



APPLICATION HELP | PUBLIC
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SAP Trade Management

Release 4.0 Support Package 4

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1 SAP Trade Management

Product Information

Product	SAP Trade Management
Release	4.0 Support Package 4
Based On	<ul style="list-style-type: none">• SAP Customer Relationship Management• SAP Business Warehouse, powered by SAP HANA• SAP NetWeaver• SAP BusinessObjects Business Intelligence (BI) Platform• SAP Analytics Cloud <p>For more information, see SAP Notes 2595796 (Release strategy and Maintenance Information for SAP Trade Management 4.0) and 2593962 (SAP Trade Management 4.0 - Release Information Note).</p>
Last Documentation Update	December 2019

Use

SAP Trade Management offers extensive functionality for planning and managing trade promotions, customer business planning, as well as trade management analytics.

SAP Trade Management includes the following functional areas:

- [SAP Trade Promotion Planning and Management](#)
- [SAP Customer Business Planning](#)
- [SAP Advanced Trade Management Analytics](#)

1.1 Common Concepts

The following topics are common to all areas of the SAP Trade Management application:

- Business roles
- Data flows
- Responsibility areas

- Account defaults
- Upload data
- Product Replacement Tool
- Managing private links
- Sales Management Cockpit

1.1.1 Business Roles

The following standard business roles are delivered with SAP Trade Management:

- [Key Account Manager \[page 4\]](#)
- [Sales Director \[page 5\]](#)
- [Sales Finance/Controller \[page 5\]](#)
- [Trade Marketing Manager \[page 6\]](#)
- [Field Sales Representative \[page 6\]](#)
- [Claims Analyst \[page 7\]](#)
- [Claims Manager \[page 7\]](#)
- [Business Operations \[page 7\]](#)
- [IT Administrator \[page 8\]](#)

1.1.1.1 Key Account Manager

This role focuses on selling into one or more retail customers for a specific product mix and is responsible for developing a customer business plan for each managed account with the purpose of exceeding defined internal and external business targets. Within the customer business plan, the Key Account Manager details the promotion execution strategy to achieve his or her targets.

Other Main Tasks

- Sales Planning (baseline or promoted/non-promoted)
- Promotion Planning
- Customer Care
- Support for Customer Relationship Management
- Account Planning
- Event/Annual Calendar Planning
- Fund Reservation
- Consumer Event Interactions
- Workflow Approvals
- Sell-in & Negotiation
- Proposal/Presentation Generation
- Promotion-Driven Demand Planning Integrated with Supply Chain Planning
- Account/Contact Management
- Customer Calendar Alignment

Goals

- Account focused

1.1.1.2 Sales Director

Together with the Regional Account Managers reporting to him or her, the Sales Director is responsible for a regional organization and for selling all brands to the retail customers in the assigned region. This role usually works with the Key Account Managers whose customers are located in the Sales Director's territory.

Other Main Tasks

- Annual sales planning
- Headcount-per-area planning
- High-level planning of promotions
- Manage trade budget by approving the promotion or customer business plan created by the KAM
- Communication with retail
- Achieve new distribution or sell-in new items

Goals

- Geographically focused
- Deliver business objectives
- Establish credible relationship with customer
- Generate incremental sales

Related Information

[Key Account Manager \[page 4\]](#)

1.1.1.3 Sales Finance/Controller

This role is active primarily in the sales planning and budgeting phase and works closely with the Trade Marketing Manager in determining trade spend budgets and rates. It also works closely with the Sales Director in distributing trade budget across the retail customers and is responsible for instituting the organization's trade budget (fund) structure and monitoring activities against those budgets.

Other Main Tasks

- Set up dynamic fund rates
- Set up funds and budget allocations for each retail customer
- Ensure the organization's financial liabilities can be met via accrual management
- Transfer trade budgets between funds as dictated by business activities

Goals

- Sales focused

Related Information

[Trade Marketing Manager \[page 6\]](#)

[Sales Director \[page 5\]](#)

1.1.1.4 Trade Marketing Manager

This role focuses primarily on managing all kinds of trade events and is, therefore, responsible for planning and executing events such as national promotions, advertising campaigns, and so on.

Other Main Tasks

- Manage and assign trade spends effectively
- Define the level of detail for trade event planning
- Set the budgets for key metrics (mainly volume and trade spending)
- Drive the incremental sales volume with the help of trade events

Goals

- Event focused

1.1.1.5 Field Sales Representative

This role is directly responsible to the Key Account Manager and is the closest contact between a manufacturer and the customer on a shop-floor basis.

Other Main Tasks

- Regular visits to retail customers' outlets
- On-location order entry
- Confirm execution of trade promotions at outlet level (proof of performance)
- Check planogram compliance
- Use tools such as Retail Execution (ReX)

Goals

- Account and geographically focused

Related Information

[Key Account Manager \[page 4\]](#)

1.1.1.6 Claims Manager

This role is active primarily in the execution and settlement phase for claims and settlements.

Other Main Tasks

- Oversee and perform similar functions as the Claims Analyst
- Approve claims at a higher monetary threshold than the Claims Analyst
- Approve payments above agreed thresholds

Goals

- Organization focused

Related Information

[Claims Analyst \[page 7\]](#)

1.1.1.7 Claims Analyst

This role is active primarily in the execution and settlement phase for claims and settlements and reports directly to the Claims Manager.

Other Main Tasks

- Process claims based upon submitted proof of performance
- Approve claims up to a predetermined monetary threshold
- Check promotion accruals
- Settle claims
- Process accounts receivable open items

Goals

- Organization focused

Related Information

[Claims Manager \[page 7\]](#)

1.1.1.8 Business Operations

This role is active primarily in the planning preparation phase and acts as the business process and functional power user for the business organization. It supports all business users in functional and technical issues and

acts as the liaison between the business and organization's technical resources. With explicit authorization from a business user, it can perform system functions on the user's behalf.

Other Main Tasks

- Responsible for master data-related activities such as setting up responsibility areas as well as account and product hierarchies
- Review and adjust internal and external planning structures
- Ensure that sales and investment targets are received by the sales organization
- Set up assortments
- Enter fund budgets for each KAM (either total amount or a dynamic rate)
- Maintain territory management
- Upload external data to the systems for claim analyst proof of performance and latest estimates
- Ensure that analytic reports are accurate

Goals

- Organization focused

1.1.1.9 IT Administrator

This role works closely with Business Operations in supporting the organization's user community from a technical perspective. It does not have the authority to act on behalf of a business user and execute business transactions in the system and can only view business transactions.

Other Main Tasks

- Troubleshoot technical issues
- Ensure system availability and performance

Goals

- Organization focused

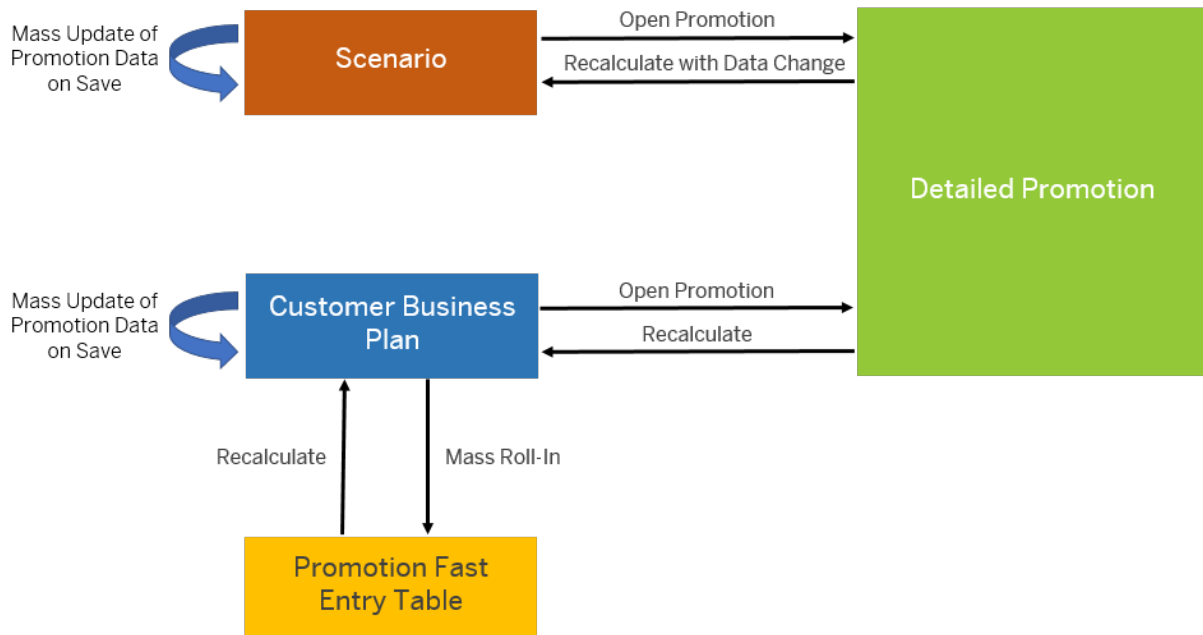
Related Information

[Business Operations \[page 7\]](#)

1.1.2 Data Flows

When you make changes to the KPIs in a customer business plan, scenario, or detailed promotion, these changes also need to be reflected in the related target plan, scenario, or promotion.

In the following diagram, it is assumed that you have implemented SAP Customer Business Planning and SAP Trade Promotion Planning and Management. The diagram illustrates the data flows between the two functional areas and shows which actions trigger them.



Data Flows

Data Flow	Description
Plan/Scenario → All Promotions (Mass Update of Promotion Data on Save)	If you change the baseline volume, for example, in your plan or scenario and save this change without going to your promotion in the fast entry table, a scheduled job called <i>Mass Update on Save</i> runs in the background to update the new baseline in all the promotions linked with the plan or scenario.
Plan → Promotion Fast Entry Table (Mass Roll-In)	If you change the baseline volume, for example, in your plan and want this change to be reflected in all the promotions in the promotion fast entry table, you use the <i>Mass Roll-In</i> function in the <i>Bulk Actions</i> dropdown in the promotion fast entry table.
Promotion Fast Entry Table → Plan (Recalculate)	If you change the uplift volume, for example, in your promotions in the promotion fast entry table and want this to be reflected in your plan, you use the <i>Recalculate</i> function (the same effect can be achieved by clicking <i>Save</i>).
Plan/Scenario → Promotion (Open Promotion)	If you change the baseline volume, for example, in your plan or scenario and want this change to be reflected in your promotion, open the detailed promotion. The baseline volume is then updated automatically to the promotion.
Promotion → Plan (Recalculate)	If you change the uplift volume, for example, in your promotion and want this to be reflected in your plan or scenario, you use the <i>Recalculate</i> function (the same effect can be achieved by clicking <i>Save</i>).

Data Flow	Description
Promotion → Scenario (Recalculate with Data Change)	If you change the baseline volume, for example, in a scenario, navigate to a promotion that is linked to the scenario and click <i>Save</i> or <i>Recalculate</i> and <i>Save</i> , the data in the scenario is not updated with the changes for the new volume. You need to make an additional change in the promotion planning data and click <i>Recalculate</i> to see the effect on the scenario.

Related Information

[KPIs Used in SAP Trade Promotion Planning and Management \[page 10\]](#)

[KPIs Used in SAP Customer Business Planning \[page 16\]](#)

1.1.2.1 KPIs Used in SAP Trade Promotion Planning and Management

The following KPIs can be used on the *Detailed Promotion* and *Long-Term Agreement* screens in SAP Trade Promotion Planning and Management. The columns next to the KPI name show whether a roll-up/roll-in operation takes place to/from the plan object, and whether the KPI can be edited and recalculated.

KPIs Used in SAP Trade Promotion Planning and Management

KPI Name	Roll-In Operation from Operational Plan Object	Editable	Recalculate	Roll-Up Operation to Plan Object Re. Operational and Associated Scenarios	Source (Ref. Data) / Calculation Base
Sell-In Total	N	Y	N	N	Sell-In Non Promo + Sell-In Promo
Sell-In Promo	N	N	Y	Y	Rolled Up from Promotion Sell-In Total Volume

KPI Name	Roll-In Operation from Operational Plan Object	Editable	Recalculate	Roll-Up Operation to Plan Object Re. Operational and Associated Sce- narios	Source (Ref. Data) / Calcula- tion Base
Sell-In Non-Promo	Y	N	N	N	Base Volume + Sell-In Non-Promo (Editable) - Sell-In Promo If there is no pro- motion in a prod- uct/week: Base Volume + Sell-In Non-Promo (Edita- ble) Otherwise 0
Sell-Out Total	N	N	Y	N	Sell-Out Non Promo + Sell-Out Non-Promo (Edita- ble) + Sell-Out Promo
Sell-Out Promo	N	N	N	Y	Rolled Up from Promotion Sell- Out Total Volume
Sell-Out Non- Promo	Y	N	N	N	Sell-Out Total Vol- ume + Sell-Out Non-Promo (Edita- ble) - Sell-Out Promo
Sell-In Total	N	Y	N	N	Sell-In Base + Sell- In EDLP Uplift + Sell-In Uplift

KPI Name	Roll-In Operation from Operational Plan Object	Editable	Recalculate	Roll-Up Operation to Plan Object Re. Operational and Associated Sce- narios	Source (Ref. Data) / Calcula- tion Base
Sell-In Base	Y	N	N	N	Baseline Vol. Plan- ning: Base Volume <i>or</i> Upload Ref. Data (e.g. APO): Plan- ning Function [Copy from Ref. Data (Volume)] <i>or</i> TPO: Planning Function (Predict Plan or Update Plan with Statisti- cal Forecast)
Sell-In Uplift	N	N	Y	Y	Rolled Up from Short- Term Pro- motion(s)
Sell-Out Total	N	Y	N	N	Sell-Out Base + Sell-Out EDLP Up- lift + Sell-Out Uplift

KPI Name	Roll-In Operation from Operational Plan Object	Editable	Recalculate	Roll-Up Operation to Plan Object Re. Operational and Associated Sce- narios	Source (Ref. Data) / Calcula- tion Base
Sell-Out Base	Y	N	N	N	Editable in CBP or Upload Ref. Data (e.g. Nielsen): Planning Function [Copy from Ref. Data (Volume)] or Sell-In to Sell-Out Shift Example: Planning Function [Sell-In to Sell-Out Shift] or TPO: Planning Function (Predict Plan or Update Plan with Statisti- cal Forecast)
Sell-Out Uplift	N	N	Y	Y	Rolled Up from Short-Term Pro- motion(s)
List Price	Y	N	N	N	Editable in CBP
Gross Sales Value	Y	N	N	N	List Price * Sell-In Total
Promo Discounts (ON)	N	N	Y	Y	((Promo Discount (%) * List Price) + Promo Discount (pU)) * Sell-In To- tal
Promo Discount (%)	N	Y	N	Y	Rolled Up from Short-Term Pro- motion(s)

KPI Name	Roll-In Operation from Operational Plan Object	Editable	Recalculate	Roll-Up Operation to Plan Object Re. Operational and Associated Sce- narios	Source (Ref. Data) / Calcula- tion Base
Promo Discount (pU)	N	Y	N	Y	Rolled Up from Short-Term Pro- motion(s)
On Invoice Total	N	N	Y	N	Slotting Fee (ON) + EDLP Discounts (ON) + Promo Dis- counts (ON)
Slotting Fee (OFF)	N	N	Y	Y	((Slotting Fee Re- bate (%) * List Price) + Slotting Fee Rebte (pU)) * Sell-In Total) + Slotting Fee Re- bates (Fixed)
Slotting Fee Re- bate (%)	N	Y	N	Y	Rolled Up from Long-Term Agree- ment(s)
Slotting Fee Re- bate (pU)	N	Y	N	Y	Rolled Up from Long-Term Agree- ment(s)
Slotting Fee Re- bates (Fixed)	N	Y	N	Y	Rolled Up from Long-Term Agree- ment(s)
Promo Rebates (OFF)	N	N	Y	Y	((Promo Rebate (%) * List Price) + Promo Rebate (pU)) * Sell-In To- tal) + Promo Re- bate Feature (Fixed) + Promo Rebate Display (Fixed) + (Promo Rebate (pU)-Sell- Out * Sell-Out To- tal)

KPI Name	Roll-In Operation from Operational Plan Object	Editable	Recalculate	Roll-Up Operation to Plan Object Re. Operational and Associated Sce- narios	Source (Ref. Data) / Calcula- tion Base
Promo Rebate (%)	N	Y	N	Y	Rolled Up from Short-Term Pro- motion(s)
Promo Rebate (pU)	N	Y	N	Y	Rolled Up from Short-Term Pro- motion(s)
Promo Rebate (Fixed)	N	Y	N	Y	Rolled Up from Short-Term Pro- motion(s)
Off Invoice Total	N	N	Y	N	Slotting Fee (OFF) + EDLP Rebates (OFF) + Promo Re- bates (OFF)
Promo Investment Total	N	N	Y	N	Promo Discounts (ON) + Promo Re- bates (OFF)
Promoted RSP (per CU)	N	Y	N	Y	If not (rolled-up from promotions - Editable in Sell-Out P&L view of short- term promotion), then it is the (Reg- ular RSP (per CU) - this is to make the weighted aver- ages work)

Related Information

[Data Flows \[page 8\]](#)

1.1.2.2 KPIs Used in SAP Customer Business Planning

The following KPIs can be used on the *Plan* and *Scenario Planning* screens in SAP Customer Business Planning. The columns next to the KPI name show whether the KPI can be edited and recalculated, and if a mass update is possible on save.

KPIs Used in SAP Customer Business Planning

KPI Name	Editable	Recalculate	Mass Update on Save	Source (Ref. Data) / Calculation Base
PY Base Volume	N	N	N	Prior Year Baseline Volume
Store Open/Close (%)	Y	N	N	Total % entry and ability to override % by period
Store Open/Close Volume Change	N	Y	N	Ability to see the volume change resulting from the % for a period
Distribution (%)	Y	N	N	Total % entry and ability to override % by period
Distribution Volume Change	N	Y	N	Ability to see the volume change resulting from the % for a period
Base Volume Sub-Total	N	Y	N	Sub-total of above calculations
PY Retail Price	N	N	N	Retail price from previous year in CBP
Retail Price Increase (%)	N	N	N	Calculated from regular RSP (per CU) increase % from prior year
Every Day RSP Volume Change	N	N	N	Volume increase/decrease per unit. This is a manual override for the impact of the Retail Price Increase (%)
Category (%)	Y	N	N	Total % entry and ability to override % by period

KPI Name	Editable	Recalculate	Mass Update on Save	Source (Ref. Data) / Calculation Base
Category Volume Change	N	Y	N	Ability to see the volume change resulting from the % for a period
Advertising & Promotion (%)	Y	N	N	Total % entry and ability to override % by period
Adv. & Promo Volume Change	N	Y	N	Ability to see the volume change resulting from the % for a period
Other Drivers (%)	Y	N	N	Total % entry or absolute volume entry
Other Volume Change	N	Y	N	Ability to see the volume change resulting from the % for a period
Innovation Baseline	Y	N	N	Volume increase/decrease per unit
Sell-In Base Volume	N	Y	N	Sub-total of the baseline volume planning calculations
PY Base Volume Change (%)	N	N	N	Calculate the % change from PY Base
Sell-In Uplift Volume	N	N	Y	Aggregated from promotions
PY Uplift Volume	N	N	N	Aggregated from prior year promotions
PY Uplift Volume Change (%)	N	N	N	Calculate the % change from PY Uplift
Sell-Out Total Volume	N	N	N	Sell-Out Base + Sell-Out EDLP Uplift + Sell-Out Uplift
PY Sell-Out Total Vol	N	N	N	Prior Year Sell-Out Total
PY Sell-Out Total Change (%)	N	N	N	Calculate the % change from PY Sell-Out Total Volume

KPI Name	Editable	Recalculate	Mass Update on Save	Source (Ref. Data) / Calculation Base
Sell-In Total	N	Y	Y	Sell-In Non Promo + Sell-In Promo
Sell-In Promo	N	N	Y	Rolled Up from Promotion Sell-In Total Volume
Sell-In Non-Promo	N	Y	N	Base Volume + Sell-In Non-Promo (Editable) - Sell-In Promo If there is no promotion in a product/week: Base Volume + Sell-In Non-Promo (Editable) Otherwise 0
Sell-In Non-Promo (Editable)	Y	N	N	Increments/Decrements Sell-In Total
Sell-Out Total	N	Y	Y	Sell-Out Non Promo + Sell-Out Non-Promo (Editable) + Sell-Out Promo
Sell-Out Promo	N	N	Y	Rolled Up from Promotion Sell-Out Total Volume
Sell-Out Non-Promo	N	Y	N	Sell-Out Total Volume + Sell-Out Non-Promo (Editable) - Sell-Out Promo
Sell-Out Non-Promo (Editable)	Y	Y	N	Increments/Decrements Sell-Out Total
Sell-In Total	N	Y	Y	Sell-In Base + Sell-In EDLP Uplift + Sell-In Uplift

KPI Name	Editable	Recalculate	Mass Update on Save	Source (Ref. Data) / Calculation Base
Sell-In Base	N	Y	N	Baseline Vol. Planning: Base Volume <i>or</i> Upload Ref. Data (e.g. APO): Planning Func- tion [Copy from Ref. Data (Volume)] <i>or</i> TPO: Planning Func- tion (Predict Plan or Update Plan with Stat- istical Forecast)
Sell-In Uplift	N	N	Y	Rolled Up from Short- Term Promotion(s)
Sell-Out Total	N	Y	Y	Sell-Out Base + Sell- Out EDLP Uplift + Sell- Out Uplift
Sell-Out Base	Y	N	N	Editable in CBP <i>or</i> Upload Ref. Data (e.g. Nielsen): Planning Function [Copy from Ref. Data (Volume)] <i>or</i> Sell-In to Sell-Out Shift Example: Planning Function [Sell-In to Sell-Out Shift] <i>or</i> TPO: Planning Func- tion (Predict Plan or Update Plan with Stat- istical Forecast)
Sell-Out Uplift	N	N	Y	Rolled Up from Short- Term Promotion(s)
List Price	Y	N	N	Editable in CBP

KPI Name	Editable	Recalculate	Mass Update on Save	Source (Ref. Data) / Calculation Base
Gross Sales Value	N	Y	Y	List Price * Sell-In Total
Slotting Fee (ON)	N	Y	Y	((Slotting Fee Discount (%) * List Price) + Slotting Fee Discount (pU)) * Sell-In Total
Slotting Fee Discount (%)	Y	N	N	Editable in CBP
Slotting Fee Discount (pU)	Y	N	N	Editable in CBP
Promo Discounts (ON)	N	N	Y	((Promo Discount (%) * List Price) + Promo Discount (pU)) * Sell-In Total
Promo Discount (%)	N	Y	Y	Rolled up from short-term promotions
Promo Discount (pU)	N	N	Y	Rolled up from short-term promotions
On Invoice Total	N	Y	Y	Slotting Fee (ON) + EDLP Discounts (ON) + Promo Discounts (ON)
Net Invoice Value (pU)	N	Y	Y	Net Invoice Value Total / Sell-In Total
Net Invoice Value Total	N	Y	Y	Gross Sales Value - On Invoice Total
Slotting Fee (OFF)	N	N	Y	((((Slotting Fee Rebate (%) * List Price) + Slotting Fee Rebte (pU)) * Sell-In Total) + Slotting Fee Rebates (Fixed)
Slotting Fee Rebate (%)	N	Y	Y	Rolled Up from Long-Term Agreement(s)
Slotting Fee Rebate (pU)	N	Y	Y	Rolled Up from Long-Term Agreement(s)

KPI Name	Editable	Recalculate	Mass Update on Save	Source (Ref. Data) / Calculation Base
Slotting Fee Rebates (Fixed)	N	N	Y	Rolled Up from Long-Term Agreement(s)
Promo Rebates (OFF)	N	N	Y	((Promo Rebate (%) * List Price) + Promo Rebate (pU)) * Sell-In Total) + Promo Rebate Feature (Fixed) + Promo Rebate Display (Fixed) + (Promo Rebate (pU)-Sell-Out * Sell-Out Total)
Promo Rebate (%)	N	Y	Y	Rolled Up from Short-Term Promotion(s)
Promo Rebate (pU)	N	N	Y	Rolled Up from Short-Term Promotion(s)
Promo Rebate (Fixed)	N	N	Y	Rolled Up from Short-Term Promotion(s)
Off Invoice Total	N	N	Y	Slotting Fee (OFF) + EDLP Rebates (OFF) + Promo Rebates (OFF)
Net Net Invoice Value (pU)	N	Y	Y	Net Net Value Total / Sell-In Total
Net Net Invoice Value Total	N	Y	Y	Net Invoice Value Total - Off Invoice Total
Base Investment Total	N	Y	Y	Slotting Fee (ON) + EDLP Discounts (ON) + Slotting Fee (OFF) + EDLP Rebates (OFF)
Promo Investment Total	N	N	Y	Promo Discounts (ON) + Promo Rebates (OFF)
Cost of Goods Sold	Y	N	N	Editable in CBP
Internal Profit (pU)	N	Y	Y	Net Net Value (pU) - Cost of Goods Sold
Internal Profit Total	N	Y	Y	Internal Profit (pU) * Sell-In Total

KPI Name	Editable	Recalculate	Mass Update on Save	Source (Ref. Data) / Calculation Base
Internal Profit (%)	N	Y	Y	Internal Profit (pU) / Net Net Value (pU) * 100
Return on Investment (%)	N	Y	Y	Internal Profit Total / (Base Investment Total + Promo Investment Total)
Retailer Shelf Price (per CU)	N	N	Y	Promoted RSP (per CU) if available, otherwise Regular RSP (per CU)
Promoted RSP (per CU)	N	N	Y	If not (rolled-up from promotions - Editable in Sell-Out P&L view of short-term promotion), then it is the (Regular RSP (per CU) - this is to make the weighted averages work)
Regular RSP (per CU)	Y	N	N	Editable in CBP / interfaced from DSIM
Customer Profit (pU)	N	Y	Y	(Retailer Shelf Price (per CU) * #CUperTU) - Net Net Value (pU)
Customer Profit Total	N	Y	Y	Customer Profit (pU) * Sell-Out Total
Customer Profit (%)	N	Y	Y	(Customer Profit (pU) / (Retailer Shelf Price (per CU) * #CU-perTU))*100
Customer ROI %	N	Y	Y	Customer Profit Total / Customer Investment Total

Related Information

[Data Flows \[page 8\]](#)

1.1.3 Responsibility Areas

A responsibility area is set up by the back office or administrator and defines who is responsible for which customer and what product category. Responsibility areas are used to store authorization information.

1.1.3.1 Creating a Root Responsibility Area (Company Level)

Prerequisites

- A CRM business partner (BP) has been assigned in the back end.
- The responsibility area hierarchy has been created.
- You have made the necessary settings in Customizing for Customer Relationship Management under [Trade Management](#) > [General Settings](#) > [Responsibility Area \(RA\)](#) .

Procedure

1. On the *CBP Administrator Home* screen, click [Responsibility Areas](#) on the left.
2. Go to [Result List](#) and click [Root Responsibility Area](#).
3. Enter the name of the responsibility area and ID and press .
4. In the [Responsibility Area Header](#), enter the integrated planning profile group, sales area, shop format, and account hierarchy node ID.
5. Under [Product Category](#), click [Insert](#) to enter the product category.
6. To assign an employee, go to [Employee](#), click [Insert](#) to create an entry for the KAM who is to be allowed to create a plan, and make the necessary entries.
7. Change the status of the root responsibility area to [Active](#) so that it's visible in the application and save your data.

The RA is then displayed in the plan dropdown list from which the KAM can create a plan.

More Information

[Creating a Subordinate Responsibility Area \[page 24\]](#)

1.1.3.2 Creating a Subordinate Responsibility Area

Prerequisites

- A CRM business partner (BP) has been assigned in the back end.
- A root responsibility area has been created in the *Responsibility Area* application in the front end (for more information, see [Creating a Root Responsibility Area \(Company Level\) \[page 23\]](#)).
- The responsibility area hierarchy has been created.

Procedure

1. On the *CBP Administrator Home* screen, click *Responsibility Area* on the left.
2. At the top of the screen, click *Edit* and *New*.
3. Enter a name and ID, choose the level, and press .
4. In the *Responsibility Area Header*, enter the integrated planning profile group, sales area, shop format, and account hierarchy node ID.
5. Under *Product Category*, click *Insert* to enter the product category.
6. To assign an employee, go to *Employee*, click *Insert* to create an entry for the KAM who is to be allowed to create a plan, and make the necessary entries.
7. Change the status of the root responsibility area to *Active* so that it's visible in the application and save your data.

The RA is then displayed in the plan dropdown list from which the KAM can create a plan.

If you are assigned as an employee to the root responsibility area, you will be able to see, but not edit, a plan created under a subordinate responsibility area. In this case, the plan is displayed with a padlock icon and *Read Only*.

Other Functions

You can also copy and delete responsibility areas. When you copy a responsibility area, you have to enter a different shop format and account hierarchy node ID. These exist as a unique combination that cannot be assigned to several responsibility areas. Any changes you make to a responsibility area are recorded in a change history.

1.1.4 Upload Data

The *Upload Data* feature provides a fast and easy way of loading data from an Excel file to create responsibility areas and to make pricing reference data available in the system.

Uploading data involves the following three steps:

- Download template
- Fill template/upload data
- View log

You can access the *Upload Data* feature by choosing **SAP Menu** > *Customer Business Planning* > *Upload Data*. You are recommended to follow the order of the menu items. The items are ordered in such a way that the current item does not depend on any subsequent item.

The *Upload* program uploads data maintained in Excel sheet(s) to the system. You have to download the template by executing the *Download Template* step to maintain data for the respective object. Avoid using Excel editing features that may change the format of the data. The tool continues using Excel editing features like copy, paste, bold/italics, Format Painter, and so on, although certain formats may not be read by the tool. Note that Excel uses data validation to help maintain correct data for the object. This means that you have to use the Excel cell dropdown list to choose data.

The download template is a Microsoft Excel document (extension *xlsx*) with the Office Open XML format.

Help for the respective object is displayed when you execute the *Guide* step under the individual object.

The *View Log* step displays the status of the upload job. The initial load defaults search results based on parameters defaulted on the screen. You can also display a detail log and download the file that was used to upload data.


1.1.5 Managing Private Links

Once you have created a personalized version of a report or an SAC story, you can set a private link to this so that it is always loaded instead of the standard version of the report/story.

Prerequisites

You have made a note of the URL of the report/SAC story.

Procedure

1. Click  (*User Settings*) and choose *Manage Private Links*.
2. In the *Private Link* field alongside the name of the report/story, enter the URL that links to the report/story.
3. Select the *Use Private Link* checkbox on the right.
4. Save your entries.

1.1.6 Product Replacement Tool

Prerequisites

To use the Product Replacement Tool (PRT), you must be assigned the Administrator role (/JBPC/ADMIN).

Business Context

As consumer product companies manage their product portfolios, new products are introduced, old products are retired, and some products are replaced. There are many reasons for these changes, for example, new flavored drinks are created, poor-selling products are no longer manufactured, and new packaging is introduced.

When the mix of products is changed, Key Account Managers (KAMs) need to adjust their customer business plans and promotions. For complex changes, each plan and each promotion must be updated manually for every retailer.

For more straightforward use cases, the administrator can make the changes on behalf of the KAMs. For example, the manufacturing and logistics departments decide that the 12 pack of cookies is not an efficient pack size and replace it with a 24 pack. It's decided, as of a certain date, that the 12 pack will no longer be sold and will be replaced with the 24 pack. This product replacement is straightforward. One SKU is replaced with another and the difference in sales quantity is easy to calculate with the same unit of measure. Since the case has twice as many units, half as many cases will be sold. This percentage change in sales quantity can be maintained in the tool. In this example, the administrator can use the tool to make the changes for all the plans and promotions and schedule the job to run in the background. This saves the KAMs a lot of time because their manual data entry effort is reduced.

The PRT Tool does not support BOM products.

Overview

PRT lets you add, replace, or remove one or multiple products to, in, or from multiple plans and promotions by following a guided procedure. The key business benefits of using PRT are:

- Significantly less administrative work
- More accurate data

To launch PRT, log in using the Administrator role and click [Product Replacement Tool](#). The tool takes you through a sequence of steps to achieve your goal:

1. Action
2. Processing Option
3. Search

4. Summary
5. Job Scheduler
6. Review

1.1.6.1 Select an Action

Procedure

1. Select an option to perform the following tasks:
 - Add a product
This option allows you to add a product to plans or promotions and, optionally, copy trade spends and KPIs from a source product (that acts as a reference) and to adjust these.
 - Replace a product
This option allows you to replace a product with another in plans or promotions and to copy trade spends and KPIs from the source product to the target product.
 - Delete/delist a product
This option allows you to delete or delist a product from plans or promotions.
2. Click [Next](#) to go to the *Processing Option* step.

1.1.6.2 Select a Processing Option

Context

PRT allows you to perform actions on one or multiple:

- Customer Business Plans
- Trade Promotions or Long-term Agreements

There are separate processing options for plans and promotions to keep the structure of the user interface clear and to ensure that there is no negative impact on performance.

Procedure

1. Select the processing option you require.
2. Click [Next](#) to go to the *Search* screen.

1.1.6.3 Search for Plans or Promotions

In the *Search* step, you search for the plans or promotions in which you want to add, replace, or delete/delist products. In the *Result List*, you select one or more rows. You also select the products to be added, replaced, or deleted/delisted. You can select all the rows if you need to.

The *Result List* on the *Search* screen includes a *Personalize* option. You can use this, for example, to choose how you want to navigate and which columns are displayed. Once you have saved your preferences, these will be applied straight away.

1.1.6.4 Add a Product

Procedure

1. Enter the search criteria to search for the relevant object (plan or promotion) and click *Search*.
2. In the *Result List*, select the plans or promotions in which you want to make the change.
3. In the *KPI Adjustment* view:
 - a. Go to the *Target Product ID* column and select the product you want to add.
 - b. If you want to add a source product as a reference for copying KPIs from, select this in the *Source Product ID* column.
 - c. Enter the target start and end dates for which the product is to be added to the plans or promotions.

These dates are optional. In case of a plan, if the dates are not entered, the system automatically determines the dates on the basis of the year selected in the search criteria. If you enter the dates, then the product is assorted for that specified duration.

Similarly, In case of promotions, if you do not enter any date, then the system adds the product to the promotion(s) by checking whether that product is assorted or listed for the sell-in period of that promotion. If you enter the dates that lie between and less than the promotion sell-in date, then the system considers these dates as the product effective dates and the product shall be effective for that duration in the promotion.

- d. In case you have selected a reference product, the system shall by default copy the KPIs from the reference product to the target product. In case you want to adjust the KPIs during the copy process, you can specify an adjustment of the KPIs in this step.

❁ Example

100% means that the amount stays the same, while **50%** means half the original amount. If you want the KPI to be twice the original, enter **200**.

If you want to adjust other KPIs of the same product, copy the product into a new row by clicking *Copy*. You can then select and adjust the additional KPIs.

KPIs that can be changed in PRT shall also be editable on the UI of Customer Business Planning and Promotion Planning.

4. Click *Next* to go to the *Summary* screen.

1.1.6.5 Replace a Product

Procedure

1. Enter the search criteria to search for the relevant object (plan or promotion) and click [Search](#).
2. In the [Result List](#), select the plans or promotions in which you want to replace the product.
3. In the [KPI Adjustment](#) view:
 - a. Go to the [Source Product ID](#) column and select the product you would like to replace.
 - b. In the [Target Product ID](#) column, select the product that should replace the source product.
 - c. While replacing the product in a plan, enter the target start and end dates.

If no dates are entered, then the product is replaced fully for the year selected on the search page; but for the current year, it is replaced from the current date (today) until the time source product is assorted for a specific year. An error message is displayed if you enter dates outside the plan dates.

- d. In case of a promotion, partial replacement of a product is not allowed and supported.

Source product is replaced with the target product with the same sell-in and sell-out dates.

- e. You can select and adjust the relevant KPIs if required.

If you have not entered any KPI for adjustment, then the system automatically copies all KPI data from the source product to the target product. Similarly, if you have entered one or more KPIs for adjustment, then the system implicitly copies the remaining KPI data from the source product to the target product with 100% adjustment.

❖ Example

100% means that the amount stays the same; while **200%** means double the original amount.

4. Click [Next](#) to go to the [Summary](#) screen.

1.1.6.6 Delete/Delist a Product

Context

When you're processing plans, a product is delisted from the plan according to the dates entered from the [Product Replacement Tool](#) (PRT).

In the case of promotions, a product is deleted from the promotion completely when the [Exclude Product](#) indicator is set.

Procedure

1. Enter the search criteria to search for the relevant object (plan or promotion) and click [Search](#).
2. In the [Result List](#), select the plans or promotions in which you want to delete/delist the product.

3. In the *Products* view:
 - a. Go to the *Source Product ID* column and select the product you want to delete/delist.
 - b. Select the source end date as of which the product is to be deleted/delisted.

For the current year in case of a plan, if no date is entered, then the source product is delisted from the current date (today) to the end of the year. However, in case of a future year, it is delisted for the year selected.

In case of a promotion, if the exclude flag is not set, the source end date is set as the effective end date of the product if the date lies between the promotion dates. An error message is displayed if you enter a date outside the plan dates.

4. Click *Next* to go to the *Summary* screen.

1.1.6.7 View a Summary

In the *Summary* screen, you can view your selections before scheduling the job to perform the selected operation.

Each plan or promotion is listed in a separate row and the source and target products (ID and description) are shown in columns.

1.1.6.8 Schedule a Job

In the *Job Scheduler* screen, you can choose to perform the selected action immediately or schedule it for a later time.

i Note

The name that appears in the *Job Name* field is defaulted based on your Customizing settings and can be edited.

1.1.6.9 Review Job

The *Review* screen provides an overview of the actions performed. To run the job, click *Save*.

i Note

Although the *Review* screen looks like it can be edited, you can't make any changes here.

1.1.7 Sales Management Cockpit

The Sales Management Cockpit ensures that your sales management team gains visibility into the progress of planning and the health of plans.

The *Business Insights* group in the Sales Director's Fiori Launchpad and on the *Plan Overview* screen of SAP Customer Business Planning contains a set of customizable KPI tiles (standard KPIs delivered: ROI %, Internal Margin, GSV Growth, Net Net Total, Baseline Growth, Customer Revenue Growth, Uplift Growth, and Customer Profit) that aggregate the data from all the customer business plans that you, as Sales Director, can access. These KPIs provide a holistic overview of the plans. The data shown in the tiles is retrieved from SAP CRM and SAP BW.

The *Business Insights* group also contains the two market share analysis tiles *Past 3 Months (P3M)* and *Moving Annual Total (MAT)*.

You access the Fiori Launchpad using the same logon credentials as for the SAP Trade Management application.

Monthly Sales Review

You can access the Monthly Sales Review by clicking any of the KPI tiles apart from those for the market share analysis. The dashboard and specific detailed KPI pages contain all the information you need for your sales meetings in one central location and are used to review the performance of retailers and categories right down to product level.

Key features:

- Main dashboard showing the principal KPIs and targets to easily identify business problems
- Bottom N filtering to link directly to the relevant customers and/or products
- Details of the KPI can be switched between graphical and tabular view
- Full drilldown capabilities by retailer structure and product hierarchy (ERP hierarchy and planning product hierarchy)
- Full TMA P&L available based on live connectivity

Detailed pages:

- Major P&L Subtotal Net Net Value to analyze revenue and spending
- Promotion Investment overview to analyze where spending is consumed
- P&L details to analyze the financial details across the KPI hierarchy
- Volume details to analyze sell-in and sell-out volumes
- Latest Estimate vs. Reference to analyze main KPIs comparing these with targets or previous-year values

Market Share Analyses

You can access the market share analyses using the *Past 3 Months (P3M)* and *Moving Annual Total (MAT)* tiles. These provide you with an overview of current market shares across categories, sub-categories, manufacturers, brands, and sub-brands. The analyses show who wins and who loses in the market and where customers are moving to within the categories.

Key business benefits:

- Take corrective action to respond to market share changes at customer and product level
- Early detection of competitive threat
- Understand impact of distribution, pricing, sales, and marketing activities

Key features:

- Current market share based on value or volume
- Changes compared to previous year:
 - Past three months (P3M)
 - Past one month (P1M)
 - Moving annual total (MAT)
- Filter on any attribute value to see the share within a filtered scenario
- Additional category-specific attributes can be added if required

Related Information

[Setting Up Fiori Launchpad \(Optional\)](#)

[Enable Access to Delivered Fiori Tiles](#)

[Integrate Fiori Tiles in the Fiori Launchpad](#)

[Configuring Authorizations for SAC Reports](#)

1.1.8 Account Defaults

Use

Account Defaults are used to maintain default data on *Account* and *Sales Area* level. Account defaults are relevant only for the *Trade Promotion Planning* and *Trade Promotion Optimization* scenarios.

From a business perspective, account defaults represent the fact that customers (retailers) tend to show certain patterns when executing a trade promotion. For example, the retailer may always execute promotions starting on a Friday and might always want the buying period to start two weeks before the in-store promotion start date. To enable this type of recurring customer behavior to be considered in the *Trade Promotion* planning process, you can use the *Account Defaults* function.

In SAP Advanced Trade Management Analytics, you can specifically maintain:

- *Buying Pattern Percentages on Product Category or Product Group Level*
Although, you can enter the buying pattern percentages by *Product Category* or *Product Group*, you may also leave the product dimension completely empty.
- *Forecasting and Simulation Defaults*
This includes the shipment factors (*Scale-Up %*, *Forward Buy %*, and *Diversion %*), data sources (for example, data cluster 1), and *ACV%*.
- *Causal and Restriction Defaults*
This includes causal factors for each product category or product group, price endings, temporary price reduction, and restrictions.

Prerequisites

Buying Pattern Percentages

- You have maintained the buying pattern percentages in the *Account Defaults* application.
- For key figure synchronization to work, you have maintained the mapping of buying percentage key figures in Customizing for Customer Relationship Management under ► *Trade Management* ► *Advanced Trade Management Analytics* ► *System Settings* ► *Define BW Mapping Profile* ► *Map Forecast Results to Key Figures* ►:
 1. Select **BUYING_PERCENTAGES** as the *Field Name*.
 2. In the *Key Figure* field, enter the name of the BI key figure that holds the buying percentages in your planning layout.

i Note

Although the Customizing activity is called *Map Forecast Results to Key Figures*, it is also used to maintain the buying percentages key figure mapping, which is not a DDF/UDF result.

TPO Parameters

You have maintained the TPO parameters in the *Account Defaults* application.

Features

Default Dates

The attribute *Promotion Start Day* along with *TPM Type* is used to default the *Fix Weekday* attribute in the *Promotion Optimization Scenario* when you select the account and sales area.

Buying Pattern

The buying pattern percentages are read from the *Trade Promotion* and are synchronized into a customizable key figure in the KPI planning layout. The synchronization into a new key figure is needed because the percentages can be stored on product category or product group level, and may have to change the defaulted percentages manually.

In BW, Monday to Sunday is the calendar week. If a promotion starts midweek, then the buying percentage is synchronized prorata based on the number of days left in the week. This is applied for all calendar weeks in the layout.

To use the buying percentages for calculating the weekly shipment volume from the sales volume, map the relevant key figure and choose the calculation rule **Distribution Based on Buying Pattern**.

Forecasting and Simulation Defaults

In this assignment block, you can enter the product categories and product groups for which you want to maintain default causal factors.

For each product group or product category, you can maintain the following parameters:

- *Shipment Factors*: Used to indicate shipment percentages in terms of diversion or forward buy practices.

- *Scale-Up %*: Scale-up factor used to calculate the shipment volume on a base of consumption volume.
- *Forward Buy %*: Forward buy volume as a percentage of shipment volume. Forward buying is a practice whereby retailers and wholesalers stock up on a product being offered by a manufacturer at a lower deal or off-invoice price and resell it to consumers once the marketer's promotional period has ended. Forward buy volume represents the volume stocked up with this practice.
- *Diversion %*: Diversion volume as a percentage of shipment volume. Diversion is a practice whereby retailers and wholesalers buy a product being offered by a manufacturer at a lower deal or off-invoice price and distribute or divert it internally to other regions or countries or other retail chains and resell it to consumers once the marketer's promotional period has ended. Diversion volume represents the volume bought with this intention.
- *Data Clusters*: checkbox selection for which data source is applicable. There are eight data cluster columns namely *Data Cluster 1*, *Data Cluster 2*, and so on up to *Data Cluster 8*. These represent various data sources such as point-of-sale (POS), syndicated, shipment, and so on.
- *ACV%*: for each product group or product category

The shipment factors are defaulted into the corresponding fields in the *Parameters* and *What-If-Analysis* assignment blocks of *Promotion Optimization Scenario* and *Trade Promotion*, respectively.

The data source selection is used for filtering which TPO types can be selected in the *Parameters* and *What-If-Analysis* assignment block as well as the *TPO Type* attribute in the header of the *Trade Promotion* and *Agreement*.

Example

If the account defaults indicate that there is no data for the selected data cluster for the account and the *Product Category*, the *TPO Type* dropdown lists shall not display any TPO type for the selected data cluster for that account and product category.

Causal and Restriction Defaults

In this assignment block, you can maintain default causal factors for each product category or product group entered under *Forecasting and Simulation Defaults*.

To maintain the default causal factors and restrictions for a product category or product group:

1. Click *Edit List* in the *Forecasting and Simulation Defaults* assignment block.
2. In the edit mode, select a data cluster.
The *Maintain Causal Defaults* button is enabled.
3. Click *Maintain Causal Defaults*.
4. Maintain the causals, temporary price reductions, price endings, and restrictions.

For more information, see [Causal Maintenance](#), [Price Endings](#), and [Promotion Optimization Scenario](#).

The attribute *Causal Defaults* under *Forecasting and Simulation Defaults* indicates whether the default causals are maintained or not against the product category or product group.

The defaults you maintain here are available in the corresponding assignment blocks in a promotion optimization scenario and trade promotion. The sales area information of the account defaults is used to filter the causals and restrictions that are displayed.

Activities

To create an account default:

1. In the navigation panel, click [Marketing](#).
2. Under [Create](#), click [TPO Account Defaults](#)

Example

Buying Pattern Percentages

You open the account defaults for an account and maintain the following buying pattern percentages for two product categories – **Snacks** and **Frozen**.

Two Weeks Buying Period

Product Category	Week 1	Week 2
Snacks	60%	40%
Frozen	20%	80%

You can maintain other percentages for different buying period durations.

A [Trade Promotion](#) is created for this account, and the buying period is set to two weeks. The other parameters (sales area and promotion type) match the [Account Defaults](#) record. The buying percentages are found by the system and are synchronized into the customized key figure in the planning layout. Note that you can overwrite these values manually.

A forecast is executed for the promotion, and the forecast populates the [Sales Volume](#) key figure with **200 Cases**.

The [Calculate Shipment Volume](#) planning function is executed (either manually or automatically), which populates the [Shipment Volume](#) key figure as follows:

Shipment Volume Buying (Cases)

Product Category	Shipment Volume Buying (Cases)	
	Week 1	Week 2
Snacks	60	40
Frozen	20	80

1.1.9 Simplified Data Model

The simplified data model is based on BW 7.5 on HANA and is available as of Release 4.0.03 (Feature Package 3). The data model offers the following key capabilities:

- Performance
 - Improved offline and, to a certain extent, online performance by using real-time calculations
 - Fewer planning or background/update jobs to be executed
 - Parallel processing of promotions assigned to the same plan
- Minimization
 - Need for redundant data storage is minimized, thereby reducing sizing for customers
- Simplicity
 - Simplified BW data model with fewer objects
 - Simplified implementation for customers by reducing dependency on planning functions
- User centric
 - Ease of use: multiple users can edit promotions assigned to the same plan

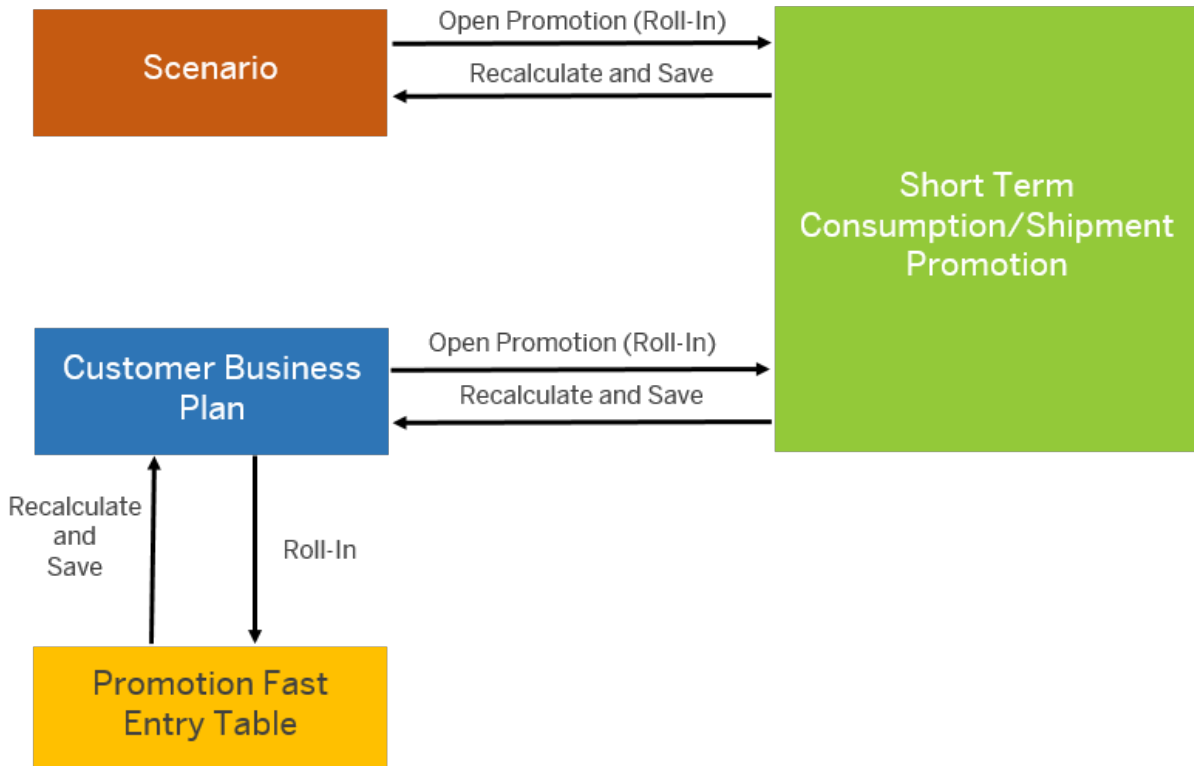
Related Information

[Key Figures Supported by the Simplified Data Model \[page 38\]](#)

1.1.9.1 Data Flows for Simplified Data Model

When you make changes to the KPIs in a customer business plan, scenario, or detailed promotion, these changes also need to be reflected in the related target plan, scenario, or promotion.

In the following diagram, it is assumed that you have implemented SAP Customer Business Planning and SAP Trade Promotion Planning and Management. The diagram illustrates the data flows between the two functional areas and shows which actions trigger them.



Data Flows

Data Flow	Description
Plan/Scenario → All Promotions (Update of Promotion Data) (Mass Update of Promotion Data on Save)	You change the baseline volume (for example, in your plan or scenario) and save this change. To see the changes in the promotions, you need to open the fast promotion or detailed promotion screen; then the <i>Roll-In</i> function is triggered and reflects the changes on the promotion screen.
Plan → Promotion Fast Entry Table (Mass Roll-In)	If you change the baseline volume, for example, in your plan and want this change to be reflected in all the promotions in the promotion fast entry table, you use the <i>Roll-In</i> planning function in the promotion fast entry table.
Promotion Fast Entry Table → Plan (Recalculate and Save)	If you change the uplift volume, for example, in your promotions in the promotion fast entry table and want this to be reflected in your plan, you use the <i>Recalculate</i> function and <i>Save</i> (the same effect can be achieved by clicking <i>Save</i>). You must reload the plan screen to see the changes.
Plan/Scenario → Promotion (Open Promotion)	If you change the baseline volume, for example, in your plan or scenario and want this change to be reflected in your promotion, open the detailed promotion. The baseline volume is then updated by the <i>Roll-In</i> planning function to the promotion.

Data Flow	Description
Promotion → Plan (Recalculate and Save)	If you change the uplift volume, for example, in your promotion and want this to be reflected in your plan, you use the <i>Recalculate</i> function and <i>Save</i> (the same effect can be achieved by clicking <i>Save</i>). You must load the <i>Plan</i> screen to see the changes.
Promotion → Scenario (Recalculate with Data Change)	If you change the baseline volume, for example, in a scenario, navigate to a promotion that is linked to the scenario and click <i>Save</i> or <i>Recalculate</i> and <i>Save</i> , the data in the scenario is updated with the changes for the new volume.

Related Information

[KPIs Used in SAP Trade Promotion Planning and Management \[page 10\]](#)

[KPIs Used in SAP Customer Business Planning \[page 16\]](#)

1.1.9.2 Key Figures Supported by the Simplified Data Model

The simplified data model supports the following key figures.

For SAP Customer Business Planning:

- Sell-In Total Vol.
 - Sell-In Base Vol.
 - Sell-In Uplift Vol.
- Sell-Out Total Vol.
 - Sell-Out Base Vol.
 - Sell-Out Uplift Vol.
- List Price
- Gross Sales Value
- Efficiency Discount
 - Efficiency Rate
- EDLP Discount
- Promo Discount
- Discount (Total)
- Net Invoice Value (pU)
- Net Invoice Value (Total)
- EDLP Rebate
- Promo Rebate

- Rebate (Total)
- Net Net Value (pU)
- Net Net Value (Total)
- Non-Promo Investment (Total)
- Promo Investment (Total)
- Cost of Goods Sold
- Internal Profit (pU)
- Internal Profit (Total)
- Internal Profit (%)
- Return on Investment (%)
- Retail Shelf Price
- Promo Retail Shelf Price
- Regular Retail Shelf Price
- Customer Investment (Total)
- Trade Rate (%)
- Customer Investment (%)
- Customer Profit (pU)
- Customer Profit (Total)
- Customer Profit (%)
- Customer ROI (%)
- PY Base Volume
 - Innovation Baseline
 - Store Open/Close (%)
 - Store Open/Close Volume Change
 - Distribution (%)
 - Distribution Volume Change
- Base Volume (Sub-Total)
 - Category (%)
 - Category Volume Change
 - Advertising & Promotion (%)
 - Adv. & Promo Volume Change
 - Other Drivers (%)
 - Other Volume Change
 - Sell-In Base

For the short-term promotion (shipment):

- Sell-In Total Vol.
 - Sell-In Base Vol.
 - Sell-In Base Vol. from Plan
 - Baseline Scale Factor
 - Sell-In Uplift Vol.
 - Sell-In Uplift Vol. from LLPs
- List Price
- Gross Sales Value
- Promo Discount (%)



- Promo Discount (pU)
- Discount (Total)
- Efficiency Discount (Total)
- EDLP Discount (Total)
- Net Invoice Value (pU)
- Net Invoice Value (Total)
- Promo Rebate (%)
- Promo Rebate (pU)
- Promo Rebate Feature (Fixed)
- Promo Rebate Display (Fixed)
- Rebate (Total)
- EDLP Rebate (Total)
- Net Net Value (pU)
- Net Net Value (Total)
- Promo Investment (Total)
- Cost of Goods Sold
- Internal Profit (pU)
- Internal Profit (Total)
- Internal Profit (%)
- Return on Investment (%)
- Cost per Incremental Case
- Trade Rate (%)

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