APPLICATION HELP | PUBLIC
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SAP Customer Business Planning

SAP Trade Management 4.0 (Support Package 4)

THE BEST RUN

Content

1 SAP Customer Business Planning

Use

SAP Customer Business Planning is a functional area of the SAP Trade Management solution, which runs on SAP CRM 7.0 EhP3 and EhP4. SAP Customer Business Planning supports sales planning & budgeting, customer planning & optimization, promotion planning & optimization, and execution & settlement. The focus of SAP Customer Business Planning is customer planning & optimization. This covers account manager activities to combine volume, margin, assortment, promotion, and trade terms planning in an integrated plan that maximizes return on customer investment to proactively manage the customer throughout the year. The collaborative planning process balances non-promotional and promotional activities aligning both company and customer targets.

SAP Customer Business Planning is the central management tool for key account managers (KAMs) in the consumer products and other industries and is fast replacing the more traditional annual negotiations between retailers and suppliers, where trade terms are agreed, promotions booked, and an annual plan developed. For sales plans to be successful, a high degree of collaboration and sharing of information is required by both sides. At the same time, goals and objectives must be aligned with a view to developing a plan that will benefit both parties.

SAP Customer Business Planning is designed to close the current gaps in sales processes within the consumer products and other industries by enabling KAMs to plan and discuss in the same language as their retailers' buyers. It helps KAMs to understand the KPIs of their retailers and to identify a mutually beneficial account plan including the best promotions.

Integration

SAP Customer Business Planning is integrated in promotion planning and execution. Promotions use plan data such as baseline volumes and prices. Promotional data such as uplifts, discounts, rebates, and promotional prices are rolled up to the plan. The system also supports fixed funding as well as dynamic funding. Dynamic funding is based on the latest estimate of the approved plan. The budget displayed in the plan is aggregated from a fixed budget, which is posted to funds. The dynamic budget is calculated based on dynamic funding rates. In addition to this budget, which is used for promotions, a budget for non-promotional spend can be used in SAP Customer Business Planning. This type of budget, which is used for non-promotional spend, is not shown in funds management.

The application also features an inbound pricing interface for retrieving, from an external source, the prices and terms you want to use during customer business planning.

More Information

The BI Content for this product is available in the Configuration Guide.

Features

- Structured target setting process
- Creation of customer-specific planning product hierarchies
- Assortment planning
- Volume planning with building blocks
- Planning of draft promotions (or short-term promotions (shipment) with the simplified data model) and long-term agreements
- Customer P&L analysis
- Plan optimization functionality
- Business-friendly, easy-to-use graphical tool to plan and track annual business with trading partners
- Support for rolling forecasts
- Planning of promoted and non-promoted P&L

2 Global Functions

SAP Customer Business Planning features a number of functions that are common to all the screens in the application. These functions appear at the top of the user interface.

Responsibility Area/Plan Dropdown List

The dropdown in the top left of the screen contains a list of all the responsibility areas you're assigned to together with the plans created for the respective years. The list is sorted alphabetically based on the name of the responsibility areas. Simply click one of the plans to access it.

If the list contains a lot of entries, you can search for a specific responsibility area using the *Search* field at the top. The list is filtered as you type in the field based on the responsibility area description.

The list also contains a *Create Plan* button, which gives you a direct way of creating a new plan for the current year or any year in the future (this button only appears if you have not yet created a plan for a particular responsibility area) and an *Extend Plan* button to extend a plan by one year.

Operational Plan

The *Operational Plan* dropdown list contains all the operational plans and scenarios together with their respective versions that you've created. You can use this dropdown list to do the following:

- Search for a particular plan or scenario
- Compare operational plans, scenarios, as well as versions of a plan and scenario
- Create a new version of a plan or scenario
- Delete a version of a plan or scenario
- Set a filter to search for a plan or scenario

Mass Versioning

To carry out their monthly business planning, sales, finance, marketing, and demand planning team members require snapshots to be taken of all the customer business plans belonging to a particular sales area. These snapshots, or versions, can be reported on in monthly sales reviews. The versions are created automatically by a scheduled job that runs at specified intervals. Once created, the versions appear in the *Operational Plan* dropdown list. They're easy to recognize and find again because their names follow a standard naming scheme.

Plan Currency

Indicates the default currency used in the plan.

Search Function

You can use the *(Search)* button to search for data specific to the screen you're currently in. For example, in the *Calendar* view on the *Plan* screen, you can search for promotions that are assigned to the plan that's open.

System Messages

You can use the *(System Messages)* button to view system messages, which are used by the application to draw your attention to something. These messages can be errors, warnings, or just for information purposes. You can display a list of all your messages or just ones of a certain category. You can also get more detailed information on a particular message.

Alerts

You can display your alerts by clicking *(Alerts)*. Alerts are also displayed on the home screen of your Web UI. They indicate that an item needs your attention or that an action is still outstanding (for example, you might need to approve a promotion). Each alert entry contains the alert description, alert ID, date on which the alert was generated, priority, and assigned object (if applicable). The assigned object is also a link. Clicking on the link takes you directly to the details of the alert.

You can select individual or all alerts using the checkboxes and set them to completed after which they will disappear from the list. You can filter alerts based on year and priority.

Example

SAP Customer Business Planning can be configured to trigger an alert if two lines (key figures or a threshold value) in the P&L have a bigger deviation than a specified percentage. A new forecast run creates sell-out volume reference data that is 10% lower than the planned sell-out data. The system then creates an alert to prompt you to take action.

Fullscreen Button

When you click the *(Fullscreen)* button, the application occupies the entire screen area (the CRM navigation bar on the left also disappears). Click the button again to return it to its original size.

Attachments

If you need to store additional information on your plan from an external source, you can do this by adding an attachment by clicking the *(Attachments)* button. Click the + icon and navigate to the file you want to upload. You can sort your attachments by plan year and also search for a particular attachment.

Comments

You can use the *(Comments)* function to display, add (+), and edit comments for a particular key figure in your plan. You can also see the comments entered by other users. A search and detailed filter function are available too. In the *Profit & Loss* view, you can also access the comments from the key figure itself (appears to the right of the key figure). In this case, the *Comments* popup is filtered to display the comments for the key figure selected. You can also enter general comments for a plan that are not assigned to a particular key figure.

User Settings

The *(User Settings)* dropdown list contains the following options depending on which view is displayed:

- *Personalize*
  This option allows you to configure the user interface to suit the way you work. You can delete all of the personalization settings you've made using *Reset All Personalization*. The *Personalize* option is available in all views.
- *Manage Private Links*
  If you have created a personalized version of a report or SAC story, you can create a private link to this so that it is always loaded instead of the standard version of the report or story. This option is available in all views.
  For more information on managing private links, see Managing Private Links.
- *Personalize Product Picker*
  You can personalize the product picker by defaulting the tree or flat view as well as the hierarchy level using the L buttons. This option is available in the *Plan* and *Scenario Planning* views.
- *Add Subvariant*, *Add Variant*, *Manage Variants/Subvariants*
  These options allow you to define your own sequence and naming of header views and subviews and are available in the *Plan* view.

Related Information

Personalizing the User Interface [page 71]
Variants and Subvariants [page 45]
Creating Variants [page 47]
Creating Subvariants [page 46]
Managing Variants and Subvariants [page 48]
Creating a Job for Mass Customer Plan Versioning [page 75]
Managing Private Links
Personalizing the Retailer View [page 66]

3 Plan Overview Screen

The *Plan Overview* screen gives you an at-a-glance view of the most important data relating to your plan.

At the top of the screen, you can see the current plan year and the *(Edit)* icon for personalizing the information shown.

The main dashboard contains tiles that are grouped together according to information type, for example, promotions, reports, analyses, and so on.

Analysis tiles show the retailer targets for each buyer. They can also show internal information, such as plan versus target comparisons, as well as external data per buyer. You can customize KPIs for buyers in order to represent their respective portion of the business, for example, customer revenue can be displayed for several buyers showing just their share of the business. For more information on customizing KPIs, see Set Up KPI Monitor.

The *Budget Monitor* tile gives you an overview of the budget situation within the current plan and considers the budget for non-event spends and the budget for event spends. If you are using the simplified data model, the non-event spend data is not shown and the event spend data is only visible when you hover over the Budget Monitor.

Navigating from an Analysis Tile to the Plan Screen

When you click an analysis tile, you go directly to the *Product Tree* view on the *Plan* screen. The KPI you clicked on the *Plan Overview* screen appears in the KPI picker. If you clicked a retailer KPI, the buyer also appears in the buyer selector.

3.1 Personalizing the Plan Overview Screen

Definition

When you click *(Edit)*, you go from display to edit mode in which you can:

- Change the title of a tile by clicking it.
- Delete a group and all the tiles it contains (click *Delete*).
- Delete individual tiles in a particular group (click ⊗).
- Add tiles to a group (click + *(Tile Catalog)*).
- Add a new group (you can do this under any of the existing groups by clicking *+ Add Group*).
- Move a tile within a group or to a different group using drag & drop.

More Information

Adding a New Group to the Plan Overview Screen [page 10]

Adding New Tiles to the Plan Overview Screen [page 10]

3.1.1 Adding a New Group to the Plan Overview Screen

Procedure

1. Click ✎ *(Edit)*.
2. Go to the group underneath which you want to add your new group.
3. Click *+ Add Group*.
4. Enter the name of the new group.
5. Save your change.

You can now add tiles to your new group.

More Information

Adding New Tiles to the Plan Overview Screen [page 10]

3.1.2 Adding New Tiles to the Plan Overview Screen

1. Go to the group to which you want to add a tile.
2. Click + *(Tile Catalog)*.
3. On the *Add Tiles* screen, choose the tile you want to add by clicking the + icon underneath the tile.

> i Note
>
> You can search for specific tiles using the filter or the search function. Tiles with a checkmark (✓) are already visible on the *Plan Overview* screen.

In the *Promotions* group, each of the categories (Recent, Upcoming, and Past) shows the top three promotions by default. Each tile shows a list of the promotion IDs. When you hover over an ID, you can see details of the promotion (type, objective, and status). The ID is also a link, which when clicked takes you to the detailed promotion screen. If you need to see more promotions, click the + icon. You can customize the number of weeks for upcoming and past promotions.

4 Plan Setup Screen

Definition

The *Plan Setup* screen comprises two subscreens, *Buyer Setup* and *Planning Product Hierarchy* in which you have to carry out a number of important steps before you can start planning.

> **i Note**
>
> The planning product hierarchy can also be maintained by an administrator if the planner does not have to model plan-specific planning product hierarchies.

More Information

Buyer Setup [page 11]

Planning Product Hierarchy [page 12]

4.1 Buyer Setup

Prerequisites

A responsibility area has been created for you.

Context

Buyers only need to be set up if this is required by your company.

Procedure

1. On the *Buyer Setup* screen, click + *(Create New Buyer)* on the left.
2. Enter the first and last name as well as the contact details of your buyer.
3. Under *Set Buyer's Targets*, you can:

a. Add external targets by clicking + *(Add)* next to *Copy From Previous Year*.
b. Enter the relevant values for each of the targets.
c. Copy the targets from the previous year.
d. Delete any targets you don't need by clicking the ✕ icon.

4. Save your entries.

> **i Note**
>
> You can edit any of the data you've entered for a buyer at any time. The buyers that have been created are displayed on the left. Buyer targets and comparisons between them and plan data can be shown in the KPI Monitor in the subviews of the *Plan* screen.

Related Information

Creating a Root Responsibility Area (Company Level)
Creating a Subordinate Responsibility Area

4.2 Planning Product Hierarchy

Definition

The hierarchy of product categories and products in your company's ERP system might not match the hierarchy that your buyer uses.

Many customers don't want to have a different planning product hierarchy (PPH) for each retailer. The ECC product hierarchy, however, is not suitable for planning. In this case, customers create a central planning product hierarchy that is used for each plan.

By creating a planning product hierarchy, you can speak the same language as your buyer. In other words, you can combine various product categories and products from your ERP pricing hierarchy into a product hierarchy that matches your buyer's. This can help you present your plan more effectively to your buyer.

Innovation Products

Consumer goods manufacturers are continually introducing new products to their line-ups. This is a very important process because a great deal of profit is generated from new products. The process of launching new products takes a long time and involves a lot of planning.

The master data for the new product is usually not created in the ERP system until just before the launch date; there are many valid reasons for this. During the phase before the new product is entered in the system, however, the KAM needs to plan for increased volumes, spends, and promotions. This is normally achieved using innovation products. Once the master data has been created, the innovation product is replaced with the real master data.

Innovation products are created purely for planning purposes and cannot be ordered. The best way to look at them is as an empty shell for future products. Innovation products are identified by means of a special icon ( ) so that they can be recognized as such in the planning product hierarchy.

Automatic Updates to the Planning Product Hierarchy

If a new product category is added to the ECC hierarchy in CRM, it is also added automatically to the planning product hierarchy. For this to happen, the node above must be assigned 1:1 to the planning product hierarchy (indicated by "ECC" in the planning product hierarchy). If the application has been customized to do so, a deferred alert appears in your alert inbox notifying you that a new product category has been added. Once you have viewed the alert, set it to complete.

More Information

Creating a Planning Product Hierarchy [page 13]

Creating Multiple Planning Product Hierarchies [page 15]

Creating a Planning Product Hierarchy from a Product Group [page 15]

4.2.1 Creating a Planning Product Hierarchy

Use

The *Planning Product Hierarchy* subscreen shows the template for creating your planning product hierarchy on the left along with the ECC hierarchy on the right.

Procedure

To create a planning product hierarchy (PPH), proceed as follows:

1. On the *Planning Product Hierarchy* screen, click + *(Add)*.
2. Enter a title for your PPH, choose the number of levels (a minimum of 2 but no more than 7) and click *Create*.

   > **Note**
   >
   > The levels you created then appear on the left of the screen. The lowest level is always the product level. The ECC hierarchy on the right contains the product categories assigned in the responsibility area. You can change the number of levels in your PPH at any time by clicking ✎ to the right of *# Levels*.

3. To add a node to any level of the PPH, click + *(Add Node)*. You can delete the node again by clicking the ✕ icon.
4. Enter a name for the node by clicking the empty input field. You can change the name by clicking the current name.

> **Note**
>
> Any product categories you drag from the ECC hierarchy will already have a name which you can change if you need to.

5. Drag categories and products from the ECC hierarchy to the levels in your PPH.
   You can:
   - Add product categories directly from the ECC hierarchy.
   - Add products to these product categories from other categories in the ECC hierarchy or remove products from these.
   - Drag & drop partially-assigned ECC nodes.
6. Assign a buyer to the PPH by clicking *(New Buyer)*.
   Once you've assigned a buyer, the icon turns blue. All of the subnodes at this level are assigned the same buyer and also turn blue. You can unassign the buyer by clicking the buyer icon again. If you do so, the icon turns black again. Once a buyer has been assigned to a node, you cannot change it for child nodes.
7. When you're satisfied with the structure of your PPH, change its status from *Inactive* to *Active* and click *Save*.
   Your PPH is then replicated to the BW system. You can make changes to an active PPH. If you do make any changes, "ECC" appears in the PPH.

Display Features

- The ECC hierarchy on the right of the screen expands when you move your mouse over it and shrinks when not in use.
- You can move to the left and right in the table view by hovering your mouse over the arrow icons.
- Position your cursor on one of the ECC hierarchy rings and turn your mouse wheel to rotate the ring back and forth to see the product categories/products in the non-visible areas of the ring.
- The *Upload From Listing* option, which you access by clicking *(More)* in the bottom right of the screen, has the same function as on the *Assortment* screen and uploads listing information from the CRM system.

  > **Note**
  >
  > In certain UI5 versions, the *More* icon may appear like this: .

  Once you've uploaded the listing information, the *Show* button in the center of the ECC hierarchy displays this information in the hierarchy. If you make any changes to the assortment on the *Assortment* screen, the *Show* button changes to *Refresh* and you can then update the information in the ECC hierarchy. The *Unassigned Items* option in the dropdown in the center of the ECC hierarchy filters and shows the products that have not been listed at all.
- When you drag a product category or product from the ECC hierarchy to your PPH, the system tells you where you can drop it on the PPH (**No Dropping** or **Dropping** and an explanatory text are displayed).

More Information

Creating Multiple Planning Product Hierarchies [page 15]

Creating a Planning Product Hierarchy from a Product Group [page 15]

Assortment [page 17]

4.2.2 Creating Multiple Planning Product Hierarchies

Context

Multiple PPHs give you different views of your plan and let you:

- Create more than one PPH for each responsibility area or plan.
- Assign a name for each PPH so that you can decide which one you want to display on the *Assortment* screen as well as in the *Profit & Loss*, *Product Tree*, and *Summary* views on the *Plan* screen.

> **i Note**
>
> You can change the name of a PPH by clicking the title field. The icon appears to show that you're in edit mode.

- Specify a default PPH for each planning year, which is used whenever the plan for that year is loaded, by clicking *(Default Planning Product Hierarchy)* to the right of the title field.

Procedure

1. On the *Planning Product Hierarchy* screen, choose one of the following options:
   - Create a new, additional PPH from scratch by clicking + *(Add)* to the right of the title field.
   - Copy an existing PPH by choosing the PPH you want to copy from the dropdown list and clicking *(Copy)* to the right of the + *(Add)* icon.
2. Continue as follows:
   - If you're creating a new, additional PPH, enter the title of the PPH and choose the number of levels. Your new PPH will not contain any nodes.
   - If you're copying a PPH, enter a name for the PPH copy and edit it as required. The nodes from the original PPH are copied too.
   - If you're creating a copy of a PPH from a previous year, you can select it in the views of the *Plan* screen or assign it as a default PPH for a particular year.

4.2.3 Creating a Planning Product Hierarchy from a Product Group

If you work with product groups and have assigned products to these, you can create a planning product hierarchy directly on the basis of these groups.

Prerequisites

You have created product groups and assigned products to these in the master data.

Procedure

1. On the *Planning Product Hierarchy* screen, click *(More)* , or in certain UI5 versions, in the bottom right of the screen and choose *Create PPH from Product Group*.

> **i Note**
>
> The system fetches all of the product groups and products assigned to these from the back-end system and creates a two-level product hierarchy. Apart from changing the title, you can't make any other changes to this hierarchy, though. The system shows you that the hierarchy is read only because the options for setting the buyer and changing the number of hierarchy levels are grayed out and the hierarchy is set to *Active*. Changes to the hierarchy are only possible in a copy of it.
>
> Products that are assigned to a product group appear in the respective node, whereas products that have not been assigned to a product group appear in a node called "No Product Group". You can move these products to a different node by setting the relevant product group value. For more information on defining product groups, see Customizing for *Customer Relationship Management* under *Master Data* > *Products* > *Special Settings for Sales Operations* > *Define Product Groups*. For more information on assigning product groups, see Customizing for *Customer Relationship Management* under *Trade Promotion Management* > *Basic Data* > *Products* > *Assign Product Groups*.

2. Save the hierarchy.

> **i Note**
>
> If any changes are made in the back-end system, you can update the hierarchy by choosing *Update PPH from Product Group* (the name of the *Create PPH from Product Group* option changes to this after you've created and saved your hierarchy).

5 Assortment

Definition

Usually, not all products are sold to all retailers. This is where assortments come in. Creating assortments is a way of limiting what can be sold, when, and to whom. The products in the assortment are valid for a certain time. Assortments are used for planning and can be built from CRM listing data.

As a key account manager, you can maintain assortments for your various accounts. The assortments are then checked in all draft trade promotions you create. You can't create two assortments for the same customer and shop format (a shop format is a structure of certain customers that is not modeled as a separate customer hierarchy node but is planned separately. For example, hypermarkets and supermarkets).

Assortment planning involves selecting the products that are relevant for planning. The products you select were either uploaded from a source, such as a CRM listing, or were added manually directly in the application.

Elements of the Assortment Screen

Element	Description
KPI Monitor/Buyer Selector	Provides an overview of the key performance indicators for the current plan, prompting you to take a more detailed look at certain areas or carry out any required actions. Three different types of KPI can be displayed: • KPIs that compare target values with plan values • KPIs that show calculated plan values • KPIs that compare plan values with values from different years (for example, revenue growth) The KPI Monitor also features a Buyer Selector with which you can scroll through and select from the buyers. If multiple buyers are assigned to a plan, selecting one of the buyers will display only those KPIs specific to that buyer's responsibility area. Similarly, the promotions displayed in the calendar are filtered to show the promotions assigned to the buyer selected.

Element	Description
Time Selector	The time selector, or time control, is at the top of the screen and filters based on fixed-date ranges (quarters and years). It allows you to select the desired time range for your planning data, to navigate to a different fiscal year, and to enhance the plan by another year. If you want to define the exact dates of the period to be displayed, use the time filter (see **Period Shown** function). The time range displayed by the time selector is very flexible and is based on the periods and their durations defined in Customizing. A period is based on months. For example, durations of varying lengths can be assigned as long as these add up to 12. So you could have 3 periods with 4, 2, and 6 months respectively. The start of the first period is always the start date of your plan. When you click on a quarter or month label in the calendar, the period shown for your assortment is defaulted to the relevant quarter or month. The fiscal year is divided up into three time periods: • Actual period Represents data from the previous months. Sell-in and sell-out data can be used as a source for this. • Short-term period Represents periods in the near future starting from the current date up until a configurable number of months. Planning is detailed within this period. The short-term period always ends at the end of a month and is defined as today + #months (the number of months is defined in Customizing). • Long-term period Represents periods further in the future. Planning takes place at a high level and promotional activities are represented by draft and detailed promotions as well as long-term agreements. The long-term period starts at the end of the short-term period and continues until the end of the plan. You can choose between two calendars in the time selector: • Internal calendar Calendar format (for example, the start and end date of a year, months/week format or fiscal calendar) used by the manufacturer. • Retailer calendar

Element	Description
	Calendar format (for example, the start and end date of a year, months/week format or fiscal calendar) used by the retailer.
Budget Monitor	Gives you an overview of the budget situation within the current plan and considers two different types of budget: • Budget for non-event spend: This is separate fund intended to support non-event-related expenses, for example the slotting process for shipping a product to a retailer and placing it on the store shelf. Slotting fees are typically not part of the event budget. The budget is interfaced into the system and non-event trade terms consume from this budget. **i Note** If you are using the simplified data model, the non-event spend data is not shown. • Budget for event spend: This is the promotional budget allocated to the sales team which is used to plan and fund events that are related to promotions. The budget comes from initial deposits to funds that belong to the plan (fixed budget) and/or from dynamic fund calculation based on a latest estimate of the approved version.
Upload (*Upload From Listing* button)	You use this button to upload a listing to your assortment from a source like a CRM listing.
Product Types	You use this dropdown list like a filter to see just a certain type of product. You can choose from the following options: • All Products When you choose this option, the application displays all products belonging to the node selected in the tree. • Listed This option shows you all the products that are listed in your assortment. These are the products you've uploaded from a listing from another source as well as the ones you added manually. • Not Listed Here, you can see the products that have been intentionally excluded from the assortment. There can be different reasons for this. Maybe you're selling the product to a different retailer or you're not allowed to sell it in a particular country because of legal restrictions.

Element	Description
Period Shown	You can use this function to set the period you want to see. The normal setting is for all years. Click the calendar to define a specific period. Just enter the start and end dates and click *Apply*. To go back to the normal setting of all years, click ⊗ *(Reset)* on the right.
Bar Chart View ()	The bar chart view of the assortment shows the listed and delisted products from the planning product hierarchy. The time period from which the products are displayed can be customized. You can also use the *Product Types* and *Period Shown* options as filters. The bar chart view shows the listing periods in the form of time bars. The start and end dates are displayed when you move your mouse over the bar. You can also display the listing periods by clicking *More*. Changes you make in the bar chart view are replicated automatically to the grid view.
Grid View ()	The grid view of the assortment shows the same information as the bar chart view but in the form of a table. Changes you make in the grid view are replicated automatically to the bar chart view.
Attributes ()	You can assign attributes such as validity date, product brand, color and so on to your products. You can use this function to assign attributes (which are defined in Customizing) to a single product or to multiple products. You can even copy some or all of the attributes assigned to a particular product to some or all of your other products using *Copy/ Paste Selected*.
Search ()	You can use this function to filter the list of products based on their descriptions.
Filter ()	You can filter the view below according to one or more specific products.
List/Delist	In this dropdown, you can tell the application that you want to list or delist the selected product(s). When you select a product that is not listed (Product not Listed) and choose *List Selected*, a calendar appears in which you can set the start and end dates for the listing period.

More Information

Maintaining an Assortment [page 21]

5.1 Maintaining an Assortment

Prerequisites

- You've created your planning product hierarchy on the *Planning Product Hierarchy* screen.
- If you want to work with products from a listing from another source, this listing has been created for you, for example, in a CRM system.
- If you work with product groups and assigned products, you have created your two-level hierarchy.

Procedure

To maintain an assortment, proceed as follows:

1. Go to the *Assortment* screen.
2. If you're working with a listing from another source, click *Upload From Listing* to import the data from the listing. The products uploaded are displayed with their predefined listing periods in gray in the bar chart view or black in the grid view.

   > **i Note**
   >
   > Listing periods that you've added manually do not change (they are simply merged). The listings for the entire account hierarchy path are retrieved and the listing periods for these are merged and updated to the assortment.

3. Choose whether you want to work in the bar chart or grid view. Whichever view you choose, the data you enter is replicated automatically to the other view.
4. Expand your planning product hierarchy on the left of the screen to display the products you want to add to your assortment and to create the assortment periods for these (these are the periods during which the products are available for planning).
5. Select the checkbox on the left of the product to add it to your assortment.
6. To create a listing period, click + *(Add)* under *Actions* and choose the start and end dates in the calendar that appears. In the bar chart view, the listing period you've created is represented by a blue time bar (dates appear when you hover over the bar with the mouse) and in the grid view, it's represented by blue dates. The color blue shows that the product was added manually.
7. To create additional listing periods for the same product, repeat the step above.
8. Continue in the same way for the other products and save your assortment.

   > **i Note**
   >
   > Any changes you make to your assortment later on are synchronized to the plan for the current year when you save the assortment.

9. Optional step: Assign attributes to your products.

Changing Listing Periods

Bar chart view:

To change the listing period of a manually added product in the bar chart view, click the time bar itself or click *More* next to the time bar. Click the date(s) you want to change and save your changes. You can also delete a listing period here.

Grid view:

To change the listing period of a manually added product in the grid view, click the date(s) you want to change and save your changes.

In both views, you can also change the listing periods for products uploaded from a listing from another source. The color of the listing period then changes to blue because the application now regards the product as having been added manually. It's important to remember that this change is not replicated to the source system.

Deleting Listing Periods

In the bar chart and grid views, you can delete a listing period by clicking 🗑 *(Delete)*. Note that if there is more than one listing period for a product, all the listing periods are deleted when you do this. If you need to delete just one specific listing period, go to the bar chart view, click *More* and delete the relevant period.

You can't delete listing periods that have a start and end date in the past because they're now over. This is also not possible for listing periods that have a start date in the past and an end date in the future because they've already started. With these listing periods, though, you can still change the end date because it's in the future. In other words, the only listing periods you can delete are those that have a start and end date in the future.

Delisting Products

A product is delisted automatically once you have deleted all of the listing periods for it. This is indicated in the bar chart view by an empty time bar, and in the grid view by 'Product not Listed' in the *Validity* column. You can also delist one, several, or all products without having to delete their listing period(s) first by selecting the products and choosing *Delist Selected* in the *List/Delist* dropdown.

More Information

Assigning Attributes to Products [page 22]

5.1.1 Assigning Attributes to Products

Use

There are three scenarios for assigning attributes to a product.

Procedure

Assign an attribute to a single product

1. On the *Assortment* screen, click *(Attributes)*.
2. Select the relevant product checkbox on the left.
3. Click the attribute field and make the necessary entry.
4. Repeat this procedure for the other attributes.

Assign an attribute to multiple products

1. Click *(Attributes)*.
2. Select the relevant product checkboxes on the left.
3. Make the necessary entry for the attribute for the first product and press `Enter`. The attribute will then be copied to the other products selected.
4. Repeat this procedure for the other attributes you want to assign.

Copy attributes of a particular product to another product

1. Click *(Attributes)*.
2. Select the product whose attributes you want to copy.
3. Click *Copy/Paste Selected*.
4. Select the attribute(s) you want to copy and click *Copy Selected*.
5. Select the product(s) to which the attributes are to be pasted and click *Save*.

6 Plan Screen

The *Plan* screen is the main screen in the SAP Customer Business Planning application. You use it to:

- Review baseline data (volume, prices, and discounts) as well as additional data in Profit & Loss (RSP, COGS)
- Plan baseline data for future periods (volume and value)
- Create and edit promotions
- Review the impact of promotions
- Review latest estimates as well as target versus plan data
- Monitor budgets as well as create promotions and scenarios

Elements of the Plan Screen

Element	Description
Plan View Selector	Planning data is displayed in four different views: • The *Calendar* view (Calendar View [page 25]) displays promotional activities and marketing events. • The *Profit & Loss* view (Profit & Loss View [page 33]) shows the data of a certain node in the planning product hierarchy. • The *Product Tree* view (Product Tree View [page 38]) shows the data of a certain key figure. • The *Summary* view (Summary View [page 40]) shows the plan data for a certain period.
KPI Monitor/Buyer Selector	See **Elements of the Assortment Screen** in Assortment [page 17].

Element	Description
Time Selector	For general information on the time selector, see **Elements of the Assortment Screen** in Assortment [page 17]. In the *Plan* view (*Calendar*, *Profit & Loss*, and *Product Tree* subviews), when you click on a quarter, a weekly view of the quarter is displayed. If the first and/or last week of the quarter is a split week, only that portion is displayed that belongs to the quarter. When you click on a month, a weekly view of the month is displayed. If the first and/or last week of the month is a split week, only that portion is displayed that belongs to the month. The label of each week can be configured. Either the week number (for example CW21) or the date of the first day of this week (w/c May 21) can be used as a label.
Budget Monitor	See **Elements of the Assortment Screen** in Assortment [page 17].

6.1 Calendar View

You use the *Calendar* view to plan draft and detailed promotions as well as long-term agreements for your product categories and products. The promotions you've created are displayed in the main calendar screen. You can also display a split screen that contains marketing events you may have planned. This enables you to align your promotions more easily with your planned campaigns.

Elements of the Calendar View

Element	Description
Product	The planning product hierarchy level or product you choose here in the product picker tells the application which promotions and events you want to see in the calendar underneath. The root node is always defaulted, but you can navigate down through your planning product hierarchy to product category or product level. All promotions are shown that have at least one product of the selected category assigned. The product picker allows you to search for products and to display detailed information on them. In the *Select Products* dropdown, you choose the planning product hierarchy you want to display below. The tree view displays the product categories and products in a hierarchy. You can expand and collapse the planning product hierarchy, level by level, using the level selectors (L1, L2, L3, and so on). Alternatively, you can choose the flat list view so that only the nodes and associated data of the level you choose with the relevant L button are visible. The product attributes in the columns to the right of the products contain important information such as the product ID, category description, category ID, and so on. The contents of each column can be sorted in ascending and descending order, and filtered if more than one product is displayed. You can configure which standard attributes are displayed here and define your own. You do this in Customizing for Customer Relationship Management under *Trade Management* > *General Settings* > *Product Picker* > *Maintain Product Picker Attribute Profiles*. In the global search field (🔍), you can enter a string and search for this in the hierarchy and attribute columns.
More Options	You can choose to display the sell-in period and/or HQ promotions as well as filter your promotions by type or status.

Element	Description
Split Calendar	You can show and hide the split calendar using the ON/OFF toggle switch. You can filter by marketing event or trade promotion. If you choose to filter by trade promotion, you can also select the promotion year (the promotion calendar of a different year is shown). Displaying your marketing events in the split calendar allows you to better align your planned promotions with these events. The Business Add-In *Determine Marketing Events* enables you to control the marketing events displayed in the split calendar. If you split the calendar according to promotion year, you can show a year-over-year representation. This enables you to see the promotions you executed from a previous year, evaluate these, and maybe decide to reuse a successful promotion by dragging it over to the current planning cycle. This initiates copying of the promotion from one year to a new planning year. Once you've copied the promotion, you can review it with regard to dates, volumes, and spends.
Filter	You can choose to filter by trade promotion ID, trade promotion description, trade promotion type, trade promotion progress as well as sell-out and sell-in period. The fields to the right adapt in line with your selection allowing you to make the necessary entries. You can add additional filters by clicking + *(Add New Line)*.
Zoom (🔍)	The vertical zoom function allows you to view the calendar in greater detail. This is particularly useful as some responsibility areas may contain a large number of promotions, which are difficult to read on the screen. When you hover over a promotion in the calendar, detailed information on the promotion appears in a tooltip window. When you click 🔍 *(Zoom)*, this information appears on the promotion bar itself.

Element	Description
Add Promotion	This button gives you a direct way of creating a draft/ detailed promotion or a long-term agreement. You also have the option of creating a promotion from a template. The *Add Other Promotion* option allows you to assign promotions to the plan that were created outside the plan. For a promotion to be listed for selection: • The promotion date must be within the same year as that of the plan • The promotion should have products that are part of the plan • The promotion was created on the same customer hierarchy node as that of the plan or any successor account hierarchy (in other words, the account hierarchies below the plan's account hierarchy) To be able to assign a promotion to the plan, the assortment for the products must already exist in the promotion.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Promotion table (fast entry)</td><td>
You can open the editable promotion table by clicking on the slider on the right of the screen. This table offers you a fast and easy way of creating a new promotion (+) and entering your planning data, including selecting a tactic and the required products. You can also edit the promotions you have already created.
Elements of the table:

Number and type of promotions
In the top left of the promotion fast entry table, you can see the total number of promotions and the number of promotions per type. If you are using the simplified data model, this information and the promotions listed in the table reflect any selections you made in the product picker and time selector. In other words, only those promotions are displayed that match the filter criteria you selected.
Create variant
You can save frequently-used filters and personalization settings as a variant to avoid having to make the settings repeatedly. Standard appears on the dropdown if you haven't yet created a variant. When you create a variant, you can specify that it is to be set as default whenever you open the promotion fast entry table.
<blockquote> i Note The variants you create on the Plan screen can only be used here and are not copied over to the Scenario Planning screen (and vice versa). </blockquote>
Once you've created your variant and saved it, you can apply further temporary filters to it. These temporary filters remain in place while you're working in the same screen. But if you exit this screen and go to a different one, the temporary filters won't be saved. When you go back to the first screen, your default variant and the filters it includes is applied again but not with the temporary filters you added on top.
<blockquote> i Note If you change any data on the screen, you must save these changes before you can set your temporary filters or change the variant currently applied. If you don't save them, the system displays an error. </blockquote>

</td></tr>
</table>

Element	Description
	You can manage the variants you've created. For example, you can delete variants and, if you've created several of them, you can choose which one you want to set as default. • Search () If you know a specific item of information relating to a promotion, such as the trade promotion ID or product name, you can search for this using the *Search* field. To cancel your search and display all of your promotions again, click ⊗ in the *Search* field. **i Note** The trade promotion ID is displayed as a link, which, when clicked, takes you directly to the trade promotion details in the CRM system. • Filter Promotions () Search for a specific promotion based on selectable criteria (promotion ID/description/type, status, employee responsible, product, planning account, start/end dates for sell-in/sell-out, tactic, causal group, funds plan, sales organization, distribution channel, and division). The filter criteria shown depend on your Customizing settings. • Create Promotion (+) This is a fast and easy way of creating a new promotion (see **Fast Promotion Entry** in Carrying Out Promotion Planning [page 50]). • Show All Spends () This option is used to display all of the trend spends for the promotions in the table. • Bulk Actions Allow you to perform mass copy (with a time shift, if required), mass change, and mass roll-in (not available with the simplified data model) operations on promotions. • Select Columns to Display () You can choose which columns you want to see in the table and the order in which they appear. Functions available in the promotion rows: • The *Actions* column contains functions for copying () and deleteing () promotions as well as deriving () a detailed promotion from a draft promotion. • *ID/Description*

Element	Description
	Clicking on the link displayed in the *ID/Description* column takes you directly to the detailed promotion screen where you can enter further data. • *Type* Indicates the type of promotion, for example, draft promotion, detailed promotion, or long-term agreement. • *Customer* The picker (⧉) in this column allows you to choose a different customer. • *Status* Indicates the status of your promotion (for example, *New*, *Draft*, *Released* and so on) and allows you to choose the next status in the dropdown list. • *Sell-Out Start/End Date* and *Sell-In Start/End Date* The sell-out dates indicate when the promotion is active in the store. The sell-in dates represent the period during which the discounts normally apply. Products are ordered during the sell-in range in order to benefit from a better price. As it takes time from order placement to the products being on the shelf, the sell-in period starts before the agreed start time of the promotion in the store (sell-out period). • *Objective* Select the relevant objective here. The following objectives are delivered with the standard solution: ○ New Product Introduction ○ Drive Volume ○ Drive Share ○ Trial ○ Competitive Response • *Tactic* Select the relevant tactic here. You can only select a tactic for a draft or detailed promotion but not for a long-term agreement. Depending on your Customizing settings, the *Tactic* column displays either the legacy tactic field or the *Tactics* popup The following tactics are delivered with the standard solution:. ○ Display & TPR ○ Feature Ad & Coupon ○ Feature & Display ○ Feature & Multibuy ○ Feature & Display & TPR ○ TPR Only • *Product*

Element	Description
	The product picker (⧉) allows you to search for products and to display detailed information on them. In the *Select Products* dropdown, you choose the planning product hierarchy you want to display below. The tree view displays the product categories and products in a hierarchy. You can expand and collapse the planning product hierarchy, level by level, using the level selectors (L1, L2, L3, and so on). Checkboxes are displayed to the left of the product categories and products. Select the checkboxes of the products you require and choose *Selected* to see just those products. This is helpful if you are dealing with a large number of products. Alternatively, you can choose the flat list view so that only the nodes and associated data of the level you choose with the relevant L button are visible. The product attributes in the columns to the right of the products contain important information such as the product ID, category description, category ID, and so on. The contents of each column can be sorted in ascending and descending order, and filtered if more than one product is displayed. You can configure which standard attributes are displayed here and define your own. You do this in Customizing for Customer Relationship Management under *Trade Management* > *General Settings* > *Product Picker* > *Maintain Product Picker Attribute Profiles*. In the global search field (🔍), you can enter a string and search for this in the hierarchy and attribute columns. • Column Grouping Feature To keep the columns for the trade spends in the table to a manageable number, a grouping concept combines the key figures assigned to the various trade spends. The key figures can be edited separately in a popup and the total of these is displayed in the column field for the relevant trade spend. • Plan/Promotion Locking If you are working with the simplified data model, you can switch this function on and off by making the appropriate Customizing setting. When the function is switched off: ◦ Promotions are rolled up automatically to the plan upon save.

Element	Description

	○ When a user accesses the plan, all the promotions in the plan are locked and cannot be edited by other users.
	○ When a user navigates to the detailed promotion screen via the landing page, the plan of this promotion and all the other promotions in this plan are locked.
	When the function is switched on:
	○ The impact of the promotions is rolled up because this is stored in the staging table. The subtotals in the plan that require promotional data (such as uplift, trade spends) are not updated, for example the GSV.
	○ Different users can edit different promotions in the same plan at the same time.
	○ The promotion fast entry table can be edited if it does not contain locked promotions.
	○ Promotions that are shown as editable in the promotion fast entry table are locked on the landing page and vice versa.
	○ A batch process can be used to update the plan with promotion data:
	  ○ The plan is only updated if it is unlocked
	  ○ The batch process can be scheduled to run on a permanent basis

Recalculate	Use this button to update any data you've modified. All calculations in the plan and promotions are performed.

6.2 Profit & Loss View

This is the central view where you carry out your planning activities. It contains volume as well as pricing information and is where all the KPIs relevant for planning and review processes are calculated.

Elements of the Profit & Loss View

Element	Description
Product	This opens the product picker in which you can choose the products. For more information, see **Elements of the Calendar View** in Calendar View [page 25].

Display	This option switches the promotion power on and off. You can display promotion power indicators in the *Profit & Loss* view that reflect the amount of impact promotions have for a selected timeframe and selected product category/product.
	
	This enables you to quickly identify any significant promotion impact in the plan in order to review the promotions that create this impact. The following indicators are delivered with the standard solution:
	
	• Uplift volume in relation to total sell-in volume
	  ○ >= 25% - 1 quarter filled
	  ○ >= 40% - 2 quarters filled
	  ○ >= 50% - 3 quarters filled
	  ○ >= 60% - completely filled
	• Promotion spend in relation to list price
	  ○ >= 10% - 1 quarter filled
	  ○ >= 20% - 2 quarters filled
	  ○ >= 30% - 3 quarters filled
	  ○ >= 40% - completely filled
	
	Promotion power is shown on the user interface by means of a colored circle that is filled according to the impact of the promotion. The indicators and thresholds can be defined in BW queries.

Element	Description
Units	You can show your planning data in trading units (TU), consumer units (CU), and normalized units (NU). • Trading unit A unit that is sold by the manufacturer to the retailer. Trading units are packages that consist of consumer units. For example, a trading unit could consist of a box with twelve bottles of shampoo. • Consumer unit A single unit sold from the retailer to the consumer. For example, one bottle of shampoo. • Normalized unit A single unifying unit of measure across all the products of a consumer product manufacturer within a given sales area. Depending on the products produced, this is normally a unit of mass (for example, kg, lb), volume (for example, l, gal), or revenue (for example, USD, EUR – volume * list price). The NU can, therefore, be any unit of measure to which all of the products in a given sales area can be converted. The NU helps to show how the plan relates to defined sales targets. Switching between the TU and NU identifies any action needed at TU level to keep on track at NU level. The NU is also a valuable measure of growth across the entire product portfolio. With the exisiting data model, the TU view and CU view can be edited. The NU view is display only. With the simplified data model, only the TU view can be edited. This three-unit approach provides a flexible and dynamic way of mapping different units of measure and the conversions between them, where the base UoM, sales UoM, or a specified sequence of alternative UoMs, as defined in the master data, can serve as a basis for this. Complex profiles for each of the unit types (TU/CU/NU) can be defined and mapped to a sales area for this purpose. As a result of this approach, multiple units of measure, providing these have been defined, can be displayed in the TU and CU views for a particular product. An asterisk is used on the UI to show that multiple units of measure are available for planning. This is because it is not possible to aggregate across different units. To show the individual units, simply click on > for the KPI in question. Asterisks are used for this purpose consistently across the application. **Sales BOMs**

Element	Description
	Different sales BOM types are used to model the key Trade Management items multipack, mixed pack, and display pallet. The challenge is to model the impact on total volume at consumer unit level, irrespective of how much volume is being promoted through multipacks, mixed packs, or display pallets. SAP Customer Business Planning enables volume to be entered in trading units at the multipack, mixed-pack, and display-pallet level of the planning hierarchical structure and for the component-level CU volume to be calculated. It is also possible to switch to the CU view showing all of the volume. With the item category group ERLA, rebates and discounts can be entered at the header level of the multipack, mixed pack, or display pallet in trading units. The rebate and discount amounts can be calculated in consumer units and be disaggregated to the consumer-unit component level. BOM components can only be planned in the TU view but not in the CU view (display only). This is to ensure that the referential integrity between the BOM and its components is maintained.

Element	Description
Comparison Data	This function helps you carry out your planning by displaying a second data source (which cannot be edited) with which you can compare your latest estimate (LE) data. You can only change the data in the LE row (if the key figure can be edited at all). Any data you change in this row is copied to the plan data. The LE combines data from the actuals period as well as the short-term and long-term periods. The drop-down list contains the following options: • Latest Estimate vs Plan This option compares the latest estimates with the data entered in the current plan. • Latest Estimate vs Previous Year This option compares the latest estimates of the current planning year with those of the previous year. You can't edit data that belongs to the previous year. If no data is available from the previous year, the system just shows the value 0 instead. You can display previous year data at any level of the planning product hierarchy and per week, month, or for the total fiscal year. • Latest Estimate vs Reference Reference data is used as a starting point for planning. Examples of reference data include forecasts for volumes or ECC data for prices. Different sources can be used for this, for example: - ECC for pricing data - APO or TPO for baseline volume data - Other sources for retailer-specific data, like retailer sales prices (RSP) Reference data can be displayed at any level of the planning product hierarchy and per week, month, or for the total fiscal year. • Estimate vs Version This option compares the latest estimates with the data from the last approved version of the plan. • Estimate vs Scenario If you have created a scenario, this option allows you to compare the latest estimates with the scenario.
Zoom In () and Zoom Out ()	The vertical zoom lets you display just your main data source (latest estimate) or, in addition, a second source that you choose using the *Comparison Data* function.
View	You can use this function to switch between *(Line Chart View)* and *(Table View)*.

Element	Description
Recalculate	When you change individual values for a KPI for a particular week or month, the *Recalculate* function updates the view with the new values and sends these to the back-end system. It also recalculates the dependent key figures.
(*More*) or in certain UI5 versions.	This option contains the following functions: • Predict Plan: This helps you predict baseline volumes as part of your planning activities and as input for trade promotion planning. You can predict baseline demand, forecast trade promotion uplifts, and total volumes. • Update Plan/Scenario: If you don't want to start from scratch with your planning data, you can use the *Update Plan/Scenario* function to choose a data source to copy data into the top row of each KPI and then use this as a basis for planning. The dropdown list contains options for copying volume and value reference data (for a single cell or single row), updating your plan with a statistical forecast as well as sell-in to sell-out options. If you are using the simplified data model, this function is only available in batch mode but not in online mode. • Run Plan Optimization Launches the plan optimizer for generating scenarios of a promotion. To find out more about the plan optimizer, see Plan Optimizer [page 68]. • Plan Optimization Results Takes you directly to the *Results List View* of the plan optimizer which displays the scenarios generated for a promotion and the associated plan KPIs. To find out more about the plan optimizer, see Plan Optimizer [page 68].
Promotion table (fast entry)	For more information, see **Elements of the Calendar View** in Calendar View [page 25].

6.3 Product Tree View

The *Product Tree* view is an alternative planning view where you can carry out volume and value planning. This differs from the *Profit & Loss* view in that it shows the data of just one key figure, which is applied to the levels of your planning product hierarchy underneath.

Elements of the Product Tree View

Element	Description
Planning Product Hierarchy	In this dropdown list, you can choose the hierarchy you want to display below.
KPI	You use this function to choose the KPI you want to plan or display. Choose the KPI by clicking ⌄.
Filter (▽)	You can search for products that have a certain value, for example, a baseline volume of 0. You specify a condition (is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to) and a value for the selected key figure. In our example, you choose *is equal to* and enter `0`. The application returns a list of products, together with the plan data, in a flat list for which the total baseline volume is 0. The hits always relate to the total value. The filter works in the monthly view of the year, the weekly view of a quarter, and in a weekly view of a month/period.
Find (🔍)	In this field, you can search for a product, product category, or product attribute by entering a full or partial string. The application searches in all nodes regardless of whether they are expanded or collapsed, so that even products and product categories that are hidden will be found. The application expands the tree just to the subtree node where the first hit is located and highlights the entire row including the plan data. You can scroll through the screen and expand any levels you need to. If more than one hit is found, arrow buttons appear with which you can move forwards and backwards through the hits. The search works for all product information shown in the description but not for product attributes that are not part of the description.

Element	Description
Tree view/flat view + L buttons	When you choose the tree view, the product categories and products are displayed in a hierarchy. You can expand or collapse the planning product hierarchy, level by level, using the level selectors (L1, L2, L3, and so on). If you click L3 in the tree view, for example, the complete tree is expanded to level 3. Alternatively, you can choose the flat list view so that only the nodes and associated data of the level you choose with the relevant L button are visible. This makes it easier to copy and paste planning data from an external source such as Microsoft Excel, for example, because the nodes in between are not displayed. If you create a variant of the *Product Tree* view, the variant will adopt whichever view was set in the original *Product Tree* view. You can also personalize the application so that your preferred view is always defaulted. The responsibilty area setting for the default level (L1, L2, L3 and so on) is used in the tree view and the flat view. The tree/flat view is also available in the *Summary* subview of the *Plan* view.

The *Product Tree* view shares a number of elements with the *Profit & Loss* view. For more information about these elements, see Profit & Loss View [page 33].

6.4 Summary View

The *Summary* view shows the plan data for a certain period. Each row displays the latest estimates of selected key figures of a certain product category/product in the planning product hierarchy. The planning product hierarchy is shown as rows and the key figures are shown as columns. You can specify the number of levels that are automatically expanded when you open the view.

Navigating in the Summary View

When you click a cell with a product/key figure combination, the application takes you to the *Product Tree* view with the relevant key figure selected and the hierarchy expanded to the relevant product category.

Elements of the Summary View

All of the elements in the *Summary* view also appear in the *Product Tree* view. For more information, see Product Tree View [page 38].

6.5 Volume and Value Planning

Definition

Volume and Value Planning

You carry out volume and value planning for the current year in the plan itself and in the promotions you've created. This involves reviewing and changing your volume-specific and value-specific key performance indicators (KPIs) to reflect your planning needs.

Volume Planning

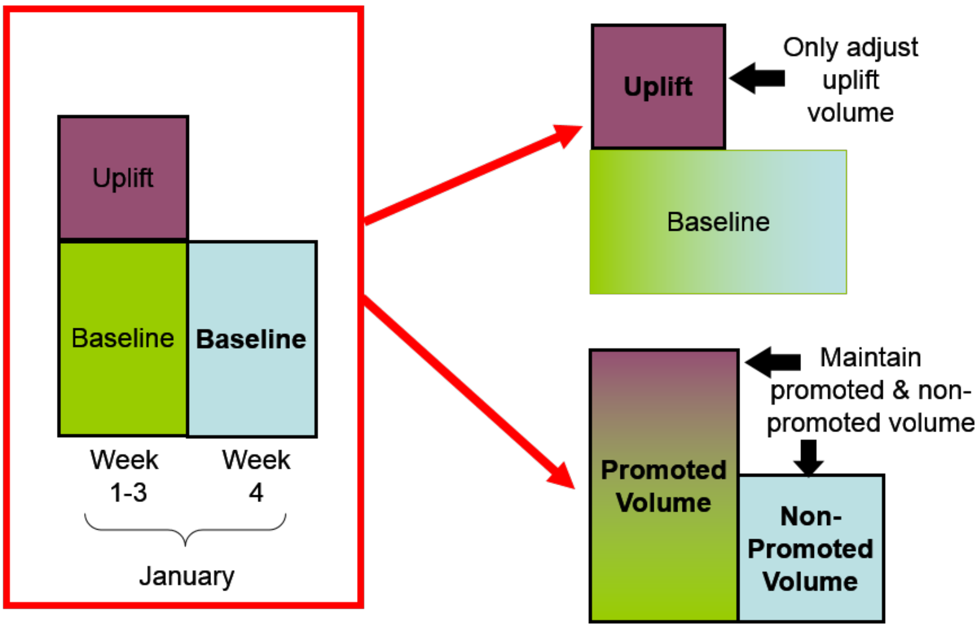
Volume planning is based on a set of KPIs. Multiple aspects of your business can be planned and managed from a single tool showing volume, revenue, spends, costs, and retailer KPIs. You can define a superset of KPIs that you want to plan. Then you define sets of KPIs that you want to exclude.

Baseline Versus Promoted/Non-Promoted Volume Planning

SAP Customer Business Planning supports two approaches to volume planning:

- Baseline volume planning
- Promoted/non-promoted volume planning

The difference between these two approaches is illustrated in the following graphic:



Baseline Volume Planning

The baseline volume is the volume you plan to sell to your retailer without any short-term promotional activity. You can use reference data here to help you, which you get from your SAP APO or ERP systems, or from your retailer (sell-out volume). You edit the baseline volume directly in the plan. Once the baseline has been agreed upon, typically between sales, marketing and the supply chain, it is approved for use in creating promotions.

You can also plan promotions without a baseline. For example, special promotion packs do not have a baseline because they are created exclusively for the promotion and there is no historic basis from which to derive a baseline for them.

In your promotion, the incremental volume on top of the baseline, called the uplift volume, is calculated automatically when you enter the total volume. The baseline volume flows from the plan to the promotion and the uplift volume flows from the promotion to the plan to give the total volume.

The advantages of this approach are that the baseline helps you understand the underlying health and trends of a brand, while the uplift measures the effectiveness and efficiency of your promotion against the overall context of their combined contribution to achieving the sales targets.

KPIs provided with the standard application for building a baseline volume plan and which can be edited include *Store Growth*, *Distribution*, *Category Growth*, *Advertising & Promotion*, and *Innovation*.

Promoted/Non-Promoted Volume Planning

If the planning account you're working with doesn't have a baseline, you can use promoted/non-promoted volume planning as an alternative.

Promoted volume is the volume sold in those stores/periods in which a promotion is taking place. For example, if brand A is sold in a store that is running a trade promotion (feature, display, TPR), all of the volume for the brand during that promotion time period would be recorded as promoted volume.

Non-promoted volume is the volume sold in those stores/periods in which no promotion (feature, display, TPR) is taking place.

This is mapped in the system so that you plan and see your volume either:

- entirely as promoted volume
  or
- entirely as non-promoted volume

When you're planning a promotion, you only enter the total volume. No baseline volume is brought in from the plan and no uplift volume is transferred from the plan.

Since promoted volume measures all of the volume sold, you cannot see how effective your promotion was as you can with baseline and uplift volume.

This approach does have other advantages, however. Weighted averages, for example, are calculated more reliably.

KPIs provided with the standard application for promoted/non-promoted volume planning and which can be edited include *Non-Promoted Volume Sell-In* and *Non-Promoted Volume Sell-Out*.

Note the following in conjunction with promoted/non-promoted volume planning:

- The standard planning content delivered for SAP Trade Management does not support overlapping promotion roll-ups to SAP Customer Business Planning.
- If you plan the same promotion type for the same customer, the same product, the same dates, and in certain cases for the same trade spend, more than once, it is generally defined as an overlapping promotion.

- In the case of overlapping promoted/non-promoted volume, the promoted volume is counted twice.
- It is not considered best practice to plan overlapping short-term promotions.

Value Planning

Value planning involves planning all of your promotional and non-promotional terms as well as prices.

Any promotional discounts (like extra visibility) you define are rolled up automatically from the promotion to the plan and are not edited directly in the plan.

Non-promotional KPIs and prices (like permanent placement) on the other hand, can be edited in the plan.

As with volume planning, you can use reference data to help you plan. This reference data is made available via an inbound pricing mechanism that imports the data from your ECC system.

Changing Data

Certain KPIs can be changed directly during planning while others are read only, such as KPIs that are rolled up from a promotion (like uplift volume), or are calculated automatically by the application (like total volume). KPIs that have been rolled up from a promotion can be changed, but only in the promotion itself.

You can change editable KPIs for any period in the future. If products are added to an assortment for just a certain number of weeks in the year, the data for these products can be edited only for the weeks assigned. Rows that contain at least one editable field have a white background. The values you can edit are shown in bold (the other values are not bold). Rows that don't contain any editable values have a light gray background. This functionality is available in the *Profit & Loss*, *Product Tree*, and *Summary* views of the *Plan* screen. In the *Profit & Loss* and *Product Tree* views, you can make changes to more than one cell at the same time by selecting the relevant cells using the `Ctrl` key and mouse button. The cells you've selected are highlighted. Right-click to perform the required action.

You can also copy data from a spreadsheet directly to the planning grid. Simply copy your data from Excel and select the cell as of which you want to paste the data. If the system detects a data structure mismatch, it will point this out to you. Cells that contain invalid values, such as text, are not copied. The copied cells are displayed with a dashed border. Copy & paste works in the planning grid in the *Profit & Loss*, *Product Tree*, and *Summary* views, but not in the *Totals* column.

Reference data and previous year data can't be changed. You can change latest estimate data for periods that consist of plan data. In this case, the system updates the plan data in the background.

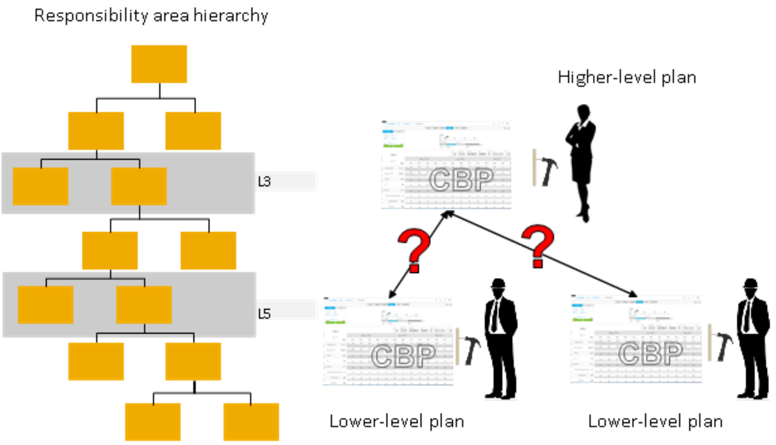
In a typical planning layout, several key figures depend on each other and changing one key figure will result in the others being recalculated. To avoid any negative impact on performance, the application doesn't recalculate the entire set of KPIs. Instead, you make changes to one or several cells and use the *Recalculate* function to update the values. You don’t need to use the *Recalculate* function if you change the total value or use the defined value function for multiple cells. In these cases, the values are recalculated automatically.

Extending a Plan

When you copy a plan to a new year, you can specify which data you want to copy. A wizard guides you through the various steps. When you choose to create a new plan, and a plan already exists, the system asks you which data you want to copy. For example, you can specify whether you want to copy promotions (by activating the *ON/OFF* switch), and which type, and whether you want to copy reference and baseline volume data.

Overlapping Plans

Overlapping plans allow you to connect plans. These can be plans at different levels of the same customer, for example national and regional, or could involve a wholesaler plan with multiple indirect plans. The plans can be managed at different levels in the responsibility area hierarchy. The following graphic illustrates this feature:



The system supports the following overlapping plan scenarios:

Top-down planning (disaggregation scenario)

In this scenario, certain key figures, such as prices, are planned at the higher level and are copied over to the lower-level plans. These key figures cannot, therefore, be edited in the lower-level plans.

Bottom-up planning (aggregation scenario)

In this scenario, certain key figures, such as volumes, are planned at the lower levels and are aggregated to the higher-level plan. These key figures cannot, therefore, be edited in the higher-level plan.

More Information

Carrying Out Volume and Value Planning [page 45]

6.5.1 Carrying Out Volume and Value Planning

Prerequisites

If necessary, the relevant settings have been made at responsibility area level for the planning approach you want to use (either baseline volume planning or promoted/non-promoted volume planning). This ensures that you only see the KPIs for the required approach in the customer business plan.

1. Go to the *Plan* screen and open the *Profit & Loss* view.
2. In the bottom right of the screen, click *(More)* , or in certain UI5 versions, and choose *Update Plan/Scenario* > *Copy from Reference Data (Volume)* to copy reference data for your volume-based KPIs to the plan data.
3. Click *(More)* , or in certain UI5 versions, and choose *Update Plan/Scenario* > *Copy from Reference Data (ECC Rates)* to import reference data for your value-based KPIs to the plan data.
4. Open the *Comparison Data* dropdown list and choose a data source with which you want to compare your current planning data.
5. Modify the data in the *Latest Estimates* row to reflect your planning requirements.
6. Save your entries.

6.5.1.1 Weekly View of a Single Month

The application offers a weekly view of a single month. This is important for weeks that are split between two months, for example a week begins at the end of February and ends at the beginning of March. This view shows weeks/week portions that belong to the selected month allowing you to specify a value for the relevant part of the split week.

You select the view in the usual way by clicking on the relevant month in the time selector.

Features of the weekly view:

- The total column in your planning data shows the total value for the selected month. Any changes you make to the total will only be split to the weeks of the selected month.
- The weekly view of a single month works in the same way if you have configured fiscal periods instead of months.

6.5.1.2 Variants and Subvariants

The functionality for creating and managing variants and subvariants in SAP Customer Business Planning allows you to define, by way of central configuration and personalization, your own sequence (horizontally and vertically) and naming of header views and subviews. This gives you greater flexibility for mapping your own planning processes.

You can do the following:

- Create customer-defined subviews using subvariants in an existing header view.

- Create customer-defined header views using variants, for example for baseline volume planning, alongside the existing standard header views (*Plan Setup*, *Plan Overview*, *Assortment*, *Plan*, and *Scenario Planning*).
- Embed standard subviews and customer-defined subvariants into the standard views and customer-defined variants, for example move the *Assortment* header view into the *Plan Setup* header view in between the existing *Planning Product Hierarchy* and *Buyer Setup* subviews.
- Personalize the process definition layout, in other words, rearrange the sequence of header views/variants and subviews/subvariants.
- Move a new subvariant, for example *Baseline Volume Planning P&L*, created from a standard subview such as *Profit & Loss* to a customer-defined header view *Baseline Volume Planning*.

You first create a subvariant, after which you create a variant and assign the subvariant to it.

Related Information

Creating Variants [page 47]
Creating Subvariants [page 46]
Managing Variants and Subvariants [page 48]

6.5.1.2.1 Creating Subvariants

Context

This example shows you how to create a customer-defined subvaraint for baseline volume planning P&L using the *Profit & Loss* subview from the *Plan* header view as a source.

> **i Note**
>
> You always create a subvariant first, followed by a variant to which you then assign the subvariant.

Procedure

1. Go to the *Plan* header view and choose *Profit & Loss*.
2. Click *(User Settings)* and choose *Personalize*, set your defaults, and click *Save Personalization*.

   The defaults you can set are highlighted against a grayed-out screen.
3. Choose the KPIs you require for baseline volume planning, for example *Store Growth*, *Distribution*, *Advertising & Promotion*, and so on.
4. Click *(User Settings)* and choose *Add Subvariant*.

5. Enter **`Baseline Volume Planning P&L`** as the name of the subvariant and choose *Save*.

Related Information

[Creating Variants [page 47]]
[Managing Variants and Subvariants [page 48]]

6.5.1.2.2 Creating Variants

Context

This example shows you how to create a customer-defined header variant for baseline volume planning using the *Profit & Loss* subview from the *Plan* header view as a source.

Procedure

1. Go to the *Plan* header view and choose *Profit & Loss*.
2. Click *(User Settings)* and choose *Personalize*, set your defaults, and click *Save Personalization*.

   The defaults you can set are highlighted against a grayed-out screen.
3. Click *(User Settings)* and choose *Add Variant*.
4. Enter **`Baseline Volume Planning`** as the name of the variant.
5. If necesssary, assign one or more subvariants (or subviews such as Profit & Loss, Product Tree, or Summary) to your variant and choose *Save*.

Related Information

[Creating Subvariants [page 46]]
[Managing Variants and Subvariants [page 48]]

6.5.1.2.3 Managing Variants and Subvariants

Context

The *Manage Variants/Subvariants* option offers a range of functions for organizing your variants and subvariants.

- Edit the names of your variants/subvariants ( )
- Delete your variants/subvariants ( )
- Display or hide your variants/subvariants using the *Pin to Tab* checkbox
- Assign a subvariant to a different variant or header view (the procedure below shows you how to do this)

Procedure

1. Click *(User Settings)* and choose *Manage Variants/Subvariants*.
2. In the *Manage Variants* screen, select the variant or subvariant you want to reassign by clicking the relevant radio button.
3. Choose *Change Assignment*.
4. In the *Change Assignment to* dropdown, choose the new variant or header view.
5. Click *Apply*.

6.6 Promotion Planning

Definition

A trade promotion is a sales activity used by industries that sell into the retail channel. A promotion takes place within a specific time period and aims to increase sales volume or to launch new products or product lines. It's also used to increase brand capital, brand awareness, and market shares.

In SAP Customer Business Planning, you can create draft and detailed promotions (these are short-term promotions) as well as long-term agreements.

A draft promotion is a slimmed-down version that doesn't contain too many details, usually just a date range, a product category, a spend, and your planning data (for example, uplift and discounts). If you're unsure about certain details of a promotion, it's better to create a draft promotion first before you finalize it. You can then convert the draft promotion to a detailed promotion later by adding additional information.

You can also create detailed promotions directly in the application if you're sure that all of your data is correct and you don't need to make any changes.

Long-term agreements (LTAs), also known as Every Day Low Cost (EDLC) or Every Day Low Price (EDLP) are not related to a specific marketing activity and are typically annual in nature. They generate baseline or non-promoted volume and form part of the trading terms that are negotiated with the customer. You can run one or more short-term promotions on top of a long-term agreement. The uplift volume generated as a result of the short-term promotion(s) is synchronized to the long-term agreement and is indicated separately in the planning layout. The total volume is then calculated in the long-term agreement and is correctly reflected in funds consumption. With the simplified data model, the application automatically identifies the LTA to which the short-term promotion timeline and products match in the same plan, and rolls up the uplift to the LTA and recalculates the costs of the LTAs. The costs of the short-term promotions are not rolled up to the LTA. One short-term promotion can be assigned to multiple long-term agreements.

Another type of promotion you may come across is the headquarters promotion or corporate promotion, which is defined at a national level. These promotions are displayed in the upper part of the calendar and can be added from here as a draft or detailed promotion (depending on the type of headquarters promotion) to a plan with all the discounts you're offering as part of your national promotion. The application automatically adjusts the discounts, and so on, if the products are not valid for the current responsibility area (for example, for a draft promotion if the products are not in the assortment).

Promotion Types in the Simplified Data Model

The following promotion types are supported by the simplified data model:

- **Short-Term Promotion (Shipment)**
  The main focus of the promotional activity is shipment data, where spends are related to the shipment volume. Only sell-in key figures are used for planning. For a list of the KPIs available for this promotion type, see Key Figures Supported by the Simplified Data Model.
- **Short-Term Promotion (Consumption)**
  The main focus of the promotional activity is consumption data, where spends are related to the consumption volume. Only sell-out key figures are used for planning.
- **Long-Term Agreement (Shipment)**
  The main focus of the promotional activity is planning long-term agreements (for example, EDLPs) for a customer. Uplift volumes are not planned in the long-term agreement but are derived from the uplifts in the attached short-term promotions.

Multilevel Promotion Planning

If you are using the simplified data model, you can create promotions at various levels of the customer hierarchy in the same plan to see the impact of the promotions with respect to each other. The uplift volumes from the lower-level promotions roll up to the long-term agreements in the plan. The promotion discounts and rebates from the lower levels are also shown.

> Example
>
> A customer with multiple chains (for example Superfresh with the chains Superfresh Discounter and Superfresh Premium) can create an overarching promotion at plan level and different promotions for each chain. You can then see the impact of these lower-level promotions at the higher, aggregated level, in other words, with respect to the overarching promotion at plan level. If you plan promotions at lower levels, you have to specify a scale factor that defines the portion of the plan baseline that is assigned to the specific customer hierarchy node that acts as anchor for the promotion.

More Information

Carrying Out Promotion Planning [page 50]

Creating a Root Responsibility Area (Company Level)

Creating a Subordinate Responsibility Area

6.6.1 Carrying Out Promotion Planning

There are various ways of creating draft or detailed promotions and long-term agreements.

Fast Promotion Entry

The editable promotion table is available on the *Plan* screen (*Calendar*, *Profit & Loss*, *Product Tree*, and *Summary* views) and the *Scenario Planning* screen (*Profit & Loss* and *Product Tree* views). It offers a fast and easy way of creating a new promotion and editing existing ones.

1. Open the promotion table by clicking on the promotions slider on the right of the *Plan* screen or clicking > to the left of *Promotions* on the *Scenario Planning* screen.
2. To create a new promotion, click + *(Create Promotion)* and choose *Draft Promotion*, *Detailed Promotion*, or *Long-Term Agreement* (or *Short-Term Promotion (Shipment)/Short-Term Promotion (Consumption)/Long-Term Agreement (Shipment)* if you're using the simplified data model).
3. Enter a description, sell-out dates, sell-in dates, a tactic (only for draft and detailed promotions), products, and your planning data.
4. Save your entries.
5. To go to the detailed promotion screen to enter further data, click on the promotion ID.

Creating Promotions in the Calendar View

If you use the product filter when creating a promotion, the product category/product defined in the filter is used to preset the product list in the new promotion.

Add Promotion Button

1. Click the *Add Promotion* button and choose *Create Draft Promotion*, *Create Detailed Promotion*, or *Create Long-Term Agreement*.
2. In the detailed promotion screen, enter the relevant data for your promotion.

Context Menu

1. Right-click your mouse on the calendar in the month in which you want to create your promotion.
2. Choose *Create New*, *Fast Entry*, or *Detailed Entry*, and the relevant option. If you choose *Fast Entry*, the editable promotion table appears. If you choose *Detailed Entry*, the detailed promotion screen is displayed.

3. Enter the required data and save your entries.

> **i Note**
>
> The thicker bar shows the in-store execution window while the thinner bar below it shows the sell-in window associated with the promotion.

Creating a Draft Promotion from a Template

If promotion templates have been defined in the standard CRM system, you can use these as a basis for creating a promotion. To be able to see a template, it must be created for the same responsibility area or without a responsibility area. This option is available via the *Add Promotion* button and in the context menu of the *Calendar* view.

Copying Promotions

You can also create a promotion by copying an existing one. The copy function is available in the promotion table (click in the *Actions* column) and in the context menu () of the *Calendar* view.

Converting a Draft Promotion to a Detailed Promotion

Once you're happy with your draft promotion and have entered all the data for it, you can convert it to a detailed promotion.

You do this in the *Calendar* view by right-clicking the draft promotion and choosing *Derive Detailed Promotion*. You'll see that your draft promotion has been converted to a detailed promotion and that the original draft promotion is kept too. This means that you can continue to make changes to the original draft promotion, although the detailed promotion and plan aren't updated to reflect these.

6.7 Versioning

Definition

The versioning process allows you to store all of your plan data at a certain point in time in a version. This version is read-only and can be used for comparisons. The plan approval process is also triggered by versioning. You can create a version at any time. The data that is stored in the version consists of header data and plan data. Version data can also be used as a separate data source on the planning screen so that you can compare the latest estimate data with your version data (latest version of a certain type). Only one version can be used for in-line comparisons. The version used (for example, the latest approved version of the type "internal") is specified in Customizing.

Types of Version

The types of version that are available can be configured when the system is implemented. It's also possible to specify whether versions of a certain type need approval. The following types are available in the standard system:

- Internal approval (approval required)
- Customer approval (no approval required)
- Forecast (no approval required)

Version Plan Data

All of the plan data (week/SKU) related to the latest plan is stored in the version. The start and end dates are determined as the minimum start date of the internal fiscal year and retailer fiscal year and the maximum end date of the internal fiscal year and retailer fiscal year.

> **i Note**
>
> The internal fiscal year is used by the manufacturer, whereas the retailer fiscal year is, as the name suggests, used by the retailer. You define the retailer fiscal year in BAdI **Get Dates for Retailer Calendar Year**. The internal fiscal year and retailer fiscal year are often different, in which case, a dropdown appears in the time selector allowing you to switch between the two.

More Information

Creating a Version [page 52]

6.7.1 Creating a Version

Procedure

You can create a version of a plan or scenario from any screen in SAP Customer Business Planning. To do so:

1. Click *Operational Plan* at the top of the screen.
2. Click + *(Add)* on the right.
3. In the dropdown list at the top, choose whether you want to create a version of an operational plan or a scenario (you can create up to three scenarios of a plan).
4. In the *Type* dropdown list, choose the type to be assigned to the new version.
5. Enter a title and description for your version.
6. Click *Save*.

After you've created your new version, it appears in the dropdown boxes for versions and operational plans.

By creating different versions of your operational plans and scenarios, you can compare them.

More Information

Comparing Versions [page 53]

6.7.2 Comparing Versions

You can compare the annual total values of versions and operational plans or scenarios by selecting two items (which are then numbered 1 and 2) from the *Operational Plan* dropdown box and clicking *Compare Selected*.

You can choose to compare:

- Operational plans from different years
- An operational plan version and operational plan from the same year or different years
- Scenarios and scenario versions from the same or different years

The comparison shows you the annual total of the selected versions/operational plans as well as the absolute difference and percentage difference. If the key figure is a percentage value, the absolute difference is displayed in BPS and the relative difference is calculated as (value2/value1 - 1) * 100%. You can view the comparison according to P&L or product tree data.

> **i Note**
>
> You cannot change the data displayed on the screen.

Profit & Loss View

The *Profit & Loss* view contains the list of key figures and shows the annual data along with the planning P&L. You can expand and collapse the various nodes and use the product picker to show data for a certain category or product only (to find out more about the product picker, see **Elements of the Calendar View** in Calendar View [page 25]). You can also choose to view the information according to the internal or retailer calendar.

Product Tree View

The *Product Tree* view shows the annual data along with the planning product hierarchy in the tree view or flat view (to find out more about these views, see **Elements of the Product Tree View** in Product Tree View [page 38]). You can expand and collapse the different nodes in the planning product hierarchy and use the key figure selector to restrict the information displayed. You can also search for a particular product (to find out more about using the product search function, see **Elements of the Product Tree View** in Product Tree View [page 38]). You can also choose to view the information according to the internal or retailer calendar.

7 Baseline Volume Planning

The *Baseline Building Blocks* screen and its views *Baseline Extended Product Tree*, *Baseline Volume Build*, *Baseline Product Tree*, and *Baseline Summary* allow you to focus on planning just your baseline volumes. The views correspond to those of the *Plan* screen but relate only to the baseline volume and no other key figure. If you require other KPIs in addition to those for the baseline volume, you can configure these as necessary.

Baseline Extended Product Tree

This extension of the standard *Product Tree* allows you to select and display more than one KPI for each product hierarchy node or product to help you plan your baseline volumes in greater detail. To select the KPIs, click *(Settings)*.

> **Note**
>
> To avoid impacting performance, it is advisable not to select more than 5 KPIs.

In the *Tree View*, you can expand the hierarchy node by clicking the relevant *L* button and > to the left of the node name. You will then see the KPIs you have selected and the collapsed node for the next level directly underneath. The flat view is only available at product (SKU) level and does not, therefore, contain any *L* buttons.

Baseline Volume Build

In this view, you plan the baseline volumes by adjusting the editable KPIs to obtain the sell-in baseline.

The first line of each adjustment is an editable field in which you can specify the percentage impact. The second line is calculated and shows the volume impact. Each percentage adjustment between *PY Base Volume* and *Base Volume Sub-Total* is related to *PY Base Volume* and each percentage adjustment below *Base Volume Sub-Total* is related to *Base Volume Sub-Total*.

Once you have finished, the sell-in baseline is updated and can be used as a basis for planning the other plan KPIs. The updated values are transferred automatically to the *Plan* screen.

Baseline volume KPIs delivered with the standard application:

- *PY Base Volume*
  - *Innovation Baseline*
  - *Store Open/Close (%)*
    - *Store Open/Close Volume Change*
  - *Distribution (%)*
    - *Distribution Volume Change*

- *Base Volume Sub-Total*
    - *Category (%)*
        - *Category Volume Change*
    - *Advertising & Promotion (%)*
        - *Adv. & Promo Volume Change*
    - *Other Drivers (%)*
        - *Other Volume Change*
- *Sell-In Base*

Baseline Product Tree

This view is similar to the *Product Tree* view in the *Plan* screen but includes only the baseline KPIs.

Baseline Summary

This view is similar to the *Summary* view in the *Plan* screen but includes only the baseline KPIs.

Related Information

Plan Screen [page 24]
Product Tree View [page 38]
Summary View [page 40]

8 Indirect Planning

A manufacturer does not necessarily sell products directly to the retailer. Sometimes, a third party is involved where the manufacturer sells to one or more wholesalers who then sell to one or more indirect accounts. Indirect planning, which is based on a three-tier distribution model (manufacturer-wholesaler-indirect), allows you to map this method of selling and plan accordingly.

Data is not mapped in a hierarchy because a many-to-many relationship is used as a basis here; in other words, a manufacturer can sell to several wholesalers who, in turn, can sell to several indirect accounts.

The products sold can also vary. For example, refrigerated products could be sold via a wholesaler whereas dry goods could be sold directly to the retailer. Different volumes of products or entirely different products can be sold to different indirect accounts.

Planning is carried out based on the sell-through volume. This KPI represents the volume sold from the wholesaler to the indirect account. The sell-through volume is not necessarily identical to the wholesaler's sell-in volume for a particular period. In other words, not all of the goods the wholesaler buys from the manufacturer are sold on to retailers. The wholesaler can store the goods or even sell them to consumers.

The solution supports the following scenarios:

- Single wholesaler sells to single indirect account
- Multiple wholesalers sell to multiple indirect accounts
- Indirect account buys directly from the manufacturer and via the wholesaler

Related Information

Wholesaler-Indirect Relationships [page 56]
Maintaining Indirect Accounts [page 58]
Maintaining Wholesalers [page 59]
Wholesaler and Indirect Account Plans [page 59]
Planning Wholesalers and Indirect Accounts [page 60]

8.1 Wholesaler-Indirect Relationships

The *Wholesaler-Indirect Relationship Maintenance* application has the following objectives:

- Automatically determine the wholesalers a certain indirect account buys from
- Automatically determine the indirect accounts a certain wholesaler sells to
- Distribute indirect data to all the wholesalers the indirect buys from (according to the percentage specified for the relationship/product/time period)
- Distribute wholesaler data to all the indirect accounts the wholesaler sells to (according to the percentage specified for the relationship/product/time period)

- Aggregate indirect data to the correct wholesalers (according to the percentage specified for the relationship/product/time period)
- Aggregate wholesaler data to the correct indirect account(s) (according to the percentage specified for the relationship/product/time period)

The application allows the Key Account Manager to maintain the time-dependent relationship between wholesalers and indirect accounts by modeling which percentage each indirect account is buying from its wholesalers and which percentage each wholesaler is selling to its indirect accounts. The percentages can be specified by product/category.

The volume sold from the manufacturer to the wholesaler is known whereas the volume sold to the indirect account can only be estimated because this data is not always available.

Example

The manufacturer sells 10,000 cases to the wholesaler and estimates that 20% of a certain product category is sold on to the indirect account.

Structure of the Application

The application consists of two tab pages, *Indirect Accounts* and *Wholesalers*, that are structured in the same way.

The header area contains mandatory (*) filters to allow you to select the indirect account or wholesaler by sales organization, distribution channel, and actual name of the indirect or wholesaler. You can use the optional filters division, products, and valid from/to dates to select even more specific filter criteria. The *Go* button on the right triggers the filters you have set.

The *Items* area comprises a series of functions in the header bar:

- *+ Products*
  You use this button to add products to the items table. In the *Add Products* popup, you can search for products and display detailed information on them.
  The tree view displays the product categories and products in a hierarchy. You can expand and collapse the hierarchy, level by level, using the level selectors (L1, L2, L3, and so on). Alternatively, you can choose the flat view so that only the nodes and associated data of the level you choose with the relevant L button are visible.
  You can filter the product categories and products to display all of them or just the selected ones. Use the checkboxes on the left to select the required entries. Rows are added to the items table for the product categories and products you selected.
- *Manage Indirects / Manage Wholesalers*
  Depending on whether you have selected the *Indirect Accounts* or *Wholesalers* tab page, you use the *Manage Indirects* or *Manage Wholesalers* button to add indirect accounts or wholesalers to the items table. In the *Select Indirects* or *Select Wholesaler* popup, the indirect accounts or wholesalers are displayed in a hierarchy which you can expand and collapse, level by level, using the level selectors (L1, L2, L3, and so on). You can filter the indirect accounts or wholesalers to display all of them or just the selected ones. Use the checkboxes on the left to select the required entries. Columns are added to the right of the table for the indirect accounts or wholesalers you selected.

- *Copy*
  You use the *Copy* button to copy a selected product category or product to a new row in the items table. You can copy multiple categories and products.
- *Delete*
  You use the *Delete* button to delete a selected product category or product from the items table. You can delete multiple categories and products. A confirmation prompt appears before the row is deleted.

Related Information

Indirect Planning [page 56]
Maintaining Indirect Accounts [page 58]
Maintaining Wholesalers [page 59]
Wholesaler and Indirect Account Plans [page 59]
Planning Wholesalers and Indirect Accounts [page 60]

8.1.1 Maintaining Indirect Accounts

Procedure

1. Log on as Key Account Manager or Administrator.
2. Choose *Master Data* > *Wholesaler-Ind. Relationships*.
3. On the *Indirect Accounts* tab, set the sales organization, distribution channel, and wholesaler filters (*).

   You can also select the division, products, and valid from/valid to dates as optional filters.
4. Click *Go* to trigger the filters you have set.
5. In the *Items* table, click *+ Products* to add the required products/categories and enter the valid from/valid to dates.
6. Click *Manage Indirects* to select the required indirect accounts. Additional columns are inserted on the right of the table.
7. Enter the percentage estimated volumes that are sold to the indirect account(s) and save your data.

   The estimated volumes do not have to add up to 100% here because you do not have any accurate data indicating how much is sold to which indirect account.

Related Information

Indirect Planning [page 56]
Wholesaler-Indirect Relationships [page 56]
Maintaining Wholesalers [page 59]
Wholesaler and Indirect Account Plans [page 59]

Planning Wholesalers and Indirect Accounts [page 60]

8.1.2 Maintaining Wholesalers

Procedure

1. Log on as Key Account Manager or Administrator.
2. Choose *Master Data* > *Wholesaler-Ind. Relationships*.
3. On the *Wholesalers* tab, set the sales organization, distribution channel, and indirect filters (*).

   You can also select the division, products, and valid from/valid to dates as optional filters.
4. Click *Go* to trigger the filters you have set.
5. In the *Items* table, click *+ Products* to add the required products/categories and enter the valid from/valid to dates.
6. Click *Manage Wholesalers* to select the required wholesalers. Additional columns are inserted on the right of the table.
7. Enter the percentage estimated volumes that are sold to the wholesaler(s) and save your data.

Related Information

Indirect Planning [page 56]
Wholesaler-Indirect Relationships [page 56]
Maintaining Indirect Accounts [page 58]
Wholesaler and Indirect Account Plans [page 59]
Planning Wholesalers and Indirect Accounts [page 60]

8.2 Wholesaler and Indirect Account Plans

Data can be exchanged between multiple wholesaler plans and multiple indirect plans. The connected plans and distribution rules (percentages) are specified in the Wholesaler-Indirect relationship table.

The sell-through volume KPI is used in the example implementation to show how the wholesaler-indirect relationship table is used.

Related Information

Indirect Planning [page 56]

Wholesaler-Indirect Relationships [page 56]
Maintaining Indirect Accounts [page 58]
Maintaining Wholesalers [page 59]
Planning Wholesalers and Indirect Accounts [page 60]

8.2.1 Planning Wholesalers and Indirect Accounts

Procedure

1. On the *Plan* screen of Customer Business Planning, open the *Planning Product Hierarchy* dropdown and choose the relevant indirect or wholesaler hierarchy.
2. Enter and adjust the volume figures. These figures are distributed from the wholesaler to the indirect account or vice versa when the indirect account or wholesaler is opened and can be used as a basis for further planning.

Related Information

Indirect Planning [page 56]
Wholesaler-Indirect Relationships [page 56]
Maintaining Indirect Accounts [page 58]
Maintaining Wholesalers [page 59]
Wholesaler and Indirect Account Plans [page 59]

9 Scenario Planning

Scenarios are alternatives of the same operational plan that are used to find out what impact a different planning strategy can have. You can activate a scenario to make it the operational plan after which the current operational plan is replaced.

The scenario planning functionality of SAP Customer Business Planning allows you to create up to three scenarios.

The information shown on the *Scenario Planning* screen is similar to that on the *Plan* screen but in a slightly different format.

Elements of the Scenario Planning Screen

Element	Description
Scenario Planning view selector	The view you choose tells the system what information you want to see for your operational plan and scenario(s) in the *Planned Scenarios* area. • *Profit & Loss* view Your operational plan and scenario(s) are broken down by KPI. The values displayed depend on the product you've selected (you can only choose one product). • *Product Tree* view Your operational plan and scenario(s) are broken down by product. The values displayed depend on the KPI you've selected (you can only choose one KPI).
KPI Monitor/Buyer Selector	For more information, see **Elements of the Assortment Screen** in Assortment [page 17].
Time Selector	For more information, see **Elements of the Assortment Screen** in Assortment [page 17].

Element	Description
Planned Scenarios area	This area displays the scenarios you've created. You can show and hide these by clicking > to the left of *Planned Scenarios*. **Elements of the *Planned Scenarios* Area** *Profit & Loss* view has been selected: • *Product* Here you select the product you want to see *(More)* in the operational plan and scenarios. To find out more about the product picker, see **Elements of the Calendar View** in Calendar View [page 25]. • *Units* See **Elements of the Profit & Loss View** in Profit & Loss View [page 33]. The normalized unit (NU) is not available in this view. *Product Tree* view has been selected: • *Find* () See **Elements of the Product Tree** in Product Tree View [page 38]. • *KPI* You use this function to choose the KPI you want to plan or display. Choose the KPI by clicking . • *Units* See above. • *Scenario Comparison* This column displays the various KPIs in the form of bar charts to compare the values for the operational plan and scenario(s) you've created. Click (*Settings*) to add and remove KPIs and to change the order in which they're displayed using drag and drop. Columns to the right of *Scenario Comparison* • The information shown in the first column depends on which view you choose (*Profit & Loss* or *Product Tree*). In the *Profit & Loss* view, you can select the KPIs you want to display by clicking (*Select KPIs to Display*). In the *Product Tree* view, you can choose between the tree view and flat view (to find out more about these views, see **Elements of the Product Tree View** in Product Tree View [page 38]). • The *Operational Plan* column contains the data for the current operational plan. You'll also find a number of op-

Element	Description
	tions here (*(More Options)* or in certain UI5 versions) for creating a new scenario and copying the operational plan. • Additional columns are displayed to the right for each scenario you copy or create. Each of these columns contains more options (or in certain UI5 versions) to activate, rename, remove, or copy the scenario, and to create a new scenario.

<table>
<thead>
<tr><th>Element</th><th>Description</th></tr>
</thead>
<tbody>
<tr><td>Promotion table (fast entry)</td><td>In addition to the elements of the promotion table for fast promotion entry on the Plan screen (for more information, see Elements of the Calendar View in Calendar View [page 25]), the table on the Scenario Planning screen contains:

The checkboxes for the scenarios you've created
The More Options function (or in certain UI5 versions) with the following options:

Check Overlap
The overlap check determines whether a particular fast promotion overlaps with other existing fast promotions with regard to date, product, account, trade spend, and scenario.
Add Other Promotion
See Elements of the Calendar View in Calendar View [page 25].

Scenario dropdown (only available with the simplified data model)
If a promotion is assigned to multiple scenarios and these scenarios have, for example, different baselines, you need to be able to choose which scenario is to be used to calculate the promotion data.
The scenario dropdown allows you to choose the context within which you want to see the promotion data. You select a certain scenario so that you only see the promotions assigned to that scenario. The promotion data is then calculated based on the data from this scenario.
Options in the dropdown:

All (Operational Plan)
All promotions are shown regardless of what they are assigned to (the system calculates the promotion data based on the operational plan data).
Operational Plan
Only shows the promotions assigned to the operational plan (the system calculates the promotion data based on the operational plan data).
Scenario <n>
Only shows the promotions assigned to the selected scenario (the system calculates the promotion data based on this scenario).

</td></tr>
<tr><td>Recalculate</td><td>Use this button to update any data you've modified.</td></tr>
<tr><td>More (or in certain UI5 versions): Update Plan/ Scenario</td><td>See Elements of the Profit & Loss View in Profit & Loss View [page 33].</td></tr>
</tbody>
</table>

9.1 Creating and Copying a Scenario

Procedure

1. In the *Planned Scenarios* area on the *Scenario Planning* screen, go to the *Operational Plan* column, click *(More Options)*, or in certain UI5 versions, and choose *Create* (+) or *Copy* ().
2. In the *Create New Scenario* (or *Copy Scenario*) dialog, enter the name, scenario type and, if you need one, a description.
3. Choose *Create* (or *Copy*).

   > **i Note**
   >
   > The application creates the following for the scenario: a new column next to the *Operational Plan* column, a new bar in the comparison charts on the left, and a checkbox in the promotion table. If you make a copy of a scenario, the promotions linked to the original scenario are copied too.

4. Edit the KPI values for your scenario as required. You can only change the values in bold. Green and red arrows appear to indicate plus and minus differences.

   > **i Note**
   >
   > The changes you've made are also visible on the *Plan* screen. You can show scenarios on the *Plan* screen by using the link in the header of each scenario on the *Scenario Planning* screen.

5. Optional step: Activate your scenario by clicking *(More Options)*, or in certain UI5 versions, and choosing *Activate* (✓).

   > **i Note**
   >
   > Promotions that are not copied from the scenario to the operational plan on account of the promotion statuses defined in Customizing are displayed in the *Scenario Activation* popup. You can then specify which promotions you want to include.
   >
   > A number of rules are implemented to ensure that the system remains consistent:
   > - When a promotion in the scenario reaches a defined status (these statuses are defined in Customizing for Customer Relationship Management under *Trade Management* > *Customer Business Planning* > *Scenario Planning* > *Maintain Allowed TPM Statuses to Activate a Scenario*), it has to be linked to an operational plan.
   > - Past promotions (the start dates (sell-in or sell-out) of which are in the past) with a certain status have to be included in the operational plan and all scenarios.

10 Retailer View

Many retailers have their own way of calculating certain values, for example, the retailer margin may or may not include a discount. The *Retailer View* in SAP Customer Business Planning provides a way of sharing retailer-specific KPIs, for example for sell-out and customer profit data, which can be kept separate from the standard planning layout. The information shown in the *Retailer View* can be fully adapted to suit the needs of a specific retailer so that he sees only the information you want him to see. Internal KPIs containing confidential information on budgets, profits, and ROI, for example, can be hidden.

The report comprises two tabs, *Retailer I* and *Retailer II*, that are divided into various areas showing information on customer profit and promotion investment, for example, a list of relevant KPIs as well as graphical representations of KPIs across different time periods. The information shown in the report can be customized to suit your requirements.

You can drill down to a single product category or product. The report then adapts the data in line with your selection.

You can create a personalized version of the *Retailer View*, for example, by adding new KPIs that contain retailer-specific calculations. You can also set a private link to this personalized version. The report with the new KPIs is then loaded instead of the standard report.

For more information on managing private links, see Managing Private Links.

Related Information

Personalizing the Retailer View [page 66]
Managing Private Links

10.1 Personalizing the Retailer View

You can personalize the *Retailer View* to suit your specific requirements. The following example shows you how to add a new KPI.

Procedure

1. In the CRM navigation bar, choose *Customer Business Planning* and *Retailer View* or on the Customer Business Planning user interface, click *Retailer View*.
2. Log on to SAP Analytics Cloud and to your backend connection if Single Sign-On has not been set up.

3. Click *Edit*.
4. Click on the area containing the KPIs and then on *Designer* in the menu bar at the top.
5. In the *Builder* window, go to *Rows*, click *+ Add Measures/Dimensions*, select the *Measures* checkbox, and close the dropdown list.
6. Click the three dots to the right of *Measures* and choose *Add Calculation*.
7. In the *Calculation Editor*, enter the name of the calculation, select the relevant formula in the *Edit Formula* window, and click *OK*.
8. Create a personalized version of the modified report by clicking *(Save)* and choosing *Save As*.
9. Enter the new name for the report and save your entries.

   You can give other users access to the report by choosing *Share* and *Share Settings*. You can add users and teams here and assign them the necessary authorizations.

   You can set a private link to your personalized report version. For more information on managing private links, see Managing Private Links.

Related Information

Retailer View [page 66]
Managing Private Links

11 Plan Optimizer

The plan optimizer enables you to generate scenarios of a particular customer and product combination so that you can optimize your plan.

The scenarios generated are based mainly on the planning context (business partner, products, and time), selected products, objective (optimization goal), restrictions (for example, minimum of ROI or maximum of total trade spend), and various other attributes (tactic, time, and discounts).

You can adjust the KPIs of the scenarios until you find the optimum result and transfer the scenarios as actual promotions to your plan.

The plan optimizer comprises:

- The *Plan Optimization – Fast View* for entering the simulation parameters.
- The *Results List View* which displays the scenarios generated as well as the plan KPIs for the current (gray) and simulated (blue) situation.
  You can personalize (⚙) this view to display the columns you want see. This view includes a *Delete All* icon (🗑) with which you can delete all the scenarios listed with just one click.
- The *Analysis* view which provides the following dashboards to visualize and compare the results:
  - Basic Analysis
  - Scenarios
  - Volume Decomposition
  - Weekly Overview
  - Price & Volume Decomposition
- The *Product-Specific Run Results* view which you display by clicking on the scenario ID (*ID* column) in the *Results List View*. This view shows the scenario broken down into its individual products and their respective time dimensions (these depend on the settings made in Customizing and can be either week or total time).

Variant Creation

The *Results List View* and *Product-Specific Run Results* view feature a variant creation function that allows you to create and save a variant containing just the KPIs you want to see. *Standard* appears on the dropdown if you haven't yet created a variant. When you create a variant, you can specify that it is to be set as default whenever you open these views.

When you're working with your variant, you can still change the columns displayed and their order. To save any subsequent changes to your variant, click *Save*.

You can manage the variants you've created. For example, you can delete variants and, if you've created several of them, you can choose which one you want to set as default.

Related Information

Running a Plan Optimization [page 69]

11.1 Running a Plan Optimization

Context

You run a plan optimization in order to generate scenarios of a particular customer and product combination.

Procedure

1. In the *Plan* view (*Profit & Loss*, *Product Tree*, and *Summary* views), click *(More)* , or in certain UI5 versions, and choose *Run Plan Optimization*.
2. In the *Plan Optimization – Fast View*, make the following settings (most of these may already be set based on your account defaults):

Setting	Description
Simulate Best <...> Options	Enter the number of options you want to simulate, for example, 5.
By	Specify the optimization goal, for example, you want to increase the promotion profit.
For	Enter the tactic to be applied. Click the field to call up the *Tactics* screen in which you can make the following settings (if no tactics have been selected but an overall objective is maintained, the causal groups are shown in the dropdown and can be selected from the main screen): ○ The *Available Tactics* area contains the tactics that have been customized and are available based on the plan context. ○ In the *Planned Tactics* area, you make your settings for temporary price reduction (TPR) and multi buy, as well as the total reduction and total price, expressed as a range. ○ The *Merchandising Tactics* area breaks the tactics down into their individual components (for example, Display could comprise generic display, end of aisle, and so on) and allows you to specify the associated ACV and trade spends.

Setting	Description
In Time Horizon	This specifies the optimization time frame and is defaulted from the time selector in your plan. For example, if Q1 is selected in the time selector, Q1 will be defaulted here.
For Duration	Enter the number of days or weeks for the duration of the scenarios.
With Restrictions	Enter any restrictions to be applied. Multiple selections are possible.

3. Click *Run Optimization* to generate the scenarios which are then displayed on the *Results List View*.
4. Select the checkbox(es) of the scenario(s) you're interested in.

   The plan KPIs on the left of the screen are then recalculated based on the volume, price, and trade spend information of the scenario (gray bars represent the current situation and blue bars the simulated situation).
5. Adjust the input parameters until you've optimized the scenario(s).
6. To update the scenario that best suits your needs as a promotion to your plan:
   - Click the *Update Plan* ( ) icon in the relevant scenario row. A message appears telling you that the promotion has been created and the procedure ends here.

   Or
   - Select the relevant scenario(s) using the checkbox(es) on the left (you can update more than one scenario to your plan) and click on the *Update Plan* button at the bottom of the screen. Then continue with the steps below.
7. In the *Promo Creation in Background* dialog, you can edit the defaulted promotion description and specify that you want the update job to run in batch mode and when this is to take place. You have the following options here:
   - *Immediate (After Plan is Released)*
     The plan is normally still locked at this stage so it has to be released first.
   - *Schedule*
     Here you set a date and time.
   - *Do Not Release Job*
     This option places the job on hold until it is processed by an administrator, for example.
8. Once you have made your changes, click *Create Trade Promotion* to update your plan.

12 Personalizing the User Interface

Use

In SAP Customer Business Planning, you can personalize the user interface to suit the way you work. In other words, you can rearrange the order of the header views and subviews and configure certain default settings as you need them. The default settings you can configure differ depending on the header view and subview.

Procedure

To personalize the user interface:

1. Click the *(User Settings)* icon in the top right of the screen. The screen then turns gray and stars are displayed alongside the views you can move. The fields that you can set defaults for are highlighted on each screen.
2. Rearrange the views by dragging them to the required position.
3. Set the defaults for the configurable fields.
4. Click *Save Personalization*.

Example

In the *Profit & Loss* subview of the *Plan* screen, you can default the promotion power to ON or OFF, set the default unit of measure (TU, CU, or NU) and view (line chart or table), and default the comparison for the latest estimate data.

13 Tasks for Administrator

This section contains information on:

13.1 Authorizations

SAP Customer Business Planning uses the following authorizations:

Authorization	Description
/JBPC/ALRT	This authorization object grants the user authorization to create, change, or display alerts in SAP Customer Business Planning.
/JBPC/ASRT	This authorization object gives the user authorization to create or generate, change, display, lock, or delete assortments.
/JBPC/TAR	This authorization object gives the user authorization to upload targets.

13.2 Internal Target Planning

Use

The *Internal Target Planning* application provides a mechanism for distributing goals and targets down through the responsibility area hierarchy and interfacing these with SAP Customer Business Planning.

It allows internal targets for sales volumes to be planned at the headquarters level of an organization and drilled down to all the lower levels. The targets are then assigned to the key account manager for his responsibility area for the year in question.

Prerequisites

The *Generate Internal Targets* report in CRM has been run in order to generate the planning combinations for each responsibility area and year for which internal target planning is to be carried out. Once the report has been executed, the results can be viewed in a log.

Procedure

1. On the *CBP Administrator Home* screen, click *Internal Target Planning* on the left.
2. In the dropdown in the top left, choose the responsibility area and year for which you want to generate the internal targets.
3. In the *Product Category* picker, select the category for which you want to plan and click *Apply*.

   > **i Note**
   >
   > The highest product category level (*Root*) is selected by default.

4. In the *Responsibility Area* picker, drill down to the relevant responsibility area and click *Apply*.

   > **i Note**
   >
   > The highest product category level (*Root*) is selected by default. The initial status of the internal target object is *Open*.

5. Use the time selector to display the planning data on a yearly or monthly basis.
6. Optional step: You can plan the internal targets referring to the latest estimates volume from the previous year. To do this, click the *Update Targets* button to copy the latest estimates from the previous year. These values are then displayed in the top row of the planning grid.
7. Edit the key figures as required in the planning grid.
   You can enter percentages to increase or decrease the initial values. The changes are layered across the economic, customer, and product factors according to the selections made in the *Product Category* and *Responsibility Area* dropdown lists. You can also make adjustments by entering the relevant values directly, for example to change the number of cases.
8. Edit the individual monthly values and click *Recalculate* to update the totals for a key figure.
9. Update the total value for the key figure and press `Enter`.
   The values are then distributed across the year.
10. Set the status to *Submitted for Approval* and save your data.

    > **i Note**
    >
    > The next statuses you're allowed to set are *Approved* and *Rejected*.

11. Change the status to *Approved* and save.

    > **i Note**
    >
    > Once you've set the status to *Approved*, you cannot change the planning data. If you need to update an approved or rejected internal target, change the status to *Revised*.

The internal target calculated for the sales volume is displayed in the KPI Monitor on different screens in SAP Customer Business Planning.

13.3 Defining a Central Variant

Prerequisites

The key account manager has created a variant for the plan.

Context

This functionality allows a variant to be defined as a central variant with respect to a sales area, regardless of whether the variant was created by the administrator or another user.

Procedure

1. As administrator, log on to the CRM system.
2. Run the **Central Variant Creation** report.
3. Select the row containing the variant to be defined as the central variant and click the *Mark as Central Variant* button.
4. To assign the variant as central to a different sales area, click the *Assign to Additional Sales Area* button and enter the relevant data.

 > **i Note**
 >
 > Product selections are not stored in central variants.

Results

The variant will then be displayed for all users for the particular sales area. No changes can be made to the central variant.

13.4 Creating a Job for Mass Customer Plan Versioning

Versions of the customer business plans that belong to a particular sales area can be created automatically at defined intervals by means of a scheduled job.

Context

Proceed as follows to create a *Mass Customer Plan Versioning* job:

Procedure

1. Log onto the CRM system as CBP Administrator.
2. In the *Create* area on the right, click on *Job*.
3. *Select*:
    a. In the *Report Type* field, choose *Mass Customer Plan Versioning*.
    b. Click on *Next*.
4. *Define*:
    a. Select the relevant job parameters. *Planning Year*, *Version Title*, and *Version Description* require an entry. The other fields are optional.
    a. Under *Selected Plans and Responsibility Areas*, add your plan(s) and/or responsibilty areas.
5. *Schedule*:
    a. Enter the job name. You can change the default name if you want.
    b. Choose the release options and make the relevant entries in the fields provided in line with your selection.
    c. Click on *Next*.
6. *Confirm*:
    a. Check that all your entries are correct.
    b. Click on *Create Job*.

Related Information

Job Scheduling and Monitoring

13.5 Reports

Definition

SAP Customer Business Planning ships with the following reports:

Name	Transaction	Technical Name	Description
Listing for Assortment Upload	/JBPC/LIST_ASRT_UPD	/JBPC/R_LISTING_TO_ASRT_UPLOAD	This report creates or updates an assortment with the listing data.
Target Object Determination for Deferred Alerts	/JBPC/DEFERRED_ALERT	/JBPC/AMS_DEFERRED_ALERT	This report determines the target objects for deferred alerts.
Draft Promotion Nearing Short-Term Period Without Detailed Promotions	/JBPC/AMS_STH_NOTPM	/JBPC/AMS_STH_NOTPM	This report is used to raise an alert for draft promotions if a detailed promotion has not yet been created as the short-term period approaches.
Generate Targets Test Report	/JBPC/INT_TAR_UPLOAD	/JBPC/INT_TAR_GENERATE	This report uploads internal targets from a spreadsheet to the system.
Extend Plan and Copy Promotions from Previous Year	/JBPC/EXTEND_PLAN	/JBPC/EXTNDPLAN_AND_COPY_PROMO	This report is used to extend a plan to the next year.
Sell-In/Sell-Out Plan	Can be executed from the plan overview	TM_PLAN_SELLIN_SELLOUT_FULL	This report provides a view of the sell-in volume progression against the sell-out volume changes in the context of a plan.
Sales Dashboard	Can be executed from the plan overview	TM_SALES_DASHBOARD_FULL	This report provides a one-stop view of the current state of a plan along with the running sum and the year-on-year % change. The report can be used to view the progression of many predefined measures on these 3 charts.

Name	Transaction	Technical Name	Description
Plan Analysis	Can be executed from the plan overview	TM_POST_EVENT_ANALYSIS_FULL	This report allows you to analyze the progress of the plan and compare the planned values against the actuals and targets.

More Information

For more information about these reports, see the system documentation.

14 Glossary

Follow the steps below to access the SAP Customer Business Planning glossary:

1. Go to `http://www.sapterm.com/`.
2. Choose *Look up terminology*.

Either search for a specific term or choose *Advanced Search* to search for all terms in the component `CRM-MKT-MPL-CBP`.

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