH	OTXTSH	Direct
TXTMD	OTXTMD	Direct
TXTLG	OTXTLG	Direct

2.1.6.1.5 Territory: (OCRM_TR)

This InfoObject contains the responsibility area GUID master data. This is extracted into SAP BW/HANA to map the plan ID to the RA GUID.

[Territory Text \[page 101\]](#)

[Territory Attributes \[page 101\]](#)

[Territory Hierarchy \[page 102\]](#)

2.1.6.1.5.1 Territory Text

You use this DataSource to extract texts for Territory Management information from your SAP CRM system to your SAP BW/HANA system.

Extractor: 0CRM_TR_TEXT

Source Fields	Target Fields	Mapping Rule
TERR_GUID	OCRM_TR	Direct
LANGU	OLANGU	Direct
DATEO	ODATEO	Direct
DATEFROM	ODATEFROM	Direct
TXTMD	OTXTMD	Direct

2.1.6.1.5.2 Territory Attributes

You use this DataSource to extract Territory Management information from your SAP CRM system to your SAP BW/HANA system.

Extractor: 0CRM_TR_ATTR

Source Fields	Target Fields	Mapping Rule
TERR_GUID	OCRM_TR	Direct
TERR_ID	OCRM_TRID	Direct
TERR_LVID	OCRM_TRLV	Direct

Source Fields	Target Fields	Mapping Rule
PATH_ID	OCRM_TRPID	Direct
TERR_PERS	OCRM_TRPERS	Direct
LOGSYS	OLOGSYS	Direct

2.1.6.1.5.3 Territory Hierarchy

You use this DataSource to extract a territory hierarchy from your SAP CRM system to your SAP BW/HANA system.

Extractor: 0CRM_TR_HIER

Source Fields	Target Fields	Mapping Rule
OBJECTID	OOBJECTID	Direct
HIENM	OH_HIENM	Direct
DATETO	ODATETO	Direct
DATEFROM	ODATEFROM	Direct
OBJECTID	OOBJECTID	Direct
LANGU	OLANGU	Direct
TXTSH	OTXTSH	Direct
TXTMD	OTXTMD	Direct
TXTLG	OTXTLG	Direct
OBJECTID	OOBJECTID	Direct
NODEID	OH_NODEID	Direct
IOBJNM	OH_IOBJNM	Direct
PARENTID	OH_PARENTID	Direct
CHILDID	OH_CHILDID	Direct
NEXTID	OH_NEXTID	Direct
TLEVEL	OH_TLEVEL	Direct

Source Fields	Target Fields	Mapping Rule
LINK	OH_LINK	Direct
NODENAME	OH_HIERNODE	Direct
NODENAME	OCRM_TR	Hierarchy Split
OBJECTID	OOBJECTID	Direct
LANGU	OLANGU	Direct
NODENAME	OH_HIERNODE	Direct
TXTSH	OTXTSH	Direct
TXTMD	OTXTMD	Direct
TXTLG	OTXTLG	Direct

2.1.6.1.6 BP: Business Partner Group (from Hierarchy): (OBP_GRP)

[Business Partner Group Texts \[page 103\]](#)

[Business Partner Group Attributes \[page 104\]](#)

[Business Partner Group Hierarchy \[page 104\]](#)

2.1.6.1.6.1 Business Partner Group Texts

You use this DataSource to extract the texts for business partner groups.

Extractor: ØCRM_BP_GRP_TEXT

Source Fields	Target Fields	Mapping Rule
NODE_GUID	OBP_GRP	Direct
LANGUAGE	OLANGU	Direct
DESCRIPTION	OTXTMD	Direct

2.1.6.1.6.2 Business Partner Group Attributes

You use this DataSource to extract all attributes for a business partner group from the SAP CRM view CRMV_BP_GRP_ATTR.

Extractor: ØCRM_BPGRP_ATTR

Source Fields	Target Fields	Mapping Rule
PARTNER	OBPARTNER	Direct
HIER_NODE	OBP_GRP	Direct
SEARCH_TERM_NODE	OBP_GRP_SRC	Direct
PARTNER_GUID	OBP_GUID	Direct
SALES_ORG	OCRM_SALORG	Direct
CUSTOMER	OCUSTOMER	Direct
CUSTOMER_GROUP1	OCUST_GRP1	Direct
CUSTOMER_GROUP2	OCUST_GRP2	Direct
CUSTOMER_GROUP3	OCUST_GRP3	Direct
CUSTOMER_GROUP4	OCUST_GRP4	Direct
CUSTOMER_GROUP5	OCUST_GRP5	Direct
CHANNEL	ODISTR_CHAN	Direct
DIVISION	ODIVISION	Direct

2.1.6.1.6.3 Business Partner Group Hierarchy

This DataSource extracts the business partner group hierarchy using the valid structure for the current date.

Extractor: ØCRM_BP_GRP_HIER

Source Fields	Target Fields	Mapping Rule
OBJECTID	OOBJECTID	Direct
HIENM	OH_HIENM	Direct

Source Fields	Target Fields	Mapping Rule
DATE TO	ODATE TO	Direct
DATE FROM	ODATE FROM	Direct
OBJECT ID	O OBJECT ID	Direct
LANGU	OLANGU	Direct
TXTSH	OTXTSH	Direct
TXTMD	OTXTMD	Direct
TXTLG	OTXTLG	Direct
OBJECT ID	O OBJECT ID	Direct
NODE ID	OH_NODE ID	Direct
IOBJNM	OH_IOBJNM	Direct
PARENT ID	OH_PARENT ID	Direct
CHILD ID	OH_CHILD ID	Direct
NEXT ID	OH_NEXT ID	Direct
TLEVEL	OH_TLEVEL	Direct
LINK	OH_LINK	Direct
NODENAME	OH_HIERNODE	Direct
NODENAME	O BP_GRP	Hierarchy Split
OBJECT ID	O OBJECT ID	Direct
LANGU	OLANGU	Direct
NODENAME	OH_HIERNODE	Direct
TXTSH	OTXTSH	Direct
TXTMD	OTXTMD	Direct
TXTLG	OTXTLG	Direct

2.1.6.17 CRM Marketing Element (Campaign and Marketing Plan): (OCRM_MKTELM)

You use this DataSource to extract all marketing project attributes (marketing plan, marketing plan elements, campaigns, trade promotions, customer business plans and so on).

Extractor: OCRM_MKTELM5_ATTR

Source Fields	Target Fields	Mapping Rule
EXTERNAL_ID	OCRM_MKTELM	Direct
RESPONSIBLE_NAME	OBP_RESPPER	Direct
CHANGED_BY	OCHANGEDBY	Direct
CHANGED_ON	OCH_ON	Direct
CONSTRAINTDATE	OCONS_DATE	Direct
CONSTRAINT_TYPE	OCONS_TYPE	Direct
CREATED_BY	OCREATEDBY	Direct
CREATED_ON	OCREATEDON	Direct
CAMP_TYPE	OCRMCAMPTYP	Direct
CHANNEL	OCRMCHANNEL	Direct
ACTUALSTARTDATE	OCRM_ACFR	Direct
ACTUALFINISHDATE	OCRM_ACTO	Direct
ADRESS_ID	OCRM_ADR_ID	Direct
AUTH_GROUP	OCRM_ATHGRP	Direct
SHORTCUT	OCRM_CAMPSC	Direct
COMPLETION	OCRM_COMPL	Direct
DELFLAG	OCRM_DELE	Direct
FAX_FORM	OCRM_FRMFX	Direct
MAIL_FORM	OCRM_FRMMA	Direct
SMARTFORM	OCRM_FRMSMF	Direct
SMS_FORM	OCRM_FRMSMS	Direct

Source Fields	Target Fields	Mapping Rule
MILESTONE	OCRM_MILEID	Direct
GUID	OCRM_MKGUID	Direct
POSID	OCRM_MKTELE	Direct
OBJECTIVE	OCRM_OBJEC4	Direct
OBJECT_TYPE	OCRM_OBTYP3	Direct
PLANSTARTDATE	OCRM_PLFR	Direct
PLANGROUP	OCRM_PLGRP	Direct
PLANFINISHDATE	OCRM_PLTO	Direct
PRIORITY	OCRM_PRIO	Direct
PRINT_ID	OCRM_PRNTID	Direct
PROJECT_ID	OCRM_PROJID	Direct
SCRIPT_TREEID	OCRM_SCRIPT	Direct
SEND_PARTNER	OCRM_SND_PT	Direct
TACTICS	OCRM_TACTIC	Direct
BWSTMKTSYSO	OSTAMKTSYSO	Direct
BWSTMKTSYS1	OSTAMKTSYS1	Direct
BWSTMKTSYS2	OSTAMKTSYS2	Direct
BWSTMKTSYS3	OSTAMKTSYS3	Direct
CAMP_LINK_EXTID	OCRM_CMPLNK	Direct
CPT_TYPE	OCRM_CMPTYP	Direct
RECURRING	OCRM_RECCMP	Direct
CAMP_PERIOD	OCRM_RECCUR	Direct
SALES_ORG	OCRM_SALORG	Direct
TERR_PATH_ID	OCRM_TRPID	Direct
DIS_CHANNEL	ODISTR_CHAN	Direct
DIVISION	ODIVISION	Direct

Source Fields	Target Fields	Mapping Rule
CALENDAR_ID	OFACTCAL_ID	Direct
CURRENCY	OCRM_MKTCUR	Direct
BP_ID	OBPARTNER	Direct
BP_NODE	OBP_GRP	Direct
TERR_PATH_GUID	OCRM_TR	Direct
DISTMETHOD	OCRM_DISTM	Direct
EXP_DATE	OCRM_EXP	Direct
OFRCODE	OCRM_OCR	Direct
INACTIVE	OCRM_INACTV	Direct
MKT_ORG	OCRM_MKTORG	Direct
CLEARING_HOUSE	OCRM_CLHOUS	Direct
TARGETGRP_GUID	OTGGRP_ID	Direct
DATE_RANGE_ST01	OBUY_DATF	Direct
DATE_RANGE_END01	OBUY_DATT	Direct

2.1.6.1.8 CBP Scenario: (/JBPB/SCEN)

You extract this DataSource as explained in order to extract customer business plan scenario data from your SAP CRM system to your SAP BW/HANA system. You should do this only if you are using SAP Customer Business Planning, version for SAP BW/4HANA.

[CBP Scenario Text \[page 108\]](#)

[CBP Scenario Attributes \[page 109\]](#)

2.1.6.1.8.1 CBP Scenario Text

This DataSource extracts the scenario texts from CRM.

Extractor: 0JBP_SCEN_TEXT

Source Fields	Target Fields	Mapping Rule
EXTERNAL_ID	/JBPB/SCEN	Direct
DESCRIPTION	OTXTSH	Direct

2.1.6.1.8.2 CBP Scenario Attributes

This DataSource extracts the list of scenario attributes from your SAP CRM to your SAP BW/HANA system.

Extractor: 0JBP_SCEN

Source Fields	Target Fields	Mapping Rule
EXTERNAL_ID	/JBPB/SCEN	Direct
GUID	/JBPB/SC_GUID	Direct
RA_GUID	OCRM_TR	Direct
CREATED_BY	OCREATEDBY	Direct
CREATED_ON	OCREATEDON	Direct
PLAN_START_DATE	OCRM_PLFR	Direct
PLAN_END_DATE	OCRM_PLTO	Direct
CHANGED_ON	OCH_ON	Direct
CURRENCY	OCURRENCY	Direct
CHANGED_BY	OCHANGEDBY	Direct
PLAN_GUID	/JBPB/PL_GUID	Direct
TERRITORY_ID	OCRM_TRID	Direct
PLAN_ID	/JBPB/PLAN	Direct
NODE_GUID	OBP_GRP	Direct
SHOP_FORMAT	/JBPB/SFINDIC	Direct
RA_TYPE	/JBPB/RA_TYPE	Routine
RELATED_RA_GUID	/JBPB/REL_RA	Direct

i Note

If the RA_TYPE value is 'OP' - **Overlapping Plan**, you need to adjust this value to 'NM' - **Higher Level Plan** if the RELATED_RA_GUID value is blank. If the RELATED_RA_GUID is not blank, the RA_TYPE should be set to 'KM' - **Lower Level Plan**. This should be handled in the transformation routines.

For wholesaler, indirect and overlapping plans, this extractor needs to be executed before BW/4HANA planning.

2.1.6.1.9 Customer Business Plan: (/JBPB/IPLAN)

You extract this DataSource as explained in order to extract customer business plan data from your SAP CRM system to your SAP BW/HANA system. You should do this only if you are using SAP Customer Business Planning, version for SAP BW/4HANA.

[Customer Business Plan Texts \[page 110\]](#)

[Customer Business Plan Attributes \[page 110\]](#)

2.1.6.1.9.1 Customer Business Plan Texts

This DataSource extracts the texts for the customer business plans from CRM.

Extractor: 0JBP_PLAN_TEXT

Source Fields	Target Fields	Mapping Rule
EXTERNAL_ID	/JBPB/PLAN	Direct
DESCRIPTION	OTXTSH	Direct

2.1.6.1.9.2 Customer Business Plan Attributes

This DataSource extracts the plan and attribute details from CRM.

Extractor: 0JBP_PLAN

Source Fields	Target Fields	Mapping Rule
EXTERNAL_ID	/JBPB/PLAN	Direct

Source Fields	Target Fields	Mapping Rule
RA_GUID	OCRM_TR	Direct
CREATED_BY	OCREATEDBY	Direct
CREATED_ON	OCREATEDON	Direct
CHANGED_BY	OCHANGEDBY	Direct
PLAN_START_DATE	OCRM_PLFR	Direct
CURRENCY	OCURRENCY	Direct
CHANGED_ON	OCH_ON	Direct
PLAN_END_DATE	OCRM_PLTO	Direct
SHOP_FORMAT	/JBPB/SFINDIC	Direct
GUID	/JBPB/PL_GUID	Direct
CPH_ID_TU	/JBPB/TU_ID	Direct
CPH_ID_CU	/JBPB/CU_ID	Direct
TERRITORY_ID	OCRM_TRID	Direct
IS_VERSION	/JBPB/V_FLAG	Direct

2.1.6.1.10 JBP Sales Org to Fiscal Variant Map: (/JBPB/SAFV_M)

This DataSource extracts the sales organization and fiscal year variant mapping from CRM.

Extractor: /JBPB/SALESORG_FISCV_MAP

Source Fields	Target Fields	Mapping Rule
SALES_ORG	/JBPB/SAL_ORG	Formula to convert /JBPB/SAL_ORG format in BW/4HANA
FISCAL_YEAR_VARIANT	OFISCVARNT	Direct

The system uses this DataSource to derive the fiscal time dimension.

2.1.7 Maintain Combination Limits for Advanced DSOs

For each planning aDSO, you need to configure the upper limit of the number of combinations that can be generated within a planning session. This is done using transaction RSPLAN for each planning aDSO on the [Central Settings](#) tab. The default is set to 50,000. This should be increased to a higher value based on the volume of records being generated in the planning session.

2.1.8 Set Up Time Dimension

Context

You can derive monthly planning values from weekly planning values.

Procedure

1. Execute transaction [/TMAB4/MULT_TIME](#).
2. For each BW/4HANA planning infoprovider, maintain the [Source](#) and [Target](#) time characteristics.

You can find more information on this feature in the Customizing for [SAP NetWeaver](#) under [▶ SAP BW/4HANA > SAP Trade Management > Set Up Time Dimension for Info Providers >](#).

2.1.9 Lock Characteristics

Lock characteristics must be defined for all the InfoProviders that store planning-relevant data in BW/4HANA. This can be done using transaction RSPLSE ([Lock Characteristics](#) tab) in your BW/4HANA planning system.

For Customer Business Planning InfoProviders, the lock setting should include the following:

- /JBPB/TUCUPRD
- /JBPB/SCINDIC
- ØBP_GRP
- ØCALWEEK
- ØCALMONTH

For Trade Promotion Planning and Management InfoProviders, the lock characteristics should ideally include:

- ØCRM_MKTELM
- ØBP_GRP

- ØCRM_PROD
- ØCALMONTH
- ØCALWEEK

i Note

The lock characteristics may differ depending on your implementation. You must consider the planning layout when defining the lock characteristics for each InfoProvider. The lock characteristics also affect the amount of data that is committed to the database on the save of a planning session.

2.1.10 Assign Planning Functions

You can assign planning functions to events for your queries, using transaction [/TMAB4/EVENTCUST](#).

You can choose to run planning functions to perform operations before or after the system performs any activities related to a query.

You can maintain these settings and find more details in Customizing for [SAP NetWeaver](#) under [▶ SAP BW/4HANA](#) [▶ SAP Trade Management](#) [▶ Define Event for Planning Queries](#).

Business Add-Ins

You can use the following business add-ins (BAdIs) via transaction [SE18](#):

- You can influence the filters and variables that are used on the planning functions that are executed using the [Define Events for Queries](#) ([/TMAB4/EVENTCUST](#)) transaction in SAP BW/4HANA using [BAdI: Modification of Planning Functions](#) ([/TMAB4/IMP_EVT_PLANNING_FUNCT](#)).
- You can use [BAdI: Filter for Standard Planning Functions](#) ([/TMAB4/IMP_STD_PLANNING_FUNCT](#)) to change the filter used for the standard planning functions. You can implement this BAdI, for example, to add the InfoProvider that is used when synchronizing data between SAP CRM and SAP BW/4HANA.
- You can use [BAdI: Determination of Values for Query Execution](#) ([/TMAB4/IMP_QUERY](#)) to provide values for the variables defined in your query definition. This BAdI provides the mapping between variables and values, which is used when the query is executed.

2.2 Planning Context

In SAP Trade Management, version for SAP BW/4HANA, planning functions are used in BW/4HANA-Integrated Planning for system-supported editing and generating data. In certain conditions, execution of these planning functions can be controlled by planning contexts. Planning contexts are used to improve the performance

of the application and to achieve functional requirements. These planning contexts come from CRM to BW/4HANA while performing certain actions, for instance, while loading a plan screen.

You can call the function module `/JBPB/IMP_SET_QUERY_FILTERS` to set any variable/filter and context for query or planning function execution.

For the standard planning context, table `IT_CONTEXT_PARAMETER` is used and for custom planning context, you must use table `IT_CUSTOM_CONTEXT_PARAMETER`. The custom planning context can be retrieved using the class `/TMAB4/CL_IMP_ACTION_MANAGER`, method `GET_CUST_PLANNING_CONTEXT`.

Kindly refer to [Controlling Execution of Planning Functions](#) in the Configuration Guide for SAP Customer Business Planning, version for SAP BW/4HANA, to get more details on the standard planning context parameters and their usage.

2.3 Product Replacement Tool

2.3.1 Define Queries in SAP BW/4HANA System

In order to perform key figure adjustments from the *Product Replacement Tool*, you must define the following queries in your SAP BW/4HANA system:

- Planning Query to retrieve technical details of the key figures that are required to be adjusted while replacing or adding products to a Customer Business Plan.
- Planning Query to retrieve technical details of the key figures that are required to be adjusted while replacing or adding products to a Trade Promotion.

These queries are used to read the meta info of the relevant query to prepare the KPI adjustment drop down of the product replacement tool for customer business plans and trade promotions. These queries are also used to configure and trigger the planning functions in SAP BW/4HANA.

BW/4HANA Queries for PRT

Technical Name	Description
<code>/JBPB/APLN_M_PRT_PLAN</code>	Query for PRT Plan
<code>/JBPB/APRM_PL_PRT_PROMO</code>	Query for PRT Promo

Related Information

[Define Queries in CRM System \[page 80\]](#)

2.3.2 Setting Up Planning Functions

2.3.2.1 Define Planning Functions for Customer Business Plan

In order to supply the entered value of key figures from the *Product Replacement Tool* user interface to the *Customer Business Plan*, the system executes the following planning functions:

- Planning function to replace a product and its key figure values in a Customer Business Plan.
- Planning Function to add a product and its key figure values in a Customer Business Plan.

The following planning functions are delivered in the standard solution:

- */JBPB/PRT_PL_REPLACE*: Planning function to replace products in a plan.
This planning function replaces the source product with the target product of the specified plan for all the source indicators. *Source Product, Target Product, Date Range, KPI adjustment factors* available from the CRM layer are passed to the planning function in ABAP internal table of type */JBPB/S_PRT_KADJ*.
- */JBPB/PRT_PLAN_COPY*: Planning function to copy products in a plan.
This planning function copies the KPIs of the source product (reference product) into the target product of the specified plan for all source indicators. *Source Product, Target Product, Date Range, KPI adjustment factors* available from the CRM layer are passed to the planning function in ABAP internal table of type */JBPB/S_PRT_KADJ*.

2.3.2.2 Define Planning Functions for Trade Promotions

In order to supply the entered value of key figures from the *Product Replacement Tool* user interface to the *Trade Promotion*, the system executes the following planning functions:

- Planning function to replace a product and its key figure values in a Trade Promotion.
- Planning Function to add a product and its key figure values in a Trade Promotion.

The following planning functions are delivered in the standard solution:

- */JBPB/PRT_PR_REPLACE*: Planning function to replace products in a promotion.
This planning function replaces the source product with the target product of the specified promotions or long-term agreements. *Source Product, Target Product, Date Range, KPI adjustment factors* available from the CRM layer are passed to the planning function in ABAP internal table of type */JBPB/S_PRT_KADJ*.
- */JBPB/PRT_PROMO_COPY*: Planning function to copy a product in a promotion.
This planning function copies the KPIs of the source (reference product) into the target product of the specified promotions or long-term agreements. *Source Product, Target Product, Date Range, KPI adjustment factors* available from the CRM layer are passed to the planning function in ABAP internal table of type */JBPB/S_PRT_KADJ*.

2.3.2.3 Configure Planning Functions

The following events are used to execute the planning functions:

- Event **38**: Used to trigger the planning function to replace a product.
- Event **39**: Used to trigger the planning function to add a product.

You must configure the planning functions for these events in the planning queries. You can use transaction / TMAB4/EVENTCUST to configure the planning functions in SAP BW/4HANA.

For processing a Customer Business Plan in the *Product Replacement Tool*, the following planning functions are maintained for the query / JBPB/APLN_M_PRT_PLAN in the delivered solution.

Event ID	Event	Planning Function	Description	Sequence	Filter
38	PRT Product Replace	/ JBPB/ PRT_PL_REP_SM	Planning Function to replace products in Plan	1	C Custom
39	PRT Product Copy	/ JBPB/ PRT_PL_COPY_SM	Planning function to copy product in Plan	1	C Custom

For processing Trade Promotions in the *Product Replacement Tool*, the following planning functions are maintained for the query / JBPB/APRM_PL_PRT_PROMO in the delivered solution.

i Note

The same configuration is used for all promotion types.

Event ID	Event	Planning Function	Description	Sequence	Filter
38	PRT Product Replace	/ JBPB/ PRT_PR_REP_SM	Planning function to replace product in Promotion	1	C Custom
39	PRT Product Copy	/ JBPB/ PRT_PR_COPY_SM	Planning function to copy product in Promotion	1	C Custom

2.3.2.4 Change Mapping Logic to Pass Key Figure Values from CRM to BW/4HANA

You can use the following objects:

- **Function Module** / JBPB/FORMAT_PRT_DATA: Format PRT Data to BW/4HANA Specific Structure
This function module is used in the PRT planning functions to convert the CRM-specific format of the KPI adjustment factors into the BW/4HANA-specific structure format / JBPB/S_PRT_KADJ. By default, all KPIs

in structure /JBPB/S_PRT_KADJ are initialized to multiplication factor **1**. If any KPI's multiplication factor is passed from CRM, then that factor overrides the default value **1**. This function module is used in the execute method of the AMDP class corresponding to the planning functions. You can use this function module as a reference to create your planning functions.

- ABAP Structure /JBPB/S_PRT_KADJ:** KPI Adjustment Data Collected from PRT Screens
 This structure is used to maintain the KPI adjustment factor in the format that can be applied on the plan or promotion data in the planning function in a performance efficient manner.
 The KPI adjustment factors are passed from CRM in the format of structure /JBPB/S_PRT_KADJ, which is row store structure with respect to the KPI; the KPI and its adjustment factor are maintained in individual rows. However, the plan, promotion, and long-term agreement (LTA) data models are key figure based model, where every KPI is represented by an individual column. For a performance efficient join between the plan, promotion, and LTA data models and KPI adjustment factor table, it is required to represent the KPI adjustment table in the same format as the data model used for plan, promotion, and LTA.
 For the 'product add with reference' or 'product replace' scenarios, if a KPI needs to be adjusted, then the corresponding field having the KPI InfoObject technical name must be maintained in this structure.
 You can copy this structure and adjust it according to your InfoObjects.

2.3.3 Add Product

This process adds products with or without reference to a plan/promotion/long-term agreement. Event 39 is triggered on PRT queries to further trigger the configured planning functions listed in the tables below.

Query for PRT Plan /JBPB/APLN_M_PRT_PLAN

Event ID	Event	Planning Function	Description	Sequence	Filter
39	PRT Product Copy	/JBPB/ PRT_PL_COPY_SM	Planning function to copy products in Plan	1	C Custom

Query for PRT Promo /JBPB/APRM_PL_PRT_PROMO

Event ID	Event	Planning Function	Description	Sequence	Filter
39	PRT Product Copy	/JBPB/ PRT_PR_COPY_SM	Planning function to copy products in Promotion	1	C Custom

2.3.4 Replace Product

This process replaces an existing product, within a plan/promotion/long-term agreement, with a new product. Event 38 is triggered on PRT queries to further trigger the configured planning functions listed in the tables below.

Query for PRT Plan /JBPB/APLN_M_PRT_PLAN

Event ID	Event	Planning Function	Description	Sequence	Filter
38	PRT Product Replace	/JBPB/ PRT_PL_REP_SM	Planning function to replace products in Plan	1	C Custom

Query for PRT Promo /JBPB/APRM_PL_PRT_PROMO

Event ID	Event	Planning Function	Description	Sequence	Filter
38	PRT Product Replace	/JBPB/ PRT_PR_REP_SM	Planning function to replace products in Promotion	1	C Custom

2.4 Fiscal Support

The SAP Customer Business Planning, version for SAP BW/4HANA application can be used to define three type of calendars: internal, retailer and fiscal. You can configure these as per custom requirements.

Features

- Fiscal definition should always be aligned with the calendar week definition in the system.

❖ Example

If the first day in the calendar week is defined as "Monday", the fiscal period must start on a Monday.

- The fiscal period can either include the full calendar week, or a portion of the week if the week is a split calendar week.

❖ Example

Suppose CW5 in 2019 in a split week, so the fiscal period can either contain the first portion of CW5 (i.e. from 28-Jan 2019 to 31 Jan 2019) or the second portion (1st Feb to 3rd Feb) or both. This period cannot include any other portion for example 28-jan-2019 to 1st Feb and 2nd Feb to 3rd Feb.

[Time and Fiscal Characteristics in SAP BW/4HANA \[page 119\]](#)

2.4.1 Time and Fiscal Characteristics in SAP BW/4HANA

The BW/4HANA data model consists of the calendar week as the basic time characteristic. The corresponding fiscal characteristic should also be added in the data model. The fiscal characteristic can be derived during the creation of the planning session.

To support the derivation of fiscal periods in SAP BW/4HANA, a characteristic relationship is delivered on the planning DSOs. The characteristic relationship is an exit-based derivation to derive the fiscal periods from the calendar week. The derivation logic reads the sales organization mapped to the fiscal variant stored in a variable. A sample implementation of this derivation has been delivered in class `/JBPB/CL_CR_EXIT_FISCVARNT_DER`.

Query Definition

Queries must always return the data required for a given view on the UI for the customer business plan. A matching calendar definition is sent using a CRM BAdI. If there is a mismatch, this CBP UI will not render correctly. Thus, queries are required to have fiscal characteristics instead of the corresponding calendar month.

2.5 SAP Analytics Cloud

2.5.1 Configuring Authorizations for SAC Stories

Context

The SAP Analytics Cloud (SAC) stories are launched from:

- the promotion details screen in SAP Trade Promotion Planning and Management, version for SAP BW/4HANA.
- the [Plan Overview](#) screen in SAP Customer Business Planning, version for SAP BW/4HANA.
- the SAP Fiori Launchpad.

The initial context set here controls what a user can see. However, you can configure these report links, access the SAC reports directly, and also change the filter setting. You can configure the authorizations in the backend, in this case the assignment of a user to a responsibility area (RA) or a promotion.

To access the HANA views generated by the BW/HANA system, some general object and package privileges are needed besides the data authorizations (Roles, SQL Analytic Privileges, Procedures, and Filter Values). SQL Analytic Privileges are automatically generated from the existing BW/HANA analysis authorizations (and assigned to a role which is automatically created and attached to the DB user) by BW/HANA object activation

or running the program RS2HANA_AUTH_RUN. SQL Analytic Privileges use procedures which currently access table RS2HANA_AUTH_STR containing the filter values.

Procedure

1. Create BW/HANA Analysis Authorizations.

For more information, see [Authorizations](#).

2. Replicate the authorizations from SAP BW/HANA to SAP HANA by running transaction RS2HANA_AUTH_RUN.

For more information, see [Generating SAP HANA Views from the SAP BW/4HANA System](#). For checks concerning authorization replication (as well as checks and repairs of external SAP HANA views) see SAP note [2390443](#).

[Calculation Views for SAC Reporting \[page 120\]](#)

Related Information

[Authorizations](#)

[Generating SAP HANA Views from the SAP BW/4HANA System](#)

2.5.1.1 Calculation Views for SAC Reporting

The following SAC (SAP Analytics Cloud) stories are delivered with the solution.

- *Monthly Sales Review* (SAP__TM_GEN_PROFIT_LOSS_MSR_SDM)
- *Sell-In Sell-Out Plan* (SAP__TM_GEN_SELL_IN_SELL_OUT_SDM)
- *Retailer View* (SAP__TM_GEN_RETAILER_VIEW_SDM)
- *Trade Details* (SAP__TM_GEN_TRADE_DETAILS_SDM)
- *Historical Volume Decomp* (SAP__TM_UDF_HVD)
- *Hold Out Report* (SAP__TM_UDF_HOT)

The following sections provide details for each story.

Monthly Sales Review (SAP__TM_GEN_PROFIT_LOSS_MSR_SDM)

The following models are consumed in these stories:

- SAP__TM_GEN_LH_PLAN_PROFITLOSS_SDM: This model is built on calculation view sap.tma::CV_PTGT_TPM_SAC_SDM.

- **SAP__TM_GEN_LH_PLAN_TRANSPOSE_SDM:** This model is built on calculation view `sap.tma::CV_PTGT_SAC_TRANSPOSE_SDM`.

The following parameters are passed to these models:

Report Parameter	Parameter Value	Parameter Path
f01Dim	OCALYEAR	
f01Model	t.S:SAP__TM_GEN_LH_PLAN_PROFIT-LOSS_SDM	
f01Val	OCALYEAR	
v01Model	t.S:SAP__TM_GEN_LH_PLAN_PROFIT-LOSS_SDM	
v01Par	PL_ID	
v01Val	EXTERNAL_ID	JBPPlan
v02Par	LE01_WEEK_PL_WF	
v02Val	WEEKFROM	
v03Par	LE01_WEEK_PL_WT	
v03Val	WEEKTO	
v04Par	Version	
v04Val	GUID	JBPSscenario->ScnVersionRel
v05Model	t.S:SAP__TM_GEN_LH_PLAN_TRANSPOSE_SDM	
v05Par	PL_ID	
v05Val	EXTERNAL_ID	JBPPlan
v06Par	LE01_WEEK_PL_WF	
v06Val	WEEKFROM	
v07Par	LE01_WEEK_PL_WT	
v07Val	WEEKTO	
v08Par	Version	
v08Val	GUID	JBPSscenario->ScnVersionRel

Sell-In Sell-Out Plan (SAP__TM_GEN_SELL_IN_SELL_OUT_SDM)

The following model is consumed in this story:

SAP__TM_GEN_LH_PLAN_PROFITLOSS_SDM: This model is built on calculation view `sap.tma::CV_PTGT_TPM_SAC_SDM`.

The following parameters are passed to this model:

Report Parameter	Parameter Value	Parameter Path
f01Dim	OCALYEAR	
f01Model	t.S:SAP__TM_GEN_LH_PLAN_PROFIT-LOSS_SDM	
f01Val	TBD	
f03Dim	OBP_GRP_BPG	
f03Val	NODE_GUID	JBPPlan
v01Model	t.S:SAP__TM_GEN_LH_PLAN_PROFIT-LOSS_SDM	
v01Par	PL_ID	
v01Val	EXTERNAL_ID	JBPPlan
v02Par	LE01_WEEK_PL_WF	
v02Val	TBD	
v03Par	LE01_WEEK_PL_WT	
v03Val	TBD	

Retailer View (SAP__TM_GEN_RETAILER_VIEW_SDM)

The following model is consumed in these stories:

SAP__TM_GEN_LH_PLAN_PROFITLOSS_SDM: This model is built on calculation view sap.tma : : CV_PTGT_TPM_SAC_SDM.

The following parameters are passed to this model:

Report Parameter	Parameter Value	Parameter Path
f01Dim	OCALYEAR	
f01Model	t.S:SAP__TM_GEN_LH_PLAN_PROFIT-LOSS_SDM	
f01Val	CAL_YEAR	
v01Model	t.S:SAP__TM_GEN_LH_PLAN_PROFIT-LOSS_SDM	
v01Par	PL_ID	
v01Val	EXTERNAL_ID	JBPPlan
v02Par	LE01_WEEK_PL_WF	
v02Val	X_CALWEEK_FROM	
v03Par	LE01_WEEK_PL_WT	

Report Parameter	Parameter Value	Parameter Path
v03Val	X_CALWEEK_TO	

Trade Details (SAP__TM_GEN_TRADE_DETAILS_SDM)

The following models are consumed in this story:

- SAP__TM_GEN_LH_MKTELM_SDM: This model is built on calculation view `sap.tma::CV_PTGT_MKTELM_SDM`.
- SAP__TM_GEN_LH_PNL_BUYDATE_SDM: This model is built on calculation view `sap.tma::CV_PRMO_TPM_SAC_SDM`.
- SAP__TM_GEN_LH_PNL_PLANDATE_SDM: This model is built on calculation view `sap.tma::CV_PRMO_TPM_SAC_SDM`.

The following parameters are passed to these models:

Report Parameter	Parameter Value	Parameter Path
v01Model	t.Z:SAP__TM_GEN_LH_MKTELM_SDM	
v01Par	Promotion	
v01Val	EXTERNAL_ID	Trade
v02Model	t.Z:SAP__TM_GEN_LH_PNL_BUY- DATE_SDM	
v02Par	LE01_WEEK_PL_WF	
v02Val	WEEKFROM_BUY	
v03Par	LE01_WEEK_PL_WT	
v03Val	WEEKTO_BUY	
v04Par	PL_ID	
v04Val	EXTERNAL_ID	JBPPlan
v05Par	PRMO_ID	
v05Val	EXTERNAL_ID	Trade
v06Model	t.S:SAP__TM_GEN_LH_PNL_PLAN- DATE_SDM	
v06Par	LE01_WEEK_PL_WF	
v06Val	WEEKFROM_PLAN	
v07Par	LE01_WEEK_PL_WT	
v07Val	WEEKTO_PLAN	
v08Par	PRMO_ID	
v08Val	EXTERNAL_ID	Trade

Report Parameter	Parameter Value	Parameter Path
v09Par	PL_ID	
v09Val	EXTERNAL_ID	JBPPlan

Historical Volume Comp (SAP__TM_UDF_HVD)

The following models are consumed in this story:

- SAP__TM_UDF_LH_COMB_TSD: This model is built on calculation view `sap.is.ddf.tma.add_insights::TMA_COMB_TSD_Q`.
- SAP__TM_UDF_LH_MAPE_HIST_PL: This model is built on calculation view `sap.is.ddf.tma.add_insights::TMA_MAPE_HIST_PL_Q`.
- SAP__TM_UDF_LH_MOD_QUAL: This model is built on calculation view `sap.is.ddf.tma.add_insights::TMA_MOD_QUAL_Q`.
- SAP__TM_UDF_LH_PRC_FC: This model is built on calculation view `sap.is.ddf.tma.add_insights::TMA_PRC_FC_Q`.

Hold Out Report (SAP__TM_UDF_HOT)

The following models are consumed in this story:

- SAP__TM_UDF_LH_COMB_TSD: This model is built on calculation view `sap.is.ddf.tma.add_insights::TMA_COMB_TSD_Q`.
- SAP__TM_UDF_LH_MAPE_HIST_PL: This model is built on calculation view `sap.is.ddf.tma.add_insights::TMA_MAPE_HIST_PL_Q`.
- SAP__TM_UDF_LH_MOD_QUAL: This model is built on calculation view `sap.is.ddf.tma.add_insights::TMA_MOD_QUAL_Q`.

Calculation View `sap.tma::CV_PTGT_TPM_SAC_SDM`

This calculation view `sap.tma::CV_PTGT_TPM_SAC_SDM` is used in various SAC stories.

The following underlying calculation views are used in the final calculation view `CV_PTGT_TPM_SAC_SDM`.

- CV_CBP_PTGT_SDM: This calculation view brings in data. The KPIs exposed in an SAC story are calculated here.
- CV_PTGT_VERSIONS: This calculation view consumes the calculation view `CV_CBP_PTGT_SDM`. In this calculation view, column *Version* is populated, that is, *Latest Estimates*, *Actual*, *Target*, and so on. This field is used in the SAC models to maintain version information.

- **CV_PTGT_TPM_SAC**: This calculation view consumes the calculation view **CV_PTGT_VERSIONS**, and is used in SAC to create a model. In this calculation view, hierarchies are brought in for *BP Group*, *CRM Product*, and *TUCU Product*. The KPIs used in an SAC story are calculated here.

2.6 Activating BW/4HANA Content

BW/4HANA Content is a collection of preconfigured role- and task-based models in the SAP BW/4HANA system based on consistent metadata. It provides selected roles with the information they need to carry out their tasks. For Enterprise reporting, these models cover Composite Providers, variables, queries, reports, and roles.

Before you can work with BW/4HANA Content objects, you need to activate them and convert them from the SAP-delivered version (D version) to the active version (A version).

To install BW/4HANA Content, you first need to install the InfoObjects, Advanced DataStore objects, Composite Providers, aggregation levels, planning function types, planning functions, queries, and so on.

If the BW/4HANA Content is activated during an upgrade, you need to use the match (X) or copy option. If the SAP-delivered version and the active version can be matched, a checkbox is displayed in the relevant column.

The active version and the SAP-delivered version can be matched for the most important object types. From a technical point of view, the SAP-delivered version (D version) is matched against the M version. As in most cases, the M version is identical to the active version (A version) in a customer system. This is referred to as a match between the D and A versions for reasons of simplification. It is important to use the match option if the standard BW/4HANA Content has been customized, thus making sure that it is not overwritten.

Related Information

[SAP BW/4HANA Content](#)

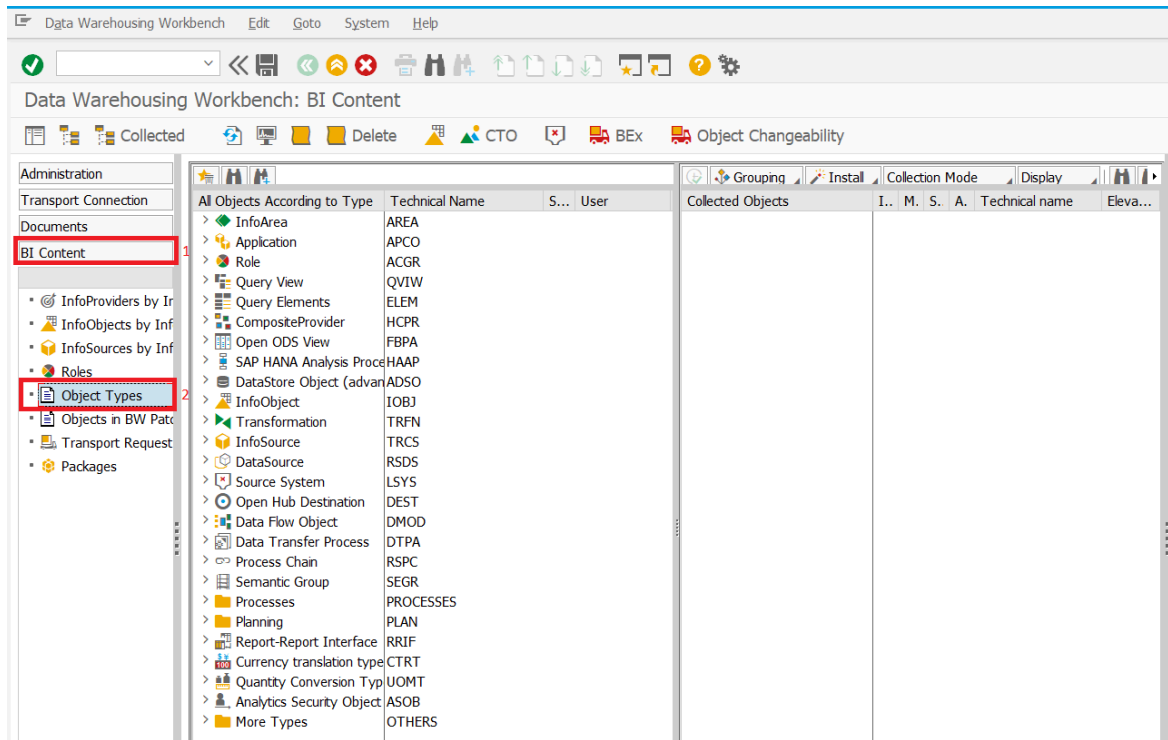
2.7 Installing BW/4HANA Content

As part of the standard offering, you can install BW/4HANA content. To activate the Standard Business Content, you must first convert it from the SAP delivery version (**D** version) to the active version (**A** version).

If you are installing SAP Trade Management, version for SAP BW/4HANA for the first time, you must install the listed BW/4HANA objects.

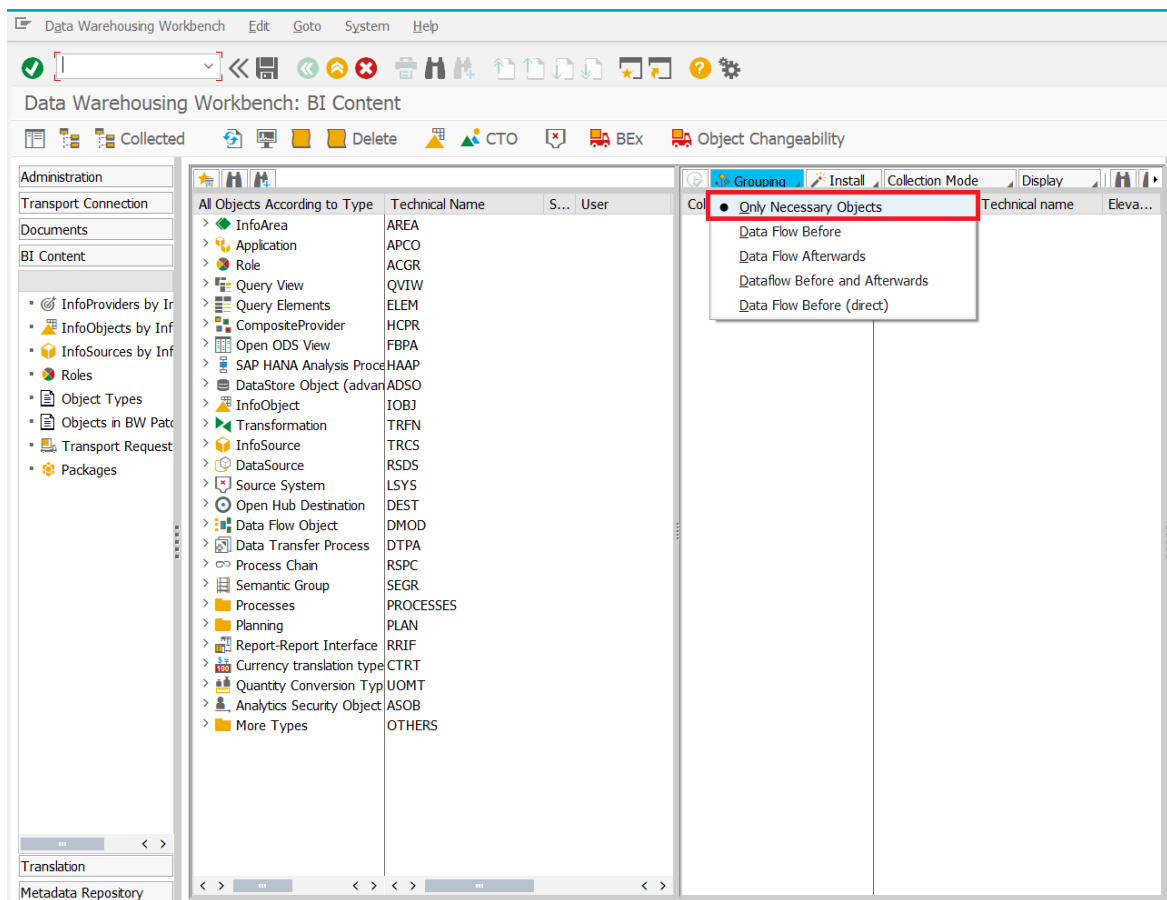
To install these objects from the Business Content, perform the following steps:

1. Start transaction **RSOR** (*Data Warehousing Workbench: BI Content*).
2. Click *BI Content* in the left pane, and then click *Object Types*.



BI Content -> Object Types

3. Choose *Only Necessary Objects* from the *Grouping* dropdown.



Grouping -> Only Necessary Objects

4. Select the relevant objects from the *All Objects According to Type* column and transfer or drag them to the right pane.
5. Select the relevant objects and click *Install*.

i Note

Refer to SAP Note [2981084](#) for the list of BW/4HANA Objects which are required for the installation of SAP Trade Management, version for SAP BW/4HANA.

Install the calculation views before installing the composite providers as a few of the composite providers are dependent on the calculation views.

6. Start transaction SCTS_HTA_DEPLOY to deploy the HANA views.

i Note

For more information about how to deploy HANA views using this transaction, see [Manually Deploying SAP HANA Objects and Packages](#) on the SAP Help Portal.

All the installed objects are shown in the *Data Warehousing Workbench*.

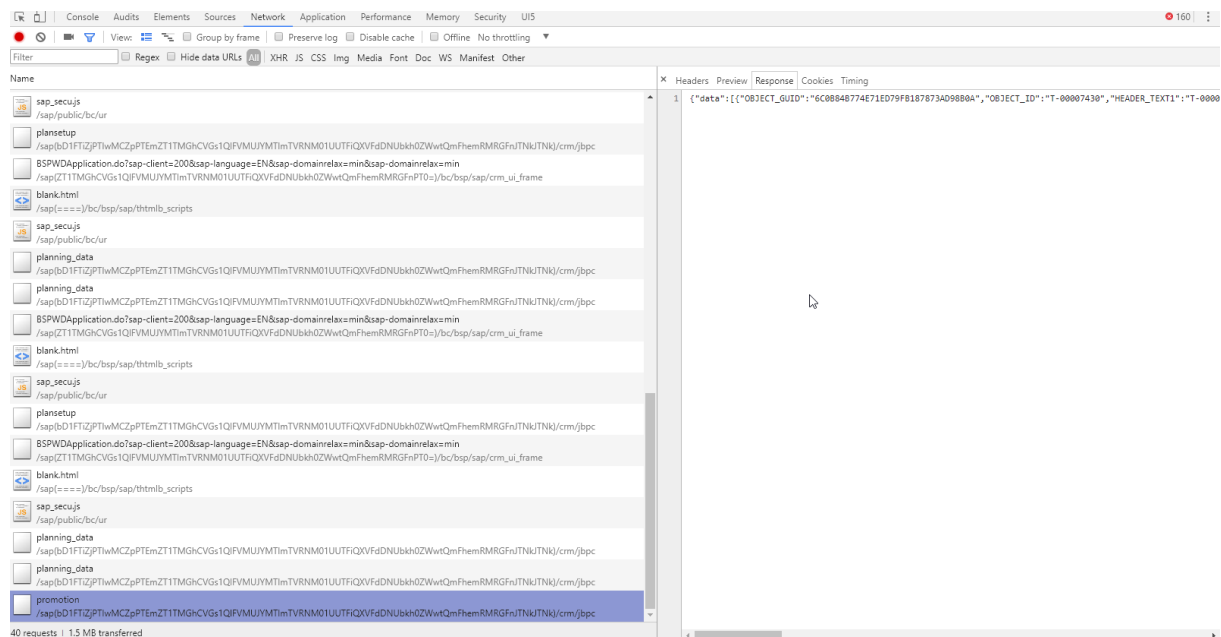
3 Tips for Implementation

3.1 Troubleshooting and Debugging Tips

3.1.1 Troubleshooting in UI

Please refer to *System Messages* if you encounter problems when the content of a screen is being loaded.

In a sample use case, let's assume that the planning data does not load and there are no errors or warnings shown under *System Messages*. Press F12 to open your browser's *Developer Tools*. It is recommended to use Chrome for debugging. If errors are displayed on the *Console* tab, for example *XML could not be parsed* or *JSON parse error*, you may need to check the information passed on from the back end. You can do this on the *Network* tab of your browser's *Developer Tools* to find out the response that was received. Please refer to the screenshot for an example of checking the JSON response to an ICF call.



If errors are displayed on the *Console* tab, for example, *Uncaught TypeError*, please note the file from which the error is being logged. If this is an extension file, debug the source code for this file. If it is an SAP-delivered file, contact the SAP Trade Management, version for SAP BW/4HANA Customer Support Team or raise an incident. Please note that most of the information error messages such as *No virtual view defined* originating from *sap-ui-core.js* can be ignored.

3.1.2 Troubleshooting in CRM System

Troubleshooting if there is no data in the planning layout (in any screen) or the message *PSM initialization failed* appears:

- In CRM, put a breakpoint at
Class: CL_CRM_IMP_BI_COMMANDS_ASYNC
Method: SYNCHRONIZE
while opening the *Plan/Scenario Planning* screen or while creating a trade promotion (this must have a valid product, time, and all the necessary header data; trade spends are optional in the standard delivery). In the SAPUI5 user interface for Promotion Planning, the breakpoint should be hit as soon as all the required data has been entered. If not, a CRM issue has occurred, else debugging the RFC call and pick the reported messages. The following provides further information on debugging in the CRM and BW/4HANA systems.
- If these breakpoints are not reached while the actions described above are being performed, further investigate the Planning Synchronization Manager (PSM) item class.
The standard PSM item classes delivered are as follows:
 - For Promotion Planning: /JBPC/CL_CRM_MKTPL_TPM_PSM_ITM
 - For Customer Business Planning: /JBPC/CL_CRM_MKTPL_ITP_SCN_ITMIf no issues are found and it calls further
Class: CL_CRM_IMP_OBJECT
Method: SYNCHRONIZE_DATA
and if fails either at the method call `get_planning_model` or `serialize_sync`, either the standard delivery configuration is missing (or the characteristic configuration if you have already added custom content) or there is a shared memory issue.
- If the breakpoint is hit within
Class: CL_CRM_IMP_BI_COMMANDS_ASYNC
Method: `synchronize`,
check the RFC call and see if it returns any errors. In this case, you can investigate further in the BW/4HANA system.
It is, however, worth checking the most common causes before further debugging, for example, missing master data; content is not active; filters/filter values may not exist in the BW/4HANA system if the CRM system is passing filters; if custom filters for time and product dimension (such as `0MATERIA` and so on) are used and if time shift with redistribution is active, check that these are being sent from IMP.
BAdI: CRM_MKTPL_IMP_TPM
Method: GET_CHARACTERISTICS_FOR_REDIST
For a list of key figures to be redistributed, check method GET_KEYFIGURES_FOR_REDIST.
- If the combination generation step is OK, further debugging can be carried out for query execution. This reads the results created by synchronization and updated. The following are breakpoints that can be explored to find the probable cause:
 - Class: /JBPC/CL_VVF_BW_QUERY_RESULT
Method: /JBPC/IF_VVF_BW_DATA_PROVIDER~READ_DATA
This calls BAdI /JBPC/VVF_BW_QUERY to set the query input. If you are using custom BW/4HANA content, this BAdI must be implemented with the correct filters/variable.
 - Class: CL_CRM_IMP_OBJECT
Method: IF_CRM_IMP_QUERY_ACTIONS~EXECUTE_QUERY

- Class: CL_CRM_IMP_BI_COMMANDS_ASYNC
Method: IF_CRM_IMP_BI_OBJECT_COMMANDS~EXECUTE_QUERY
- If an issue occurs in Customer Business Planning where TU works but CU does not, this is generally due to missing Customizing settings. Refer to the following class for further debugging:
Class: /JBPC/CL_PLAN_LAYOUT_HANDLER
Method: /JBPC/IF_PLAN_DATA_PROVIDER~READ_DATA
- For issues regarding updating data in the planning layout, refer to the following classes and methods for debugging:
 - Class: /JBPC/CL_VVF_BW_QUERY_RESULT
Method: /JBPC/IF_VVF_BW_DATA_PROVIDER~MODIFY_DATA
Class: /JBPC/CL_PLAN_LAYOUT_HANDLER
Method: /JBPC/IF_PLAN_DATA_PROVIDER~ UPDATE_DATA
Class: CL_CRM_IMP_BI_COMMANDS_ASYNC
Method: IF_CRM_IMP_BI_OBJECT_COMMANDS~UPDATE_CELL
- Issues that occur when a plan/promotion is saved can be debugged as follows:
 - Class: /JBPC/CL_VVF_BW_QUERY_RESULT
Method: /JBPC/IF_VVF_BW_DATA_PROVIDER~EXECUTE_READ_QUERY
Class: CL_CRM_IMP_BI_COMMANDS_ASYNC
Method: IF_CRM_IMP_BI_OBJECT_COMMANDS~EXECUTE_QUERY_READ_DATA
The above step must be debugged because the read-only query execution is part of data verification while saving. If it fails, the save fails, hence this is required to be working as in TMA 400).
Class: CL_CRM_MKTGS_ASG_COLLECTION
Method: CHECK
Class: CL_CRM_MKTGS_OBJ_ITEM
Method: CHECK
Class: CL_CRM_IMP_BI_COMMANDS_ASYNC
Method: IF_CRM_IMP_BI_SESSION_COMMANDS~SAVE and
IF_CRM_IMP_BI_SESSION_COMMANDS~COMMIT
- Issue relating to the integration of the customer business plan and promotion (that is, rolling-up or copying the promotion data back to the plan) can be investigated with the following breakpoints in the CRM system:
 - Class: /JBPC/CL_CRM_MKTPL_IMP_UTIL
Method: PREAPARE_AND_CHECK_TPM_PSM and POPULATE_CBP_DSOS

3.1.3 Troubleshooting in BW/4HANA System

There are currently three areas for which troubleshooting can be carried out in the BW/4HANA system:

- Queries
- Planning functions
- SAP HANA

Queries

If an error relating to a query occurs, for example, the grid does not display or there is a TU/CU/NU data mismatch, first put a breakpoint in method /TMAB4/IF_IMP_OBJECT~EXECUTE_QUERY of class /TMAB4/CL_IMP_OBJECT.

Class Builder Class /TMAB4/CL_IMP_OBJECT Display

Method: /TMAB4/IF_IMP_OBJECT~EXECUTE_QUERY Active

```

98   lv_planning = abap_true.
99   **Execute query & Simplified planning Query
100  mo_actions_service->execute_query(
101      EXPORTING iv_query_id           = iv_query_id
102                it_query_filter      = mt_query_filters
103                iv_input_enabled     = boolc( iv_read_only = abap_false )
104                iv_render_context    = lv_render_context
105                it_visible_kyf       = lt_visible_kyf
106                iv_render_result_set_only = iv_render_result_set_only
107                it_variables         = mt_variables
108                is_hier_variable     = ls_hier_variable
109                it_query_exec_attr   = it_query_exec_attr
110                it_row_needed        = it_row_needed
111                it_col_needed        = it_col_needed
112                iv_simplified        = iv_simplified
113                iv_planning          = lv_planning
114      IMPORTING er_result             = lr_result ).
115
116  ASSIGN lr_result->* TO <ls_result_structure>.
117  ev_xml = <ls_result_structure>-xml.
118  et_xml_descriptor = <ls_result_structure>-data.
119
120  ENDMETHOD.

```

The query ID must be checked in the query name, query filters (whether they have been passed correctly by CRM), visible key figures, variables, and hierarchy node variables.

The XML generated in BW/4HANA must also be checked at ev_xml:

Planning Functions

If an issue has occurred due to a failure in a planning function, you must add a breakpoint in method IF_RSCRM_IMP_OBJECT~EXECUTE_PLANNING_FUNCTION and /TMAB4/IF_IMP_OBJECT~EXECUTE_PLANNING_EVENT of class /TMAB4/CL_IMP_OBJECT.

Class Builder Class /TMAB4/CL_IMP_OBJECT Display

Method: EXECUTE_PLANNING_FCT Active

```

37
38
39           CHANGING iv_planning_function = iv_planning_function
40           ct_data_selection = lt_data_selection
41           ct_variables = lt_variables ).
42
43   WHEN OTHERS.
44
45   ENDCASE.
46
47   * Execute the planning function based on the query filter
48   IF mo_actions->execute_planning_function( iv_planningfunction_name = lv_planning_function_name
49       it_planningfunction_variables = lt_variables
50       iv_query_id = iv_query_id
51       it_dataset_selection = lt_data_selection ) EQ abap_false.
52
53   RAISE EXCEPTION TYPE /TMAB4/CX_IMP_ACTION_FAILED
54   EXPORTING
55     textid = /TMAB4/CX_IMP_ACTION_FAILED=>FAILED_PLANNING_FUNCTION
56     message_table = mo_actions->get_messages( iv_error_only = abap_true iv_include_warning = abap_true ).
57
58   ENDIF.
59
60   IF 1 EQ 2.
61
62     mo_actions->free( iv_planningfunction_name = lv_planning_function_name ).
63
64   ENDIF.
65
66 ENDMETHOD.

```

You then need to check the planning function name where the error is raised and the variables/data selection passed for this planning function to determine whether they are correct and if any filters are missing.

SAP HANA

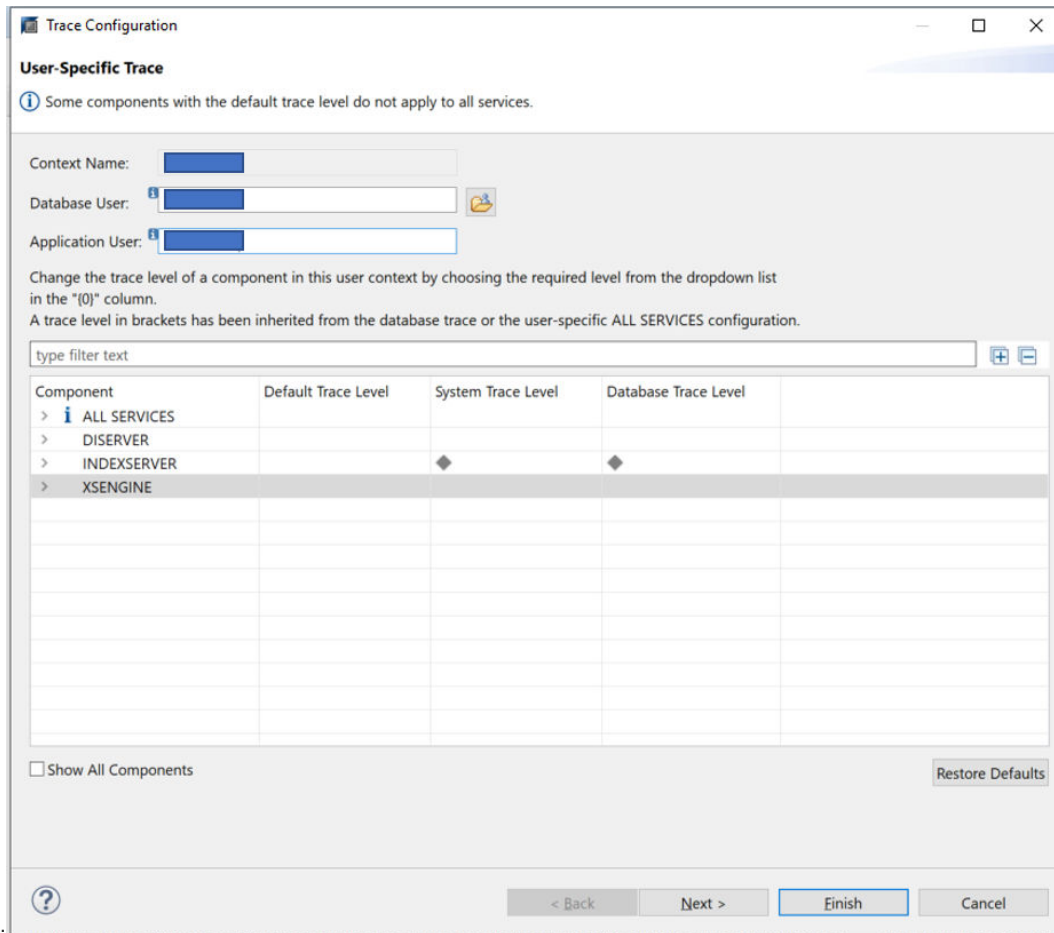
If errors relating to SAP HANA occur, enter your user ID in the SAP HANA Administration Console. While the application is being executed, you can trace and check the HANA DB logs.

You can add your user ID for debugging on the [Trace Configuration](#) tab in the SAP HANA Administration Console:

The screenshot displays the 'Trace Configuration' page in the SAP HANA Administration Console. The page is divided into several sections, each with a configuration status and a description:

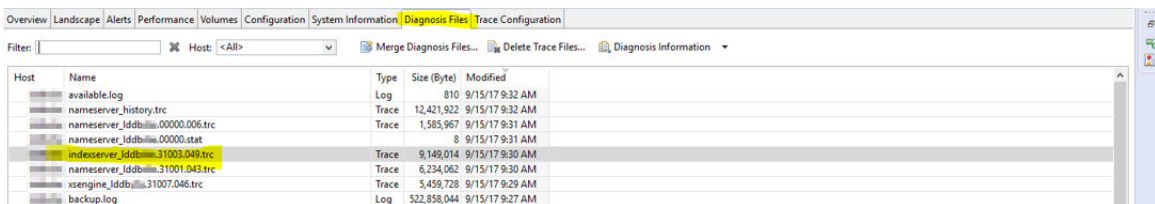
- Database Trace:** Configuration: Default. Status: Inactive. Description: If the database trace is configured, the traces for the trace components of the system (for example, INDEXSERVER and NAMESERVER) are written to files named <servicename>_<host>_<port_number>_<3_digit_file_counter>.trc. Some of these traces are always activated by default.
- User-Specific Trace:** Configuration: User Configured. Status: Inactive. Description: If the user trace is configured, the traces for the trace components for a specific database or application user (for example, INDEXSERVER and NAMESERVER) are written to files named <servicename>_<host>_<port_number>_<context>.trc. A user ID is visible in a red box.
- End-to-End Traces:** Description: The predefined end-to-end traces are used by applications to record the steps through all the available trace components (INDEXSERVER and NAMESERVER for example) in a configuration. When an end-to-end trace is used, the traces for the trace components are written to files named <servicename>_<host>_<port_number>_<end-to-end-trace_name>.trc. Two traces are listed: sap_passport_high (Default) and sap_passport_medium (Default).
- Kernel Profiler:** Status: Inactive. Description: The kernel profiler helps you to analyze performance issues with systems where third-party software cannot be installed. It is also a useful tool for investigating issues with customer systems, as it allows you to analyze issues in parts of the SAP HANA database where performance trace and function profiler tools are not available.
- SQL Trace:** Status: Inactive. Description: If the SQL trace is active, the database calls for the specified database, or application users are traced. The trace data is stored in files starting with sqltrace_<host>_<port_number>_<3_digit_file_counter>.py.
- Performance Trace:** Status: Inactive. Description: If the performance trace is running, the system performance is traced. The trace data is saved to the file specified.
- Expensive Statements Trace:** Status: Inactive. Description: If the expensive statements trace is active, all statements that last longer than the specified threshold are traced. You can analyze the results on the Performance tab under Expensive Statements Trace.
- Plan Trace:** Status: Inactive. Description: If the plan trace is active, you can visualize and analyze the execution plans for every query that has been executed in the specified application. A link is provided: 'Click here to view current list of traces'.

User-Specific Trace: You can add your user ID to trace the



logs.

On the *Diagnosis Files* tab, you can check the file and trace where and what error has been occurred for your ID:



3.2 Performance Tips

3.2.1 Performance Tools for Analysis

A performance problem can become apparent in the following ways:

- A user detects that the client (computer) is slow when using the SAP GUI or user interface
- A report takes longer to run

- During high peak loads or user logins, the user interface/transaction codes are slow

Below are some analysis tools (transaction codes) that can be used to find the root cause in the application on different layers:

CRM trace tools:

- ST12: Single transaction analysis tool
- SAT: ABAP runtime analysis tool

BW/4HANA trace tools:

- ST05: SQL trace tool
- RSTT: Trace tool to measure performance of BW/4HANA queries and planning functions

UI trace tools:

- Developer tools for UI performance issues
- HttpWatch

[ST12 \[page 134\]](#)

[SAT \[page 135\]](#)

[ST05 \[page 136\]](#)

[RSTT \[page 138\]](#)

The RSTT trace tool is used for supporting, troubleshooting, and recording call sequences.

[User Interface \[page 140\]](#)

Related Information

[ST12 \[page 134\]](#)

[SAT \[page 135\]](#)

[ST05 \[page 136\]](#)

[RSTT \[page 138\]](#)

[User Interface \[page 140\]](#)

[HttpWatch](#) 

3.2.1.1 ST12

ST12 is a combination of the standard ABAP and SQL trace, that is SE30 and ST05. ST12 combines the ABAP and performance (SQL) trace into one transaction with major functional enhancements especially for the ABAP trace part. In a joint switch on/off with the performance trace, ST12 allows the ABAP trace to be activated for another user. In this way, SAP Service Engineers can trace a dialog transaction that is executed by a business user of the customer without the need for their own sample data. ABAP and performance traces can be activated on another server or even on all servers to catch incoming RFCs, for example.

The ABAP trace results are completely collected to database. For the performance trace, ST12 remembers the timeframe server, and one click navigates directly to the ST05 trace display on the correct server. Selected results from the performance trace and other findings can be saved as annotation texts to a trace analysis.

The ST12 ABAP Trace Summary quickly shows the contribution of known cost-intensive functionalities. It is also able to estimate the time contribution of certain programs.

SAP Note 2540971 (How to run a ST12 Performance Trace) is a generic Note that is used for many environments.

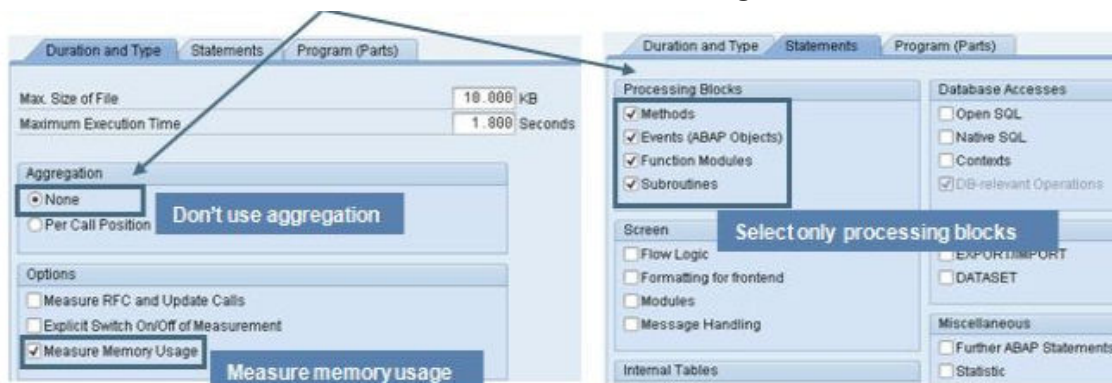
3.2.1.2 SAT

Context

SAT is a new ABAP Runtime Analysis Tool and is the successor of transaction SE30. This transaction should be used for program flow analysis. It checks the program flow and identifies particularly long runtimes. Additionally, you can analyze memory consumption problems in an ABAP application.

Procedure

1. To check the program flow, create a new measurement variant with the following parameters:
 - *Short Description*: **Load Calendar**
 - *Variant*: **Performance**
2. Click *New* and enter/select the relevant values as shown in the following screenshots:



You can now use this variant to measure the runtimes of any screen. The evaluation screen contains a number of additional tabs.

Profile	Selec...	Number	Net [microsec]	Net [%]
Runtime Measurement		1.999.476	9.213.989	100,00
Internal Processing Blocks	<input type="checkbox"/>	1.316.016	4.537.623	49,25
External Processing Blocks	<input type="checkbox"/>	14	38.278	0,42
Internal Tables	<input type="checkbox"/>	606.949	2.527.428	27,43
Data Accesses Internal	<input type="checkbox"/>	59.846	420.969	4,57
Data Accesses External	<input type="checkbox"/>	2.346	977.047	10,60
Miscellaneous	<input type="checkbox"/>	937	23.220	0,25
Runtime Analysis	<input type="checkbox"/>	2	24.202	0,26
Not Assigned	<input type="checkbox"/>	13.366	665.222	7,22

Related Information

[Tracing HTTP Requests and Other Requests with the ABAP Runtime Analysis](#)

3.2.1.3 ST05

Context

ST05 is used primarily to analyze SQL statements. It is limited to SQL analysis and does not provide an ABAP code breakdown. It supports SQL, RFC, HTTP, Enqueue, and buffered traces.

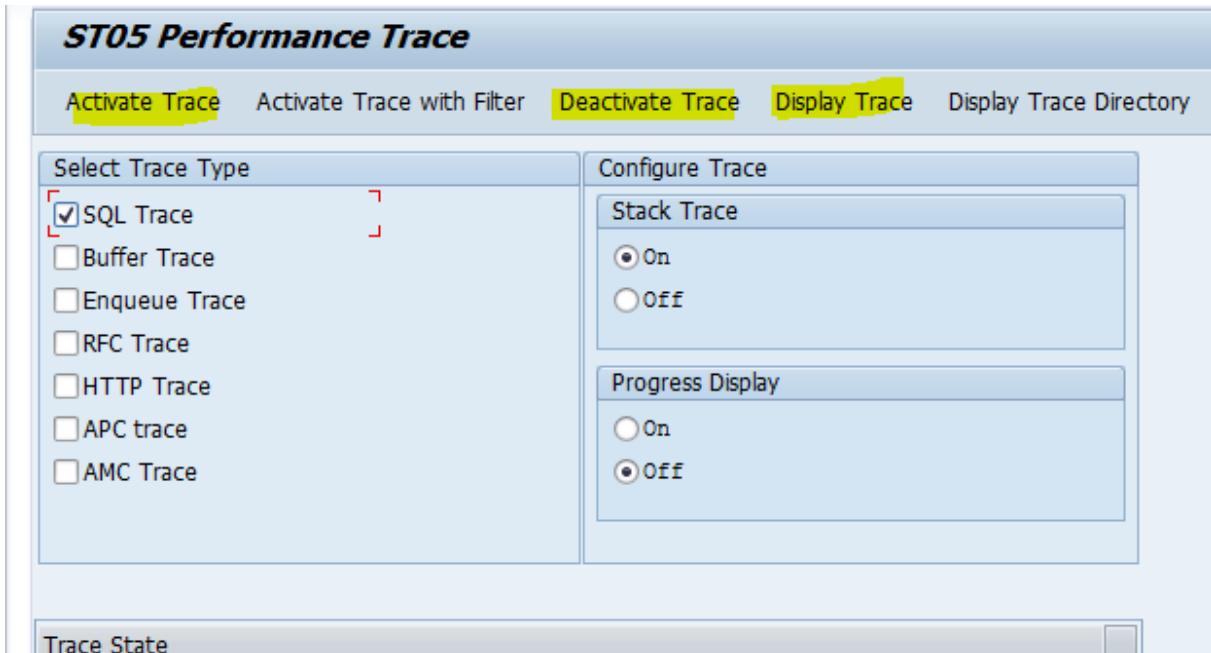
Carry out the following steps to run an SQL trace:

Procedure

1. In your BW/4HANA or CRM system, enter transaction code ST05. Make sure that your program/user interface was executed at least once, or even better, a few times, to fill the buffers and caches. Only a repeated execution provides reproducible trace results. Initial costs are not considered in this test.
2. Start the trace.
3. Execute your program/user interface steps.

- Switch off the trace. Note that only one SQL trace can be active on an application server, so always switch your trace off immediately after you are finished.
- Display the trace results.

Results



Interpretation of the Results

The SQL and buffer trace are useful for checking planning-related performance issues in BW/4HANA and CRM and to check where there is a particularly high number of DB hits.

Note that the trace can also be activated for a different user.

You can also sort the SQL statements based on duration or records to show you which runtimes are the longest.

Start Time	Duration	Records	Program Name	Object Name	Statement
	566	0			OTHER (SQL)
09:55:10.435	817	0	CL_ST05_TRACE_MAIN_M=====CP	ST05_TRACE	SELECT WHERE "MANDT" = '200' AND "INSTANCE_NAME" = 'dcwSw_WSW_11' AND "GUID" = 0x00000000000000000000000000000000
09:55:10.440	4.359	1	CL_ST05_TRACE_MAIN_M=====CP	ST05_TRACE	INSERT VALUES('200', 'CS248220', 'dcwSw_WSW_11', '20171005', '095510', 0x00000000000000000000000000000000, '00000000')
09:55:10.445	1.143	0	R_ST05_TRACE_MAIN		COMMIT WORK ON CONNECTION 0
09:55:14.315	2.832	2	SAPLRSRM_IMP_RFC_FACADE	ICFATTRIB	SELECT WHERE "ATTRIBUTE" = 'D' AND "CLIENT" = '200'
09:55:14.319	902	1	SAPLRSRM_IMP_RFC_FACADE	ABDBG_INFO	SELECT WHERE "CLIENT" = '200' AND "USERNAME" = 'CS248220'
09:55:14.320	1.114	2	SAPLRSRM_IMP_RFC_FACADE	ABDBG_BP5	SELECT WHERE "CLIENT" = '200' AND "USERNAME" = 'CS248220' ORDER BY "BP_INDEX"
09:55:14.321	600	1	SAPLRSRM_IMP_RFC_FACADE	REPOSRC	SELECT WHERE "PROGNAME" = 'CL_RSCRM_IMP_OBJECT=====CP' AND "R3STATE" = 'A'
09:55:14.322	412	1	SAPLRSRM_IMP_RFC_FACADE	REPOSRC	SELECT WHERE "PROGNAME" = 'CL_RSCRM_IMP_OBJECT=====CM012' AND "R3STATE" = 'A'
09:55:14.323	270	1	SAPLRSRM_IMP_RFC_FACADE	REPOSRC	SELECT WHERE "PROGNAME" = 'CL_RSCRM_IMP_OBJECT=====CP' AND "R3STATE" = 'A'
09:55:14.323	277	1	SAPLRSRM_IMP_RFC_FACADE	REPOSRC	SELECT WHERE "PROGNAME" = 'CL_RSCRM_IMP_OBJECT=====CM00R' AND "R3STATE" = 'A'
09:55:14.323	455	1	SAPLRSRM_IMP_RFC_FACADE	REPOSRC	SELECT WHERE "PROGNAME" = 'CL_RSCRM_IMP_OBJECT=====CP' AND "R3STATE" = 'A'

Related Information

[How to run transaction st05 to trace a program, transaction or user execution](#)

3.2.1.4 RSTT

The RSTT trace tool is used for supporting, troubleshooting, and recording call sequences.

RSTT tracing can be especially helpful while working with frontends or applications not implemented in ABAP, but that access BW/4HANA for data retrieval, planning, or similar.

The RSTT trace is very helpful in cases where a problem cannot be replicated in RSRT (*Query Monitor*) directly, but only in the frontends.

i Note

For dealing with SAP support, a test case in RSRT is requested; if this is not possible, then an RSTT trace logs the frontend function calls.

The RSTT trace is not a log capturing different statuses, but it saves the call parameter of enabled functions and BAPIs for later replay and simulation in the system. Thus, an RSTT trace is only helpful in a live system, and it makes no sense to download the RSTT traces or save them as text files. The RSTT trace is user-specific; thus, if you want to record an RSTT trace, you must know the user performing a certain activity.

In the details of the trace, you can see the sequence of recorded ABAP functions and BAPIs.

Activating Users and Recording RSTT Traces

i Note

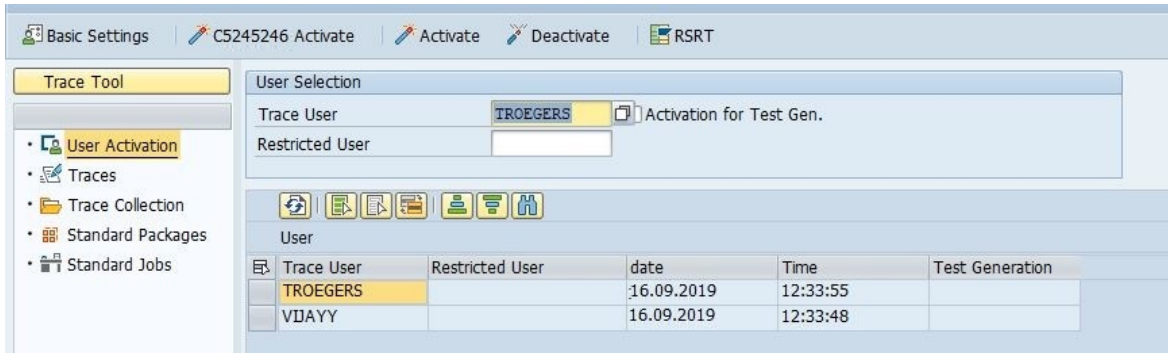
You must activate the RSTT traces before launching the planning application; otherwise, the traces are not captured.

1. In transaction RSTT, in the left navigation bar, select *Trace Tool* and click *User Activation*.
2. Select the user name of the trace user who shall be executing the frontend report or the non-ABAP application; then choose *Activate*.

Trace User	Restricted User	date	Time	Test Generation
TROEGERS		16.09.2019	06:42:59	
VJAYY		16.09.2019	06:43:07	

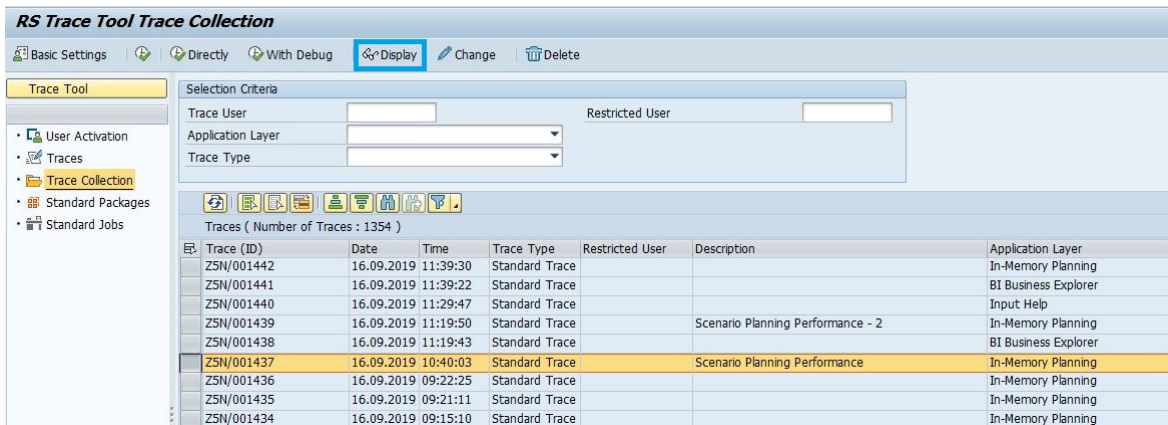
Activate RSTT Trace User

3. You can see the active users for RSTT tracing. Note that several users can be active at the same time. You can remove a user from tracing by selecting the user row and choosing *Deactivate*.



Active RSTT Trace Users

- Select *Trace Collection* in the left navigation bar to see the latest traces. With user, date, and time you can identify the latest traces. Depending on the frontend or the application session management, more than one trace may have been executed. You can double-click, or choose *Display* to see more details of the selected trace.



List of RSTT Traces

RS Trace Tool Trace Attributes Display

Basic Settings | Directly | With Debug

Trace Tool

- User Activation
- Traces
- Trace Collection
- Standard Packages
- Standard Jobs

Trace

Trace GUID: 40F2E963AE7A1ED9B68BB27C9E0AB528
Trace (ID): Z5N/001437
Description: Scenario Planning Performance

Basic Attributes | Recorded Program Objects | Checkable Program Objects | TestObjects | Sequence Descriptions

Parameters | Switch Call View

C5245246 , Z5N/001437 , 16.09.2019 , 10:40:03

Sequenc...	Item	Program Type	Program Module	Main Program	Runtime	Layer D...	Stack D...	Application Layer
1	1		RSCRM_IMP_PREPARE_SYN...		292.552	0	0	In-Memory Planning
	2		/JBPB/IMP_SET_QUERY_FIL...		152	0	0	In-Memory Planning
	3		/JBPB/IMP_SET_QUERY_FIL...		61	0	0	In-Memory Planning
	4		RSCRM_IMP_SYNCHRONIZE		37.938	0	0	In-Memory Planning
	5		RSCRM_IMP_EXEC_QUERY		3.103.133	0	0	In-Memory Planning
	6		RSCRM_IMP_PREPARE_UPD...		239	0	0	In-Memory Planning
	7		RSCRM_IMP_EXEC_QUERY_...		1.115.432	0	0	In-Memory Planning
	8		RSCRM_IMP_EXEC_QUERY_...		836.849	0	0	In-Memory Planning
	10		RSCRM_IMP_EXEC_QUERY_...		479.376	0	0	In-Memory Planning
	11		RSCRM_IMP_EXEC_QUERY		251.272	0	0	In-Memory Planning
	12		/JBPB/IMP_SET_QUERY_FIL...		61	0	0	In-Memory Planning
	13		RSCRM_IMP_EXEC_QUERY		8.549.141	0	0	In-Memory Planning
	14		RSCRM_IMP_PREPARE_UPD...		162	0	0	In-Memory Planning
	15		RSCRM_IMP_EXEC_QUERY_...		877.264	0	0	In-Memory Planning
	16		RSCRM_IMP_EXEC_QUERY		2.291.273	0	0	In-Memory Planning
	17		RSCRM_IMP_EXEC_QUERY		14.366.766	0	0	In-Memory Planning
	18		RSCRM_IMP_EXEC_QUERY		2.176.024	0	0	In-Memory Planning
	20		RSCRM_IMP_FREE		116.421	0	0	In-Memory Planning
	21		RSCRM_IMP_FREE		160.980	0	0	In-Memory Planning

Trace Details

Related Information

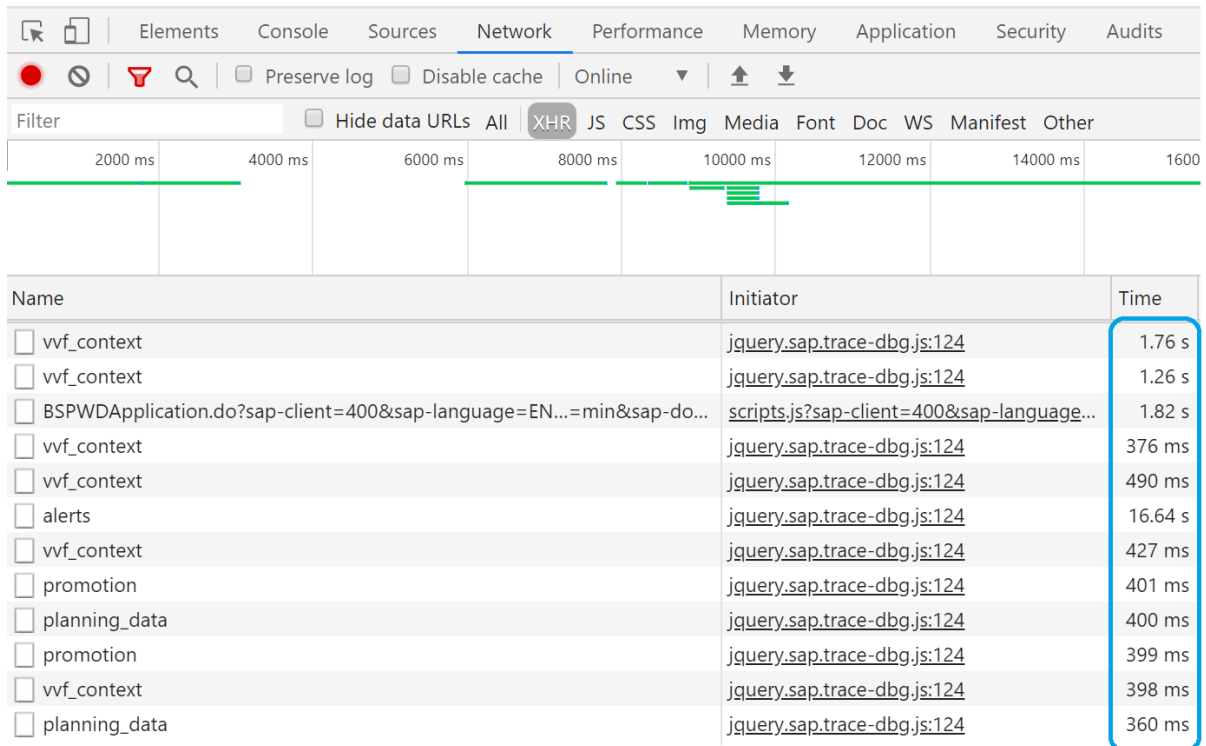
[Transaction RSTT](#)

3.2.1.5 User Interface

Check Response Times for Backend HTTP Calls

It is recommended to use the Google Chrome browser for user Interface performance analysis:

1. Press **F12** to open your browser's *Developer Tools*.
2. Go to the *Network* tab and filter the network activity by **XHR**.
3. If any HTTP request to the backend system takes more response time, you may need to further analyze that request in the backend system.

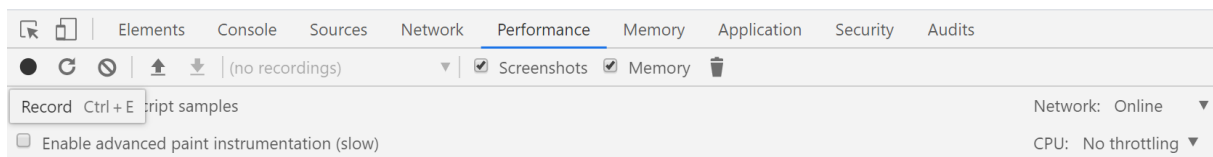


Network Activity in Google Chrome Browser

Performance Analysis Using Google Chrome Performance Tool

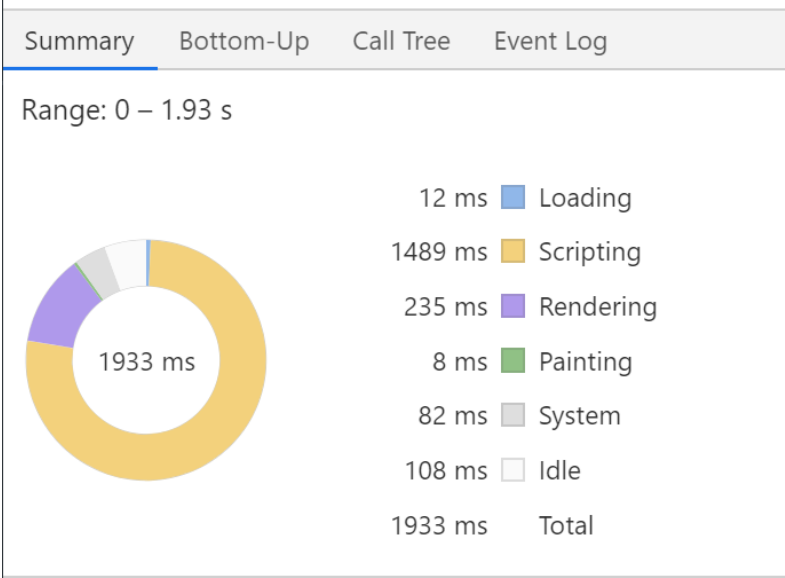
To perform advanced performance analysis, you can use the performance tool from the Google Chrome [Developer Tools](#).

1. Press **F12** to open your browser's [Developer Tools](#).
2. In the [Performance](#) tab, click the [Record](#) button immediately after performing a step (clicking a button or a link) in the UI.
3. Stop the recording after the action is completed.



Record Performance for a Specific Step in UI Through Google Chrome Performance Tool

You can check the summary of the recorded step to analyze the performance based on the amount of time taken for different activities in the browser.



Performance Summary in Google Chrome Performance Tool



For more details, you may refer [Performance Analysis Reference](#) under the *Performance* section on the [Google Developers](#) website.

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