Configuration Guide | CONFIDENTIAL

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Configuration Guide for SAP Trade Promotion Planning and Management

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Content

Configuration Guide for SAP Trade Promotion Planning and Management

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Document History

Date	Comment
November 7, 2022	Added for release 4.0 Feature Package 7: • Allowing Product Selection by Category [page 84]
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1 Configuration Settings for SAP CRM

This section lists the various configuration settings which you must perform in your SAP CRM system to be able to use SAP Trade Promotion Planning and Management.

1.1 Preparing Master Data

Before you can start working with SAP Trade Promotion Planning and Management, you need to make a number of master data settings, for example, for the sales area, account hierarchy, product hierarchy, and so on.

Related Information

Preparing Master Data

1.2 Promotion Planning

1.2.1 Common Configurations for Promotion Planning

Details are provided here of the common configuration activities required to set up Trade Promotion Planning and Management.

1.2.1.1 Define Authorizations for Promotion Planning

In this Customizing activity, you define the authorizations for Trade Promotion Planning and Management.

Related Information

Authorizations in Marketing Planning and Campaign Management

1.2.1.2　Define General Data Settings

In this Customizing activity, you define the promotion types, objectives, and tactics.

Related Information

General Data for Marketing Projects

1.2.1.3　Define Date Types

In this Customizing activity, you define the date types you want to use for planning trade promotions.

Related Information

Date Maintenance

1.2.1.4　Define Partners

In this Customizing activity, you specify the partners that you want to assign to your trade promotions, for example, an employee responsible is assigned to a trade promotion when a promotion is created.

Related Information

Partner Assignment

1.2.1.5　Change History Settings

In this Customizing activity, you set up the change history for your trade promotion.

Related Information

Change History for Marketing Projects

1.2.1.6   Define Status Profile

In this Customizing activity, you define the status profiles for your trade promotions.

The following status profiles are delivered for promotions:

Promotion Type	Promotion Type Description	Status Profiles
STAS	STA: Hier. Node / Product / Ship.	/JBPC/FI
STAC	STA: Hier. Node / Product / Cons.	/JBPC/FI
LTAS	LTA: Hier. Node / Product / Ship.	/JBPC/FI
SSPC	STA: Hier. Node / Product Cat. / Ship.	/JBPC/FI
SCPC	STA: Hier. Node / Product Cat. / Cons.	/JBPC/FI
LTPC	LTA: Hier. Node / Prod. Cat. / Ship.	/JBPC/FI
TGST	STA: Target Grp. / Product / Ship.	/JBPC/FI
TGCT	STA: Target Grp. / Product / Cons.	/JBPC/FI
TGLT	LTA: Target Grp. / Product / Ship.	/JBPC/FI

The business transaction RLUP is also delivered which controls whether the promotion data impacts the customer business plan data when a promotion is in a particular status. For example, a promotion that is set to canceled or rejected should not impact the plan data. The business transaction is added to the delivered status profile /JBPC/FI.

Related Information

Status Management

1.2.1.7   Control Campaign Determination

You use this function to control the determination of marketing projects, such as campaigns or trade promotions.

Related Information

1.2.1.8   Assign Product

In this Customizing activity, you assign a product or range of products that you want to promote to a trade promotion.

> **i Note**
>
> In the delivered content, trade promotions of the type *Product* are planned with products as the basis.

Related Information

1.2.1.9   Assign Product Categories

In this Customizing activity, you assign a product category or range of product categories that you want to promote to a trade promotion.

> **i Note**
>
> In the delivered content, trade promotions of the type *Product Category* are planned with product categories as the basis.

Related Information

1.2.1.10 Configuration Settings for Pertinent Master Data Changes (Enhanced)

This section provides the configuration settings you need to technically implement and configure the Pertinent Master Data Changes (PMDC) program and its enhanced functions.

1.2.1.10.1 Define Planning Function to Rollup Data from Promotion to Plan

Context

In the PMDC program, the roll-up planning function (`/JBPB/FUN_APRM_RU`) is used to combine the roll-up of data from multiple Trade Promotions and store it in a staging aDSO (`/JBPB/IPRSTG`). This staging aDSO is then used to perform key figure calculations to display the data in the Customer Business Plan.

Procedure

For more information on the events triggered in the system and the planning functions executed, kindly refer to under *Configuration Settings for SAP BW* in this guide.

1.2.1.10.2 Control Planning Function Execution During PMDC

In order to control planning function execution during PMDC, the following planning context parameter is provided in the standard solution. This planning context is set at the time of execution of the PMDC job and passed to the SAP BW system. In the BW system, the planning context can be used in method `IF_EX_RSCRM_IMP_EVENT_PF~CHANGE_PF_SELECTION` of BAdI `RSCRM_IMP_EVT_PLANNING_FUNCT` to control execution of planning functions.

Context Parameter Name	Context Parameter Value
IN_PMDC	B

To retrieve the value of this context parameter, you can use the following methods:

- `CL_CRM_IMP_OBJECT=>GET_CONTEXT_PARAMETER` in the SAP CRM system
- `CL_RSCRM_IMP_OBJECT=>GET_PLANNING_CONTEXT` in the SAP BW system

1.2.1.11 Create Account Defaults for Trade Promotions

This function allows you to create account defaults for dates and buying patterns for trade promotions.

Related Information

Account Defaults for Trade Promotions

1.2.1.12 Include Display Pallets in Trade Promotions

This function allows you to include display pallets in your trade promotions. In the user interface, the components of a display pallet are not displayed in the planning layout or in the product picker.

1.2.1.13 Run Promotion Guideline Check

This function can be used to provide guidance to key account managers (KAMs) for trade promotion planning.

Related Information

Trade Promotion Guidelines

1.2.1.14 Check Trade Promotion Overlaps

This function can be used to check for trade promotions that overlap with a selected trade promotion.

Related Information

Trade Promotion Overlaps

1.2.1.15 Manage Promotion Approval and Re-Approval

You can manage trade promotion approvals and re-approvals using the Mass Approval, Versions, and System Checks for Critical Changes functions.

Related Information

Trade Promotion Approval and Re-Approval

1.2.1.16 Maintain Trade Spend and Dates

Trade promotion date ranges are used to track the dates of specific activities relating to the trade promotion.

You can perform the following tasks:

- Associate a date range to a trade spend combination so that the *Date Range* field is automatically filled in a new trade promotion
- Automatically pre-populate trade spends and set default values for the start and end date of the trade spend in trade promotion planning
- Add a product and specify effective dates
  Effective dates can be different from the trade promotion start and end buying dates.

> **i Note**
>
> If you copy a trade promotion with product effective dates, these dates are not copied to the new trade promotion.

Prerequisites

In Customizing for *Customer Relationship Management* you have performed the following tasks:

- Defined additional date ranges under ▶ *Marketing* 〉 *Marketing Planning and Campaign Management* 〉 *Basic Data* 〉 *Define Additional Date Ranges* 〉
- Related a combination of spend type, spend category, and spend method to a date range under ▶ *Trade Promotion Management* 〉 *Trade Promotions* 〉 *Trade Spends* 〉 *Define Trade Spends for Values* 〉 by choosing *Relate Date Range*
- Defined if you want the trade spend date information pre-populated in trade promotion planning under ▶ *Trade Promotion Management* 〉 *Trade Promotions* 〉 *Trade Spends* 〉 *Define Trade Spends for Values* 〉 under *Spend Method, Take Rate* and selecting the *pre-populate* checkbox

- Defined if you would like to integrate funds management functions by mapping the relevant expense type to the trade spend under ▌▶ *Trade Promotion Management* ❭ *Trade Promotions* ❭ *Funds Integration* ❭ *Define Settings for Funds Integration* ❭

- Defined default date ranges for the effective dates under ▌▶ *Trade Promotion Management* ❭ *Basic Data* ❭ *Products* ❭ *Define Product Default Date Ranges* ❭

- Defined if you allow off-invoice trade spends with dates in the past under ▌▶ *Trade Promotion Management* ❭ *Trade Promotions* ❭ *Trade Spends* ❭ *Define Sales Areas for Off-Invoice Check* ❭

Features

Trade Spends and Date Range Defaults

- Trade spend dates are defaulted automatically to new trade promotions when the dates maintained for the trade promotion in the *Dates* assignment block is the date range related to the trade spends in Customizing.

- The *Date Range* for the trade spends in the planning page is defaulted after the trade spend values have been selected if the date range has been related to a trade spend in Customizing.

- If no Customizing has been done, the system searches for the *Buy* or *Plan* date range. Otherwise, it is left blank and can always be modified.

> **i Note**
>
> Data is only pre-populated when initially creating the trade promotion. If you delete the default data, you must manually maintain it.

Adjusting Dates During Active Trade Promotions

- You can add a product, trade spend, or a trade spend exception to a trade promotion even if it has the status *Released*.
  You can also add a product retroactively to a released trade promotion. However, you cannot add an off-invoice trade spend retroactively unless you have an active Business Add-In (BAdI) implementation. For more information, see SAP Note 1241739 .

- Product effective dates are not adjusted if you change the trade promotion date ranges or trade spend dates.

- You withdraw a product from a trade promotion by specifying an *Effective To* date that is earlier than the trade promotion buying end date.
  You stop a trade spend by specifying the trade spend end date.

> **i Note**
>
> You cannot delete a product or trade spend from a trade promotion that is being executed.

Checking Off-Invoice Trade Spend for Sales Areas

For each sales area, you can check if off-invoice trade spends exist for a trade promotion. When off-invoice trade spends with dates in the past already exist, the system prevents you from adding the following:

- Off-invoice trade spends with dates in the past

- Products with dates in the past

Activities

- You can include additional date ranges to your trade promotion in the *Dates* assignment block.
- If you change the dates in the *Dates* assignment block for the trade promotion, and you have not modified any of the dates in the *Planning* assignment block, then the changes are synchronized to the trade spends automatically.

Related Information

Trade Spends and Dates

1.2.1.17 Maintain Conditions and Rebates in Promotions

In these Customizing activities, you can:

- Determine for which usages, condition types, and condition tables the system creates condition records when generating conditions.
- Define a rebate in a particular sales area with an account, which functions as the rebate recipient.

Related Information

Customizing for Condition Generation with SAP Accelerated Trade Promotion Planning
Rebates

1.2.1.17.1 Regenerate Conditions for BW-Relevant Changes

Context

You can maintain a configuration to ensure that on changing and saving BW data for any released promotion, a queue is executed to regenerate the conditions and reflect new values in condition records.

> ⚠ **Caution**
>
> This feature might take additional execution time for running the condition generation process, depending on volume of data for the released promotions changed in queue processing.

Procedure

1. Activate *Automatic Conditions Generation* in Customizing for *Customer Relationship Management* by choosing ▐▶ *Trade Management* ❯ *General Settings* ❯ *Activate Trade Management Features* ▐ .
2. Register the queue with prefix `CBP_COND_GEN_*`.

1.2.1.18 Use Funds Integration for Trade Promotion Management

Funds integration enhances the functionality of the Trade Promotion Management (TPM) solution by incorporating claims and funds management functions.

Related Information

Funds Integration for Trade Promotion Management

1.2.1.18.1 Set Default Fund Plan ID

You can set a default fund plan ID in a promotion using a BAdI implementation.

Context

You can activate the Business Add-In (BAdI) implementation `/JBPC/CRM_MKTPL_OL_TPM_EXAMPLE` to default a fund plan ID in a promotion. This implementation is part of the BAdI definition `CRM_MKTPL_OL_OBJ`.

The delivered implementation is in an inactive state. You can activate it in Customizing for *Customer Relationship Management* by choosing ▐▶ *Marketing* ❯ *Marketing Planning and Campaign Management* ❯ *Additional Fields and Business Add-Ins (BAdIs) for Marketing Planning* ❯ *BAdI: Additional Marketing Project Checking and Controlling Options* ▐ .

1.2.1.19 Maintain Claims with Trade Promotion Management

You can use this function to create, validate, and settle claims within the Trade Promotion Management (TPM) business scenario.

Related Information

Claims Management in Trade Promotion Management

1.2.1.20 Run Background Jobs and Mass Update Reports for TPM

Various reports are available in the Trade Promotion Management (TPM), Funds Management, Claims Management, and Market Development Funds (MDF) business scenarios for you to schedule as background jobs.

Related Information

Reports for TPM, Funds, Claims, and MDF

1.2.1.21 Define Target System

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

Related Information

Define Target System

1.2.1.22 Define BW Queries

In this Customizing activity, you specify the queries that you want to use for SAP Trade Promotion Planning and Management.

Related Information

1.2.1.23 Define Allowed Promotion Types

Context

You configure the relevant promotions so that only the configured ones are displayed as selection values when you create a promotion in the promotion fast entry table or on the detailed promotion screen. All the allowed promotion types are displayed in a dropdown.

Procedure

1. Configure the promotion types in Customizing for *Customer Relationship Management* by choosing ▶ *Marketing* ❯ *Marketing Planning and Campaign Management* ❯ *Basic Data* ❯ *Define Types/Objectives/ Tactics* ▮.

2. Configure the allowed promotion types in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Settings for Fast Promotions and Promotion Planning* ❯ *Define Allowed Promotion Types* ▮. The following promotion types are provided in the standard delivery content:

Promotion Type	Promotion Type Description	Is Draft Promotion	Is Target Group Planning	Is Product Category Planning
STAS	STA: Hier. Node / Product / Ship.	False	False	False
STAC	STA: Hier. Node / Product / Cons.	False	False	False
LTAS	LTA: Hier. Node / Product / Ship.	False	False	False
TGST	STA: Target Grp. / Product / Ship.	False	True	False

Promotion Type	Promotion Type Description	Is Draft Promotion	Is Target Group Planning	Is Product Category Planning
TGCT	STA: Target Grp. / Product / Cons.	False	True	False
TGLT	LTA: Target Grp. / Product / Ship.	False	True	False
SSPC	STA: Hier. Node / Product Cat. / Ship.	False	False	True
SCPC	STA: Hier. Node / Product Cat. / Cons.	False	False	True
LTPC	LTA: Hier. Node / Prod. Cat. / Ship.	False	False	True

Related Information

Maintain Settings for Creating Promotions [page 73]

1.2.1.24 Define Sales Areas and Promotion Types

Context

In this Customizing activity, you configure the sales area and promotion type combinations that use in-memory planning. If you do not maintain these settings, you cannot plan promotions in the SAPUI5 user interface.

Procedure

Configure the promotion types in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Application Kit* ❯ *Define Sales Areas and Promotion Types* ❯.

In the standard delivered content, the following promotion types are available with the generic sales area entries:

Promotion Type	Promotion Type Description	Sales Org	Distribution Channel	Division
LTAS	LTA: Hier. Node / Product / Ship.	*	*	*
STAS	STA: Hier. Node / Product / Ship.	*	*	*
STAC	STA: Hier. Node / Product / Cons.	*	*	*
TGLT	LTA: Target Grp. / Product / Ship.	*	*	*
TGST	STA: Target Grp. / Product / Ship.	*	*	*
TGCT	STA: Target Grp. / Product / Cons.	*	*	*
LTPC	LTA: Hier. Node / Prod. Cat. / Ship.	*	*	*
SSPC	STA: Hier. Node / Product Cat. / Ship.	*	*	*
SCPC	STA: Hier. Node / Product Cat. / Cons.	*	*	*

1.2.1.25 Maintain Settings for Integrated Planning Profile Group in CRM

Prerequisites

You have defined the relevant BW queries that you want to use for Trade Promotion Planning and Management.

Context

This Customizing activity for setting the integrated planning profile group is mandatory for in-memory planning.

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

- Define Integrated Planning Profile Group
- Assign Planning Queries
- Assign Dependency to Account Type
  Only **Customer Hierarchy Node** or **Target Group** is supported.
- Assign Dependency to Product Planning Basis
  Only **Product** or **Product Category** is supported.
- Assign Read Queries
  You can define read queries for query contexts **<*>**, **FUNDS**, **CONDITION**, **TPO** and **FORECAST**.
- Assign Additional Date Ranges

Procedure

Configure these settings in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *Define Integrated Planning Profile Groups* ▶.

Related Information

Define BW Queries

1.2.1.26 Defaulting Planning Profile Group Based on Promotion Types

In the SAPUI5 user interface, the planning profile group is defaulted when a promotion is created. The planning profile group is displayed in the *Admin* area on the detailed promotion screen.

1.2.1.26.1 Define Default Planning Profile Group in Promotions

Context

If you define your own promotion types and related planning profile group, you need to configure the setting in Customizing for *Customer Relationship Management* under ▐▶ *Trade Management* ❯ *Customer Business Planning* ❯ *Fast Promotions* ❯ *Define Default Planning Profile Group in Promotions* ◀▌.

Procedure

1. Define a sales area profile.
2. Assign the promotion types and relevant planning profile groups to the sales area profile.

   The following Customizing settings are delivered in the standard content:

Sales Area Profile	Promotion Type	Integrated Planning Profile Group
SIDM_GEN	LTAS	TPM9
SIDM_GEN	STAS	TPM7
SIDM_GEN	STAC	TPM8
SIDM_GEN	TGLT	TPM9
SIDM_GEN	TGST	TPM7
SIDM_GEN	TGCT	TPM8
SIDM_GEN	LTPC	TPMC
SIDM_GEN	SSPC	TPMA
SIDM_GEN	SCPC	TPMB

1.2.1.26.1.1 Map Planning Profile Groups to Sales Area

Context

Once you have defined the planning profile group, you map the group to a generic sales area. If you use the same promotion types across all markets, you assign the sales area profile to a generic entry.

Procedure

Assign the default planning profile group to a sales area in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *rade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Settings for Fast Promotions and Promotion Planning* ❯ *Assign Default Planning Profile Group to Sales Area* ❯ .

Example Customizing

Sales Organization ID	Distribution Channel	Division	SA Profile ID
<*>	<>	<>	SIDM_GEN

The profile ID **SIDM_GEN** is mapped to the promotion type and planning profile group.

1.2.1.27 Setting Up Promotion Life Cycle Phase

A promotion life cycle phase represents a distinct stage in the overall life cycle of a promotion. The phase is determined by the promotion status or a combination of the promotion status and planned/buying dates.

The standard delivered phases are: **Plan**, **Approve**, **Track**, and **Review**. You can configure different promotion life cycle phases for each promotion type. For example, a promotion with the status **Released** would not have the **Track** life cycle phase until the buying start date has been reached (that is, the promotion is executed). In the promotion fast entry table, the system displays the promotion count based on the promotion life cycle phase or simply the status as defined in the Customizing settings.

On the detailed promotion screen, the system displays the valid promotion phases of the promotion based on these Customizing settings. Each phase is displayed by means of an icon defined in the Customizing settings.

Related Information

Maintain Fast Promotion Header Counter [page 44]

1.2.1.27.1 Maintain Promotion Life Cycle Phase

Context

In this Customizing activity, you configure the following:

- Maintain Life Cycle Phase
  Here, you maintain a promotion life cycle phase ID along with its icon type. Icon type can only be selected from a pre-delivered set of icons. SAP has delivered 14 icons. These icons are defined as fixed values in the domain.
- Maintain Life Cycle Status
  Here, you maintain the user status settings, that is, the combination of status profile and user status key.
- Maintain Life Cycle Dates for Promotion
  Here, you configure the date type (planned, buying, or any other date type configured for promotions) and the duration of the dates which is used in the promotion life cycle phase.

  > i Note
  >
  > Date relevance is normally only required for life cycle phases such as **Track** and **Review**. The current date and the dates on the promotion help determine when these phases are active.

- Maintain Profile ID
  Here, you configure a profile for the promotion life cycle phase. This profile can be assigned later on to a promotion type and sales area.
- Map Life Cycle Phases to Profile ID
  Here, you assign the promotion life cycle phase defined in step 1 (Maintain Life Cycle Phase) to the profile.

Procedure

Configure these Customizing settings in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Promotion Life Cycle Phases* ❯ *Maintain Promotion Life Cycle Phase* ❯.

Related Information

Date Maintenance

1.2.1.27.2 Assign Promotion Life Cycle Phase to Sales Area and Promotion Type

Context

In this Customizing activity, you assign the promotion life cycle phase you have created to the combination of sales area and promotion type.

Procedure

Configure this Customizing setting in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Promotion Life Cycle Phases* ❯ *Assign Promotion Life Cycle Phase to Sales Area* ▮.

The following standard Customizing settings are delivered:

Sales Org	Distribution Channel	Division	Promotion Type	Promotion Lift Cycle Phase Profile
<*>	<>	<>	STAS	DETL
<*>	<>	<>	STAC	DETL
<*>	<>	<>	LTAS	LTA
<*>	<>	<>	SSPC	DETL
<*>	<>	<>	SCPC	DETL
<*>	<>	<>	LTPC	LTA
<*>	<>	<>	TGST	DETL
<*>	<>	<>	TGCT	DETL
<*>	<>	<>	TGLT	LTA

Related Information

[Maintain Promotion Life Cycle Phase [page 22]](#)

1.2.1.28 Tactics and Causals in CRM

Details are provided here on how to configure the tactics and causals relevant for the promotion.

1.2.1.28.1 Defining TPO Types for Causal Factors

1.2.1.28.1.1 Define TPO Types

Procedure

Define the TPO types in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Trade Promotion Planning* ▶ *Tactics and Causals* ▶ *Define TPO Types for Causal Factors* ▶ *Define TPO Types* ▶.

Sub-Customizing for the TPO type is used to select which values for certain entities, such as objectives, restrictions, and causals, should be allowed for a certain scenario based on the selected TPO type. The total set of allowed values for a certain entity is configured in different Customizing activities.

1.2.1.28.1.2 Define Mapping Between Trade Promotion Type and TPO Type

Prerequisites

You have defined the promotion types in Customizing for *Customer Relationship Management* by choosing ▶ *Marketing* ▶ *Marketing Planning and Campaign Management* ▶ *Basic Data* ▶ *Define Types/Objectives/Tactic* ▶.

You have defined the TPO types in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Trade Promotion Planning* ▶ *Tactics and Causals* ▶ *Define TPO Types for Causal Factors* ▶ *Define TPO Types* ▶.

Procedure

Map the promotion types to TPO types in Customizing for *Customer Relationship Management* by choosing
▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Tactics and Causals* ❯ *Define TPO Types for Causal Factors* ❯ *Define TPM to TPO Mapping* ❯. Select *STA: Hier. Node / Product / Cons.* type and maintain the following mapping to the TPO type:

TPO Type	Description	Default for What-If	Used in Header Forecast	Default in Header Forecast
30	SM-Promo. Sim. (TMA-Layer)	X		
32	SM-Promo. Sim. (TMA-Layer)	X	X	

Similarly, you can maintain this configuration for promotion types *STA: Hier. Node / Product Cat. / Cons.* and *STA: Target Grp. / Product / Cons.* and the TPO types listed above.

In the *Promotion Optimization* and *Plan Optimization* popup, only the TPO types with forecast mode *Simulation* are shown, while in the *Promotion What-If* assignment block, all TPO types are visible. The TPO types with forecast mode *Prediction* can be used in the header forecast and can be set as default.

1.2.1.28.2 Causal Factors and Assignment to Sales Area

1.2.1.28.2.1 Maintain Causal Factors

Context

Causal factors are defined to provide incentives, such as discounts, special offers like 'Buy 2 for 1 dollar', or to position products/product categories in a strategic way to attract customers.

Causal factors are defined in a trade promotion and play an important part in influencing the forecasted volumes in the promotion. Trade spends only influence the profit, margin, and so on, of the retailer and manufacturer but not the forecast volumes.

A causal factor type is a clustering entity that groups the causal factors together. For example, the causal factor type **Display** has causal factors such as **Side Stacks** or **Cart Rail**, which specify the type of display.

> **i Note**
>
> Trade Management promotion causal definition is not used if you use the TPO causals. TPO causals are directly mapped to the promotion causal profile.

Procedure

1. Define and map the TPR discount types to TPO discount types in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* 〉 *Advanced Trade Management Analytics* 〉 *Define TPR Discount Types* 〉.

2. Define causal factor types and causal factors in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* 〉 *Trade Promotion Planning and Management* 〉 *Trade Promotion Planning* 〉 *Tactics and Causals* 〉 *Define Causal Factors* 〉 *Define Causal Factor Profiles* 〉 *Types and Default Values* 〉.

   In the standard delivery Customizing, the following causal factor types are maintained:

Causal Type	Group Type	Tactic Type Description	Default	Price Increment	IMC Desciption
01	Generic Causals(GC)	Media Support			
02	Generic Causals(GC)	Display			
03	Temporary Price Reduction Causal(TC)	TPR			
04	Generic Causals(GC)	Feature			
05	Generic Causals(GC)	Feature Ad			
06		Free Goods			
10	Generic Causals(GC)	Feature (new)			
20	Generic Causals(GC)	Display (New)			
50	Multibuy Causal(MC)	Buy X For Y			
70	Generic Causals(GC)	Feature AD (New)			
80	Generic Causals(GC)	Coupon (New)			
90	Generic Causals(GC)	Media (New)			

Causal factor type **10** is assigned the following causal factors:

Causal Factor Field	Causal Factor Description
11	Communication and Action
12	Rollback (New)
13	Special Promo Price Tag

3. Define causal factor profiles to assign causal factors to a sales area. Causal factor types are mapped to causal factor profiles. You can select a causal factor profile from the dialog structure.

   In the standard delivery Customizing, the following causal factor profiles are maintained:

Causal Factor Profile	Causal Factor Profile Text
0001	TPM Causal Profile
0002	MDF Initiative Causal Profile
0009	Causal test
TPO	Causal Profile For Trade Promotion Optim

For the causal factor profile **TPO**, the following causal factor types are mapped in the standard delivery Customizing:

Causal Factor Type	Causal Factor Type Description
03	TPR
04	Feature
10	Feature (New)
20	Display (New)
50	Buy X For Y
70	Feature AD (New)
80	Coupon (New)
90	Media (New)

For the causal factor profile TPO, assign the TPR discount types. The following entries are maintained in the delivery Customizing:

Discount Type	Default
Promo Shelf Price	
Consumer Discount	
%	X

1.2.1.28.2.2 Assign Causal Factor Profiles to Promotion Type and Sales Area

Procedure

Assign causal factor profiles to the trade promotion type and sales area in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Tactics and Causals* ❯ *Define Causal Factors* ❯ *Assign Causal Factor Profiles to Promotion Type and Sales Area* ❯.

For the causal factor profile TPO, the following mapping is maintained in the standard delivery Customizing:

Type	Causal Profile	Sales Org	Dis. Chan.	Division
STAC	TPO	<*>	<>	<>
STAS	TPO	<*>	<>	<>
SCPC	TPO	<*>	<>	<>
SSPC	TPO	<*>	<>	<>
TGCT	TPO	<*>	<>	<>
TGST	TPO	<*>	<>	<>

1.2.1.29 Defaulting of Objective

When you create a promotion (from either the promotion fast entry table or the detailed promotion screen), the objective is defaulted according to the promotion type and sales area. You can define only one default value of an objective for a promotion type.

1.2.1.29.1 Define Objective Profile

Prerequisites

You have configured the required objectives in Customizing for *Customer Relationship Management*
under ▌▶ *Marketing* ❯ *Marketing Planning and Campaign Management* ❯ *Basic Data* ❯ *Define Types/Objectives/
Tactics* ❯.

Context

In this Customizing activity, you configure the promotion types and relevant objective value. A combination of
promotion type and objective value is assigned to an objective profile.

Procedure

You configure this setting in Customizing for *Customer Relationship Management* under ▌▶ *Trade Management*
❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Objectives* ❯ *Define Objective
Profiles* ❯.

Please refer the following example:

Objective Profile	Promotion Type	Objective
SIDM	STAC	0001 (Increase Revenue)
SIDM	LTAS	0001 (Increase Revenue)

1.2.1.29.2 Assign Objective Profile to Sales Area

Context

Once you have created an objective profile, you assign the objective profile to a specific or generic sales area.

Procedure

Configure this setting in Customizing for *Customer Relationship Management* under ▌▶ *Trade Management* ❭ *Trade Promotion Planning and Management* ❭ *Trade Promotion Planning* ❭ *Objectives* ❭ *Assign Objective Profiles to Sales Area* ❭.

The following entries are delivered with the standard solution:

Sales Org	Distribution Channel	Division	Objective Profile
<*>	<>	<>	GEN

1.2.1.30 Maintaining Settings for Long-Term Agreement

Related Information

1.2.1.30.1 Define Long-Term Agreement Type

Context

In this Customizing activity, you set the condition generation to long term and then assign this to a sales area and promotion type.

Procedure

1. Configure the setting for condition generation in Customizing for *Customer Relationship Management* under ▌▶ *Trade Promotion Management* ❭ *Trade Promotions* ❭ *Condition Maintenance* ❭ *Define Condition Generation* ❭ *Condition Generation Type* ❭.
2. Assign this condition generation to a sales area and promotion type in Customizing for *Customer Relationship Management* under ▌▶ *Trade Promotion Management* ❭ *Trade Promotions* ❭ *Condition Maintenance* ❭ *Assign Condition Generation Types* ❭.

Related Information

1.2.1.31 Integration with In-Memory Planning

SAP Trade Management is integrated with the Planning Applications Kit and uses SAP HANA appliance software. For more information, see SAP Note 2343286 .

1.2.1.31.1 Mapping InfoObjects

In SAP Trade Management, you define new key figures in SAP BW. To synchronize the data between SAP CRM and SAP BW, you need to map the newly defined key figures with trade promotion attributes.

1.2.1.31.1.1 Map CRM Application Data to BW InfoObjects

Context

In this Customizing activity, you map the InfoObjects in SAP BW to the application data in SAP CRM for a planning application. The planning application uses this mapping to synchronize the planning data between the two systems.

Procedure

1. Map the InfoObjects in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *InfoObject Mapping* ▶ *Map CRM Application Data to BW InfoObjects* ▶ *InfoObject Mapping* ▶.
2. Map the additional attributes (added using the Enhancement Workbench) to the custom BW InfoObjects in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *InfoObject Mapping* ▶ *Map CRM Application Data to BW InfoObjects* ▶ *Extend InfoObject Mapping* ▶.

The following additional attributes are delivered with the standard delivery content:

Structure Name	Field Name	BW InfoObject
INCL_EEW_MKTPL_HEADER	PLAN_ID_EXT	/JBPB/PLAN
INCL_EEW_MKTPL_HEADER	SCENARIO_ID_EXT	/JBPB/SCEN

> **i Note**
>
> The PLAN_ID_EXT and SCENARIO_ID_EXT attributes are applicable only if you are implementing SAP Customer Business Planning.

1.2.1.31.2 Map Key Figure for Distribution Ratio

Context

In this Customizing activity, you define the key figure for distribution ratio. This key figure represents the number of days used in the ratio for distributing values when you are planning by week.

Procedure

Define the key figure for distribution ratio in Customizing for *Customer Relationship Management* under
Trade Management > *Trade Promotion Planning and Management* > *Key Figure Planning with the Planning Applications Kit* > *InfoObject Mapping* > *Map Key Figure for Distribution Ratio* .

1.2.1.31.3 Map Key Figure for Buying Patterns

Context

In this Customizing activity, you define the key figure for buying patterns. If you are using buying patterns, map the key figure you have defined in SAP BW for buying patterns in SAP CRM.

Procedure

Define the key figure for buying patterns in Customizing for *Customer Relationship Management* under
▌▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *InfoObject Mapping* ❯ *Map Key Figure for Buying Patterns* ❭.

Related Information

Buying Patterns in Volume/Value and Trade Spends Planning with the Planning Applications Kit

1.2.1.31.4 Map Time Characteristics for InfoProviders

Context

In this Customizing activity, you map the time characteristics to an InfoProvider when you are deriving monthly planning values from weekly planning values.

For further details, refer to Set Up Time Dimension under *Configuration Settings for SAP BW* in the Common Configuration Guide for SAP Trade Management.

Procedure

Run transaction `RSCRM_MULT_TIME` in the SAP BW system you are using for your planning with SAP Trade Promotion Planning and Management.

For more information, see Customizing for *Customer Relationship Management* under ▌▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *InfoObject Mapping* ❯ *Map Time Characteristics for InfoProviders* ❭.

1.2.1.31.5 Define Events for Queries

Context

In this Customizing activity, you assign planning functions to events for your queries.

For more information on the configuation of BW planning functions, refer to Assign Planning Functions under *Configuration Settings for SAP BW* in the Common Configuration Guide for SAP Trade Management.

Procedure

Run transaction `RSCRM_EVENTCUST` in the SAP BW system you are using for your planning with SAP Trade Promotion Planning and Management.

For more information, see Customizing for *Customer Relationship Management* under ❚▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Define Events for Queries* ❚.

1.2.1.31.6 Set Up Manual Planning Functions

Context

When you want certain operations to be done to promotion planning, and these need to be executed manually, then you can configure these planning functions as manual planning functions. These planning functions can be triggered from the promotion details screen by the user.

Manual planning functions are available on the promotion details screen under the context menu ❚▶ *More* ❯ *Update Promotions* ❚. To enable the context menu for manual planning functions, use the following procedure.

Procedure

1. In Customizing for *Customer Relationship Management*, choose ❚▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *UI Configuration* ❯ *Define UI Configuration* ❚.

    a. Select the *Maintain Configuration Profile* node, and select the profile.

b. Select the *Maintain Virtual Screen* subnode, and select **7.0.1 (Promotion Details Screen)**.

c. Select the *Maintain Layout Configuration* subnode, and for the *Virtual View Usage* **701_PLANNING_FUNCTION**, select the check box in the *Display* column.

2. Maintain the query against which the manual planning functions need to be run in the relevant planning profile group for trade promotions, in Customizing for *Customer Relationship Management* by choosing ▌▶ *Trade Management* ❭ *Trade Promotion Planning and Management* ❭ *Key Figure Planning with the Planning Applications Kit* ❭ *Define Integrated Planning Profile Groups* ❭.

3. In the BW system, you can configure the manual planning functions against the queries configured in step 2 in transaction RSCRM_EVENTCUST.

> **i Note**
>
> The planning event IDs configured here must be between the range **200** and **225**. All events configured between this range are retrieved from BW via an RFC call.

Results

Once configured, a list of planning events is visible relevant to the query configured for the current screen in the *Update Promotions* context menu on the promotion detail screen.

Related Information

Define UI Configuration [page 54]
Define Events for Queries [page 34]

1.2.1.31.7 Controlling Execution of Planning Functions

You can control the execution of planning functions by using planning contexts.

Context

In SAP Trade Management, planning functions are used in BW-Integrated Planning for system-supported editing and for generating data. In certain conditions, execution of these planning functions can be controlled by planning contexts. Planning contexts are used to improve the performance of the application and also to achieve functional requirements. These planning contexts come from CRM to BW while doing certain actions; for example, saving a trade promotion.

On the other hand, in BW, you must implement the BAdI RSCRM_IMP_EVT_PLANNING_FUNCT, where you can control the execution of planning functions on the basis of the planning contexts. For more

information about controlling the execution of planning functions, see the standard BAdI implementation `/JBPB/IM_RSCRM_IMP_EVENT_PF`.

> **i Note**
>
> For more information, refer to Planning Context under *Configuration Settings for SAP BW* in the Common Configuration Guide for SAP Trade Management.

The following planning contexts are delivered in standard and can be used in the BW BAdI:

Planning Context Parameter	Usage
SKIP_AFTER_DELETE	While deleting or removing products from a trade promotion, CRM sends this planning context to BW to avoid running the roll-in planning functions (update plan baseline volume to promotion) as it is not required on delete operation.
SKIP_AFTER_SAVE_PF	After saving a promotion, the system loads all data again and executes after synchronization planning functions, which may not be required. For example, when you change any key figure in a promotion and save the promotion, there is no need to pull volumes from the customer business plan. By using this planning context, you could achieve this and also improve the save operation performance.
DETAIL_RECAL_SAVE	On the promotion detail screens, we set this parameter with the value as action performed on the UI (R-*Recalculate*, S-*SAVE*, SAR - *SAVE after Recalculate*), to control the roll-up on *Recalculate* and *SAVE* actions individually. In BW, based on the value set, we can skip the roll-up planning functions as required.
IN_PMDC	By using the PMDC report, you can update promotions. If the promotion is linked to a plan, then CRM sends this planning context to BW to avoid executing the roll-up planning functions (updating promotion key figures to plan) one-by-one for all promotions that are linked to the plan. This improves the performance of the PMDC report.
SKIP_TSPEND_CHANGE_PF	While adding or updating trade spend values in a trade promotion, CRM sends this planning context to BW to avoid running the roll-in planning functions that may be configured on the after-synchronization event in BW.

Related Information

Set Up Manual Planning Functions [page 34]

1.2.1.31.8 Modify Planning Behavior

Context

You use the Business Add-In *Modification of Planning Behavior* to influence the planning behavior.

Procedure

Configure the settings for modifying the planning behavior in Customizing for *Customer Relationship Management* under ▌▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Business Add-Ins(BAdIs)* ❯ *BAdI: Modification of Planning Behavior* ❯.

1.2.1.31.9 Modify Planning Data

Context

You use the Business Add-In *Modification of Planning Data* to modify the information that is synchronized between the SAP CRM and SAP BW systems. This BAdI can be used to change the following information:

- Include additional key figures for products
- Remove dates from a date range
- Change the visibility of key figures
- Add key figures to be deleted

Procedure

Configure the settings for modifying the planning data in Customizing for *Customer Relationship Management* under ▌▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Business Add-Ins (BAdIs)* ❯ *BAdI: Modification of Planning Data* ❯.

1.2.1.31.10 Modify Planning Integration

Context

You use the Business Add-In *Modification of Planning Integration* to modify the integration between the SAP CRM and SAP BW systems. You can use this BAdI to change the following information:

- Choose which warning or information messages issued by SAP BW to display on the SAP CRM UI.
- Send additional CRM application data to SAP BW. This data can be used to enhance Query/Planning Function filters in SAP BW.

Procedure

Configure the settings for modifying the planning integration in Customizing for *Customer Relationship Management* under ⏵ *Trade Management* ⏵ *Trade Promotion Planning and Management* ⏵ *Key Figure Planning with the Planning Applications Kit* ⏵ *Business Add-Ins (BAdIs)* ⏵ *BAdI: Modification of Planning Integration* ⏵.

1.2.1.31.11 Modify Condition Generation

Context

You use the Business Add-In *Modification of Condition Generation* to change data that is sent for condition generation.

Procedure

Configure the settings for modifying condition generation in Customizing for *Customer Relationship Management* under ⏵ *Trade Management* ⏵ *Trade Promotion Planning and Management* ⏵ *Key Figure Planning with the Planning Applications Kit* ⏵ *Business Add-Ins (BAdIs)* ⏵ *BAdI: Modification of Condition Generation* ⏵.

1.2.2 Setting Up Promotion Planning Using Fast Entry

Fast entry is a quick way of creating a promotion by providing the minimum information required such as description, dates, products/product categories, and trade spends.

The following attributes are defaulted when a promotion is created using fast entry:

- Promotion type
- Customer hierarchy node (node from responsibility area)/target group
- Product planning basis (only **Product** or **Product Category** is supported)
- Objective

In Customer Business Planning, fast promotion entry is available in all planning views of the customer business plan and its scenarios. You can display and hide the promotion fast entry table in the customer business plan by clicking a button.

In the Promotion Planning application, the promotion fast entry table is just one screen. You can navigate from here to the detailed promotion screen.

1.2.2.1 Common Configurations

1.2.2.1.1 Key Figure Grouping

1.2.2.1.1.1 Define Key Figure Groups

Context

In the promotion fast entry table, you enter the minimum information required to plan a promotion. The default table should, therefore, contain the minimum number of columns. The system gives you the option of grouping the key figures in line with your requirements.

For example, discount trade spends can be defined as a rate and as a percentage. This means that you need two different key figures to enter the discount rate and discount percentage. You can also define a third key figure that displays the combined effect of both the discount rate and discount percentage. This can be achieved with a key figure grouping feature. When you open the promotion fast entry table, you only see the discount (combined). When you zoom in, all three key figures are displayed.

In this Customizing activity, you can define the following:

- Key figure group ID
- Key figure description
- Key figure technical ID pattern
- Trade spends

Procedure

Configure the settings in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Trade Promotion Planning* ▶ *Settings for Fast Promotions and Promotion Planning* ▶ *Key Figure Grouping* ▶ *Define Key Figure Groups* ▶.

The following settings are delivered:

Maintain Spends

Key Figure Group	Spend Type	Spend Category	Key Figure
LTDI	P125	PTR	/JBPB/REDLP_D
	P130	PTR	/JBPB/PEDLP_D
LTRE	P115	PTR	/JBPB/REDLP_R
	P120	PTR	/JBPB/PEDLP_R
STDI	EXON	PERCENT	/JBPB/PPRM_D
		RATE	/JBPB/RPRM_D
STRE	CPFF	LUMPSUM	/JBPB/LPRM_R
		PERCENT	/JBPB/PPRM_R
		RATE	/JBPB/RPRM_R
	CPFO	LUMPSUM	/JBPB/LPRM_RD

Define Profile ID

Profile ID	Profile Description
SMDM	Simplified Data Model

Map Key Figure Group

Profile ID	Key Figure Group
SMDM	LTDI
	LTRE
	STDI

Profile ID	Key Figure Group
	STRE

1.2.2.1.1.2 Assign Key Figure Groups to Sales Area

Context

In this Customizing activity, you assign profile IDs to a sales area.

Procedure

Maintain the profile IDs against the sales area in Customizing for *Customer Relationship Management* under
▶ *Trade Management* 〉 *Trade Promotion Planning and Management* 〉 *Trade Promotion Planning* 〉 *Settings for Fast Promotions and Promotion Planning* 〉 *Key Figure Grouping* 〉 *Assign Key Figure Groups to Sales Area* ◀ .

Related Information

Define Key Figure Groups [page 39]

1.2.2.1.2 Fast Promotion Filters

1.2.2.1.2.1 Maintain Filter Profiles

Context

In this Customizing activity, you can define filters that are to be displayed on the promotion planning screen and promotion fast entry table.

Procedure

Maintain the profile IDs against the sales area in Customizing for *Customer Relationship Management* under ▌*Trade Management* 〉 *Trade Promotion Planning and Management* 〉 *Trade Promotion Planning* 〉 *Settings for Fast Promotions and Promotion Planning* 〉 *Maintain Filter Profiles* ▌.

The following settings are delivered with the standard solution:

Filter Profile	Filter Profile Description
GEN	Filter profile for promotion planning

Map Filter Attributes to Profile

Filter Profile ID	Attribute Name	Attribute Description
GEN	BUYINGDATE	Buying Date
	DISTRIBUTION_CHANNEL	Distribution Channel
	DIVISION	Division
	EMPLOYEE_RESP	Employee Responsible
	FUND_PLAN_ID	Funds Plan ID
	PLANDATES	Plan Dates
	PLANNINGACCOUNT	Planning Account
	PLAN_ID	Plan ID
	PRODUCTID	Product ID
	PROMOTIONID	Promotion ID
	PROMOTIONTYPE	Promotion Type
	PROMOTION_DESC	Promotion Description
	SALES_ORG	Sales Organization
	STATUS	Status
	TACTICS	Tactics
	CAUSALS	Causals

You can only select the attributes from a set of attributes that has already been defined. The allowed values of filters are defined in maintenance view `/JBPC/VFP_FILATT`. Customers can maintain their own entries in the customer namespace (Z* or Y*) in this view.

TACTICS and CAUSALS are maintained as attributes in the filter profile ID. These are used to filter promotions based on the trade promotion header tactic or causals maintained.

TACTICS: If TACTICS is maintained as a filter attribute, the promotions are filtered based on the header tactics field in the trade promotion.

CAUSALS: If CAUSALS is maintained as a filter attribute, the promotions are filtered based on the causals popup in the trade promotion.

1.2.2.1.2.2 Assign Filter Profiles to Sales Area

Context

In this Customizing activity, you can assign the filter profiles to a sales area. Only the filters maintained here are displayed on the promotion planning screen and promotion fast entry table.

Procedure

Maintain the profile IDs against the sales area in Customizing for *Customer Relationship Management* under *Trade Management* > *Trade Promotion Planning and Management* > *Trade Promotion Planning* > *Settings for Fast Promotions and Promotion Planning* > *Assign Filter Profiles to Sales Area* .

The following settings are delivered with the standard solution:

Sales Organization	Distribution Channel	Division	Filter Profile	Filter Profile Description
<*>	<>	<>	GEN	Filter profile for promotion planning

1.2.2.1.3   Maintain Fast Promotion Header Counter

Context

In the promotion fast entry table, the header area shows the number of promotions displayed in the table. Promotions are counted based on the:

- Promotion Phase (PP)

or

- Promotion Type (PT)

For example, 50 promotions are displayed in the fast entry table, 10 of which are *STA: Hier. Node / Product / Ship.*, 38 are *STA: Hier. Node / Product / Cons.*, and 2 are *LTA: Hier. Node / Product / Ship.*. If *Promotion Type* is selected as the count criterion, the header area shows the following:

50 Promotions/10 *STA: Hier. Node / Product / Ship.*/38 *STA: Hier. Node / Product / Cons.*/2 *LTA: Hier. Node / Product / Ship.*

In this Customizing activity, you can assign the promotion phase or promotion type overlay filter value to a sales area.

Procedure

Maintain the filter type against the sales area in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Settings for Fast Promotions and Promotion Planning* ❯ *Assign Overlay Header Filters to Sales Area* ❯.

The following settings are delivered with the standard solution:

Sales Organization	Distribution Channel	Division	Filter Type
*	<>	<>	PT (Promotion Type)

1.2.2.2 Creating Fast Promotions from Customer Business Plan

Context

You can create promotions using the promotion fast entry table in SAP Customer Business Planning.

A fast promotion is a quick means of creating a promotion by providing the minimum information required in one line. The system allows you to create fast promotions from the *Plan* and *Scenario Planning* screens. On the *Plan* screen, the promotion fast entry table appears as an overlay screen that can be displayed and hidden at the click of a button. On the *Scenario Planning* screen, the fast entry table is always visible

Consider the steps listed below when implementing fast promotions.

Procedure

1. Select the same account hierarchy node as that of your customer business plan, or a node below it, based on the settings defined in Customizing for *Customer Relationship Management* under ▌ *Trade Management* ▸ *Customer Business Planning* ▸ *Basic Settings* ▸ *Activate CBP Features* ▌.

   > **i Note**
   >
   > The standard delivered content contains the setting that allows promotions to be created only at the anchor (same) customer hierarchy node of the customer business plan.

2. Select a promotion type.
3. Select products/nodes from the planning product hierarchy assigned to the current year of the customer business plan.
4. Define one planning query that allows you to create promotions of different types and spends.

   The system uses the same master queries for combination generation as you have defined for your promotion types.

5. Perform a selective roll-up to your operational plan as well as any scenario.

   When you create, copy, or delete a promotion, the system uses the same planning functions as configured for the short-term promotions and long-term agreements.

6. Assign promotions outside your customer business plan.

   This functionality is only available in a customer business plan and not on the promotion planning screen.

7. Perform an overlap check on the promotions.

   The planning profile group is defaulted based on your configuration.

1.2.2.2.1 Maintain Basic Settings for Fast Promotion Planning

In this procedure, you configure query profile and key figures for fast promotions for the BW data model.

Context

If you have defined your own query for fast promotion entry and want to use it for fast promotion query determination, follow this procedure.

Procedure

1. Configure the fast promotion query in Customizing for *Customer Relationship Management* by choosing
   ▶ *Trade Management* ❯ *General Settings* ❯ *System Settings* ❯ *Define BW Queries* ◀.
2. Assign the fast promotion query to a query profile in Customizing for *Customer Relationship Management*
   by choosing ▶ *Trade Management* ❯ *General Settings* ❯ *System Settings* ❯ *BW Query Determination*
   ❯ *Maintain Query Profile* ◀.

   The following standard configuration is delivered:

   Configured Query Profile

Query Profile	Criteria Profile	Virtual View Usage	Query
QR_SIMP_DM	SM_FPPR	321_PROMO_PLANNING	/JBPB/ APRM_PL_FAST_PROMO_Q0 01
QR_SIMP_DM	SM_PFPOPR	320_PROMO_PLANNING	/JBPB/ APRM_PL_FAST_PROMO_Q0 01
QR_SIMP_DM	SM_FPPR	702_PROMO_PLANNING	/JBPB/ APRM_PL_FAST_PROMO_Q0 01

   In the delivered solution, the system uses the query /JBPB/APRM_PL_FAST_PROMO_Q001.

   The criteria profiles belong to the screens where fast promotion entry is possible:

   - SM_FPPR: *Scenario Planning* screen in *Customer Business Planning* and *Promotion Planning* screen in *Trade Promotion Planning and Management*.
   - SM_PFPOPR: Promotion overlay screen in the *Plan* tab in *Customer Business Planning*.

3. Maintain the key figures that you want to display on the fast promotion entry table, in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *General Settings* ❯ *System Settings* ❯ *BW Query Determination* ❯ *Maintain Query Profile* ❯ *Maintain KPIs for Query* ◀.

4. If you have defined your own query for fast promotions, you can define the planning functions for your query using transaction RSCRM_EVENTCUST in the BW system.

   For more information on the setup for the BW data model, kindly refer to Fast Entry Table [page 93] under *Configuration Settings for SAP BW* in this guide.

1.2.2.2.2   Maintain Settings for Creating Fast Promotion

Context

In this step, you can create a promotion from the promotion fast entry table.

When a promotion is created from the promotion fast entry table, the system:

- Allows you to create promotions for the promotion types maintained in Customizing for fast promotion planning.
- Defaults the planning profile group in the created promotion based on the Customizing settings for fast promotion planning.
- Uses the same master queries for combination generation as defined for the defaulted planning profile groups based on the Customizing settings.

No additional configuration or setup is required for this step.

Related Information

1.2.2.2.3   Maintain Settings for Saving Fast Promotion

Context

In this procedure, you can define your own planning functions to roll up the data from the fast promotion to your customer business plan.

Procedure

Define the planning function that rolls up the data from the fast promotion to your operational plan or its scenario.

You can define the planning function for your query using transaction RSCRM_EVENTCUST in the BW system.

For more information on the setup of the BW data model, kindly refer to Save Promotions [page 91] under *Configuration Settings for SAP BW* in this guide.

1.2.2.2.4 Perform Recalculate or Cell Update

Context

In this procedure, you can configure your own planning functions that you want to call at the time of performing a cell update in the promotion fast entry table. In the promotion fast entry table, the cell update is performed when you click the *Recalculate* button. During the cell update, the system:

- Transfers the fast promotion updates to the BW system.
- Performs calculations of the key figures, for example, total promotion investment based on the updated values in the promotion fast entry table.
- For the *Scenario Planning* screen, rolls up the promotion data to the operational plan or scenarios depending on the roll-ups selected in the promotion fast entry table.
- For the *Plan* screen, reloads the entire promotion fast entry table; and for the *Scenario Planning* screen, along with the promotion fast entry table, reloads the *Scenario Planning* screen in order to apply the impact of the updated fast promotions on the operational plan and its scenarios.

If you do not click the *Recalculate* button and click *Save* or navigate away from the screen after updating promotions in the promotion fast entry table, the system implicitly calls the recalculate operation so that your updated data is not lost. When you click the *Recalculate* button, the baselines from the operational plan are not rolled into the promotions. The plan is merely updated from the relevant promotion planning data only on the *Scenario Planning* screen only at the *Recalculate* step.

Procedure

Define your own planning function that you want to call at the time of the recalculate operation on the promotion fast entry table.

You can define the planning function for your query using transaction RSCRM_EVENTCUST in the BW system.

For more information on the setup of the BW data model, kindly refer to Update or Recalculate Promotions [page 92] under *Configuration Settings for SAP BW* in this guide.

1.2.2.2.5 Maintain Settings for Copying Fast Promotion

Context

In this procedure, you can copy a promotion from the fast entry table on the *Promotion* screen.

For information on the setup of the BW data model, kindly refer to Copy Promotions [page 95] under *Configuration Settings for SAP BW* in this guide.

1.2.2.2.6 Maintain Settings for Copying Promotions from Other RAs or Plan Years

Prerequisites

This feature can only be used if the simplified data model is active for your sales area. You can activate it in Customizing for *Customer Relationship Management* by choosing ▌▶ *Trade Management* ❯ *General Settings* ❯ *Activate Trade Management Features* ▌.

Procedure

1. Maintain the queries to display the planning grid of source promotions in the copy promotion process across the *Plan*, *Scenario Planning* and *Promotion Planning* screens within the SAP Customer Business Planning application. In Customizing for *Customer Relationship Management*, choose ▌▶ *Trade Management* ❯ *General Settings* ❯ *System Settings* ❯ *BW Query Determination* ❯ *Maintain Query Profile* ❯ *Assign Criteria Profile and Query ID* ▌.

   Assign queries corresponding to the following criteria profiles and virtual view usage:

Criteria ID	Virtual View Usage
PL_320CP	320_COPY_PROMO_PLANNING
PL_321CP	321_COPY_PROMO_PLANNING
PL_702CP	702_COPY_PROMO_PLANNING

The above configuration is delivered with the solution for the query profile `QR_SIMP_DM`

.

2. [OPTIONAL] Set up the wait time for the background processes per sales area in the Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *General Settings* ❯ *System Settings* ❯ *Configure Wait Time for Background Processes per Sales Area* ❯.

   You can configure the wait time to start the execution of the job process in the mode *Immediately*.

3. [OPTIONAL] Implement the BAdI `/JBPC/MASS_COPY_PROMOTIONS` to:

   - Modify the attributes of the target promotion before these are synchronized with BW, using the method `MODIFY_TARGET_PROMO_ATTRIBUTES`
   - Determine the default values of target accounts shown during the guided procedure of copying promotions across responsibility areas (RAs) and plan years, using the method `MAINTAIN_DEF_VAL_FOR_TAR_PROMO`
     If you wish to change the target account determination logic. you must implement this BAdI, available in the Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Mass Processing* ❯ *Business Add-Ins (BAdIs)* ❯ *BAdI: Mass Copying of Promotions from Another RA/Plan Year* ❯.

   > **i Note**
   >
   > A default implementation is delivered with the solution that determines the target account of the target promotion based on the below conditions:
   >
   > - If the source and target RAs are the same, the account of the target promotion is the same as that of the source promotion.
   > - If the source and target RAs are different, the source promotion is created on the *Account Heirarchy* node and this node is assigned to the source RA, then the account of the target promotion is assigned to the target RA.

1.2.2.2.7   Maintain Settings for Deleting Fast Promotion

In this procedure, you can delete a promotion from the fast entry table on the *Promotion* screen.

For information on the setup of the BW data model, kindly refer to under *Configuration Settings for SAP BW* in this guide.

1.2.2.2.8 Maintain Settings for Assigning Promotion

Context

In this procedure, you assign the promotions outside your customer business plan in the promotion fast entry table. For more information on the required configurations and setup, see Assign Promotions to Plan.

No additional configuration is required to enable this feature in the promotion fast entry table.

1.2.2.2.9 Perform Overlap Check

Context

In this procedure, you can perform an optional overlap check for the promotions from your promotion fast entry table.

Procedure

Implement BAdI to perform overlap check on the promotions.

In this step, you can implement your own logic to perform the overlap check on the promotions from your promotion fast entry table. You can change the logic by implementing the `GET_OVERLAPS` method of BAdI `/JBPC/EH_OVERLAP_CHECK`.

> **i Note**
>
> The following logic is delivered with the default implementation `/JBPC/IM_OVERLAP_CHECK`. For each promotion in the operational plan or scenario:
>
> - Check whether the promotions are created for the same account hierarchy node and dates.
> - Check whether the promotion is created for the same products.
> - Check whether the promotion is created for the same spend.

1.2.2.2.10 Display Baselines from Scenarios in Fast Promotion Screen

Context

In the **Fast Promotion** screen, from *Scenario Planning*, users can select a plan scenario from a dropdown to view the baseline volumes and prices from the selected scenario. From the dropdown, users can select the *Operational Plan*, *All*, or the scenarios available in the plan. When the user selects *Operational Plan* or *All*, the baselines and prices in the fast entry screen are fetched from the operational plan and displayed. When the user selects a specific scenario, the baselines and prices in the fast entry screen are fetched from the selected scenario and displayed.

The parameter `EXECUTE_ROLL_IN` must be passed to BW on opening the overlay or on selecting a value from scenario dropdown. This parameter is passed from the UI with an ICF call to execute the Promotion Overlay Screen (`320_PROMO_PLANNING`), Promotion Planning Screen (`702_PROMO_PLANNING`), Scenario Planning Promotions Screen (`321_PROMO_PLANNING`), and Detailed Promotion Screen (`701_PLANNING_LAYOUT`).

More Information

- For further details, refer to Controlling Execution of Planning Functions [page 35].
- For more information on the setup of the BW data model, kindly refer to Fast Entry Table [page 93] under *Configuration Settings for SAP BW* in this guide.

1.2.2.3 Creating Fast Promotions Outside Customer Business Plan

You use this business process if you want to create promotions using the promotion fast entry table in SAP Trade Promotion Planning and Management. You always create the promotions in the context of a responsibility area.

The responsibility area is a TPM-only RA if you have maintained the RA type as TPM-only.

Consider the following points when implementing fast promotions outside a customer business plan:

1. Your responsibility area is defined as TPM-only.
2. Select a promotion type.
3. Select the same customer hierarchy node (or a node below it) or the same target group as your responsibility area,. You can select any customer node in the customer hierarchy defined at responsibility area level.
   The planning profile group is defaulted based on your configuration.

4. Select product/product category nodes from the ECC pricing hierarchy nodes assigned to the responsibility area. You can only select the products or product categories which are a part of your responsibility area.

5. Define one planning query that allows you to create promotions of different types and spends. The system uses the same master queries for combination generation as you have defined for your promotion types.

6. When you create/copy/delete a promotion, the system uses the same planning functions as configured for the short-term promotion and long-term agreement types.

7. Perform an overlap check on the promotions.

Related Information

Setting Up Responsibility Area
Maintain Basic Settings for Fast Promotion Planning [page 46]
Maintain Settings for Saving Fast Promotion [page 47]
Maintain Settings for Creating Fast Promotion [page 47]
Perform Recalculate or Cell Update [page 48]
Maintain Settings for Copying Fast Promotion [page 49]
Maintain Settings for Deleting Fast Promotion [page 50]

1.2.3 Setting Up Promotion Planning Using Detailed Entry

1.2.3.1   Activate Navigation to SAPUI5 User Interface

Context

This Customizing activity is mandatory if you want to access the SAPUI5 user interface. The setting is role based.

Procedure

Configure this setting in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Trade Promotion Planning* ▶ *Maintain Business Roles for Promotion UI* ◀.

The following Customizing settings are delivered with the standard solution:

Business Role	Business Role Description
/JBPC/KAM	Key Account Manager

1.2.3.2 Setting Up UI Configuration for Detailed Promotion Screen

The detailed promotion screen can be configured for the different sales areas, promotion types, and promotion life cycle phases available. This is a mandatory setting for the SAPUI5 user interface.

You can configure the following settings:

- You can display and hide any section on the detailed promotion screen. For example, you can hide the promotion forecast option for a long-term agreement.
- You can specify that a section is to be collapsed or expanded when the detailed promotion screen is opened. For example, you can configure the *Change History* and *Parties Involved* assignments to be collapsed by default.
- You can hide a tab, or set any tab as default, in the *Volume and Value Planning* section. For example, if the *Sell-Out* tab is not relevant for a particular campaign type, it can be hidden.

1.2.3.2.1 Define UI Configuration

Context

In this Customizing activity, you can define a new UI configuration:

1. **Maintain Configuration Profile**: You define a new configuration profile for the detailed promotion screen. You maintain the configuration profile ID and its description.
2. **Maintain Virtual Screen**: You assign the screen number (7.0.1 for the detailed promotion screen) to the configuration profile maintained in the previous step.
3. **Maintain Layout Configuration**: You assign the *Virtual View* and *Virtual View Usage* to be displayed on the detailed promotion screen for the configuration profile. You can also configure that a *Virtual View* is to be collapsed or expanded on the detailed promotion screen.
   Some virtual views (for example, `KPI_MONITOR`, `BUDGET_MONITOR`, `FUND_MONITOR`, `PLAN_KPI_MONITOR`, and `SIDEBAR_REPORTS`) cannot be collapsed.
4. **Maintain Attribute Configuration**: You assign the logical context node and the attributes that can be displayed in the virtual view on the detailed promotion screen. You can also configure whether an attribute is displayed or not, and whether the attribute is editable or not on the screen.

5. **Control**: You add the control ID `PROMO_VIEW` for editing the visibility of different tabs in the *Volume and Value Planning* section on the detailed promotion screen.
This is valid only for control ID `PROMO_VIEW` and not for other control IDs.

6. **Element**: You can add whatever element that is available in the control `PROMO_VIEW`; each element represents a tab in the *Volume and Value Planning* section.
For each element, you can control its visibility by using the *Hidden* check box; if selected, the element is hidden on the UI.
You can also choose a tab that needs to be selected by default while opening a promotion. If none of the elements is chosen as default, the first visible tab in the sequence is chosen. Similarly, if more than one element are chosen as default, then the one that comes first in the sequence among the defaulted elements is chosen.

> ⁂ Example
>
> You want the fields *Sales Organization* and *Territory ID* to be displayed on the detailed promotion screen, but the user cannot change their values for a promotion. To configure this, you can select the *Display* option and clear the *Editable* option for these fields.

> i Note
>
> - You can control the visibility and edit ability of the fields by using the *Display* and *Editable* options.
> - You can control the visibility of the fields in the table control like *Products*, *Funds Association*, and so on, by personalization.
> - The *Mandatory* option is currently not supported.
> - The *Position* option is used to specify the sequence of the fields on the screen in the *General Data* section on the detailed promotion screen.

Procedure

Configure these settings in Customizing for *Customer Relationship Management* by choosing ▕▶ *Trade Management* ❭ *Trade Promotion Planning and Management* ❭ *Trade Promotion Planning* ❭ *UI Configuration* ❭ *Define UI Configuration* ❭ .

The following configuration settings are part of the standard delivery for short-term promotion (shipment) and long-term agreement (shipment).

Configuration ID	Configuration Description	Screen Number	Virtual View Usage	Virtual View	Display	Collapse
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_ADMIN-DATA	ADMIN_DATA	X	' '

Configuration ID	Configuration Description	Screen Number	Virtual View Usage	Virtual View	Display	Collapse
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_BUDGET_MONITOR	BW_GENERIC_VV	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_FUND_MONITOR	PROMO_FUNDS	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_GENERAL_DATA	GENERAL_DATA	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_KPI_MONITOR	BW_GENERIC_VV	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PLANNING_FUNCTION	BW_PLANNING_FUNC_VV	' '	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PP_SIDEBAR_REPORTS	PP_SIDEBAR_REPORT	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PRODUCTS	PRODUCTS	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_CHANGEHISTORY	PROMO_CHANGEHISTORY	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_CLAIMS	PROMO_CLAIMS	X	X
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_DISCOUNTS	PROMO_DISCOUNTS	X	X
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_FORECAST	PROMO_FORECAST	X	X
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_FUNDASSOCIATION	PROMO_FUNDASSOCIATION	X	' '

Configuration ID	Configuration Description	Screen Number	Virtual View Usage	Virtual View	Display	Collapse
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_FUNDUSAGES	PROMO_FUNDUSAGES	X	X
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_PARTIESINVOLVED	PROMO_PARTIESINVOLVED	X	X
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_REBATES	PROMO_REBATES	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_SIDEBAR	PROMO_SIDEBAR	X	' '
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_PROMO_TACTICS	PROMO_TACTICS	X	X
SHIP	Configuration for Plan & Approve Phases	7.0.1	701_TRADE_SPEND	TRADE_SPEND	X	' '

A similar configuration is also delivered for short-term promotion (consumption) (*Configuration Profile ID*: SCAN). Please see the Customizing entries in the system.

Related Information

Map Virtual Screens
Maintain Virtual Views
Assign Virtual View Usage

1.2.3.2.2 Assign UI Configuration to Sales Area

Context

Once you have defined your configuration profile, you need to assign this to the sales area and promotion types. You can configure the number of levels that are shown in the planning grid for the product hierarchy in the *Promotion* screen, by entering the number in the *Levels* column.

Procedure

Make the assignment in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Trade Promotion Planning* ▶ *UI Configuration* ▶ *Assign Configurations to Sales Area* ▶.

The following sample settings for business role /JBPC/KAM can be configured for specific promotion types:

Business Role	Sales Org	Distribution Channel	Division	Promotion Type	Promotion Life Cycle Phase	Config ID	Levels
/JBPC/KAM	<*>	<>	<>	LTAS		SHIP	
/JBPC/KAM	<*>	<>	<>	STAC		SCAN	
/JBPC/KAM	<*>	<>	<>	STAS		SHIP	
/JBPC/KAM	<*>	<>	<>	LTPC		SHIP	
/JBPC/KAM	<*>	<>	<>	SCPC		SCAN	
/JBPC/KAM	<*>	<>	<>	SSPC		SHIP	
/JBPC/KAM	<*>	<>	<>	TGLT		SHIP	
/JBPC/KAM	<*>	<>	<>	TGCT		SCAN	
/JBPC/KAM	<*>	<>	<>	TGST		SHIP	

1.2.3.2.3 Identify Editability of Attributes on Detailed Promotion Screen

Context

You use this procedure to identify whether the fields on the detailed promotion screen are editable or not.

When the detailed promotion screen is opened, the editability of attributes is controlled at the following levels:

- BOL/GenIL layer
- UI configuration

For any attribute on the detailed promotion screen, the information of editability is first fetched from the BOL layer.

Procedure

1. If the attribute is marked as editable at the BOL layer, then check the editable property in the UI configuration.

   - If the same field is marked as editable in the UI configuration, then it appears as editable on the screen.

     > ⁂ Example
     >
     > If a new promotion is created, then the field *Planning Profile Group* is editable at the BOL layer. If this field is marked as editable in the UI configuration, then it appears as editable on the screen.

   - If the same field is marked as non-editable in the UI configuration, then it appears as non-editable on the screen.

     > ⁂ Example
     >
     > For a new promotion, the field *Planning Profile Group* is editable at the BOL layer. If you mark it as non-editable in the UI configuration, the field appears as non-editable on the detailed promotion screen.

2. If the attribute is marked as non-editable at the BOL layer, then the UI configuration is not considered for editability.

   The field appears as non-editable on the screen.

   > ⁂ Example
   >
   > For a promotion in *New* status, the fields *Created By* and *Created On* are non-editable at the BOL layer. Even if these attributes are marked as editable in the UI configuration, they appear as non-editable on the screen.

> ❖ Example
>
> If a promotion is in *Released* status, then the fields *Sell-In* and *Sell-Out* dates are non-editable at the BOL layer. Even if these attributes are marked as editable in the UI configuration, they appear as non-editable on the screen.

1.2.3.2.4　Link Promotion to Scenario

You can link a promotion to a valid scenario.

You can link or unlink a promotion to plan scenarios directly from the *Promotion Detail* screen using the *Link Scenarios* option. This feature of linking promotions to scenarios is also present on the *Fast Promotion Entry* screen on the *Scenario Planning* screen.

Scenario Dropdown

You can select a scenario or an operational plan from the scenario dropdown. The baseline for the promotion is updated based on the selected scenario or operational plan.

This drop down will appear only if the scenario planning feature is enabled for a specific sales area.

1.2.3.3　Setting Up Side Bar on Promotion Detail Screen

1.2.3.3.1　Set Up Fund Monitor

Context

The *Fund Monitor* is displayed on the side bar of the detailed promotion screen and shows the fund checkbook attributes such as reserved amount, claimed amount and so on. You can display only 5 attributes in this area.

Procedure

1. Maintain the *Fund Monitor Profile* and then assign the fund checkbook attributes to the fund profile in Customizing for *Customer Relationship Management* by choosing ▶️ *Trade Management* > *Trade Promotion Planning and Management* > *Trade Promotion Planning* > *Fund Monitor* > *Maintain Fund Monitor Profile* ▶️.

The following settings are delivered with the standard content:

Fund Monitor Profile	Fund Checkbook Attribute	Sequence
GEN	BUDGET	1
GEN	RESERVED	2
GEN	PRERESERVED	3
GEN	BUDGET_EARNED	4
GEN	SETTLED	5

2. Make the assignment in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Trade Promotion Planning* ▶ *Fund Monitor* ▶ *Assign Fund Monitor Profiles to Sales Area* ◀.

The following settings are delivered with the standard content:

Sales Area	Distribution Channel	Division	Fund Monitor Profile
<*>	<*>	<>	GEN

1.2.3.3.2 Set Up Plan KPI Monitor

Context

> **i Note**
>
> This configuration setting is required only if you have SAP Trade Promotion Planning and Management installed along with SAP Customer Business Planning.

Plan KPI Monitor is displayed on the side bar of the detailed promotion screen and displays internal KPIs for the current plan year.

Procedure

1. Customize internal targets displayed in the *Plan KPI Monitor*.

   In this step, you set up the targets for the KPIs that you want to display on the *Plan KPI Monitor*. For configuring the internal targets, see the configuration guide for Customer Business Planning.

2. Define BW query for *Plan KPI Monitor*.

   In this step, you set up the query that is used to retrieve the latest estimates that are displayed in the *Plan KPI Monitor* and are also used to calculate the delta with the targets.

3. Configure the query for the *Plan KPI Monitor* in your SAP CRM system.

   After the query has been defined in the BW system, it must be configured in the CRM system in Customizing for *Customer Relationship Management* under ▶ *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination* ◀.

   > **i** Note
   >
   > Query /JBPB/APLN_SCEN_IMPCT_KPI is used for plan KPI monitor for the following query profiles and promotion types:
   >
   > - QR_STAC: for STA: Hier. Node / Product / Cons. and STA: Target Grp. / Product / Cons.
   > - QR_STAS: for STA: Hier. Node / Product / Ship. and STA: Target Grp. / Product / Ship.
   > - QR_LTAS: for LTA: Hier. Node / Product / Ship. and LTA: Target Grp. / Product / Ship.
   > - QR_SCPC: for STA: Hier. Node / Product Cat. / Cons.
   > - QR_SSPC: for STA: Hier. Node / Product Cat. / Ship.
   > - QR_LTPC: for LTA: Hier. Node / Prod. Cat. / Ship.
   >
   > Example Configuration
   >
   > | Criteria Profile ID | Virtual View Usage | BW Query ID | Scenario |
   > | --- | --- | --- | --- |
   > | PLANKPIU | 701_PLAN_KPI_MONITOR | /JBPB/ APLN_SCEN_IMPCT_KPI | Plan KPI Monitor |

4. Customize key figure grouping for KPI monitor KPIs.

   The KPI monitor displays the KPIs in the following formats:

   - KPIs with comparison between latest estimates and targets. For example, GSV growth, customer profit, and so on.
   - KPIs without comparison between latest estimates and targets. For example, ROI (return on investment).

   The system differentiates between the KPI types based on the key figure grouping, as maintained in Customizing for *Customer Relationship Management* under ▶ *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination* > *Maintain Query Profile* > *Assign Criteria Profile and Query ID* > *Maintain KPIs for Query* ◀.

   > **i** Note
   >
   > An example configuration for the KPIs is delivered with the solution for query profile QR_STAS, criteria profile PLANKPIU, and Virtual View Usage 701_PLAN_KPI_MONITOR.

If you want to maintain your own KPIs, you must also maintain the grouping as described in the following table:

Key Figure Grouping

Key Figure Description	Key Figure Technical Name	Key Figure Grouping	KPI Area
Any KPI for which only the latest estimate needs to be displayed	*	701_PLAN_KPI_MONITOR	

5. (Optional) Implement BAdI to retrieve KPI monitor information and calculate delta.

   You can optionally implement the BAdI /JBPC/VVF_BW_QUERY to map the BW query result and calculate the difference between the actual values (values retrieved from BW) and the target values (target values set in CRM). This BAdI is available in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *CBP Planning* ▶ *Key Figure Planning* ▶ *Business Add-Ins (BAdIs)* ▶ *BAdI: Modification of Query Filter and Mapping of Query Response* ▶.

   Recalculation of delta values for specific scenarios can be handled from the BAdI /JBPC/VVF_RECALCULATE_DELTA in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *Targets* ▶ *Business Add-Ins (BAdIs)* ▶ *BAdI: Recalculation of Delta Value* ▶.

   For more information on the setup of the BW data model, kindly refer to Promotion Side Bar [page 86] under *Configuration Settings for SAP BW* in this guide.

1.2.3.3.3 Set Up Budget Monitor

Context

> i Note
>
> This configuration setting is required only if you have SAP Trade Promotion Planning and Management installed along with SAP Customer Business Planning.

Budget Monitor displays the planned, available, and total budget. You can use this procedure to set up the *Budget Monitor* on the promotion detail screen.

Procedure

1. Customize the BW queries in CRM in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❭ *Trade Promotion Planning and Management* ❭ *Key Figure Planning with the Planning Applications Kit* ❭ *Define BW Queries* ❭.

   In this step, you maintain all the read and planning queries that you have defined in your SAP CRM system.

2. Customize the BW query profile for the *Budget Monitor*.

   BW query profile groups together all the queries for a given country or sales area.

   1. Maintain a query profile in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❭ *General Settings* ❭ *System Settings* ❭ *BW Query Determination* ❭, then *Maintain Query Profile*

   2. Assign the queries to the query profile, together with a criteria profile and virtual view usage, in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❭ *General Settings* ❭ *System Settings* ❭ *BW Query Determination* ❭, then ▶ *Maintain Query Profile* ❭ *Assign Criteria Profile and Query ID* ❭.

      This assignment is required by the system to use the appropriate query in the corresponding view on the user interface.

      Query /JBPB/APLN_SCEN_IMPCT_KPI is used for the budget monitor for the following promotion types, for which some *Query Profile IDs* have been delivered:

      - QR_STAC: for STA: Hier. Node / Product / Cons. and STA: Target Grp. / Product / Cons.
      - QR_STAS: for STA: Hier. Node / Product / Ship. and STA: Target Grp. / Product / Ship.
      - QR_LTAS: for LTA: Hier. Node / Product / Ship. and LTA: Target Grp. / Product / Ship.
      - QR_SCPC: for STA: Hier. Node / Product Cat. / Cons.
      - QR_SSPC: for STA: Hier. Node / Product Cat. / Ship.
      - QR_LTPC: for LTA: Hier. Node / Prod. Cat. / Ship.

Criteria Profile ID	Virtual View Usage	BW Query ID	Scenario
BUDMON_PRO	701_BUDGET_MONITOR	/JBPB/ APLN_SCEN_IMPCT_KPI	Budget Monitor

For more information on the setup of the BW data model, kindly refer to Promotion Side Bar [page 86] under *Configuration Settings for SAP BW* in this guide.

1.2.3.3.4 Set Up Promotion KPI Monitor

Context

Promotion KPI Monitor displays different KPIs that impact promotion, such as uplift sell-in, total promotion investment, and so on. You can use this procedure to set up the *Promotion KPI Monitor* on the promotion detail screen.

Procedure

1. Customize the BW queries in CRM in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* > *General Settings* > *System Settings* > *Define BW Queries* ▶.

   In this step, you maintain all the read and planning queries that you have defined in your SAP CRM system.

2. Customize BW query profile for the *Promotion KPI Monitor*.

   A BW query profile is used to group all the queries for a given country or sales area.

   1. Maintain a query profile in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination* ▶, then ▶ *Maintain* > *Query Profile* ▶.

   2. Assign the queries to the query profile, together with a criteria profile and virtual view usage, in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination* ▶, then ▶ *Maintain Query Profile* > *Assign Criteria Profile and Query ID* ▶.
      This assignment is required by the system to use the appropriate query in the corresponding view on the user interface.

      > ⁂ Example
      >
      > Query `/JBPB/C_PRM_PROMO_KPI_Q004` is used for the promotion KPI monitor for the following query profiles and promotion types:
      >
      > - `QR_STAC`: for STA: Hier. Node / Product / Cons. and STA: Target Grp. / Product / Cons.
      > - `QR_STAS`: for STA: Hier. Node / Product / Ship. and STA: Target Grp. / Product / Ship.
      > - `QR_LTAS`: for LTA: Hier. Node / Product / Ship. and LTA: Target Grp. / Product / Ship.
      > - `QR_SCPC`: for STA: Hier. Node / Product Cat. / Cons.
      > - `QR_SSPC`: for STA: Hier. Node / Product Cat. / Ship.
      > - `QR_LTPC`: for LTA: Hier. Node / Prod. Cat. / Ship.

Example Configuration			
Criteria Profile ID	**Virtual View Usage**	**BW Query ID**	**Scenario**
KPIMON_PRO	701_KPI_MONITOR	/JBPB/ C_PRM_PROMO_KPI_Q00 4	Promotion KPI Monitor

For more information on the setup of the BW data model, kindly refer to Promotion Side Bar [page 86] under *Configuration Settings for SAP BW* in this guide.

1.2.3.3.5   Set Up Reports on Side Bar

Context

You can configure the side bar to display available reports on the side bar on the promotion detail screen.

Procedure

1. In SAP CRM, create a report profile in Customizing for *Customer Relationship Management* by choosing ▶️ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *UI Configuration* ❯ *Define Report Configuration* ❯.

2. Assign the report profile to a sales area in Customizing for *Customer Relationship Management* by choosing ▶️ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *UI Configuration* ❯ *Assign Configurations to Sales Area* ❯.

3. If you want to modify the URL of the promotion reports, you may implement the BAdI in Customizing for *Customer Relationship Management* by choosing ▶️ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *UI Configuration* ❯ *BAdI: Modify URL for Promotion Reports* ❯ (/JBPC/REPORT_LINKS_BADI).

   You can use this BAdI to modify URLs by changing the user-defined parameters.

1.2.4 Integration with In-Memory Planning

Context

In this Customizing activity, you define a BW query profile. BW query profiles group together all the queries for a given sales area and campaign type. After you have defined your query profile, you assign the queries to the query profile together with a criteria profile and Virtual View Usage. This is required to use the appropriate query in the corresponding view on the user interface.

Procedure

1. Maintain the query profile in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *General Settings* ❯ *System Settings* ❯ *BW Query Determination* ❯.
2. After you have defined your query profile, you must assign it to the sales area and campaign type by choosing ▶ *Trade Management* ❯ *General Settings* ❯ *System Settings* ❯ *Map Query Profile to Sales Area* ❯.

Related Information

Maintain Basic Settings for Promotions [page 68]

1.3 Settings for Promotion Planning

You use this process if you want to set up your own short-term promotions and long-term agreements for use in *Trade Promotion Planning and Management* or *Customer Business Planning*.

- A **short term promotion** is a type of promotion that allows you to plan the actual promotions that you want to execute.
- A **long term agreement** (LTA) is a type of promotion that normally lasts for a year and represents Every Day Low Price (EDLP) or Every Day Low Cost (EDLC) activities. LTAs are usually simpler than normal promotions as they reflect long-term financial arrangements between the manufacturer and retailer.

You can create short term promotions and long-term agreements from the following:

- Calendar of the customer business plan
- Views on the *Plan* screen of the customer business plan:
  - *Profit & Loss*

- *Product Tree*
- *Summary*
- Promotion fast entry table (in the *Customer Business Planning* and *Promotion Planning* applications)
- Detailed promotion screen

When you navigate to the planning screen within the detailed promotion screen, the system rolls in the volumes and prices from the customer business plan (in the case of a CBP scenario) or any reference aDSO (in the case of a promotion-only scenario) to the promotion based on the product/product category and dates you have selected. After you have planned and saved the promotion, the planning data (*Trade Spends* (lumpsum/rates) and *Sell-In* or *Sell-Out Uplift Volumes*) from the promotion is aggregated and rolled up to a staging aDSO; and then the data from the staging aDSO is written to the corresponding customer business plan (for a CBP scenario).

When you create a short-term promotion (shipment/consumption) that falls under the same duration (and has same products/product categories) as that of the long-term agreement, the uplift volumes and promotional discounts of the short-term promotions are calculated on the fly and are stored in the staging layer against each long-term agreement. In the standard delivered content, uplift volume and promotional discounts from short-term promotions are aggregated and stored in the staging layer against the long-term agreement.

In the delivered content:

- Promotions can be created for products or product categories and the time granularity is weekly.
- The example configuration considers BW rates called as BI rates.
- Promotions are integrated with *Funds Management*.

The following topics describe the implementation activities that are required to define your own promotions.

1.3.1 Maintain Basic Settings for Promotions

Context

You use this procedure to set up your own short-term or long term promotions within your customer business plan for use in SAP Trade Management, with an aim to align with your retailer's KPIs.

Below are the few promotion types delivered with the solution:

- STA: Hier. Node / Product / Cons. : This consumption type short-term promotion on a customer hierarchy node allows you to plan for the sell-out period, as well as to perform predictive planning for the tactics you may want to deploy for promoting your products.
- STA: Hier. Node / Product / Ship.: This shipment type short-term promotion on a customer hierarchy node allows you to plan for the sell-in period for promoting your products.
- LTA: Hier. Node / Product / Ship.: An LTA a customer account hierarchy nodis a type of promotion that normally lasts for a year and represents Every Day Low Price (EDLP) or Every Day Low Cost (EDLC) activities. LTAs are usually simpler than normal promotions as they reflect long-term financial arrangements between the manufacturer and retailer.

- STA: Target Grp. / Product / Cons.: This consumption type short-term promotion on a target group allows you to plan for the sell-out period, as well as to perform predictive planning for the tactics you may want to deploy for promoting your products.
- STA: Target Grp. / Product / Ship.: This shipment type short-term promotion on a target groupallows you to plan for the sell-in period for promoting your products.
- LTA: Target Grp. / Product / Ship.: This is an LTA on a target group.
- STA: Hier. Node / Product Cat. / Cons.: This consumption type short-term promotion on a customer hierarchy node allows you to plan for the sell-out period, as well as to perform predictive planning for the tactics you may want to deploy for promoting your product categories.
- STA: Hier. Node / Product Cat. / Ship..: This shipment type short-term promotion on a customer hierarchy node allows you to plan for the sell-in period for promoting your product categories.
- LTA: Hier. Node / Prod. Cat. / Ship.: This is an LTA on a customer hierarchy node for promoting your product categories.

> **i Note**
>
> Product category and target group based promotions have sample BW content for simplified data model only, that is, for the aDSO based data model. In case you are using classical data model, that is the planning DSO based data model from previous releases, you can still use these features, however there is no sample content available.

Procedure

1. Define the promotion type in Customizing for *Customer Relationship Management* by choosing ▶️ *Marketing* 〉 *Marketing Planning and Campaign Management* 〉 *Basic Data* 〉 *Define Types/Objectives/ Tactics* 〉.

2. Define a master query in Customizing for *Customer Relationship Management* by choosing ▶️ *Trade Management* 〉 *Trade Promotion Planning and Management* 〉 *Key Figure Planning with the Planning Applications Kit* 〉 *Define BW Queries* 〉.

   Define the planning query for short-term and long-term promotion planning. The system uses this query to display planning data in the planning section of the promotions.

   > **⁂ Example**
   >
   > The following is a sample of some queries for consumption type short-term promotions.
   > - For *Summary* screen: `/JBPB/APRM_PL_STP_SUM_Q001`
   > - For *Sell-In* screen: `/JBPB/APRM_PL_STP_SELLIN_Q002`
   > - For *Sell-Out* screen: `/JBPB/APRM_PL_STP_SELLOUT_Q003`
   > - For *Predictive Planning* screen: `/JBPB/ASO_PRP_PRDCT_Q004`

3. Configure the short-term and long-term promotion planning query in Customizing for *Customer Relationship Management* by choosing ▶️ *Trade Management* 〉 *Trade Promotion Planning and Management* 〉 *Key Figure Planning with the Planning Applications Kit* 〉 *Define BW Queries* 〉.

4. Define an integrated planning profile group for short-term and long-term promotion in Customizing for *Customer Relationship Management* by choosing ▶️ *Trade Management* 〉 *Trade Promotion Planning and*

Management > *Key Figure Planning with the Planning Applications Kit* > *Define Integrated Planning Profile Groups*].

> ⋰ Example
>
> The planning profile groups **TPM7** and **TPM8**, delivered with the solution as an example, are relevant for short-term promotions (shipment and consumption respectively) and also for target group short-term promotions (shipment and consumption respectively) created on products.

5. Assign additional date ranges to *Integrated Planning Profile Group* in Customizing for *Customer Relationship Management* under ⫸ *Trade Management* > *Trade Promotion Planning and Management* > *Key Figure Planning with the Planning Applications Kit* > *Define Integrated Planning Profile Groups*]. Choose *Assign Additional Date Ranges* after selecting the *Integrated Planning Profile Group*.

> ⋰ Example
>
> The date ID **PLAN** is delivered for promotion type *STA: Hier. Node / Product / Cons.* as an example.

6. Enable planning of short-term and long-term promotions using the *Planning Applications Kit* in Customizing for *Customer Relationship Management* by choosing ⫸ *Trade Management* > *Trade Promotion Planning and Management* > *Key Figure Planning with the Planning Applications Kit* > *Define Sales Areas and Promotion Types*].

7. Define the trade spends that you want to plan in your short-term and long-term promotions in Customizing for *Customer Relationship Management* by choosing ⫸ *Trade Promotion Management* > *Trade Promotions* > *Trade Spends* > *Define Trade Spends for Values*].

   The following trade spends are delivered with the solution:

Trade Spends

Trade Spend	Description	Spend Category	Spend Method	BW Key Figure in Sample Content
CPPF	CPP-Off - Simplified	LUMPSUM	LUMPSUM	/JBPB/LPRM_R
CPPF	CPP-Off - Simplified	RATE	RATE	/JBPB/RPRM_R
CPPF	CPP-Off - Simplified	PERCENT	PERCENT	/JBPB/PPRM_R
CPFO	CPP-Off - Simplified	LUMPSUM	LUMPSUM	/JBPB/LPRM_RD
EXON	EXV On - Simplified	RATE	RATE	/JBPB/RPRM_D
EXON	EXV On - Simplified	PERCENT	PERCENT	/JBPB/PPRM_D
P235	Promo Rebate (pU)-SO	PTR	PSC	/JBPB/RPRM_RS

8. Define your own condition generation type for short-term and long-term promotions in Customizing for *Customer Relationship Management* by choosing ⫸ *Trade Promotion Management* > *Trade Promotions* > *Condition Maintenance* > *Assign Condition Generation Types*].

9. Define the query profile used to display the planning data on the UI in Customizing for *Customer Relationship Management* by choosing ▸ *Trade Management* ❯ *General Settings* ❯ *System Settings* ❯ *BW Query Determination* ◂.

The following are a few entries delivered with the solution. For more examples, kindly refer to the delivered content corresponding to the promotion type.

Maintain Query Profile

Query Profile ID	Description	Level Indicator
QR_STAC	Short Term Promotion - Consumption	No Overlap
QR_STAS	Short Term Promotion - Shipment	No Overlap
QR_SCPC	Product Category STA - Consumption	No Overlap
QR_SSPC	Product Category STA - Shipment	No Overlap

Assign Criteria Profile and Query Profile ID

Query Profile ID	Criteria Profile ID	Virtual View Usage	Query ID	Query Description
QR_STAC	BUDMON_PRO	701_BUDGET_MONIT OR	/JBPB/ APLN_SCEN_IMPCT_ KPI	Promotion Budget Monitor
QR_STAC	KPIMON_PRO	701_KPI_MONITOR	/JBPB/ C_PRM_PROMO_KPI_ Q004	Promotion KPI Monitor
QR_STAC	PLANKPIU	701_PLAN_KPI_MON ITOR	/JBPB/ APLN_SCEN_IMPCT_ KPI	Plan KPI Monitor
QR_STAC	PL_WS	701_PLANNING_LAY OUT	/JBPB/ APRM_PL_STP_SUM_ Q001	Promotion Weekly Summary Screen
QR_STAC	PL_WSI	701_PLANNING_LAY OUT	/JBPB/ APRM_PL_STP_SELL IN_Q002	Promotion Weekly Sell-In Screen
QR_STAC	PL_WSO	701_PLANNING_LAY OUT	/JBPB/ APRM_PL_STP_SELL OUT_Q003	Promotion Weekly Sell-Out Screen
QR_STAC	PL_WPP	701_PLANNING_LAY OUT	/JBPB/ ASO_PRP_PRDCT_Q0 04	Promotion Weekly Predictive Planning Screen

10. Define the extended BW InfoObject mapping.

You use this step if you define your own attributes for short-term promotion/long-term promotion planning and want to map them to an InfoObject in SAP BW. In the delivered content, the system uses the following InfoObject mapping:

Extended BW InfoObject Mapping

Structure Name	Field Name	BW InfoObject
INCL_EEW_MKTPL_HEADER	PLAN_CUST_EXT	0BP_GRP
INCL_EEW_MKTPL_HEADER	PLAN_ID_EXT	/JBPB/PLAN
INCL_EEW_MKTPL_HEADER	RA_GUID_EXT	0CRM_TR
INCL_EEW_MKTPL_HEADER	SCENARIO_ID_EXT	/JBPB/SCEN
INCL_EEW_MKTPL_HEADER	SHOP_FORMAT_EXT	/JBPB/SFINDIC

11. Set up an assortment check for the promotion created on products.

   You use this step if you want to enable an assortment check in your promotion. The assortment check ensures that you use only those products in the promotion that are also valid for your customer business plan. For more details, kindly refer to Maintain Assortment Check Profiles in the configuration guide for *Customer Business Planning*.

   > **i Note**
   >
   > In the delivered solution, the system uses the cross-check class /JBPC/ CL_CRM_MKTPL_TP_CCA_COLL to perform an assortment check in the promotion. The assortment check class is configured in the object layer Customizing for the promotion object using transaction CRM_MKTGS_OL_MODEL.

   You can deactivate the assortment check from the promotion using transaction CRM_MKTGS_OL_MODEL. The listing check can be activated if you are using CRM listings. You can configure the listing check in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▶ *Basic Data* ▶ *Listings and Partner/Product Ranges* ▶ *Assign Listing Procedures and Set PPR Indicator* ▶.

12. Set up a PPH check for the promotion created on product categories.

   The PPH check ensures that you use only those product categories in the promotion that are ECC nodes in your customer business plan.

   > **i Note**
   >
   > In the delivered solution, the system uses check handler class /JBPC/CL_CRM_TP_CCA_CHCK_PPH to perform the PPH check in the promotion. The PPH check class is configured in the object layer Customizing for the promotion object using transaction **CRM_MKTGS_OL_MODEL**.
   >
   > You can deactivate the PPH check from the promotion using transaction **CRM_MKTGS_OL_MODEL**. The listing check can be activated if you are using CRM listings. You can configure the listing check in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▶ *Basic Data Listings and Partner/Product Ranges* ▶ *Assign Listing Procedures and Set PPR Indicator* ▶.

13. Set up the status-driven events for promotion planning in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Promotion Management* ▶ *Basic Data* ▶ *Define Status-Driven Events* ▶ .

14. Define your own condition generation type for promotions in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Promotion Management* ▶ *Trade Promotions* ▶ *Condition Maintenance* ▶ *Assign Condition Generation Types* ▶ .

15. Map your promotion trade spends to the corresponding InfoObjects in your SAP BW system, in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *InfoObject Mapping* ▶ *Map Key Figures for Trade Spends* ▶ .

The following configuration is delivered with the solution as an example:

Trade Spend Mapping

Spend Type	Spend Category	Key Figure
CPPF	LUMPSUM	/JBPB/LPRM_R
CPPF	PERCENT	/JBPB/PPRM_R
CPPF	RATE	/JBPB/RPRM_R
EXVO	PERCENT	/JBPB/PPRM_RD
EXVO	RATE	/JBPB/RPRM_RD
CPPO	LUMPSUM	/JBPB/LPRM_D
P235	PTR	/JBPB/RPRM_RS

For more information on the setup of the BW data model, kindly refer to Promotion Planning [page 88] under *Configuration Settings for SAP BW* in this guide.

1.3.2 Maintain Settings for Creating Promotions

Context

When a promotion is created, you can change:

- The logic of defaulting attributes
- The logic to roll in baseline volumes and prices from the customer business plan (in the context of customer business planning) or any other reference (in the case of a TPM-only scenario)
- The logic to calculate promotional key figures, such as total promotion investment and uplift volume

The following steps describe the necessary implementation activities together with details of the example configuration delivered with the solution.

Procedure

Implement BAdI to default promotion attributes during creation.

In this step, you can define your own logic to default promotion attributes when you create a promotion.

The system calls the BAdI `/JBPC/CRM_MKTPL_PROMO`, method `CREATE_PROMO` when a promotion is created from the plan. The BAdI is filter dependent on the promotion type so that different logic can be implemented based on the promotion type.

You can refer to the default implementation `/JBPC/IM_CRM_MKTPL_PROMO_FINAL` for short term promotion and /JBPC/IM_CRM_MKTPL_PROMO_LTA for Long Term Agreement, delivered with the solution.

For more information on the setup of the BW data model, kindly refer to Create Promotions [page 90] under *Configuration Settings for SAP BW* in this guide.

Related Information

Implementing Business Logic for Planning Function Types on the SAP HANA Database

1.3.3 Maintain Settings for Saving Promotions

Context

In this procedure, you can write your own logic to roll up the data from the promotion to the customer business plan when the promotion is saved.

> **i Note**
>
> In the delivered content, the plan data in the promotion is saved at the product or product category level. In the customer business plan, however, the data is stored at the TU-CU and source-indicator (scenario) level. This means that the product dimension must be converted to TU-CU and should have volumes and discounts calculated at each scenario level. Also, the promotional discounts for long-term agreements are calculated on the short-term uplift volumes; and as a plan can contain multiple promotions, you must combine the data from all the promotions within your promotion time duration. The staging aDSO `/JBPB/IPRSTG` is used for this purpose.

When a promotion is saved within a customer business plan, the system rolls up the data from the short-term promotion aDSO `/JBPB/ISTP` to the aDSO `/JBPB/IPRSTG` after converting the product granularity to TU-CU.

> **i Note**
>
> In the case of a TPM-only scenario, the planning data is not copied anywhere; the following steps are, therefore, not relevant.

Procedure

For information on the setup of the BW data model, kindly refer to Save Promotions [page 91] under *Configuration Settings for SAP BW* in this guide.

Related Information

Get Reference Prices and Non-Promotional Terms

1.3.4 Maintain Settings for Updating Promotions

Context

In this procedure, you set up the necessary planning functions that you want to be called when a promotion is updated.

The system allows you to edit a promotion from the following:

- Promotion fast entry table
- Detailed promotion screen

The system performs the following in the delivered content when it updates a short-term promotion:

- Copies the new baselines and prices to your short-term promotion
- In case of short-term promotions, it keeps the uplift volume constant and adjusts the promotional volume based on the new baseline
- In case of long-term agreements, it rolls up the uplift volume from the corresponding short-term promotion and adjusts the total promotional volume based on the new baseline retrieved from the plan
- Recalculates all promotional key figures, such as the total promotional investment

The following steps cover the details of the planning function that is called at the time of updating a short-term promotion to recalculate the key figures and roll up the new baselines from the plan.

Procedure

For information on the setup of the BW data model, kindly refer to Update or Recalculate Promotions [page 92] under *Configuration Settings for SAP BW* in this guide.

Related Information

Maintain Basic Settings for Promotions [page 68]
ABAP-Managed Database Procedures (AMDP)
Implementing Business Logic for Planning Function Types on the SAP HANA Database

1.3.5 Display Short-Term Promotional Data in Long-Term Promotions

Context

The business logic for calculating the short-term promotional discounts against each long-term agreement that falls within the same duration is derived through the planning function `/JBPB/FUN_PRM_KPI_RU` (Promotion KPI Rollup within Promotions).

For more information, kindly refer to Multi-Level Promotion Planning [page 98] under *Configuration Settings for SAP BW* in this guide.

Related Information

Calculation Views

1.3.6 Shift Promotion from One Duration to Another

Context

In this procedure, you can shift a promotion from one time duration to another. You can shift the promotion using the following means:

- Move the promotion bar in the customer business plan calendar by dragging from one time duration to another.
- Change the dates in the promotion user interface (either from the promotion fast entry table or the detailed promotion screen).

In the delivered solution, when you shift a promotion from one time duration to another, the system performs the following:

- Synchronizes the promotion data by adjusting the planning combination to the new time period.
- Adjusts the baseline sell-in and sell-out volumes, list price, and regular RSP in the promotion after retrieving the new values for the new time duration from the customer business plan (in the context of Customer Business Planning).
  In the case of a TPM-only scenario, the baselines are read from a reference aDSO `/JBPB/IREF`.
- Preserves the existing uplifts of the promotion and redistributes them to the new time frame.
- Copies the spends from the old to the new time frame if they are of the type **RATE** or **PERCENTAGE**.
- Redistributes lumpsum spends from the old-time duration to the new one based on the total volume.

Since the entire logic for shifting promotions from one time duration to another is written in BAdIs and planning functions, you can change this behavior during implementation.

The following steps describe the details of the necessary implementation activities.

Procedure

1. Implement BAdI and define your own logic to redistribute data when a promotion is shifted from one time duration to another.

   The system calls the BAdI `CRM_MKTPL_IMP_TPM` when a promotion is shifted.

   > **i Note**
   >
   > An example implementation `/JBPC/IM_CRM_MKTPL_IMP_TPM`, methods `GET_KF_REPOST_COPY_TIMESHIFT` and `GET_KF_REDISTRIBUTE_TIMESHIFT`, of this BAdI is delivered with the solution. In the example implementation, the lumpsum spend is redistributed to the new period while the rates and percentage trade spend is copied from one period to the other.

2. Define your own planning function to calculate promotional key figures during shifting.

   For information on the setup of the BW data model, kindly refer to Shift Promotion Duration [page 96] under *Configuration Settings for SAP BW* in this guide.

1.3.7 Maintain Settings for Copying Promotions

Context

In this procedure, you can implement your own logic to copy a promotion.

You can copy a promotion from the following:

- Calendar of the customer business plan
- Promotion fast entry table
- Detailed promotion screen

While the promotion is being copied from the calendar screen, the system calls the BAdI `/JBPC/CAL_AFTER_COPY` that can be used to implement your own copy logic. In addition, the system uses the standard planning function to copy the plan data from the source to the target promotion.

The following steps describe the required implementation activities.

Procedure

1. Implement your own login to copy a promotion using the BAdI `/JBPC/CAL_AFTER_COPY`.

   > **i Note**
   >
   > This BAdI is executed only when the promotion is copied from the calendar.

   Additionally, you can implement the BAdI `CRM_MKTPL_OL_OBJ`, method `COPY_AFTER`.

   The default implementation of `/JBPC/DEF_CRM_MKTPL_OL_TPM` of BAdI `CRM_MKTPL_OL_OBJ` is delivered with the solution. In this implementation, the system links the copied promotion to the same plan as the source promotion.

   > **i Note**
   >
   > The following steps are relevant only for CBP scenarios and not for TPM-only scenarios.

2. Define planning function to roll up the data from copied promotion to staging aDSO.

   In this step, you can configure your own planning function to copy the data from the copied promotion to the staging aDSO.

For information on the setup of the BW data model, kindly refer to Copy Promotions [page 95] under *Configuration Settings for SAP BW* in this guide.

1.3.8 Maintain Settings for Deleting Promotions

Context

You use this procedure if you want to delete a promotion.

The system allows you to delete a promotion from the following:

- Calendar of the *Customer Business Plan*
- Promotion fast entry table

When you delete a promotion, the system performs the following:

- Deletes the promotion data in SAP CRM
- Deletes the planning data for the promotion from the promotion aDSO `/JBPB/ISTP`
- Deletes the roll-up data from the staging aDSO `/JBPB/IPRSTG` in the case of a CBP scenario

The system uses the standard promotion deletion mechanisms to delete a promotion and calls planning functions in SAP BW to delete the promotion data as well as adjust the roll-up to the customer business plan.

For information on the setup of the BW data model, kindly refer to Delete Promotions [page 96] under *Configuration Settings for SAP BW* in this guide.

Related Information

Maintain Settings for Saving Promotions [page 74]

1.4 Multi-Level Promotion Planning

Concept

You can plan promotions at different levels in the customer hierarchy. The data of a promotion planned for a customer at a lower level of the hierarchy is shown in a promotion planned at a higher level for the same period.

> ⁂ Example
>
> Promotion **P1** is planned for customer **BP1** for period **14 July 2019** to **20 July 2019**, and promotion **P2** is planned for customer **BP2** for the same period.

> The uplifts for **P1** and **P2** are **100** and **50**, respectively.
>
> **BP2** is the child of **BP1** in the customer hierarchy. In promotion **P1**, you shall find the uplift **100** for **P1** and the uplifts for the lower-level nodes as **50**, which comes from promotion **P2**.

You can use multilevel promotion planning by following the steps listed below.

1. Change the InfoObject mapping for `ACC_NODE` in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *InfoObject Mapping* ❯ *Map CRM Application Data to BW InfoObjects* ❱. Change the BW InfoObject for *Appl. Data* (`ACC_NODE`) inside *Planning Application* TPM.

2. Enable customer change for the *Sales Organization* in use, in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *General Settings* ❯ *Activate Trade Management Features* ❱.

3. Implement the BAdI `/JBPC/CRM_MKTPL_TPM_LINK` to determine the child promotions based on the customer hierarchy node. You can refer to the default implementation `/JBPC/IM_CRM_MKTPL_TPM_LINK` delivered with the solution.

For more information on the setup of the BW/4HANA data model, kindly refer to Multi-Level Promotion Planning [page 98] under *Configuration Settings for SAP BW/4HANA* in this guide.

Related Information

Settings for Promotion Planning [page 67]

1.5   Promotion Planning by Multiple Users

Multiple users can plan promotions within the same plan simultaneously. The system does not lock the plan while another user is creating or editing a promotion in the plan.

You can enable this feature in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ❯ *General Settings* ❯ *Activate Trade Management Features* ❱ and selecting the *Simp. BW* and *Plan Unlock* options.

Once you have selected the *Plan Unlock* feature, multiple users can edit the promotions of the same responsibility area.

> **i Note**
>
> In order to enable promotion planning by multiple users, remove all planning functions rolling data in the *Plan* aDSO. For standard content, remove planning function `/JBPB/APLN_CU_CELLUP` to enable this feature.

1.6   Condition Generation

Use

You can use this function with SAP Trade Promotion Planning and Management to create condition records within a trade promotion. Condition records control the operational execution of your trade promotion. Conditions are, for the most part, generated automatically.

There are two types of conditions:

- Conditions for price determination
  These conditions control price determination when the trade promotion is executed or a sales order is opened.
  These conditions have the usage price determination (PR) or rebate (BO).
- Conditions for campaign determination
  These conditions control campaign determination when the trade promotion is executed. Campaign determination is required so that price determination takes campaign-specific condition records into account.
  These conditions have the usage campaign determination (CD).

You can create the following using conditions:

- Short-term trade promotions (shipment and consumption)
  You create short-term trade promotions for a period of several weeks. These trade promotions increase sales volume and include both conditions for price determination and conditions for campaign determination. The system creates the condition records for price determination when you start the condition generation in the *Volume and Value Planning* section. The system creates the condition records for campaign determination automatically when you release the trade promotion.
- Long-term agreements
  You create long-term agreements for a period of several months to one year. This type of promotion does not increase sales volume and includes only conditions for price determination. The system creates the conditions for price determination automatically when you release the agreement. The planning layout for long-term agreements is much simpler than for a short-term promotion, for example, you do not need to select a tactic.

The system displays condition records in the *Discounts* section of the promotion details (choose *More* to display this information). The rebate status can be *Created* or *Opened*. You can still manually change the condition records once the rebate is set.

You can generate condition records for variable and fixed trade spends as well as campaign determination condition records at product level, product category level, or product group level.

If you generate condition records with the usage rebate (BO), the system creates rebate agreements as well, based on a rebate product. In the case that the condition records are generated at product category or product group level, the system selects the rebate product arbitrarily from the list of products that belong to the product category or group.

Prerequisites

- You have completed the standard configuration settings for condition generation.
- You have assigned a key figure for each trade spend combination of your trade promotion in Customizing for *Customer Relationship Management* by choosing ▮ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *InfoObject Mapping* ❯ *Map Key Figures for Trade Spends* ❯.

> **i Note**
>
> If you have defined trade spend combinations with *Percentage* as the discount method, you must assign a unique key figure for each trade spend.

Constraints

After the conditions have been generated, you cannot change the condition records manually.

Features

When generating conditions, the system automatically creates condition records using data from the trade spends and the corresponding planning, as well as information from the basic data for the trade promotion. The following data is included in the condition records:

- Application, usage, condition type, and condition table, according to the settings you have made for trade spends in Customizing
- Products of the trade promotion (although conditions can be optimized at product category or product group level)
- Sales area of the trade promotion
- Data from the planning customer of the trade promotion
- Data from the planning layout, if you have set the condition rate origin to SAP BW in Customizing

When generating conditions, the system enters values in the fields for the condition records. You can enhance the system logic by modifying the field catalog for the condition technique by adding user-relevant fields. You do this by implementing the BAdI for condition generation in Customizing for *Customer Relationship Management* by choosing ▮ *Trade Promotion Management* ❯ *Trade Promotions* ❯ *Condition Maintenance* ❯ *Business Add-Ins (BAdIs)* ❯ *BAdI: Condition Generation* ❯. This BAdI allows you to define how values are entered into user-relevant conditions fields during condition generation.

Activities

In the SAPUI5 client, do the following:

1. Check the planning account, sales area, and campaign type fields are populated. The customer can be changed, if necessary.

2. Determine a planning profile group.
   The planning profile group and the corresponding planning queries define the key figure planning in the *Volume and Value Planning* section.
3. Include the products/product categories for the trade promotion in the corresponding sections.
   The product dimension of the trade promotion is determined by the product planning basis *Product/Product Categories*.
4. Assign trade spends to the trade promotion in the *Volume and Value Planning* section.
   Your entries determine the key figure planning and control the condition types and condition tables, which the system uses when generating conditions.

Conditions for Price Determination

1. In the *Volume and Value Planning* section, add the trade spend for the relevant condition types and condition tables. When the selected spends are applied, they are transferred automatically to the planning layout. Enter a spend value in the planning layout.
2. Select the trade spends for which you want to generate conditions. The conditions are generated based on the status configured.
3. In the *Discounts* section (choose *More* in the promotion details), you can view the condition records created by the system.
4. When you save your trade promotion, the condition records are saved in the database and can be transferred to SAP ERP, depending on the Customizing you have specified.

Conditions for Campaign Determination

* Change the status of the trade promotion to *Released*.
  The system creates condition records for price determination and for campaign determination. In the *Discounts* section, you can view the condition records generated by the system.
* When you save the trade promotion, the condition records are saved in the database and, under certain conditions, transferred to SAP ERP.
* If you block, cancel, or complete the trade promotion, the system deletes the condition records for campaign determination from SAP CRM. If the records have been transferred to SAP ERP, the system also deletes them from there.
* If you reverse the block, cancellation, or completion of the trade promotion, the system creates new condition records for campaign determination.

Reports

You can also generate conditions outside of trade promotion processing. The following reports are available for this:

* `CRM_MKTPL_COND_IF_R001`
  This report executes status changes of trade promotions and creates condition records for campaign determination.
* `CRM_MKTPL_COND_IF_R002`
  This report creates condition records for price determination.

Both reports run in the background and allow you to process several trade promotions.

More Information

For more information about Pricing Simulation in Trade Promotions, see SAP Library for SAP CRM at http://
help.sap.com/crm ↪ ▌▶ *SAP CRM* ❯ *Marketing* ❯ *Trade Promotion Management* ❯ *Conditions and Rebates in
Trade Promotions* ❯ *Conditions in Trade Promotions* ❯ *Pricing Simulation in Trade Promotions* ▐.

1.7   Allowing Product Selection by Category

Use

Enabling this feature allows users to add products to a promotion based on product categories. Any
subsequent changes to the products of specified category will then be updated in the promotion by the
pertinent master data report (PMDC) when run for the promotion – new products will be added and older ones
deleted.

Once the configuration is enabled, the user will see a switch in the product picker screen corresponding to
every ECC node category. Setting the switch to Yes will add all products from that category.

Procedure

Select ▌▶ *Customizing for Customer Relationship Management* ❯ *Trade Management* ❯ *General Settings*
❯ *Activate Trade Management Features* ▐ and activate the *Product Selection by Category* feature.

2 Configuration Settings for SAP BW

This section lists the various configuration settings which you must perform in your SAP BW system to be able to use SAP Trade Promotion Planning and Management.

2.1 System Setup

Before you can use SAP Trade Promotion Planning and Management, you must install and configure the content and objects relevant to SAP BW.

For more information on the configuration settings for SAP Trade Management, kindly refer to Configuration Settings for SAP BW in the Common Configuration Guide for SAP Trade Management.

2.2 Common Elements and Concepts

2.2.1 Promotion Life Cycle During Runtime

Promotions can be created based on products or product categories, and for an account or target group. In the sample data model delivered with SAP Trade Management, a promotion created from the trade management UI5 screen will store the data in aDSO `/JBPB/ISTP` for a short-term promotion (STA) and aDSO `/JBPB/ILTA` for a long-term agreement (LTA).

When a promotion is created, the synchronization process generates the records and planning functions configured after the synchronization event of the promotion master query is triggered. The roll-in process is triggered where planning functions configured after the synchronization of the promotion master query copy the plan KPIs from the plan aDSO to the promotion aDSO, based on the products/product categories, account/target group and the dates selected in the promotion. Lower-level key figures, such as *Lower Level Uplift* in an STA or a *Short-Term Uplift* in an LTA, are also computed at this step.

Once a promotion has been planned, the planning data (*Trade Spends* and *Uplift Volume*) from the promotion is aggregated and rolled up to the staging aDSO (`/JBPB/IPRSTG`) through a roll-up planning function, and the data from the staging aDSO is the written to the corresponding customer business plan (for a CBP scenario).

The processes listed below trigger the synchronization process and subsequently, the planning functions configured at after synchronization event of the promotion master query are also triggered.

- Creating a promotion
- Adding or deleting a product or product category
- Changing the account of target group

- Changing various dates relevant to the planning of a promotion

2.2.2 Promotions Screen

The *Promotions* screen provides an overview of all the promotions for a plan. It is similar to the *Promotion* slider available on the *Plan* screen. The query/configurations used on the landing screen and the slider are the same. For a TPM-only scenario, this is the only screen from where promotions can be created. This screen also has the options to perform bulk actions such as *Mass Copy*, *Mass Copy with Time Shift* and *Mass Change* on promotions.

2.2.3 Baselines from Scenarios on Fast Promotion Screen

On the fast promotion screen within *Scenario Planning*, you can select any of the following options from the dropdown, to view the baseline volumes and prices from the selected scenario:

- *Operational Plan*
- *All*
- Specific scenarios available in the plan

When you select either of the first two options, the baselines and prices on the fast entry screen are fetched from the operational plan and displayed. Conversely, on selecting a specific scenario, the baselines and prices from the selected scenario are displayed.

The following planning function is configured on the *Before Query Execution* event of the fast promotion query `/JBPB/APRM_PL_FAST_PROMO_Q001`:

Event ID	Planning Function	Description	Sequence	Filter
4	`/JBPB/FUN_PL_PRM_RIN`	Roll In: Plan to Promotion	1	Custom

2.2.4 Promotion Side Bar

The *Promotion* side bar is visible on the right side of the detailed *Promotion* screen. The side bar has the following components:

- *Fund Monitor* - It shows the fund checkbook attributes such as *Reserved Amount*, *Claimed Amount* and so on. You can display five attributes in this area. This monitor uses CRM-only information and therefore, no BW configuration is required.
- *Plan KPI Monitor* – It displays the internal KPIs for the current customer business plan year. The sample BW content delivered with the solution uses the query `/JBPB/APLN_SCEN_IMPCT_KPI` to display the data for all promotion types.

- *Budget Monitor* - It displays the planned, available, and total budget. The sample BW content delivered with the solution uses the query `/JBPB/APLN_SCEN_IMPCT_KPI` to display the data for all promotion types.
- *Promotion KPI Monitor* - It displays different KPIs that impact promotion, such as uplift sell-in, total promotion investment, and so on. The sample BW content delivered with the solution uses the query `/JBPB/C_PRM_PROMO_KPI_Q004` to display the data for all promotion types.

You can also configure the side bar to display the available reports. For more information on report configuration and sample reports that are available, kindly refer to Configuring Authorizations for SAC Stories in the Common Configuration Guide for SAP Trade Management.

For more information on setting up the promotion side bar on the detailed promotion screen, kindly refer to the following topics:

2.2.5 Roll In

The roll in feature is frequently used in SAP Trade Promotion Planning and Management. You can implement your own planning function to copy the data from the customer business plan (in the case of a CBP scenario) or from any other reference (in the case of a TPM-only scenario), to your promotions.

The sample data model delivered with the solution uses the planning function `/JBPB/FUN_PL_PRM_RIN` for the roll in process, where baseline and other configured KPIs/key figures from the plan or any other source are rolled in to the short-term promotion (STA)/long-term agreement (LTA) object for the relevant products or product categories, account or target group, and time period. The volumes for *Lower Level Uplift* in STAs and *Short-Term Uplift* in LTAs are also calculated, along with the calculation of KPIs for STAs or LTAs with the updated volumes or rates.

The roll in planning function is triggered for the following processes related to promotions:

- Creating a promotion
- Navigating to the detailed promotion screen
- Using the promotion slider
- Switching between scenarios using the dropdown on the *Promotion* slider or the detailed screen
- Adding products or product categories
- Carrying out a time shift

2.2.6 Roll Up

Roll up is the most critical process to integrate the promotion numbers with the plan. It uses the planning functions `/JBPB/FUN_APRM_RU`, `/JBPB/FUN_PRM_SCEN_R` and `/JBPB/APLN_CU_CELLUP`.

Using this process, short-term promotions or long-term agreements based on products or product categories are stored in a shadow aDSO at the TU CU level. Promotion records are created as per the promotion assignment to various scenarios. Spends are calculated and stored in the shadow aDSO with respect to the corresponding scenario baseline volume. Lower level uplift computation for each scenario is also carried out through this process. Plan costs are recalculated with the promotional uplift.

The roll up planning functions are triggered in the following situations:

- *Recalculate/Save* event on the fast promotion slider
- *Recalculate/Save* event on the detailed promotion screen

For more information on the roll up process, kindly refer to the following topics in the Application Help for SAP Trade Promotion Planning and Management:

- Multi-Level Promotion Planning
- Data Exchange Between Promotions and Plan

2.3   Promotion Planning

You use this process if you want to set up your own short-term promotions and long-term agreements for use in Trade Promotion Planning and Management or Customer Business Planning.

When you navigate to the planning screen within the detailed promotion screen, the system rolls in the volumes and prices from the customer business plan (in the case of a CBP scenario) or any reference aDSO (in the case of a promotion-only scenario) to the promotion based on the product/product category and dates you have selected. Once a promotion has been planned, the planning data (*Trade Spends* (lumpsum/rates) and *Sell-In* or *Sell-Out Uplift Volumes*) from the promotion is aggregated and rolled up to a staging aDSO; and then the data from the staging aDSO is written to the corresponding customer business plan (for a CBP scenario).

Once a long-term agreement has been planned, the planning data (trade spends) from the long-term agreement is rolled up to the staging layer for promotions. The *Sell-In Uplift Volume* key figure for the long-term agreement is aggregated in the roll-up process by reading through all the short-term promotions for the same duration as that of the long-term agreement.

When a short-term promotion (shipment/consumption), falling under the same duration and having the same products as that of the long-term agreement, is created or updated, the uplift volumes of the short-term promotions are calculated and are stored in the staging layer against each long-term agreement.

For more details on promotion planning, refer to Settings for Promotion Planning [page 67].

2.3.1 BW Queries for Promotion Planning

The queries listed below have been used in the sample BW content delivered with the solution.

Short-Term Promotion Planning

BW Queries for Short-Term Promotion Planning

Screen	BW Query	Description
Master Query	/JBPB/AISTP_701_MASTER	Promotion Master
Summary Screen	/JBPB/APRM_PL_STP_SUM_Q001	Summary Query for Short-Term Promotion
Sell-In Screen	/JBPB/APRM_PL_STP_SELLIN_Q002	Sell-in Query for Short-Term Promotion
Sell-Out Screen	/JBPB/APRM_PL_STP_SELLOUT_Q003	Sell-Out Query for Short-Term Promotion
Predictive Planning Screen	/JBPB/ASO_PRP_PRDCT_Q004	Predictive Planning Query
Promotion Budget Monitor	/JBPB/APLN_SCEN_IMPCT_KPI	Scenario Impact KPI
Promotion KPI Monitor	/JBPB/C_PRM_PROMO_KPI_Q004	Promotion KPI Monitor
Plan KPI Monitor	/JBPB/APLN_SCEN_IMPCT_KPI	Scenario Impact KPI

BW Queries for Short-Term Promotion Planning in Indirect Plans and Lower-Level Plans in Overlapping Planning

Screen	BW Query	Description
Summary Screen	/JBPB/APRM_PL_STP_IK_SUM_Q001	Summary Query for Short-Term Promotion
Sell-In Screen	/JBPB/APRM_PL_STP_IK_SLIN_Q002	Sell-in Query for Short-Term Promotion
Sell-Out Screen	/JBPB/APRM_PL_STP_IK_SELLOUT	Sell-Out Query for Short-Term Promotion
Promotion Budget Monitor	/JBPB/APLN_IK_SCEN_IMPCT_KPI	Scenario Impact KPI
Promotion KPI Monitor	/JBPB/APRM_PL_IK_PRM_PROMO_KPI	Promotion KPI Monitor
Plan KPI Monitor	/JBPB/APLN_IK_SCEN_IMPCT_KPI	Scenario Impact KPI

Long-Term Agreement Planning

BW Queries for Long-Term Agreement Planning

Screen	BW Query	Description
Master Query	/JBPB/AILTA_701_MASTER	LTA Master

Screen	BW Query	Description
Summary Screen	`/JBPB/APRM_PL_LTA_SUMM_Q001`	Summary Query for Long-Term Agreement
Sell-In Screen	`/JBPB/APRM_PL_LTA_SELLIN_Q002`	Sell-In Query for Long-Term Agreement
Promotion Budget Monitor	`/JBPB/APLN_SCEN_IMPCT_KPI`	Scenario Impact KPI
Promotion KPI Monitor	`/JBPB/C_PRM_PROMO_KPI_Q004`	Promotion KPI Monitor
Plan KPI Monitor	`/JBPB/APLN_SCEN_IMPCT_KPI`	Scenario Impact KPI

Headquarter Promotion Planning

BW Queries for Headquarter Promotion Planning

Screen	BW Query	Description
Master Query	`/JBPB/AIHQP_MASTER_PLN_Q001`	HQP Master and Planning Query

2.3.2 Create Promotions

A promotion has the following mandatory parameters:

- Account/Target Group
- Product/Product Category
- Time Period

These parameters are required to generate the records in BW and create a promotion. Once these parameters are selected from the UI5 screen, the synchronization process is triggered, and the promotion is created in BW.

Method `GENERATE_COMBINATIONS` of class `CL_RSCRM_IMP_OBJECT` generates the records in BW. Further, method `KEYFIGURE_VALUES_SET` from the same class sets the key figure values and generates the combinations.

The BAdIs listed below can be implemented in CRM to modify the planning behavior and data:

Business Add-In	Description
`CRM_MKTPL_IMP_TPM`	*BAdI: Modification of Planning Behavior*
`CRM_MKTPL_IMP_TPM_EXTENSION`	*BAdI: Modification of Planning Data*

Once the records are generated in SAP BW, the roll in process is triggered and the planning functions configured after the synchronization, that is event 1 of the promotion master query, are triggered. The sample data model that has been delivered uses the following configuration settings:

Queries:

- Short-Term Promotion Master Query: `/JBPB/AISTP_701_MASTER`
- Long-Term Agreement Master Query: `/JBPB/AILTA_701_MASTER`

Configuration of STA and LTA Queries

Event ID	Planning Function	Description	Sequence	Filter
1	`/JBPB/` `FUN_PL_PRM_RIN`	Roll In: Plan to Promotion	1	Custom
1	`/JBPB/` `FUN_PRM_KPI_CL`	Promotion KPI Calculation	2	Custom

For more details on planing functions, kindly refer to:

- Roll In - Plan to Promotion [page 101]
- Promotion KPI Calculation [page 102]

2.3.3 Save Promotions

When you save a promotion within a customer business plan, the system triggers the roll up process which moves the data from the promotion aDSO, `/JBPB/ISTP` for short-term promotions and `/JBPB/ILTA` for long-term agreements, to the shadow aDSO `/JBPB/IPRSTG`, after converting the product granularity to TU CU.

The saving of a promotion triggers event 15 from the fast promotion screen and event 21 from the detailed promotion screen. The sample data model that has been delivered uses the following configuration settings:

Fast Entry

Query: - `/JBPB/APRM_PL_FAST_PROMO_Q001`

Event ID	Planning Function	Description	Sequence	Filter
15	`/JBPB/FUN_APRM_RU`	Copy Data from Promotion to Staging aDSO	1	Custom

Event ID	Planning Function	Description	Sequence	Filter
15	/JBPB/ FUN_PRM_SCEN_R	Promotion KPI rollup in Staging DSO with respect to scenario	2	Custom
15	/JBPB/ APLN_CU_CELLUP	CBP Plan Cell Update	3	Custom

Detailed Entry

Queries:

- Short-Term Promotion Master Query: /JBPB/AISTP_701_MASTER
- Long-Term Agreement Master Query: /JBPB/AILTA_701_MASTER

Event ID	Planning Function	Description	Sequence	Filter
21	/JBPB/FUN_APRM_RU	Copy Data from Promotion to Staging aDSO	1	Custom
21	/JBPB/ FUN_PRM_SCEN_R	Promotion KPI Roll Up in Staging aDSO, with respect to scenario	2	Custom
21	/JBPB/ APLN_CU_CELLUP	CBP Plan Cell Update	3	Custom

For more details on planing functions, kindly refer to:

- Copy Data from Promotion to Staging aDSO [page 103]
- Promotion KPI Roll Up in Staging DSO With Respect to Scenario [page 103]
- CBP Plan Cell Update (within the Configuration Guide for SAP Customer Business Planning)

2.3.4 Update or Recalculate Promotions

You can edit the values of promotions, by configuring custom planning functions which are required during a cell update of a promotion from the fast entry table or the detailed promotion screen. The cell update is performed at the click of *Recalculate* button. It uses method `IF_RSCRM_IMP_OBJECT~UPDATE_CELL` of class `CL_RSCRM_IMP_OBJECT`.

In case you do not select *Recalculate* and directly choose *Save*, or you navigate away from the screen after updating the promotion data, the system implicitly calls the recalculate operation so that the updated data is not lost.

The subsections detail out the configuration settings for the fast and detailed entry modes respectively.

2.3.4.1 Fast Entry Table

The following operations are performed during the cell update from the promotion fast entry table within the *Promotion* slider:

- Key figures, such as total promotion investment based on the updated values of spends/uplift, are calculated.
  This behavior can be adjusted by creating a custom planning function.
- For the *Scenario Planning* screen, the promotion data is rolled up to the operational plan or scenarios depending on the rekevant scenario chosen in the promotion fast entry table.
- For the Plan screen, the entire promotion fast entry table is reloaded and the Scenario Planning screen, along with the promotion fast entry table, is reloaded in order to apply the impact of the updated fast promotions on the operational plan and its scenarios.

The recalculation triggers event 3 and 15. The sample data model that has been delivered uses the following configuration settings:

Query: /JBPB/APRM_PL_FAST_PROMO_Q001

Event ID	Planning Function	Description	Sequence	Filter
3	/JBPB/ FUN_PRM_KPI_RU	Promotion KPI Roll Up within Promotions	1	Custom
15	/JBPB/FUN_APRM_RU	Copy Data from Promotion to Staging aDSO	1	Custom
15	/JBPB/ FUN_PRM_SCEN_R	Promotion KPI Roll Up in Staging aDSO, with respect to scenario	2	Custom
15	/JBPB/ APLN_CU_CELLUP	CBP Cell Update	3	Custom

For more details on planing functions, kindly refer to:

- Promotion KPI Roll Up Within Promotions [page 102]
- Copy Data from Promotion to Staging aDSO [page 103]
- Promotion KPI Roll Up in Staging DSO With Respect to Scenario [page 103]
- CBP Plan Cell Update (within the Configuration Guide for SAP Customer Business Planning)

2.3.4.2 Detailed Entry Screen

The following operations are performed during the cell update from the detailed promotion screen:

- Key figures, such as total promotion investment based on the updated values of spends/uplift, are calculated.
  This behavior can be adjusted by creating a custom planning function.
- The recalculation triggers event 3 for the screen query and 21 for the promotion master query.
  The roll up of promotion data to the plan is also triggered however it is done asynchronously, that is, event 21 that is related to data roll up is triggered in background. As soon as you click on Recalculate, the cell update event 3 is triggered and the screen is displayed once the configuration of the planning functions is completed. You can continue to work on the screen while updates to plan for the planning functions configured at event 21 are completed.

The sample data model that has been delivered uses the following configuration settings:

Queries:

- LTA Sell-In Screen: `/JBPB/APRM_PL_LTA_SELLIN_Q002`
- LTA Summary Screen: `/JBPB/APRM_PL_LTA_SUM_Q001`
- STA Summary Screen: `/JBPB/APRM_PL_STP_SELLIN_Q002`
- STA Sell-Out Screen: `/JBPB/APRM_PL_STP_SELLOUT_Q003`
- STA Sell-In Screen: `/JBPB/APRM_PL_STP_SUM_Q001`

Queries for Indirect and Overlapping Planning:

- STA Summary Screen: `/JBPB/APRM_PL_STP_IK_SUM_Q001`
- STA Sell-Out Screen: `/JBPB/APRM_PL_STP_IK_SELLOUT`
- STA Sell-In Screen: `/JBPB/APRM_PL_STP_IK_SLIN_Q002`

Configuration of Listed Queries

Event ID	Planning Function	Description	Sequence	Filter
3	`/JBPB/FUN_PRM_KPI_CL`	Promotion KPI Calculation	1	Custom

- Short-Term Promotion Master Query: `/JBPB/AISTP_701_MASTER`
- Long-Term Agreement Master Query: `/JBPB/AILTA_701_MASTER`

Configuration of Promotion Master Queries

Event ID	Planning Function	Description	Sequence	Filter
21	`/JBPB/FUN_APRM_RU`	Copy Data from Promotion to Staging aDSO	1	Custom

Event ID	Planning Function	Description	Sequence	Filter
21	/JBPB/ FUN_PRM_SCEN_R	Promotion KPI Rollu Up in Staging sDSO, with respect to scenario	2	Custom
21	/JBPB/ APLN_CU_CELLUP	CBP Plan Cell Update	3	Custom

For more details on planing functions, kindly refer to:

- Promotion KPI Calculation [page 102]
- Copy Data from Promotion to Staging aDSO [page 103]
- Promotion KPI Roll Up in Staging DSO With Respect to Scenario [page 103]
- CBP Plan Cell Update (within the Configuration Guide for SAP Customer Business Planning)

2.3.5 Copy Promotions

You can copy the data from an existing promotion to a new promotion using method `IF_RSCRM_IMP_OBJECT~COPY` of class `CL_RSCRM_IMP_OBJECT`. Once the data has been copied and a new promotion has been created, this new promotion data needs to be rolled up to the plan, therefore, the roll up process and event 21 on the promotion master query are triggered.

Queries:

- Short Term Promotion Master Query: `/JBPB/AISTP_701_MASTER`
- Long Term Agreement Master Query: `/JBPB/AILTA_701_MASTER`

Event ID	Planning Function	Description	Sequence	Filter
21	/JBPB/FUN_APRM_RU	Copy Data from Promotion to Staging aDSO	1	Custom
21	/JBPB/ FUN_PRM_SCEN_R	Promotion KPI Roll Up in Staging aDSO, with respect to scenario	2	Custom
21	/JBPB/ APLN_CU_CELLUP	CBP Plan Cell Update	3	Custom

For more details on planing functions, kindly refer to:

- Copy Data from Promotion to Staging aDSO [page 103]
- Promotion KPI Roll Up in Staging DSO With Respect to Scenario [page 103]
- CBP Plan Cell Update (within the Configuration Guide for SAP Customer Business Planning)

2.3.6 Delete Promotions

You can delete promotions from the following screens, using method `IF_RSCRM_IMP_OBJECT~DELETE` of class `CL_RSCRM_IMP_OBJECT`:

- Calendar of the Customer Business Plan
- Promotion fast entry table

When you delete a promotion, the system performs the following steps:

- Deletes the promotion data in SAP CRM
- Deletes the planning data for the promotion from the promotion aDSO
- Deletes the roll-up data from the staging aDSO in the case of a CBP scenario

The deletion triggers event 13 on the promotion master query. The sample data model that has been delivered uses the following configuration settings:

Queries:

- Short-Term Promotion Master Query: `/JBPB/AISTP_701_MASTER`
- Long-Term Agreement Master Query: `/JBPB/AILTA_701_MASTER`

Event ID	Planning Function	Description	Sequence	Filter
13	`/JBPB/FUN_SCEN_DEL_P`	Scenario Planning: De-lete Data for a Sce-nario in Promotion	1	Custom
13	`/JBPB/FUN_PRM_SCEN_R`	Promotion KPI rollup in Staging DSO with re-spect to scenario	2	Custom
13	`/JBPB/APLN_CU_CELLUP`	CBP Plan Cell Update	3	Custom

For more details on planing functions, kindly refer to:

- Scenario Planning - Delete Data for a Scenario in Promotion (within the Configuration Guide for SAP Customer Business Planning)
- Promotion KPI Roll Up in Staging DSO With Respect to Scenario [page 103]
- CBP Plan Cell Update (within the Configuration Guide for SAP Customer Business Planning)

2.3.7 Shift Promotion Duration

Time shift is the process where the duration of the promotion is changed. This process triggers method `TIME_SHIFT` of class `CL_RSCRM_IMP_OBJECT`, as a result of which old time period records are deleted, and new time period records are created.

Timeshift also allows you to distribute the data for aggregating key figures based on the BAdI `CRM_MKTPL_IMP_TPM` implemented in the CRM system. When you modify the duration of a trade promotion by

extending or reducing the time period that is synchronized with the planning layout, the system redistributes the total values over the new time period as follows:

- If you are using aggregating key figures, when you extend a trade promotion, the system redistributes the values based on the new number of calendar days.
- When you change the dates of a trade promotion (a time shift) but do not extend or reduce the number of days the trade promotion is valid for, the system shifts the same values to the new dates, regardless of whether you are using aggregating or non-aggregating key figures.
- If you are using aggregating key figures, when you shift the trade promotion dates and reduce the duration of the trade promotion, the system redistributes the values equally across the new time period.
- If you are using non-aggregating key figures, when you shift the dates of a trade promotion and extend the number of days the trade promotion is valid for, the system copies the original values to the new weeks. The system copies the original value either of the first week or last week, depending on whether you set the trade promotion start date earlier or set the trade promotion end date later.
- If you are using non-aggregating key figures, when you shift the trade promotion dates and reduce the duration of the trade promotion, the system copies the values of the original weeks to the new weeks, beginning from the first week, for as long as there are valid dates in your trade promotion.

2.3.8 Headquarters Promotions

In the delivered solution, the system uses the aDSO `/JBPB/IHQP` to store plan data for headquarters promotions.

The BW query `/JBPB/AIHQP_MASTER_PLN_Q001` (Headquarters Promotion Master Query) is used for planning headquarters promotions and is delivered with the solution. Event **12** for the master query for headquarter promotions is triggered to copy the data from the headquarters promotion for type short-term to your customer business plan.

Configuration Settings for Headquarter Promotion Master Query

Event ID	Planning Function	Description	Sequence	Filter
12	`/JBPB/ FUN_HQP_TO_STP`	Copy Data from HQP to STA	1	Custom

For more details on planing functions, kindly refer to Copy Data from HQP and STP [page 104].

2.3.9 Copy Promotions from Another RA

In the delivered solution, the user can copy promotions from another responsibility area (RA). In the popup to copy promotions, existing queries which are used to display data on the promotion overlay are reused.

Queries:

- Promotion Planning: `/JBPB/APRM_PL_FAST_PROMO_Q001`
- Promotion Planning (Indirect and Overlapping Planning): `/JBPB/APRM_PL_IK_FAST_PROMO_Q1`

Once the copy promotion process is completed, event 43 is trigerred to updat the data in the relevant plans and promotions.

Event ID	Planning Function	Description	Sequence	Filter
43	/JBPB/ FUN_PL_PRM_RIN	Roll-in: Plan to promotion	1	Custom
43	/JBPB/ FUN_APRM_RU	Copy data from promotion to staging aDSO	2	Custom
43	/JBPB/ FUN_PRM_SCEN_R	Promotion KPI rollup in staging DSO with respect to scenario	3	Custom
43	/JBPB/ APLN_CU_CELLUP	CBP plan cell update	4	Custom

For more details on planning functions, kindly refer to Copy Data from HQP and STP [page 104].

2.4 Multi-Level Promotion Planning

You can plan promotions at different levels of the customer hierarchy. The data of a promotion planned for a customer at a lower level of the customer hierarchy is shown in a promotion planned at a higher-level customer hierarchy node for the same period.

To facilitate multilevel promotion planning in SAP BW, you can create multilevel short-term promotions (STAs) using the promotion fast entry table or the detailed promotion screen. The uplift volume of promotions created at customer nodes below the level of baseline plan customer node is rolled up to the promotions at higher-level customer nodes as the uplift from lower-level promotions. The promotions at higher-level customer nodes consider uplift from lower-level promotions for KPIs calculations.

In case of long-term agreements (LTAs), the short term-uplift is computed considering the short-term promotions at the same customer node as the LTA as well as those at lower-level customer nodes.

SAP CRM passes the STA to STA and STA to LTA linkage in the parameter table LT_TPM_MAP, and this linkage information is used to compute the uplift from lower-level promotion KPIs for STAs and short-term uplift for LTAs.

The planning function /JBPB/FUN_PRM_KPI_RU (Promotion KPI Roll Up within Promotions) is triggered at event 1 of the promotion master query to compute the uplift from lower-level promotion KPIs for STAs and short-term uplift for LTAs in promotion/LTA aDSOs.

For data roll up to the plan, planning function /JBPB/FUN_PRM_SCEN_R is triggered at event 21 of the promotion master query from the detailed promotion screen, and event 15 for the fast promotion query, to compute the uplift from lower-level promotions KPIs for STAs and short-term uplift for LTAs in the staging aDSO.

For more information on how data is rolled up in a multi-level promotion, kindly refer to Multi-Level Promotion Planning in the Application Help for SAP Trade Promotion Planning and Management.

2.5 Product Replacement Tool

2.5.1 Define Queries in BW System

The following BW queries specific to the product replacement tool (PRT) must be installed in the SAP BW system. These are used to read the meta info of the query to prepare the KPI adjustment drop down of the PRT for customer business plans and trade promotions. These queries are also used to configure and trigger the planning functions in SAP BW.

Technical Name	Description
`/JBPB/APLN_M_PRT_PLAN`	Query for PRT Plan
`/JBPB/APRM_PL_PRT_PROMO`	Query for PRT Promotion

2.5.2 Configure Planning Functions

The product replacement tool (PRT) triggers the manual planning functions configured at event 38 for product replacement and event 39 for product addition with the reference scenario for plan and promotion/long-term agreement.

You can configure the PRT planning functions in SAP BW using transaction `RSCRM_EVENTCUST`.

Short-Term Promotion/Long-Term Agreement

The planning functions listed below are triggered when a product is added with reference to or replaced in a promotion/long-term agreement. These planning functions are configured for the PRT promotion query `/JBPB/APRM_PL_PRT_PROMO`, which is applicable to both STAs and LTAs.

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

Customer Business Plan

The following planning functions are triggered when a product is added with reference to or replaced in a plan. These planning functions are configured for the PRT plan query `/JBPB/APLN_M_PRT_PLAN`.

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

In the above planning functions, if the responsibility area (RA) type is indirect or lower-level plan, then a specific script is triggered, to update the key figures relevant to these RA types.

2.6 Pertinent Master Data Changes

Marketing objects are set up with certain master data and are valid during a specified time frame. Changes in the master data are not reflected automatically in these objects. If you want to have these master data changes reflected in the objects, you must identify and change all active and planned marketing objects manually, which can be a very time consuming and inefficient task, therefore the PMDC report is provided.

For more information on the CRM configuration around PMDC, kindly refer to the Configuration Settings for Pertinent Master Data Changes (Enhanced) [page 9] under *Configuration Settings for SAP CRM* in this guide.

The PMDC report triggers event 37 in the BW system for the plan master query. The sample data model that has been delivered rolls up the data from the promotion to the plan, with the following roll up planning functions configured:

Plan Master Query: `/JBPB/APLN_M_PNL_MASTER`

Event ID	Planning Function	Description	Sequence	Filter
37	`/JBPB/FUN_APRM_RU`	Copy Data from Promotion to Staging aDSO	1	Custom
37	`/JBPB/FUN_PRM_SCEN_R`	Promotion KPI Roll Up in Staging aDSO, with respect to scenario	2	Custom
37	`/JBPB/APLN_CU_CELLUP`	CBP Plan Cell Update	3	Custom

The above planning functions are adjusted to handle indirect and lower-level plan responsibility area types.

Control Planning Function Execution During PMDC

In order to control the execution of the planning function during PMDC, the following planning context parameter is provided in the standard solution. This planning context is set at the time of execution of the PMDC job and passed to the SAP BW system. In the system, the planning context can be used in method `IF_EX_RSCRM_IMP_EVENT_PF~CHANGE_PF_SELECTION` of BAdI `RSCRM_IMP_EVT_PLANNING_FUNCT` to control the execution of planning functions.

Control Parameter Name	Context Parameter Value
`IN_PMDC`	*B*

To retrieve the value of this context parameter, you can use the following methods:

- `CL_CRM_IMP_OBJECT=>GET_CONTEXT_PARAMETER` in the SAP CRM system
- `CL_RSCRM_IMP_OBJECT=>GET_PLANNING_CONTEXT` in the SAP BW system

2.7 Technical Details of Planning Functions

2.7.1 Roll In - Plan to Promotion

This planning function copies the plan key figures into the short-term promotion (STA) or long-term agreement (LTA) records for the current planning scenario context (source indicator 1 or A or B or C) to compute the *Lower-Level Uplift* for STA and *Short-Term Uplift* for LTA as per the STA to STA or STA to LTA linkage applicable for the scenario context that has been passed, along with other key figures in the STA/LTA records. If the responsbility area (RA) type is indirect or lower-level plan, then a specific script is triggered to update the key figures relevant to these RA types.

Planning Function Type: `/JBPB/PLAN_PROMO_RIN`

Class: `/JBPB/CL_PLAN_PROMO_ROLLIN`

Parameters:

- *CRM Marketing Elements for Roll In* – This is a list of CRM marketing elements for which the plan baseline KPI roll in needs to be carried out.
- *CRM Marketing Elements Linked to the Current Scenario* – This is a list of the CRM marketing elements linked to the selected planning scenario indicator (source indicator 1 or A or B or C).
- *Product Category Hierarchy* – This is the name of the product category hierarchy.
- *Source Indicator* variable – This indicates the source indicator (1 or A or B or C) for the plan scenario.
- *Product Category Data* – This table provides the relationship between the product category and product. For product category-based STA/LTA, this information is used to read corresponding plan data based on the product.
  This table is read from class `/JBPB/CL_CRM_IMP_ACTION_MANAGR` attribute in method `IF_RSPLFA_SRVTYPE_TREX_EXEC_R~TREX_EXECUTE` of the planning function type class.

- *TPM_MAP* – This table provides the relationship between two short-term promotions (STA → STA) or between a short-term promotion and long-term agreement (STA → LTA) on the basis of the customer account hierarchy (`0BP_GRP` hierarchy). Using this relationship, the *Lower-Level Uplift* KPI is calculated for STAs and *Short-Term Uplift* KPI is calculated for LTAs.
  This table is read from class `/JBPB/CL_CRM_IMP_ACTION_MANAGR` attribute in method `IF_RSPLFA_SRVTYPE_TREX_EXEC_R~TREX_EXECUTE` of planning function type class.

The relationship among product categories used for the roll up logic is derived within the AMDP method using the *Product Category Hierarchy* name.

2.7.2 Promotion KPI Roll Up Within Promotions

This planning function computes the *Lower-Level Uplift* for STA and *Short-Term Uplift* for LTA as per the STA to STA or STA to LTA linkage applicable for the scenario context that has been passed. If the responsbility area (RA) type is indirect or lower-level plan, then a specific script is triggered to update the key figures relevant to these RA types.

Planning Function Type: `/JBPB/PRM_KPI_ROLLUP`

Class: `/JBPB/CL_PRM_KPI_ROLLUP`

Parameters:

- *CRM Marketing Elements* – This is a list of the CRM marketing elements linked to the selected planning scenario.
- *Product Category Hierarchy* – This is the name of the product category hierarchy.
- *TPM_MAP* – This table provides the relationship between two short-term promotions (STA → STA) or between a short-term promotion and long-term agreement (STA → LTA) on the basis of customer account hierarchy (`0BP_GRP` hierarchy). Using this relationship, the Lower *Lower-Level Uplift* is calculated for STAs and *Short-Term Uplift* KPI is calculated for LTAs.
  This table is read from class `/JBPB/CL_CRM_IMP_ACTION_MANAGR` attribute in method `IF_RSPLFA_SRVTYPE_TREX_EXEC_R~TREX_EXECUTE` of planning function type class.

The relationship among the product categories used for the rol up logic is derived within the AMDP method using the product category hierarchy name.

2.7.3 Promotion KPI Calculation

This planning function computes the key figures which need to be calculated and stored based on the promotion information entered on the *Promotion* screen. If the responsbility area (RA) type is indirect or lower-level plan, then a specific script is triggered to update the key figures relevant to these RA types.

Planning Function Type: `/JBPB/PRM_KPI_CALC`

Class: `/JBPB/CL_PROMO_KPI_CALC`

2.7.4 Copy Data from Promotion to Staging aDSO

The following processes are carried out on the execution of this planning function:

- Key figures, if any, within the `/JBPB/IPRSTG` aDSO are updated to zero, for the marketing element in question.
- Promotional data is joined with TU CU product data from aDSO `/JBPB/TUCUNU` to store data at TU CU granularity.
- Based on the input parameters for this script, a separate dataset is created for promotions linked to the operational plan source indicator or scenario source indicator.
- Short-term promotions or long-term agreements planned at product (`0CRM_PROD`) level are transformed into data records at TU CU product (`/JBPB/TUCUPRD`) level. *Volume* is disaggregated in the ratio of the *Factored Baseline Volume* and *Trade Spends (Lumpsum)* are disaggregated in the ratio of *Gross Sales Value*. A join between the promotional data and data in `/JBPB/TUCUNU` is performed to dis-aggregate on TU CU products.
- Short-term promotions or long-term agreements planned at product categories (`0PR_CAT_SAL`) are transformed into data records at product (`0CRMPROD`) and TU CU product (`/JBPB/TUCUPRD`) level. *Volume* is disaggregated in the ratio of the *Factored Baseline Volume* and *Trade Spends (Lumpsum)* are disaggregated in the ratio of *Gross Sales Value*.

Planning Function Type: `/JBPB/CPY_PRM_IPRSTG`

Class: `/JBPB/CL_PROMO_TO_STAGING`

Parameters:

- • `VE_CRMMKTELM_1` – List of CRM Marketing elements linked to operational plan
- • `VE_CRMMKTELM_A` – List of CRM Marketing elements linked to planning scenario A
- • `VE_CRMMKTELM_B` – List of CRM Marketing elements linked to planning scenario B
- • `VE_CRMMKTELM_C` – List of CRM Marketing elements linked to planning scenario C
- *Product Category Data* - This table provides the relationship between product category and product. For product category based STA/LTA, this information is used to read corresponding plan data on the basis of product. It is read from class `/JBPB/CL_CRM_IMP_ACTION_MANAGR` attribute in method `IF_RSPLFA_SRVTYPE_TREX_EXEC_R~TREX_EXECUTE` of planning function type class.

2.7.5 Promotion KPI Roll Up in Staging DSO With Respect to Scenario

This planning function computes the *Lower-Level Uplift* for STA and *Short-Term Uplift* for LTA as per the STA to STA or STA to LTA linkage with respect to the planning scenario,s and stores them in the shadow aDSO.

Planning Function Type: `/JBPB/IPRSTG_KPI_RLU`

Class: `/JBPB/CL_PRM_KPI_ROLLUP_STG`

Parameters:

- `VE_CRMMKTELM_1` – List of CRM marketing elements linked to operational plan

- `VE_CRMMKTELM_A` – List of CRM marketing elements linked to planning scenario A
- `VE_CRMMKTELM_B` – List of CRM marketing elements linked to planning scenario B
- `VE_CRMMKTELM_C` – List of CRM marketing elements linked to planning scenario C
- *Product Category Hierarchy* - This table provides the relationship two short-term promotions (STA → STA) or between a short-term promotion and long-term agreement (STA → LTA) on the basis of a customer account hierarchy (`0BP_GRP` hierarchy). Using this relationship, the *Lower-Level Uplift* for STAs and *Short-Term Uplift* for LTAs is calculated. It is read from class `/JBPB/CL_CRM_IMP_ACTION_MANAGR` attribute in method `IF_RSPLFA_SRVTYPE_TREX_EXEC_R~TREX_EXECUTE` of planning function type class.

The relationship among product categories used for the roll up logic is derived within the AMDP method using the product category hierarchy name.

2.7.6 Copy Data from HQP and STP

This planning function creates a short-term promotion by copying the data from a headquarter Promotion. It uses the standard SAP planning function type `0RSPL_COPY`.

3 Glossary

Follow the steps below to access the glossaries for SAP Trade Promotion Planning and Management:

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 following components that are relevant to SAP Trade Promotion Planning and Management:

- `CRM-CLA` (Claims Management)
- `CRM-FM` (Funds Management)
- `CRM-FM-DF` (Dynamic Funding)
- `CRM-MKT-MPL-TPM` (Trade Promotion Management)
- `CRM-ANA-IMP` (In-Memory Planning)

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