

Configuration Guide | PUBLIC
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Configuration Guide for SAP Customer Business Planning

Release 4.0 Feature Package 8

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	  • Configuring Overlapping Plan Queries [page 152]
	  • Setting Up Responsibility Areas for Overlapping Plans [page 153]
	  • Registering Queues for Executing Planning Functions [page 153]
	  • Business Add-Ins for Overlapping Planning [page 154]
	• Advanced DataStore Objects for Wholesaler-Indirect Relationship [page 189]
	• KPIs for Indirect Planning in CBP Planning Layout [page 190]
	• Planning Functions for Indirect Planning [page 192]
	• Configuring Overlapping Planning [page 194]
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1 About This Document

Purpose and Scope

This Configuration Guide provides a central starting point for technically implementing and configuring SAP Customer Business Planning. It describes all the activities that are necessary to do so. In addition, this guide provides information about the components and further guides that are required during the implementation process.

SAP Customer Business Planning supports the following business scenarios:

- Customer Business Planning Preparation
- Customer Business Planning

To allow for an efficient implementation process, all information within this document is structured according to scenarios. You can choose from several generic business scenarios and find all the information that is relevant to technically implement and configure a specific business scenario.

Target Audience

This document is intended for the following target audiences:

- Consultants
- Partners
- Customers
- System administrators
- Business process owners
- Support specialists

Related Information

For more information, refer to the SAP Help Portal.

Important SAP Notes

Make sure that the required software is installed before you start the implementation process. You can find the required installation information in the SAP Note 2865237.

> → Remember
>
> Make sure that you read the SAP Notes before you start implementing the software. The SAP Notes contain the latest information about the installation as well as corrections to the installation information.

Also, make sure that you have the up-to-date version of each SAP Note, which is available on the SAP Support Portal.

For the complete list of SAP Notes that must be installed, see the Administration Guide.

2 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 Customer Business Planning.

2.1 Customer Business Plan Preparation

This business scenario contains the necessary preparatory steps that you need to perform before starting SAP Customer Business Planning. In this section, you can find a description of the configuration, reference to master data setup, and transactional data required to create customer business plans.

Related Information

Preparing Master Data

2.1.1 Defining a Planning Product Hierarchy

A planning product hierarchy is a product hierarchy specifically defined for use in SAP Customer Business Planning. It allows you to structure your products in a hierarchy that fits your own planning and your retailer's view of the product hierarchy. When you define a planning product hierarchy, you can manually create your own node as well as assign product categories from the ECC pricing hierarchy (`R3PRODHIER`). The hierarchy must contain products at the leaf level. You can create a maximum of seven levels in the planning product hierarchy.

Plan data in SAP Customer Business Planning is displayed and manipulated using the planning product hierarchy.

The system allows you to create multiple planning product hierarchies for a customer business plan. This helps you to readjust your hierarchies if the customer representation changes from year to year. However, you can only activate one planning product hierarchy for any given plan year.

> **i** Note
>
> If you do not define and activate a planning product hierarchy for a plan year, the system will not allow you to carry out customer business planning. Also, if you activate a different planning product hierarchy for a year, the system deletes the plan data of those products that are not found in the new planning product hierarchy.

You can delete unused planning product hierarchies that you no longer need. The authorization object `/JBPC/PH` grants you the authorization to create, change, and delete planning product hierarchies.

The following subsections describe the steps that are necessary to define a planning product hierarchy.

2.1.1.1 Create Planning Product Hierarchy

In this procedure, you create a planning product hierarchy used in a customer business plan.

Procedure

1. Create a planning product hierarchy for a customer business plan.
2. Assign product categories and products from the selection hierarchy to your planning product hierarchy.

   When you create a planning product hierarchy, you can choose only product categories or products from a specified list. The system prepares this list by retrieving all the product categories assigned to the responsibility area, determining the products assigned to these categories, and presenting these on the *Planning Product Hierarchy* user interface in the form of a hierarchy. The selection hierarchy starts from the product categories assigned to the responsibility area and presents all the products at the leaf node.

   Additionally, you can create planning product hierarchies based on the product group assigned to the product.
3. Assign buyer to planning product hierarchy node.

   A buyer is a person at your retailer's company who is responsible for buying products of a certain category. If you negotiate a plan with multiple buyers, you can define them separately in SAP Customer Business Planning and assign buyer-specific targets.

   SAP Customer Business Planning provides an interface that you can use to create buyers. The system uses SAP Business Partner master data in the background to store the information about your customer and the associated buyers. Buyers are linked to your customer using a contact person relationship.

   You can assign a buyer to any node in the planning product hierarchy. The system automatically assigns the buyers to all the sub nodes, including the node to which you have assigned the buyer.
4. Activate the planning product hierarchy.

   You use this step to activate your planning product hierarchy by changing its status from **`Inactive`** to **`Active`**.

   > **i** Note
   >
   > This step is mandatory. The system considers only active planning product hierarchies for planning. If the planning product hierarchy is not active, you cannot perform planning within SAP Customer Business Planning.

   Before you perform this step, you must maintain a status profile.
5. Select the default planning product hierarchy for planning years.

The system allows you to create multiple planning product hierarchies for a customer business plan. This helps you to readjust your hierarchies if the customer representation changes from year to year. However, you can only assign one planning product hierarchy to a given plan year that is considered as the default.

The system allows you to display plan data for multiple hierarchies but uses only the default planning product hierarchy to create the plan data for a given customer business planning year.

> **i Note**
>
> If you do not define and activate a planning product hierarchy for a plan year, the system does not allow you to carry out customer business planning.

6. Save the planning product hierarchy.

   If you save a planning product hierarchy in active status, the system transfers the hierarchy to your connected BW system.

   If you save a planning product hierarchy that was activated earlier and your product assignment/hierarchy structure has changed, the system adjusts the customer business plan data according to your new structure.

   > **i Note**
   >
   > If you have created a plan for multiple years in the future and have changed your planning product hierarchy, the system adjusts the plan data for all the future years based on your new structure. The system adjusts the plan data only for the future periods. Data from periods in the past remains intact.
   >
   > When you are in your plan for a selected year and change your planning product hierarchy, the system adjusts the plan data for the selected year online when you save the plan. However, if the hierarchy is also used for other years in the plan, the system registers the change for the remaining plan years in a queue and executes the change in an offline process.
   >
   > The system uses qRFC to update the plan data for the remaining years in a background process. The corresponding inbound queue with prefix `CBP_PLAN_UPD_*` must be registered in your system.

Related Information

Defining Buyers and Targets (Optional) [page 42]
Set Up Planning Product Hierarchy [page 16]
Transfer Planning Product Hierarchy to BW [page 11]

2.1.1.2 Transfer Planning Product Hierarchy to BW

After you have changed the status of a planning product hierarchy from **`Inactive`** to **`Active`** and have saved the hierarchy, the system transfers the planning product hierarchy to the connected SAP Business Warehouse system so that it can be used for planning.

SAP Customer Business Planning allows you to plan your planning items (such as volumes, prices, discounts, and margins) in the following views:

- *Trading Unit (TU)*
  In this view, you see your plan data based on the unit of measure in which you sell your product to your retailer (for example, cases). This helps you to negotiate your volumes, prices, discounts, and margins from an internal perspective.
  If you do not want to do planning in TU, you can disable TU planning in Customizing for Customer Relationship Management by choosing *Trade Management* > *General Settings* > *Activate Trade Management Features*. Select the *Disable TU Planning* check box to disable TU planning. When this option is selected, TU planning is not possible and the *TU* tab is hidden in the *Plan* and *Scenario Planning* screens of the plans.

  > **i Note**
  >
  > TU and NU planning both use the T hierarchy generated in BW. Disabling TU planning and NU planning shall stop the creation of the T hierarchy in BW. If TU and NU planning are initially disabled, then enabled after activation of the *Product Planning Hierarchy*, the user must save the *Product Planning Hierarchy* again to create the T hierarchy, barring which the *Plan* and *Scenario Planning* screens shall not show any data.

- *Consumer Unit (CU)*
  In this view, you see your plan data based on the unit of measure in which your retailer sells your product to the end consumer (for example, each). This helps you to present your volumes, prices, discounts, and margins from the perspective of the end consumer.
  If you do not want to do planning in CU, you can disable CU planning in Customizing for Customer Relationship Management by choosing *Trade Management* > *General Settings* > *Activate Trade Management Features*. Select the *Disable CU Planning* check box to disable CU planning. When this option is selected, CU planning is not possible and the *CU* tab is hidden in the *Plan* and *Scenario Planning* screens of the plans.

  > **i Note**
  >
  > Disabling CU planning shall also stop the creation of the C hierarchy in BW. If CU planning is initially disabled, then enabled after activation of the *Product Planning Hierarchy*, the user must save the *Product Planning Hierarchy* again to create the C hierarchy, barring which the *Plan* and *Scenario Planning* screens shall not show any data.

- *Normalized Unit (NU)*
  In this view, you see your planning data in one single unit of measure, which is in read-only view.
  The normalized unit is a single unifying unit of measure across all of your manufacturer's or internal organization's products within a given sales area. Depending on the products that they produce, this is normally one of *Mass* (for example, Kg, Lb) or *Volume* (for example, L, Gal (Equivalent Unit)).
  If you do not want to do planning in NU, you can disable NU planning in Customizing for Customer Relationship Management by choosing *Trade Management* > *General Settings* > *Activate Trade Management Features*. Select the *Disable NU Planning* check box to disable TU planning. When this option is selected, NU planning is not possible and the *NU* tab is hidden in the *Plan* and *Scenario Planning* screens of the plans.

> **i Note**
>
> TU and NU planning both use the T hierarchy generated in BW. Disabling TU planning and NU planning shall stop the creation of the T hierarchy in BW. If TU and NU planning are initially disabled, then enabled after activation of the *Product Planning Hierarchy*, the user must save the *Product Planning Hierarchy* again to create the T hierarchy, barring which the *Plan* and *Scenario Planning* screens shall not show any data.

In the *Product Tree* view (TU, CU, or NU), the plan data is presented in a hierarchy that is defined when the planning product hierarchy is created. In the NU view, the system uses the TU hierarchy, which is always non-editable as it shows only conversion from TU to NU.

The plan data for a customer business plan is stored in the SAP Business Warehouse (BW) system connected to your SAP CRM system. This means that the product information required to calculate plan data must be available in trading unit, consumer unit, and normalized unit in your BW system.

The product hierarchy that you use in trading units can have a different structure to the hierarchy in the consumer unit view if you have the same consumer unit in multiple products.

> **Example**
>
> You have the following products under the *Hair Care* category in your planning product hierarchy:
>
> - *Hair Care*
> - *Case of 10 bottles of 250 ml shampoo*
> - *Case of 20 bottles of 250 ml shampoo*
>
> Both the products share the same consumer unit *250 ml shampoo*.
>
> When you look at the above planning product hierarchy in the **trading unit** view, you see it exactly the way you have planned your planning product hierarchy:
>
> - *Hair Care*
> - *Case of 10 bottles of 250 ml shampoo*
> - *Case of 20 bottles of 250 ml shampoo*
>
> However, when you look at the planning product hierarchy in the **consumer unit** view, the system combines the products with same consumer units under one node and the hierarchy in the consumer unit view is as follows:
>
> - *Hair Care*
> - *250 ml Shampoo*
> - *Case of 10 bottles of 250 ml shampoo*
> - *Case of 20 bottles of 250 ml shampoo*
>
> On the other hand, when you look at the planning product hierarchy in the normalized unit view (for instance, KG is maintained as NU in Customizing), the system uses the TU hierarchy but conversion is applied at the product level and plan data is available in the normalized unit (KG):
>
> - *Hair Care*
> - *Case of 10 bottles of 250 ml shampoo*
> - *Case of 20 bottles of 250 ml shampoo*

As the planning hierarchies can have different structures in the trading and consumer unit view, the system prepares and transfers them as two separate hierarchies to the BW system. The hierarchies are called:

- **Planning Product Hierarchy for TU View**
  The system uses this hierarchy in the trading unit view. The TU hierarchy reflects the way you have structured your products in the planning product hierarchy. Additionally, the hierarchy contains an extra node under each product in the planning product hierarchy that is called the *TU-CU node*. In the solution, this node is hidden in the hierarchy and is used by the system when planning and aggregating results up the hierarchy.
  The TU hierarchy in the system has the following structure:
  - Root node
    - Manual node/product category from internal hierarchy
    - - Manual node/product category from internal hierarchy
        - Product
          - TU-CU node
    - - Manual node/product category from internal hierarchy
        - Product
          - TU-CU node
- **Planning Product Hierarchy for CU View**
  The system uses this hierarchy in the consumer unit view. The CU hierarchy has the same structure as the planning product hierarchy down to the level of product category or manual node. If you have multiple products under a category with the same consumer unit, you will find an extra node in the hierarchy that denotes the common consumer unit. The products that share this common consumer unit are inserted below this level. This node is termed the *CU node*.
  In addition to the CU node, the CU hierarchy, like the TU hierarchy, contains a further node that is termed the *TU-CU node*. In the solution, this node is used by the system when planning and aggregating results up the hierarchy. The TU-CU node is displayed on the UI in the CU view.
  The CU hierarchy in the system has the following structure:
  - Root node
    - Manual node/product category from internal hierarchy
      - Manual node/product category from internal hierarchy
        - CU node (for the product with the same consumer unit)
          - Product A
            - TU-CU node
          - Product B
            - TU-CU node

2.1.1.3 Upload Listing from Planning Product Hierarchy (Optional)

You can optionally use this step to upload your assortment from a CRM listing.

Prerequisites

You have the listings you want to upload available in your CRM system.

Context

A listing is a master data object in the CRM system that contains a list of products that can be sold to a customer in a defined time period.

SAP Customer Business Planning uses its own object, called an 'assortment', which also contains a list of products that can be sold to a customer for a given time frame. If you are already using CRM listings in your system, you can assume that an assortment is a copy of your listing. The reason for having a separate object for maintaining this listing is to allow the user to adjust the validity of the products within a customer business plan and assess the impact of this change on the plan.

By using assortments, you can extend or modify the validity of each product for the customer in your plan and simulate the impact of these changes. In other words, you can also regard an assortment as a list of products that can be planned for a customer for a given time frame.

If you are already using listings to validate the list of products that you sell to your customers and you change the validity of these products in your assortment, you must update your listing from the assortment so that the downstream processes (such as the sales order process) consider the revised validity from your assortment.

> **i** Note
>
> The process for updating listings from assortments is not delivered with the solution and must be built into your customer implementation.

Procedure

If you are already using CRM listings, you can upload your assortment using the listing.

Next Steps

You can also define your own assortment when you create a customer business plan.

Related Information

Prepare Listings
Defining Assortments [page 32]

2.1.1.4 Highlight Listed Products and Product Category

Context

You can highlight the listed products in the selection hierarchy that you use for your planning product hierarchy.

Procedure

Click the *Show* button in the selection hierarchy to display assortment information for all product categories and products.

Related Information

Setting Up TU and CU Hierarchy [page 22]

2.1.1.5 Set Up Planning Product Hierarchy

You must set up the planning product hierarchy to be used in SAP Customer Business Planning.

Context

This section covers the necessary configuration steps that must be performed before you start creating the planning product hierarchy.

Procedure

1. Define the required number ranges for creating planning product hierarchies.

   A planning product hierarchy has a unique identifier called the planning product hierarchy ID, which is created automatically by the system when the hierarchy is saved. The system retrieves the next available number from the defined number range.

   Similarly, each node in a planning product hierarchy is also identified by a number called the planning product hierarchy node ID. The system uses this node ID when filtering planning data for a selected node.

   > **i** Note
   >
   > If you have not defined the relevant number ranges, the system will not allow you to create a planning product hierarchy.

   Maintain the number ranges for the planning product hierarchy (PPH) header and PPH node in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Define Number Ranges*, by choosing:

   - *Maintain Number Ranges for PPH Header*
   - *Maintain Number Ranges for PPH Node*

   > **i** Note
   >
   > You should also ensure that the number ranges are created with the interval **01**, otherwise the system will not be able to retrieve the defined number range object.

2. Define the status profiles that should be used for the planning product hierarchy.

   The system uses this status profile to present the list of available statuses on the planning product hierarchy screen. You have to set the status of a planning product hierarchy manually on the screen.

   Maintain the status profile in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Define Status Profile for User Status.*

   The status profile `/JBPC/PH` is delivered with the solution as an example. If you want to define your own status profile, you must ensure to map your user status to the following transactions:

   Map User Status to Transaction

User Status	Transaction	System Status	Description
Active	BNAC	I8962	This status is set manually by the user for activating a planning product hierarchy. The system then activates the planning product hierarchy and replicates the hierarchy to the BW system.

User Status	Transaction	System Status	Description
Inactive	BNIA	I8963	This status is set by default when the user creates a planning product hierarchy. The user can also set the status manually to change a planning product hierarchy that was activated earlier.

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

Status Profile /JBPC/PH

Status Profile	Main-tained Language	Status Number	Status	Short Text	Init. Status	Lowest Status No.	Highest Status No.	Trans.
/JBPC/PH	DE	10	INAC	*Inactive*	X	10	20	BNIA
		20	ACTI	*Active*		10	20	BNAC

After you have defined the status profile, you must assign it to the planning product hierarchy using the maintenance view LOYV_FRW_STATUS.

The following configuration is delivered as an example:

Example Configuration

Application	Object	Process Type	Object Category	Status Profile
PH	/JBPC/PH_HDR		GPH	/JBPC/PH

3. Implement BAdI to filter products for selection.

   In this step, you can filter the list of available products that you can select when creating a planning product hierarchy.

   When you create a planning product hierarchy, you can choose only product categories or products from a specified list. The system prepares this list by retrieving all the product categories assigned to the responsibility area. It determines the products assigned to these categories and then presents them on the planning product hierarchy screen in the form of a hierarchy. The selection hierarchy starts from the product categories assigned to the responsibility area and presents all the products as leaf nodes.

   The logic for retrieving products from the product categories assigned to the responsibility area is implemented in the BAdI /JBPC/CRM_RESP_AREA, method GET_PCATS_PRDS_FROM_RESP_AREA. You can find this BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Responsibility Area (RA)* > *RA User Interface* > *BAdI: Responsibility Area Details*.

   > **i Note**
   >
   > A default implementation is delivered with the solution that retrieves all the products from all the categories assigned to the responsibility area.

If you want to change the product retrieval logic you must implement this BAdI.

4. (Optional) Customize feature to highlight ECC reference node.

   In this optional step, you can activate a feature that highlights the ECC reference node in the planning product hierarchy.

   You can create the following types of node in a planning product hierarchy:

   - Manual nodes
     Nodes that are manually created by the user in the hierarchy
   - ECC reference nodes
     Nodes that are created after selecting the product categories from the selection hierarchy and assigning them to the planning product hierarchy

   > **i Note**
   >
   > When you assign product categories from the selection hierarchy to the planning product hierarchy, the system marks them as ECC reference nodes. It uses this information to adjust the planning product hierarchy automatically if the corresponding reference node undergoes a change in your internal product hierarchy.

   You can activate this feature in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Activate Trade Management Features*. Select the *ECC Reference* checkbox to activate this feature.

5. Extract trading unit (TU) and consumer unit (CU) master data from product master.

   In this step, you replicate the required TU and CU master data after retrieving it from the product master in your SAP CRM system.

   SAP Customer Business Planning allows you to plan your planning items (such as volumes, prices, discounts, and margins) in the TU as well as the CU views.

   In the selected view (TU, CU, or NU), the plan data is presented in a hierarchy that is defined when the planning product hierarchy is created. To display the plan data in the hierarchy, the system aggregates the data from all the products in a certain node to the higher levels in the hierarchy.

   If a hierarchy node contains products that have different trading units or consumer units, the system aggregates the plan data up in the hierarchy and shows * at the hierarchy node level on the TU and CU view. In the NU view, the TU hierarchy is used and planning data is displayed in one unit of measure.

   The plan data for a customer business plan is stored in the SAP Business Warehouse (BW) system connected to your SAP CRM system. This means that the product information required to calculate the plan data in trading, consumer, and normalized units must be available in your BW system. You must use this step to transfer the trading, consumer, and normalized unit master data for all the products that you want to use for SAP Customer Business Planning.

   The following DataSources should be used to transfer TU and CU information for the products.

   DataSources

DataSource	Description
`/JBPB/JBP_PRODUCT_TU_CU_LINK`	TU and CU master data for products

DataSource	Description
/JBPB/JBP_PRODUCT_TU_CU_TEXT	TU and CU master data description for all products

If the TU and CU master data in the products changes after you have transferred it to the BW system, you must implement the BAdI `COM_PROD_MNT_UPD` to transfer the revised TU and CU information from the product to BW.

> **i Note**
>
> An example implementation `/JBPC/PROD_TU_CU_GET` of BAdI `COM_PROD_MNT_UPD` is delivered with the solution that retrieves all of the TU CU-related data for products that have been recently changed or created in the ECC system and writes this data to BW queues. BW then extracts this data to the corresponding source if the delta load is initiated in the BW system. You can use transaction `RSA7` to view the delta queues in your CRM system.
>
> If you do not implement this BAdI, SAP Customer Business Planning will use outdated TU/CU information from the products for planning.

6. Register inbound queues for updating plans with changes in the planning product hierarchy.

   You must register the inbound queue prefix `CBP_PLAN_UPD_*` using transaction `SMQR` in order to update the plan data for the remaining future years of your plan if you have changed your planning product hierarchy after you have performed your planning. After you have registered this queue, the system will update the plan data in a background process. If you have not registered this queue for execution, your plan years will contain incorrect plan data.

7. Execute custom checks on saving the PPH from the *Plan Setup* screen.

   You can optionally implement the BAdI `/JBPC/CRM_PH_MSG_PROD_SEL` to execute checks on the saving of the PPH from the *Plan Setup* screen, as per custom scenarios. Additionally, these checks can be executed while extending the plan. The extension can be disabled for a specific PPH selection based on the checks implemented.

Related Information

Transfer Planning Product Hierarchy to BW [page 11]
Updating Planning Product Hierarchy Automatically [page 28]

2.1.1.6 Create Planning Product Hierarchy Based on Product Group

Context

A Planning Product Hierarchy (PPH) can also be created based on the product group assigned to the products. Only one product group-based PPH can be created for a customer business plan, and this will always be active. Any update to the master data only updates this hierarchy. You cannot manually edit this hierarchy; only an update option is available.

A product group-based PPH can also be copied. The copied hierarchy behaves like a normal hierarchy and not a product group-based hierarchy.

> **i Note**
>
> The system uses the product groups defined in Customizing for *Customer Relationship Management* under *Trade Promotion Management* > *Basic Data* > *Products* > *Assign Product Groups*.

Procedure

1. Create PPH based on a product group in one of the following ways:
   - Using the Customer Business Planning application.
     A KAM can create or update the product group-based PPH for the selected responsibility area using a button present on the PPH screen.
   - Using transaction `/JBPC/PPH_PRD_GRP`.
     This transaction allows you to create or update the product group-based PPH for multiple responsibility areas. You can access this transaction from the *SAP Easy Access* menu under *Customer Business Planning* > *Administrator* > *Product-Group-Based PPH*.

     > **i Note**
     >
     > The transaction updates only the original product group-based product planning hierarchy and not any copies of the same.
2. To fetch products and associated product groups for PPH creation, based on product planning groups, implement method `GET_PG_PRDS_FROM_RESP_AREA` of BAdI `/JBPC/CRM_RESP_AREA_DETAILS`.

   You can find this BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Responsibility Area (RA)* > *RA User Interface* > *BAdI: Responsibility Area Details*.

   > **i Note**
   >
   > A default implementation `/JBPC/DEF_CRM_RESP_AREA_DETAIL` of BAdI `/JBPC/CRM_RESP_AREA_DETAILS` is delivered with the solution.

2.1.1.7 Copy Planning Product Hierarchy (Optional)

You can copy a planning product hierarchy either within the same customer business plan or across responsibility areas.

Prerequisites

If you want to copy a planning product hierarchy across responsibility areas (RAs), you must have created and activated the source and target RAs; and both RAs must have assigned overlapping sets of product categories.

Context

You can use the same planning product hierarchy in multiple customer business plans, or if you do not want a user to define a planning product hierarchy for a specific customer business plan.

If you copy a planning product hierarchy that has nodes marked as *ECC reference*, then the copied hierarchy is treated the same way as the original hierarchy. However, if you copy a planning product hierarchy that is based on a product group:

- You can change the copied hierarchy but not the original hierarchy.
- The nodes corresponding to the product group in the copied hierarchy are treated as manual nodes.
- You can add/delete products manually to/from the copied hierarchy.

Procedure

Run the report *Copy Planning Product Hierarchy (PPH) to Target RA* from the *SAP Easy Access* menu under *Customer Business Planning* > *Administrator*.

Alternatively, from the *Planning Product Hierarchy* screen on the UI, you can copy a PPH by selecting it and clicking *(Copy)* next to the selector.

2.1.1.8 Setting Up TU and CU Hierarchy

You can set up TU and CU hierarchies with or without GTIN.

If you maintain Global Trade Identification Numbers (GTIN) for your products in the product master data, you set up the hierarchies with GTIN.

If you want to set up your TU and CU hierarchies and do not maintain GTIN in your product master data, you set up the hierarchies without GTIN.

> **i Note**
>
> For information on setting up TUCU master data in BW, kindly refer to Preparing TU CU Master Data [page 156] under *Configuration Settings for SAP BW* in this guide.

Related Information

Set Up TU and CU Hierarchy Using GTIN [page 23]
Set Up TU and CU Hierarchy Without GTIN [page 25]

2.1.1.8.1 Set Up TU and CU Hierarchy Using GTIN

You use this procedure to set up TU and CU hierarchies if you maintain Global Trade Identification Numbers (GTIN) for your products in the product master data.

Prerequisites

You have maintained the TU/CU GTIN for all your products with the trading/consumer units.

In a customer business plan, you can plan products having different units, which was not possible until SAP Trade Management 3.0.

The TU/CU are determined by defining a source of unit from the product master. The following sources are delivered with the solution:

- *Sales UoM of product*: System reads the sales unit from the product master.
- *Base UoM of product*: System reads the base unit from the product master.
- *Alternative UoM*: You define an access sequence of units. The system takes the unit that is found first in the product master.

Since the NU is a common unit across all products, it is directly maintained in Customizing.

You have configured the units in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *Basic Settings* ▶ *Define Units* ▶ *Define Profiles for Multiple UoM* ▶, by choosing:

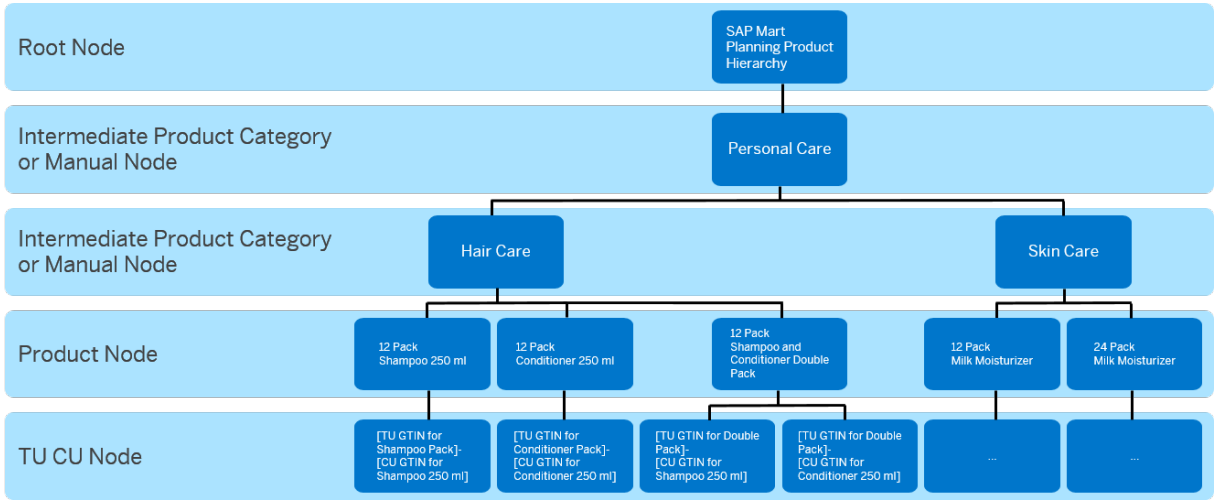
- *Define Trading Unit Profile*
- *Define Consumer Unit Profile*
- *Define Normalized Unit Profile*

Once the unit profiles are maintained, you have mapped these profiles to a sales area in Customizing for *Customer Relationship Management* by choosing ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *Basic Settings* ▶ *Map Multiple UoM Profiles to Sales Area* ▶.

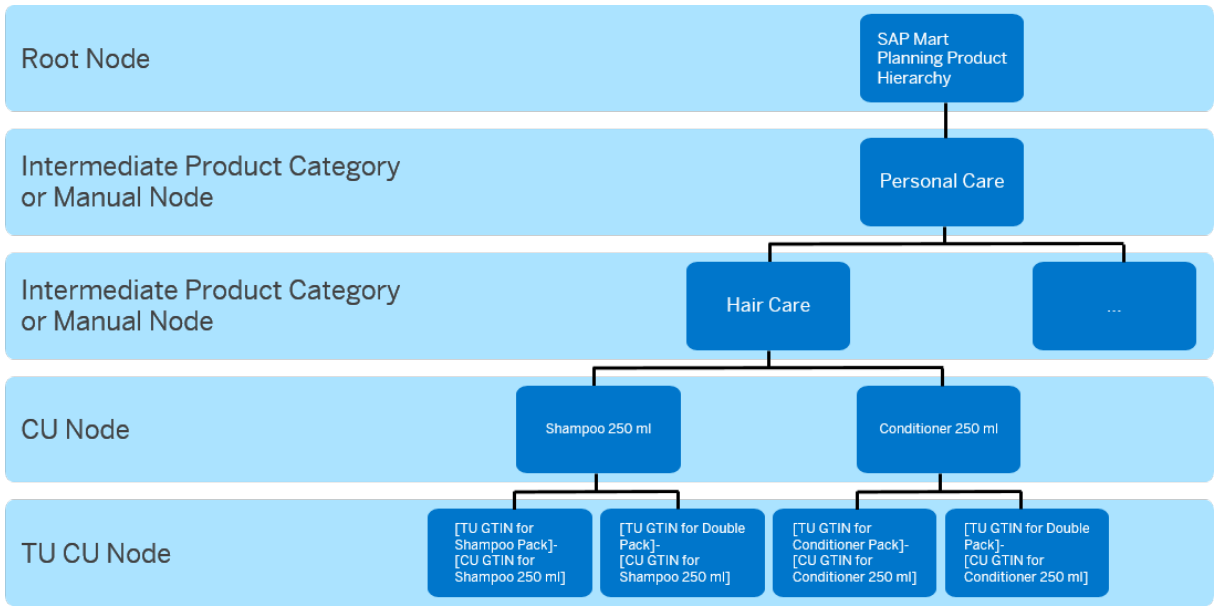
> ⚠ Caution
>
> We recommend that you don't change the multiple UoM Customizing settings once set and master data created in the system. These changes would lead to inconsistencies in the system.

Context

The system prepares the two hierarchies with the following structures:



Structure of TU Hierarchy



Structure of CU Hierarchy

The example logic for preparing TU and CU hierarchies is based on the GTIN.

Procedure

1. The system uses the BAdI `/JBPC/PRODUCT_TU_CU` to retrieve the required TU and CU GTIN information from the product master data for trading and consumer units.

   You can find this BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Business Add-Ins (BAdIs)* > *BAdI: Get Product Trade Unit and Consumer Unit GTIN Data*.

   If you have set up your product master data as described above, you can leverage the example implementation delivered with the solution.
2. The system uses the following DataSources to transfer this data to the SAP BW system:

   DataSources

DataSource	Description
`/JBPB/CPH_HIER`	Planning product hierarchy DataSource
`/JBPB/CPH_CU_HIER`	CU view of planning product hierarchy
`/JBPB/CPH_TU_HIER`	TU view of planning product hierarchy

   Planning product hierarchies are transferred to the BW system by calling an RFC (`/JBPB/SAVE_AND_ACT_HIERARCHY`) from the SAP CRM system to SAP BW.

   For performance reasons, the RFC does not use the DataSources described above to update the planning product hierarchies. Instead, it updates the hierarchies directly in the corresponding tables within the BW system.

2.1.1.8.2 Set Up TU and CU Hierarchy Without GTIN

Context

You use this step if you want to set up your TU and CU hierarchies and do not maintain Global Trade Identification Numbers (GTIN) in your product master data.

The system relies on the BAdI `/JBPC/PRODUCT_TU_CU` to retrieve the required TU and CU information in order to prepare the TU and CU hierarchies. This BAdI still respects the Customizing used for units. You can find this BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Business Add-Ins (BAdIs)* > *BAdI: Get Product Trade Unit and Consumer Unit GTIN Data*.

> **i Note**
>
> You must deactivate the example implementation delivered with the solution and implement all the methods of the BAdI `/JBPC/PRODUCT_TU_CU`.

The table lists the methods of this BAdI and provides a short description of their purpose:

Methods of BAdI /JBPC/PRODUCT_TU_CU

Method	Purpose
`GET_PRODUCT_CU_TU_DETAILS`	The system imports the GUIDs of the listed products from your planning product hierarchy. For each product, you must provide: • Unique identifiers for the TU and CU of your product. As you do not use GTINs, you must define your own mechanism to formulate unique identifiers for your TU and CU. The system uses these unique identifiers to prepare the node IDs for each node in the TU and CU hierarchy. • The TU and CU factors for each product. If your product is a structured product (also referred to as a sales BOM), you should provide the TU and CU factors for each component in your structured product. The system uses these factors to calculate the key figures when you plan them in one of the views. For example, you can plan a volume of 100 packs with 250ml shampoo in your TU view. If your pack contains 12 bottles of 250 ml shampoo, you will see 1200 as the volume of the CU node when you switch to the CU view (corresponding to 250 ml shampoo).
`GET_PRODUCT_TU_CU_WITH_DESC_CU`	This method is called when the CU hierarchy is prepared. You use this method to provide the description of each product in your hierarchy.
`GET_PRODUCT_TU_CU_WITH_DESC`	This method is called when the TU hierarchy is prepared. You use this method to provide the description of each product in your hierarchy.
`GET_BOM_FOR_CU_GTIN`	This method is used to get all the CU GTINs from the CU nodes of the planning product hierarchy to get all the products' GUIDs and determine whether the product GUID is a BOM or not.
`CHANGE_TU_CU_HIER_ATTR`	This method is used to update the product picker data and fill the product GUID for its TU CU nodes.

The system uses the following DataSources to transfer this data to the SAP BW system:

DataSources

DataSource	Description
/JBPB/CPH_HIER	Planning product hierarchy DataSource
/JBPB/CPH_CU_HIER	CU view of planning product hierarchy
/JBPB/CPH_TU_HIER	TU view of planning product hierarchy

Planning product hierarchies are transferred to the BW system by calling an RFC (/JBPB/SAVE_AND_ACT_HIERARCHY) from the SAP CRM system to SAP BW. The RFC does not use the DataSources described above to update the planning product hierarchies. Instead, it updates the hierarchies directly in the corresponding tables within the BW system.

2.1.1.8.3 Planning on Display Pallets (Sales Bill of Materials)

A bill of materials (BOM) product is a structured list of components (products) that make up a product. Each component comprises the material number with the quantity and unit of measure.

A BOM can be single- or multi-level. SAP Trade Management supports only single-level BOMs. The BOM products are identified by the item category group. You maintain the item category group for *Display Pallet* in Customizing for *Customer Relationship Management* under *Trade Promotion Management* > *Basic Data* > *Products* > *Select Item Category Groups for Display Pallets*.

When the planning product hierarchy (PPH) is created for a plan, and if it contains BOM products, the TU and CU hierarchies will be different. In the CU hierarchy, the components of the BOM products move to the normal products that exist in the hierarchy with the same CU.

Example

You have the following products under the *Hair Care* category:

- Case of 10 bottles of 250 ml Shampoo
- Case of 10 bottles of 250 ml Conditioner

You have following product under the *Display Pallet* category:

- Case of 10 packs of 250 ml Shampoo, 250 ml Conditioner, and 250 ml Oil

The products *250 ml Shampoo* and *250 ml Conditioner* in the pack in the *Display Pallet* category share the same consumer unit as the products *250 ml Shampoo* and *250 ml Conditioner* in the *Hair Care* category, respectively.

When you look at this PPH in the *TU* (trading unit) view, you see it exactly the way you have planned your PPH:

- Hair Care
  - Case of 10 bottles of 250 ml Shampoo

- Case of 10 bottles of 250 ml Conditioner
- Display Pallet
  - Case of 10 packs of 250 ml Shampoo, 250 ml Conditioner, and 250 ml Oil

However, when you look at the PPH in the *CU* (consumer unit) view, the system combines the products with the same consumer units under one node. The hierarchy in the *CU* view is as follows:

- Hair Care
  - 250 ml Shampoo
    - Case of 10 bottles of 250 ml Shampoo
    - Case of 250 ml Shampoo
  - 250 ml Conditioner
    - Case of 10 bottles of 250 ml Conditioner
    - Case of 250 ml Conditioner
- Display Pallet
  - 250 ml Oil
    - Case of 250 ml Oil

2.1.2 Updating Planning Product Hierarchy Automatically

You can adjust your planning product hierarchy if your internal product hierarchy has changed after you defined your planning product hierarchy.

Context

Your planning product hierarchy can contain ECC reference nodes. An ECC reference node is a product category within your internal product hierarchy that is assigned as-is to your planning product hierarchy.

If the internal structure below the product category that you have assigned to your planning product hierarchy changes, the system can automatically adjust your planning product hierarchy.

If you assign product categories from your internal hierarchy to your planning and you change your internal hierarchy after creating your planning product hierarchy, you must implement this process.

Procedure

1. Change the product category.

   You can make changes to your internal product hierarchy either in your SAP CRM system or in your SAP ECC system (if you are using SAP ECC as the source of your internal product hierarchy).

   In our example implementation, we assume that the source system for your internal product hierarchy is SAP ECC.

2. (Optional) Transfer product hierarchy changes from SAP ECC to SAP CRM.

   If you are using ECC as the source system for your internal product hierarchy, use this step to transfer your hierarchy changes to your SAP CRM system.

   In our example implementation, we assume that the source system for your internal product hierarchy is SAP ECC.

   For more information about the setup activities required to transfer changes to the product hierarchy from SAP ECC to SAP CRM, see the standard help documentation for SAP CRM.

3. Receive internal product hierarchy changes in SAP CRM and raise alerts.

   If you are using ECC as the source system for your internal product hierarchy, use this step to receive your internal product hierarchy changes in your SAP CRM system.

   When SAP CRM receives changes to the internal product hierarchy, it calls the BAdI `COM_PRODUCT_RECATEG`. An example implementation (`/JBPC/IM_AMS_RECATEG`) of this BAdI is delivered with the solution that raises alerts for product category changes.

4. Process internal product hierarchy change alert and determine the impacted customer business plans.

   The system uses this step to process the alert that is triggered whenever an internal product hierarchy is changed and determine the customer business plans that are impacted by this change.

   If you have marked your alert as deferred, you must execute the report that processes deferred alerts or schedule this report to run at a specified time in the background. If you have not marked your alert as deferred, the system determines the impacted plans immediately when the alert is created.

   You can access this report from the *SAP Easy Access* menu under *Customer Business Planning* > *Alerts* > *Process Deferred Alerts*.

5. Update customer business plans with changes to the internal product hierarchy.

   You use this step if you want to update your customer business plans to include the changes to your internal product hierarchy.

   Before you process this step, you must determine the impacted customer business plans as described in step 4.

   You can update the impacted customer business plans by executing the *Update Planning Product Hierarchy Automatically* report, which you can access from the *SAP Easy Access* menu under *Customer Business Planning* > *Administrator* > *Update Planning Product Hierarchy Automatically*. You can run the report either by providing the *User ID* for which alerts have been raised, or by providing the *Plan ID* along with the immediate parent category of the new/modified category. This report processes the alerts that have been raised for a specific user and updates the planning product hierarchies in all linked plans.

   > **i Note**
   >
   > This report updates the hierarchies of the plan if the ECC flag is present. For product group-based hierarchies, you can use the report `/JBPC/PPH_PRD_GRP`. You can access this report from the *SAP Easy Access* menu under *Customer Business Planning* > *Administrator* > *Product-Group-Based PPH*.

Related Information

Create Planning Product Hierarchy Based on Product Group [page 21]
Replicating Product Hierarchies from SAP ERP to SAP CRM
Setting Up Alerts (Optional)

2.1.2.1 Set Up Automatic Update for Planning Product Hierarchy

Context

In this step, you set up the required configurations and BAdI implementation to start using the automatic update function for planning product hierarchies.

The system raises an alert whenever your internal product hierarchy changes in your SAP CRM system. It records the alerts and gives you the option of running them immediately or by means of a batch job that you can schedule for a specific time. While processing the alert, the system determines the customer business plans that are impacted by the change and adjusts the planning product hierarchies and plan data accordingly.

SAP Customer Business Planning uses its own interface to manage all Customer Business Planning-relevant alerts and uses Alert Management in the SAP CRM system to store and process these alerts.

The necessary configurations and setup for alerts in SAP Customer Business Planning are described in the sections wherever applicable. For more information about the Alert Framework, refer to the standard help documentation.

Procedure

1. Customize alert categories in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Alerts* > *Maintain Alert Categories*.

   In order to set up alerts, you must define an alert category for automatic updates to planning product hierarchies.

The following alert category is delivered with the solution as an example:

Example Alert Category

Classification	Alert Category	Description	Alert Container	Alert Message
CUSTOMER_BUSINESS_PLANNING	PROD_CAT_ADDED_TO_HIER	Product category added to the product hierarchy	Attributes in alert container: • PRD_CAT_ID • PRD_CAT_GUID • PLAN_ID • PARENT_PRD_CAT_GUID • PRD_CAT_TXT	Check plan &PLAN_ID&. New product category &PRD_CAT_TXT& has been added to the planning product hierarchy.

2. (Optional) Customize marking planning product hierarchy alert category as deferred alert.

   In this optional step, you can identify the alert category for automatic updates to planning product hierarchies as a deferred alert.

   If you do so, the system does not process the alert immediately when it is created. Instead, it relies on a batch job to process the alert in the background at the time you scheduled for this job.

   You can mark the alert as deferred in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Alerts* > *Maintain Deferred Alert Categories*.

   > **i Note**
   >
   > In the example configuration delivered with the system, this alert is marked as deferred in the Customizing activity *Maintain Deferred Alert Categories*:
   >
   > Alert Category
   >
   > | Field Description | Value |
   > |---|---|
   > | *Alert Category* | PROD_CAT_ADDED_TO_HIER |

   If you do not mark this alert as deferred, the system processes it immediately when your internal product hierarchy is changed. This may affect the performance of the process that you use to change your internal product hierarchy.

3. Implement BAdI to determine the customer business plans impacted by changes to internal product hierarchy.

   You use this step to determine the customer business plans that should be adjusted as a result of changes to the categories in your internal product hierarchy.

   The logic for determining the plans impacted by these changes is written in a BAdI, which you can find in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Alerts* > *BAdI: Target Object Determination*.

> **i Note**
>
> An example implementation of this BAdI is delivered with the solution that determines all the plans impacted by this change. The example logic determines only those plans that contain a planning product hierarchy with ECC reference nodes and adjusts the planning product hierarchy as well as the plan data.

If your planning product hierarchy contains only manual nodes that you defined when you created the hierarchy, the system does not consider them for automatic updates.

In this step, you only determine the customer business plans that should be updated to include the changes to your internal product hierarchy (`R3PRODHIER`). You must implement the process step 'update customer business plans with changes to the internal product hierarchy' while updating the planning product hierarchy automatically to update your customer business plans.

Related Information

Alert Management (ALM)
Updating Planning Product Hierarchy Automatically [page 28]
Setting Up Alerts (Optional)

2.1.3 Defining Assortments

You use this process to define your list of products that can be planned for a given customer for a given time frame.

You define your assortments considering the following aspects:

- You can define one assortment for each customer.
- The assortment can contain multiple products. You can define multiple validities for a given product. The time periods must not overlap one another.
- In addition to the validity of your products, you can optionally define further attributes in your assortments.
- If your assortment does not contain any valid products for a defined planning year, the system does not allow you to plan for that year.
- You can define your assortment when you create your customer business plan or upload it from an external source.
- You can define different assortments for the same customer based on the shop format if your customer operates in multiple shop formats (for example, hypermarket, supermarket) and you want to create separate plans for these shop formats.
- The same assortment can be used by multiple customer business plans if all the plans are created for the same customer but have a different set of products.
- A customer business plan considers only those products from an assortment that you have assigned to your planning product hierarchy.

You must define the assortment to perform planning in a customer business plan.

The following subsections describe the setup activities that are required to define assortments.

2.1.3.1 Types of Assortments

There are two types of assortments in the application:

- **Operational Assortment** - Operational assortment is defined for a customer and can contain multiple products with multiple validities. This assortment can be used by multiple customer business plans if all the plans are created for the same customer but have a different set of products. Additionally, a customer business plan considers only those products from an assortment that you have assigned to your planning product hierarchy.
- **Alternative Assortment** - Alternative assortments can be created if the alternative assortment feature is enabled for specific sales areas. Most of the operations on alternative assortment are the same as for the operational assortment but alternative assortments cannot be used by multiple customer business plans. Moreover, alternative assortment cannot be assigned to operational plan. The assignment of alternative assortments is applicable to plan scenarios only.

To be able to distinguish between operational and alternative assortments at the database layer, the field `PROJECT_GUID` is filled in the assortment header table `/JBPC/MASRT_HDR`. As the alternative assortment is created in the context of a single customer business plan, the `PROJECT_GUID` field holds the plan GUID for the alternative assortment entry in the assortment header table.

2.1.3.2 Create Assortments When Creating a Customer Business Plan

You can create an assortment when you create your customer business plan.

Prerequisites

You have created your planning product hierarchy and activated it.

Context

SAP Customer Business Planning features its own user interface for creating assortments.

> → Remember
>
> If you have enabled alternative assortments for your sales area, you must remember that the features listed here apply to the *Operational Assortment*. For details on alternative assortments [page 34], kindly refer to the next topic.

The system considers the following while creating an assortment:

- An assortment is created for a given node from your account hierarchy and the shop format. The system retrieves the account hierarchy node and shop format from the responsibility area that you have used to create your customer business plan.
- The data store behind the assortment object stores the following attributes:
  - Account hierarchy node (retrieved from the responsibility area)
  - Shop format (retrieved from the responsibility area)
  - Multiple products with multiple non-overlapping validities
  - Additional optional attributes for a given product. The multiple validities from the product apply to the additional attributes.
- The account hierarchy node in your plan must match the account hierarchy node in your assortment exactly. The system does not consider assortments at higher or lower levels in the account hierarchy when you start planning an assortment at a certain level.
- The system creates one assortment for a given account hierarchy node and reuses the same assortment object across multiple customer business plans that are created for the same account hierarchy node and shop format but with different sets of product categories or products.
- You plan your assortment based on the planning product hierarchy in a given customer business plan. This means that you plan only a portion of your assortment within a given customer business plan.
- You can maintain validity for all products of a product category in assortment by using the *List* function with select all feature.
- The system does not allow you to change the validity of products in past periods (prior to today's date).
- When you create and save your assortment, the system adjusts the plan data from the revised validity of products.

Related Information

Defining a Planning Product Hierarchy [page 9]

2.1.3.3 Alternative Assortments

Prerequisites

To use the functionality of alternative assortments, you must ensure the following:

- Alternative assortments are switched on for your sales area.
  You can enable alternative assortments in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Activate Trade Management Features*.
- Scenario planning is enabled.
- The features for the simplified BW data model are available.

> **! Restriction**
>
> Indirect planning and overlapping planning functionalities are not supported if alternative assortments are activated.

Context

You use alternative assortments to define a list of products that you wish to plan for a given customer and customer business plan, for a given time frame.

Features

- You can define multiple alternative assortments for each customer and customer business plan, however, a specific alternative assortment can be used only for one customer business plan.
- You must use a unique description while creating an alternative assortment, which can be also be changed later.
- The alternative assortment can contain multiple products, and you can define multiple validities for a given product, however the time periods in these validities must not overlap.
- In addition to the validity of the products, you can optionally define further attributes in your assortments.
- By default, an alternative assortment is not relevant for planning. You need to link alternative assortments with scenarios to be able to plan using these assortments.

  > **! Restriction**
  >
  > Alternative assortments cannot be linked with operational plan.

- You can define your alternative assortment when you create your customer business plan but it cannot be uploaded from an external source.
- You also have the option to *Copy* or *Delete* alternative assortments.
- If an alternative assortment is assigned to any scenario, then you are not allowed to delete this assortment unless you delete the assigned scenarios.

2.1.3.4 Upload Assortments Using Excel (Optional)

Context

You can use this optional step if:

- You do not want your users to maintain assortments using the assortment user interface in SAP Customer Business Planning.

- You want to load an assortment from an external source initially and then allow your users to further update this assortment using the assortment user interface.

> **! Restriction**
>
> You cannot upload an alternative assortment using Microsoft Excel. This implies that even if alternative assortments are switched on for your sales area, this feature will still be available only for the operational assortment.

Procedure

To upload assortments from Microsoft Excel, use the report provided in the *SAP Easy Access* menu under *Customer Business Planning* > *Assortments* > *Upload Assortment from MS Excel*.

The Excel file that you prepare for upload must contain the following columns and be saved as a tab-delimited file.

Columns in Excel File to Upload

Column Name	Purpose
`BPHN_ID`	Denotes the account hierarchy node ID. The value in this field must match the node ID of the corresponding account in your account hierarchy.
`SHOP_FORMAT`	Denotes the shop format of your customer. The value in this field must match the shop format ID as maintained in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Responsibility Area (RA)* > *Shop Format* > *Maintain Shop Format*.
`PRODUCT_ID`	Denotes the ID of the product that you have maintained in the SAP CRM product master data.
`VALID_FROM`	Denotes the start of the validity period for your product. This value must be entered in the format **YYYYMMDD**. If you want to specify multiple validities for your product, you need multiple records in your Excel file. The validities must not overlap one another.
`VALID_TO`	Denotes the end of validity period for your product. This value must be entered in the format **YYYYMMDD**. If you want to specify multiple validities for your product, you need multiple records in your Excel file. The validities must not overlap one another.

Column Name	Purpose
SOURCE	Denotes the source of your assortment information. You can enter the following values: • **I** implies 'Internal'. Assortment records marked as internal are shown in a different color on the *Assortment* screen. In the configuration delivered with the solution, this color is blue. • **E** implies 'External'. Assortment records marked as external are shown in a different color on the *Assortment* screen. In the configuration delivered with the solution, this color is gray. You can change both externally and internally listed records from the assortment user interface. However, when you change an externally listed record, the color of the validity record changes from gray to blue in the example configuration delivered with the solution. You can change the color of the validity bars by configuring your own theme.

Related Information

Maintain Basic Settings for CBP Calendar [page 98]

2.1.3.5 Upload Assortments from Listing (Optional)

You use this optional step to upload assortments from a listing in your SAP CRM system.

Context

You can upload a listing from the planning product hierarchy and the assortment screens.

> **!** Restriction
>
> You cannot upload a listing for an alternative assortment. This implies that even if alternative assortments are switched on for your sales area, this feature will still be available only for the operational assortment.

Procedure

1. Maintain CRM listing.
2. On the *Assortment* screen, upload the listing by choosing the *Upload from Listing* button.

   This automatically adds validity dates to the products as per the defined listing.

Related Information

Listings

2.1.3.6 Maintain Additional Attributes for Assortment (Optional)

You use this optional step to maintain additional attributes for your assortment.

Context

- You use this feature only if you have been using CRM listings and have maintained additional attributes in your CRM listing object. For more information about CRM listings, see the standard help documentation.
- You can maintain additional attributes for both operational and alternative assortments.

Related Information

Listings

2.1.3.7 Display and Copy Assortment Attributes

Context

Assortment attributes that are uploaded from listing attributes for some products can be copied to other products in SAP Customer Business Planning.

2.1.3.8 Raise Alerts Upon Changes in Assortment

Context

Planning is performed based on the products that are listed in assortments. This means that any changes made to the assortment can affect the plan. For this reason, a BAdI is provided before and after an assortment SAVE that can be used to notify the KAM of the updates.

Procedure

Implement the BAdI from Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Assortments* > *Business Add-Ins (BAdIs)* > *BAdI: Save Pre- and Post-Processing for Assortments*.

This BAdI is hooked at: `/JBPC/CL_CRM_ASRT_ITM_BL-IF_LOY_FRW_BUS_LOGIC_OBJECT~DO_BEFORE_SAVE` and `/JBPC/CL_CRM_ASRT_ITM_BL-IF_LOY_FRW_BUS_LOGIC_OBJECT~DO_AFTER_SAVE`. The delivered implementation `/JBPC/ASRT_SAVE` is used to raise alerts whenever an assortment is changed. This step is applicable to operational and alternative assortment.

On assortment save, alerts are raised from the queue. The queue is triggered from the default implementation of the method DO_AFTER_SAVE of the BAdI `/JBPC/ASRT_SAVE`. Customer Business Planning uses the inbound queue prefix ASRT_SAVE_*, which should be registered using transaction **SMQR** to raise alerts whenever there is a change in either the operational or an alternative assortment.

2.1.3.9 Synchronize Assortment Changes to the Plan

Context

Since changes to an assortment can impact the plan data for several years, we ensure that such changes are reflected in the BW system, not only for the plan year in focus but also for all future planning years that use the same planning product hierarchy. These changes to the planning data in BW are achieved by running the synchronization for all future plan years via a queued RFC in the background.

Queued RFCs are used because they provide the option to restart the process in the event of failures, for example, a locking failure. SAP Customer Business Planning uses the inbound queue prefix CBP_PLAN_UPD_*, which should be registered using transaction SMQR.

This process is also applicable to alternative assortments, in case this feature is enabled for your sales area. In this case, synchronization to the BW system takes place only when the alternative assortment is linked to any plan scenario and changes in this alternative assortment are captured by the system.

2.1.3.10 Set Up Assortments

Procedure

1. (Optional) Implement the BAdI to upload assortment from listing, in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Assortments* > *Business Add-Ins (BAdIs)* > *BAdI: Upload External Listings to Assortments*.

   You can also upload your assortment from a listing. The logic for uploading assortments from listings is written in BAdI `/JBPC/EH_ASRT`, method `ASRT_UPLOAD_LISTING`.

   A default implementation of this BAdI is delivered with the solution that considers the listings at the same level of the account in your customer business plan as well as any listings at higher and lower levels of the account in your account hierarchy. After determining all of the listings, the system combines the validities and maintains the assortment for the customer in your plan.
2. (Optional) Customize additional attributes for maintaining assortments.

   You can maintain additional attributes for assortments.

   In the CRM listing, the additional attributes are configured using set types that are configured in Customizing for *Customer Relationship Management* under *Master Data* > *Listing* > *Settings for Listings* > *Partner/Product Range Settings for Listing Items and Assortments* > *Maintain Set Types.*

   After you have defined your set type and maintained your additional attributes, you assign the set type to the planning product reference type in Customizing for *Customer Relationship Management* under *Master Data* > *Listing* > *Settings for Listings* > *Partner/Product Range Settings for Listing Items and Assortments* > *Define Partner/Product Range Types for Listings and Assortments*.

   For more information about configuring set types in SAP CRM listings, refer to the standard documentation for the corresponding Customizing activities.

   After you have configured your set types in SAP CRM listings, you must map the defined attributes from the set type to the corresponding attributes in your assortment. You do this in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Assortments* > *Map Assortment Attributes to Listing*.

   > **!** Restriction
   >
   > The features to maintain assortments and additional attributes using CRM listings are not available for alternative assortments, even if the feature is switched on for your sales area.

Results

After you have completed these Customizing activities, the system displays the additional attributes on the assortment user interface.

Related Information

Upload Assortments from Listing (Optional) [page 37]
Maintain Additional Attributes for Assortment (Optional) [page 38]

2.1.3.11 Maintain Assortment Check Profiles

Context

Whenever a trade promotion is updated, an assortment check is executed on it. It checks whether the products added in the trade promotion are listed for the trade promotion duration in the operational assortment or not. If the products are not listed, an error occurs, disallowing you to save the changes you made to your trade promotion.

If you do not want the assortment check to be executed on a particular status of a trade promotion, you need to maintain the trade promotion type and the corresponding trade promotion status in the configuration for assortment checks. On doing this, the assortment check will not be executed for that specific combination of a trade promotion and its status as maintained in the configuration.

Procedure

1. You must first maintain the assortment check profile in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Promotion Planning* > *Assortment Check Profiles* > *Maintain Assortment Check Profiles*.
2. Next, you can choose the assortment check profile and assign trade promotion types and trade promotion statuses to it, in the same Customizing as the previous step.
3. You must then assign the assortment check profile to your sales area in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Promotion Planning* > *Assortment Check Profiles* > *Assign Assortment Check Profiles to Sales Areas*.

2.1.4 Defining Buyers and Targets (Optional)

You define buyers in your customer's organization with whom you negotiate terms (such as volumes, margins, and discounts) in your customer business plan.

A buyer is a person in your customer's organization who is responsible for buying products in a certain category.

SAP Customer Business Planning features its own *Buyer Setup* user interface that you can use to maintain buyers. The system leverages SAP Business Partner master data in the background to store the information about your customer and the associated buyers. The buyers are linked to your customer using a contact person relationship.

Before you start defining buyers using the *Buyer Setup* UI, you must create a customer business plan. You need to define buyers only once. The system then uses the same buyers across all the years of your customer business plan. If you have already defined your buyers in SAP Business Partner in your SAP CRM system, the system retrieves the buyers linked to the customer in the plan and displays them on the screen.

You can also set targets that your buyers want to achieve by executing your customer business plan. You can use the *Buyer Setup* user interface to define targets for your buyer only. The system allows you to choose your targets from a configurable list of values. The buyer targets that you define are applicable only for the planning year of the customer business plan for which you have defined them.

You have to define buyer targets separately for each year of your customer business plan. You can also copy your targets from the previous years of your plan by clicking a button on the *Buyer Setup* screen.

After you have defined your buyer targets, you can compare the targets against the latest estimates in your customer business plan. The plan displays this comparison in the *KPI Monitor*. Latest estimates represent your plan figures by combining the actual data in the past and your plan data in the future.

2.1.4.1 Set Up Buyer Targets Definition

In this step, you perform the configurations that are required to start defining buyers and buyer targets using the *Buyer Setup* user interface in SAP Customer Business Planning.

Procedure

1. Customize buyer target KPIs in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Targets* > *Maintain Targets*.

   When defining buyer targets, ensure to select *Retailer Target* as the scope.

The following example buyer targets are delivered with the solution:

Example Buyer Targets

Target ID	Description	Scope	Type
RET_MARGIN	Customer Margin	Retailer Target	Percentage
RET_PROFIT	Customer Profit	Retailer Target	Amount in Currency
RET_TTO	Customer. Revenue	Retailer Target	Amount in Currency
RET_USG	Customer. Revenue Growth	Retailer Target	Percentage

2. After you have defined your targets, define a target profile.

   A target profile is a collection of targets that you want to use in a given customer business plan scenario.
3. After you have maintained your target profile, assign it to a sales area.

   The system uses the targets with the *Retailer Target* scope from the defined target profile to prepare the list of possible targets that can be maintained for a buyer.

2.1.4.2 Set Up Buyer Definition

You implement the logic that is required by SAP Customer Business Planning to process buyers.

Context

You have the following options to define buyers:

- Option 1: Using the *Buyer Setup* user interface in SAP Customer Business Planning
- Option 2: Using SAP Business Partner in SAP CRM

Before you process this step, you must set up your business partners in your SAP CRM system. For more information about business partners in SAP CRM, refer to the standard help documentation.

The following subsections describe the implementation activities that are required in both of the scenarios.

Procedure

1. (Option 1) Implement *BAdI: Process Buyers* to set up buyer definition using the *Buyer Setup* user interface, in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Responsibility Area (RA)* > *RA User Interface*.

   If you want to define buyers using the *Buyer Setup* user interface in SAP Customer Business Planning, you must implement the following methods in the BAdI /JBPC/CRM_RESP_AREA_BUYER.

Methods of BAdI: Process Buyers

BAdI Method	Purpose
`GET_CUST_BP_FOR_CP`	Retrieve business partner assigned to the account hierarchy node in your customer business plan.
`GET_CP_FOR_CUST_BP`	Retrieve buyers linked to the customer in your customer business plan.
`CREATE_CP_FOR_CUST_BP`	Called when a buyer is created in the *Buyer Setup* UI.
`CHANGE_CP_FOR_CUST_BP`	Called when a buyer is changed in the *Buyer Setup* UI.

An example implementation of this BAdI is delivered with the solution. The default implementation leverages the *Contact Person* relation to process the buyers.

2. (Option 2) Implement *BAdI: Process Buyers* to set up buyer definition without using the *Buyer Setup* user interface, in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *General Settings* ▶ *Responsibility Area (RA)* ▶ *RA User Interface* ▶.

   If you do not want to define buyers using the *Buyer Setup* user interface in SAP Customer Business Planning, you must implement the following methods in the BAdI `/JBPC/CRM_RESP_AREA_BUYER`.

   Methods of BAdI: Process Buyers

BAdI Method	Purpose
`GET_CUST_BP_FOR_CP`	Retrieve business partner assigned to the account hierarchy node in your customer business plan.
`GET_CP_FOR_CUST_BP`	Retrieve buyers linked to the customer in your customer business plan.

   You can choose to retrieve the buyer information from SAP Business Partner or your own DataSource using these methods.

Related Information

Business Partners

2.1.5 Setting Up Plan

You can configure the parameters that the system requires during customer business planning.

Related Information

Maintain Basic Settings [page 45]
Customize Short-Term Period (Optional) [page 47]
Customize Flexible Time Period [page 48]
Customize Customer Business Planning Logo (Optional) [page 50]
Customize Customer Business Planning Profile [page 50]
Maintain Plan Settings [page 51]

2.1.5.1 Maintain Basic Settings

Context

This procedure covers the basic settings that are required across SAP Customer Business Planning. You must configure these settings before you start using the application.

Procedure

1. Customize internal calendar year in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *Basic Settings* ▶ *Planning Period* ▶ *Internal Calendar* ▶.

   An internal calendar is regarded as the duration of periods that constitute a year in your internal calendar. When creating a plan for a given year, the system uses the internal calendar year to define the start and end dates of the plan.

   SAP Customer Business Planning leverages the fiscal year variant to define your internal calendar year. The fiscal year calendar option (alike internal/retailer calendar) in the customer business plan is hidden on the UI in the delivered solution.

   > **i** Note
   >
   > You can implement the calendar definition BAdI (`/JBPC/CAL_DEFINITION`) to retrieve the calendar year definition, based on the calendar type, and fetch the year description.

The following table lists the methods of this BAdI with a short description of their purpose:

Methods of BAdI /JBPC/CAL_DEFINITION

Method	Purpose
`GET_CALENDAR_DEFINITION`	Get calendar year, quarter, month, and week on the basis of year and calendar definition. For example, fiscal or calendar year.
`GET_CALENDAR_YEAR_TEXT`	Get calendar year text on the basis of calendar year information; that is, year and sales organization.

2. (Optional) Customize retailer calendar.

   In this step, you define a retailer calendar year and periods. The retailer calendar is regarded as the period of time that constitutes one year in your customer's calendar.

   In SAP Customer Business Planning, you can view a plan based on your internal calendar as well as the retailer calendar:

   - In the internal calendar, the plan data is shown based on the internal year (as defined in step 2).
   - In the retailer calendar, the plan data is shown based on your customer's calendar.

   In order to display the data in both calendars, therefore, the system combines both planning periods and creates the plan data for the combined period.

   Example

   Your internal calendar year runs from **`01-Jan-2016`** to **`31-Dec-2016`** and your retailer calendar runs from **`01-Apr-2016`** to **`31-Mar-2017`**. In this case, the system combines the periods and your plan data will be created from **`01-Jan-2016`** to **`31-Mar-2017`**.

   You must define your internal calendar and retailer calendar in such a way that they overlap. At any one time, however, you can display the plan in only one calendar and for only one plan year.

   The retailer periods must be congruent with calendar months. The retailer periods must perfectly fit into the periods defined by the flexible time profile assigned to the responsibility area or the sales area, in case no *Time Period Profile ID* is assigned to the responsibility area. For more information on flexible time period, see Customize Flexible Time Period [page 48].

   You can configure a retailer calendar to leverage the account defaults feature from the standard system. For more information about account defaults, see the standard help documentation.

   SAP Customer Business Planning provides the BAdI **`/JBPC/CAL_DEFINITION`** to supply the duration of your retailer calendar (start and end dates) for a given plan year. You can find this BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Planning Period* > *Retailer Calendar* > *BAdI: Get Dates for Retailer Calendar Year.*

> **i Note**
>
> A default implementation of this BAdI is delivered with the solution that determines the retailer calendar year from the account defaults. If you want to leverage this BAdI implementation:
>
> - Maintain the account defaults at the same account hierarchy node that you use in your customer business plan.
> - Maintain a calendar in your account defaults with ID `RET_CAL`.
> - To specify periods with custom labels, define the account calendar with ID `RET_CAL`. Specify custom labels, not exceeding 3 characters, as the *Description* for the period.

Related Information

Prepare Fiscal Year Variant
Setting Up Virtual View Framework
Account Defaults for Trade Promotions

2.1.5.2 Customize Short-Term Period (Optional)

You can define a duration of time that should be considered as the short-term period within your plan year.

Context

A short-term period denotes a period in your plan that starts today and continues for a defined number of months that you maintain in Customizing.

The following types of period exist in a customer business plan year:

- *Actual*
  Denotes the previous periods of your plan. The time period from your start date of the plan until yesterday is considered as the actual period in your plan.

  > **Example**
  >
  > If you are displaying your plan based on the internal year, that is, from **`01-Jan-2016`** to **`31-Dec-2016`**, and you examine your plan on **`01-Jun-2016`**, the plan period from **`01-Jan-2016`** to **`31-May-2016`** is regarded as the actual period.

  The system does not allow you to change your plan data in the actual period, which is highlighted in a different color.
- *Short Term*
  Denotes the plan period that starts today and continues for a configurable number of months.

> **Example**
>
> Assume you have defined your short-term period as 4 months and you are displaying your plan based on the internal year, that is, from **01-Jan-2016** to **31-Dec-2016**. If you examine your plan on **01-Jun-2016**, the plan period from **01-Jun-2016** to **30-Sep-2016** is regarded as the short-term period.

The system allows you to change your plan data in the short-term period, which is highlighted in a different color.

- *Long Term*
  Denotes the plan period that starts at the end of the short-term period and continues until the end of the plan.

  > **Example**
  >
  > Assume you have defined your short-term period as 4 months and you are displaying your plan based on internal year, that is, from **01-Jan-2016** to **31-Dec-2016**. The plan period from **30-Sep-2016** to **31-Dec-2016** is regarded as the long-term period.

  The system allows you to change your plan data in your long-term period, which is highlighted in a different color

> **Note**
>
> In the example content delivered, you cannot edit your plan data on the customer business plan screen in the actual period. There is no distinction in processing customer business plan data in the short- and long-term periods. However, you can use these periods in your customer implementation to define a different behavior.

Procedure

Maintain short-term period in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Planning Period* > *Define Short-Term Period*.

2.1.5.3 Customize Flexible Time Period

Context

A plan is created for a combined duration of your internal calendar and retailer calendar and at any one time you can view the plan data for a selected year, in either your internal calendar or the retailer calendar.

When you display your plan data for a year, the system displays the plan data for all the months in that year. You can also view the plan data for a defined period within a year. When you select this period within the year, the system shows the plan data for all the weeks in the period.

> **Example**
>
> You are displaying your plan data for the year 2016 using your internal calendar, that is, from **01-Jan-2016** to **31-Dec-2016**. In this year, you have defined the following four periods:
>
> - Quarter 1: From week 1 to week 13
> - Quarter 2: From week 14 to week 26
> - Quarter 3: From week 27 to week 39
> - Quarter 4: From week 40 to week 52
>
> If you select Quarter 3, the system displays your plan data from week 27 to week 39.

You can maintain your own definition of a period within a year. This is called a 'flexible time period'.

Procedure

1. In Customizing for *Customer Relationship Management*, choose *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Planning Period* > *Maintain Flexible Time Periods*.
2. Define a time profile.

   A time profile is a collection of period definitions that constitute a year. When defining the time profile, you must specify the unit of time that you want to use when defining your period. You can only select **Month** or **Week**. The system uses this granularity for the following:

   - If you choose **Week**, the system ensures that the sum of all the durations from all your periods is equal to *52*.
   - If you choose **Month**, the system ensures that the sum of all the durations from all your periods is equal to *12*.
3. Assign your time profile to:
   - The sales area if you want to use it in your internal calendar. You do so in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Planning Period* > *Assign Time Period Profile to Sales Area*.
   - The responsibility area if you want to use it for the retailer calendar.

Related Information

Maintain Basic Settings [page 45]

2.1.5.4 Customize Customer Business Planning Logo (Optional)

You can assign your company logo so that the system displays it on the SAP Customer Business Planning user interface.

Procedure

1. In Customizing for *Customer Relationship Management*, choose *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Define Customer Logo*.

   Ensure that the icon name of your logo is `CBP_LOGO` and that the icon type is **Logo**.
2. After you have defined your icon, maintain the file paths that the system should use to load the image and display it on the SAP Customer Business Planning user interface.

2.1.5.5 Customize Customer Business Planning Profile

Context

In this step, you define customer business planning profiles. A customer business planning profile is a collection of read and write access rights for different screens in SAP Customer Business Planning. You can use it to provide read-only access to certain planning items in your customer business plan.

Procedure

1. Maintain your planning item in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Trade Terms* > *Maintain Trade Terms*.

   > **Example**
   >
   > If you do not want your user to edit the list price in your plan, you must enter the planning item that corresponds to the list price in this Customizing activity, and then assign this planning item to a planning item profile.
2. Maintain the settings for business planning profiles under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Maintain Customer Business Planning Profiles*.

Next Steps

After you have maintained your customer business planning profile, you must assign it to a responsibility area.

> **i** Note
>
> If you do not maintain a profile and assign it to a user, the system provides access to all customer business planning screens.

Related Information

Setting Up Responsibility Area

2.1.5.6 Maintain Plan Settings

Procedure

1. Customize number range for plan.

   In this step, you define the number range that the system uses when creating a new customer business plan. You can configure the number range in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Define Number Ranges* > *Maintain Number Ranges for Plan*.

   You must define a number range for your plan with number range object **`01`**, otherwise the system will not allow you to create customer business plans.
2. Customize number range for scenario.

   In this step, you define the number range that the system uses when creating a scenario within a customer business plan.

   You can configure the number range in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Define Number Ranges* > *Maintain Number Ranges for Scenario*.

   You must define a number range for your scenario, otherwise the system will not allow you to create customer business plans.
3. (Optional) Customize prefix for customer business plan ID.

   You can maintain this prefix in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *System Settings* > *Maintain Marketing Object Prefix*.

The system uses this prefix in addition to the number range that you defined in step 1 to formulate the unique identifier of your plan.

> **i Note**
>
> An example prefix with the following details is delivered with the solution:
>
> Example Prefix
>
> | Plan Object Type | Prefix |
> |---|---|
> | JBP | J |
>
> If you use this configuration, all your *Plan ID*s will start with **J-xxxxxxzxxxx**.

4. (Optional) Customize prefix for customer business plan scenario ID.

   You can maintain this prefix in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *General Settings* ▶ *System Settings* ▶ *Maintain Marketing Object Prefix* ▶

   The system uses this prefix in addition to the number range that you defined in step 2 to formulate the unique identifier of your plan scenario.

   > **i Note**
   >
   > An example prefix with the following details is delivered with the solution:
   >
   > Example Prefix
   >
   > | Plan Object Type | Prefix |
   > |---|---|
   > | SCN | N |
   >
   > If you use this configuration, all your scenario IDs will start with **N-xxxxxxzxxxx**.

5. (Optional) Customize plan type and scenario type.

   In this optional step, you define the campaign type that the system uses when creating a customer business plan and scenario. A customer business plan and its scenario are modeled as a marketing object leveraging the *Marketing Object Framework* in the SAP CRM system. For a given marketing object category, you can define multiple campaign types that you can use to maintain business configurations.

   You must maintain a campaign type for the marketing object category that corresponds to the customer business plan and scenario. The system then uses this campaign type when creating the marketing object corresponding to your customer business plan and scenario.

   Maintain the following campaign types:

   - For customer business plans, choose ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *CBP Planning* ▶ *Plan and Scenario* ▶ *Define CBP Plan Types* ▶.
   - For customer business plan scenarios, choose ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *CBP Planning* ▶ *Plan and Scenario* ▶ *Define CBP Scenario Types* ▶.

> **i Note**
>
> The following campaign types are delivered with the solution as an example:
>
> Example Campaign Types
>
> | Marketing Object Category | Campaign Type |
> |---|---|
> | JB (Customer Business Plan) | JBPC |
> | SC (Customer Business Plan Scenario) | SCN |
>
> You can use these example campaign types and skip this step.

2.2 Customer Business Planning

You use this business scenario to carry out all of your planning activities in SAP Customer Business Planning.

These planning activities primarily entail:

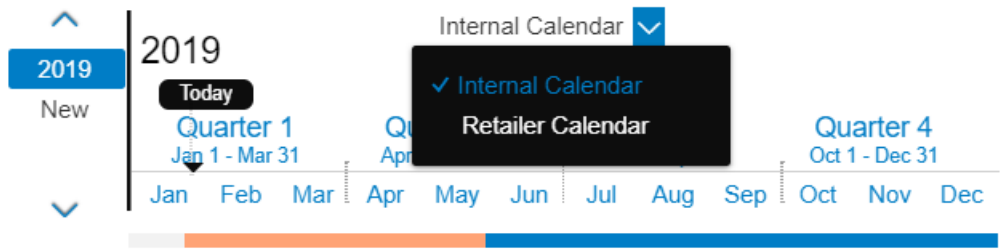
- Creating a customer business plan
- Displaying the plan overview
- Performing planning in different planning views, for example, *Product Tree*, *Profit and Loss*, and *Summary*
- Extending the customer business plan by a year
- Performing volume, value, and price planning
- Comparing plan data with the previous year, latest estimates, and reference data
- Planning promotions
- Scenario planning
- Managing plan versions

The following topics provide an overview of these planning activities and explain the required configuration and setup tasks.

2.2.1 Setting Up Fiscal Dimension

You can set up Customer Business Planning based on fiscal time dimensions.

In Customer Business Planning, you can perform planning in multiple calendars, such as *Internal Calendar* or *Retailer Calendar*. You can select the calendar type from the dropdown in the calendar view in the UI.



Calendar Dropdown

The *Internal Year* is determined from the *Fiscal Year Variant* that you have assigned to a sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Planning Period* > *Internal Calendar* > *Assign Fiscal Year Variant to Sales Organization*.

The *Retailer Year* is determined from the *Account Defaults*. You can change the definition by implementing the *BAdI: Get Dates for Retailer Calendar Year*.

A Customer Business Plan is created as the union of the *Internal Year* and the *Retailer Year*.

> ### Example
>
> If your *Internal Year* is from **01-Jan-2019** to **31-Dec-2019** and your *Retailer Year* is from **01-Apr-2019** to **31-Mar-2020**, then the Customer Business Plan for 2019 is created from **01-Jan-2019** to **31-Mar-2020**.
>
> When you select **2019** as the Customer Business Plan year, you will see the plan data from:
>
> - **01-Jan-2019** to **31-Dec-2019** when you select *Internal Calendar*.
> - **01-Apr-2019** to **31-Mar-2020** when you select *Retailer Calendar*.

Within a Customer Business Plan year (*Internal/Retailer*) you can perform planning on the following time dimensions:

- *Year*
- *Quarter*
- *Month*

In the standard delivered content, the planning capabilities are delivered using these calendar dimensions:

- If you select a year (*Internal/Retailer*), the plan data is displayed for each calendar month.
- If you select a quarter, the plan data is displayed for each calendar week.
- If you select a month, the plan data is displayed for each calendar week.

The application allows planning using other time dimensions; for example, fiscal periods. This can be used to enable planning in a 4-4-5 fiscal year variant.

Related Information

Define Fiscal Year Variant [page 55]

2.2.1.1 Define Fiscal Year Variant

Procedure

1. Define the *Fiscal Year Variant* in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Planning Period* > *Internal Calendar* > *Define Fiscal Year Variant*.

   As the lowest granularity at which the plan data is stored is *Calendar Week*, you must define the fiscal period in your *Fiscal Year Variant* in a way that it does not break the composition of a calendar week:

   - The fiscal period must start either on the start date of a calendar month or the start date of a calendar week.
   - The fiscal period must end either on the end date of a calendar month or the end date of a calendar week.

   > **Example**
   >
   > If you set *Monday* as the start date of a calendar week in the system (BAdI: `CALENDAR_DEFINITION`):
   >
   > - You can define a fiscal period starting from:
   >   - Start date of any calendar month; for example, 1st January or 1st February.
   >   - Start date of any calendar week; for example, 14th January 2019 (*Monday*) or 18th February 2019 (*Monday*).
   > - You can define a fiscal period that ends on:
   >   - End date of any calendar month; for example, 31st January or 28th February.
   >   - End date of any calendar week; for example, 13th January 2019 (*Sunday*) or 3rd February 2019 (*Sunday*).

2. Assign the *Fiscal Year Variant* to a sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Planning Period* > *Internal Calendar* > *Assign Fiscal Year Variant to Sales Organization*.

2.2.1.2 Define Calendar Definition

Context

In Customer Business Planning, you can retrieve the descriptions and definitions of time dimensions (*Year*, *Quarter*, *Month*, *Week*) using the BAdI `/JBPC/CAL_DEFINITION` in the SAP CRM system. The descriptions and definitions are then used to render the time control and labels of the time dimensions on the planning screens.

The BAdI provides the following methods:

- `GET_CALENDAR_YEAR_TEXT`: This method returns the text for year; for example, `2016-17` or `FY 19`.
- `GET_CALENDAR_DEFINITION`: This method returns the definition of weeks, months, year, and quarter, which is filled in `ET_WEEK`, `ET_MONTH`, `ET_QUARTER`, and `ET_YEAR`, respectively.

> **i** Note
>
> The definition of week, month, quarter and year must match the start and end date so that:
>
> - Year start date is always the same as 1st week, 1st month, and 1st quarter start date.
> - Year end date is always the same as last week, last month, and last quarter end date.
>
> Similarly, for quarter, week and month must follow the same rule; and for month, the corresponding week. If there is no week, then it can be left empty, in which case the user will not be able to click on the month view on the UI as this results in no data display.

Model Company

For a model company, since week is the same as a calendar week (which is already filled by the framework), you must create a BAdI implementation and copy code from the default implementation class `/JBPC/CL_CALENDAR_DEFINITION`. Then, comment the code section in method `GET_CALENDAR_DEFINITION`, where the fiscal week is being filled using the fiscal year variant **`C5`**.

Fiscal period is filled in `ET_MONTH` by the framework as per the fiscal year variant defined in Customizing *Define Fiscal Year Variant*.

Related Information

Define Fiscal Year Variant [page 55]

2.2.1.3 Configure BW Queries in CRM

Context

Procedure

1. Define a new query profile for the corresponding queries in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination*.

2. Choose *Assign Criteria Profile and Query ID* and configure the query for each of the following criteria profiles and your query profile to the corresponding queries.

> **i Note**
>
> The above configuration uses BW planning queries. For more information on setting up the BW data model, kindly refer to Fiscal Support in the Common Configuration Guide for SAP Trade Management.

2.2.2 Customer Business Planning Basics

This section covers the key fundamentals and concepts that are required to implement planning capabilities in SAP Customer Business Planning.

SAP Customer Business Planning allows you to maintain plan data in the following views:

- *Profit and Loss* view
  In this view, the plan data is displayed for a selected node in your planning product hierarchy.
  The plan data is presented in a hierarchy of your profit and loss structure.
  The plan data is displayed for a selected time dimension in the time control.
  - If you select a year, the plan data is displayed for all months in that year.
  - If you select a period, the plan data is displayed for each week in that period.
- *Product Tree* view
  In this view, the plan data is displayed for a selected key figure in your profit and loss structure.
  The plan data is presented for all the products in your planning product hierarchy.
  The plan data is displayed for a selected time dimension in the time control.
  - If you select a year, the plan data is displayed for all months in that year.
  - If you select a period, the plan data is displayed for each week in that period

  To plan for a product, you can use the *Find* option present on this screen.
- *Summary* view
  The plan data is presented for all the products in your planning product hierarchy, and you can use the *Find* functionality to find any product within the planning product hierarchy.
  The plan data is displayed as an aggregation of all the weeks in the selected time.
  The plan data is displayed for a selected time dimension in the time control.
  - If you select a year, the plan data is displayed for all months of that year.
  - If you select a period, the plan data is displayed for each week in that period.
- *Scenario Planning – Profit and Loss* view
  In this view, the plan data is displayed together with the plan scenarios.
  The data is presented in a hierarchy of your profit and loss structure.
  The data is displayed for a selected node in your planning product hierarchy.
  The data is displayed as an aggregation of all the weeks in the selected time period.
- *Scenario Planning – Product Tree* view
  In this view, the plan data is displayed together with the plan scenarios.
  The data is presented for all the products in your planning product hierarchy, and you can use the *Find* functionality to find any product within the planning product hierarchy.
  The data is displayed for a selected node in your profit and loss structure.
  The data is displayed as an aggregation of all the weeks in the selected time period.

- Promotion fast entry table
  Displays all the promotions linked to the customer business plan year.

In each of these views (with the exception of the promotion fast entry table):

- Data can be displayed in trading, consumer, and normalized units.
- Data can be compared between different sources (latest estimates, plan, reference data, previous year, scenario).
- Data can be maintained at any level in the planning product hierarchy.

In addition to the views that allow you to maintain the planning data, SAP Customer Business Planning contains the following elements and views where the plan statistics and plan data are displayed:

- *Budget Monitor*
  Displays both event and non-event budgets.
- *KPI Monitor*
  Displays internal KPIs for the current plan year when you select your company.
  Displays buyer-specific KPIs for the current plan year when you select the buyer.
- *Version Comparison – Product Tree* view
  Displays a comparison based on the selected operational plan or version.
  Displays comparison data for all the products and a selected key figure.
  You can use the *Find* functionality to find any product within the planning product hierarchy.
- *Version Comparison – Profit and Loss* view
  Displays a comparison based on the selected operational plan or version.
  Displays comparison data for all the key figures and a selected node from the planning product hierarchy.
- *Impact KPIs in Scenario Planning*
  Displays a comparison of KPIs between your operational plan and scenarios.

Related Information

Maintain Settings for Creating Fast Promotion
TU, CU, and NU Key Figures [page 64]
Source Indicator [page 60]

2.2.2.1 Define Integrated Planning Profile Groups

In this procedure, you define the integrated planning profile group to be used for customer business planning.

Context

Procedure

Define the integrated planning profile group in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Define Integrated Planning Profile Groups*.

Once you have defined the integrated planning profile group, you assign the BW planning queries.

> **Example**
>
> The following configuration is delivered as an example:
>
> Example Configuration for Integrated Planning Profile Group

IP Prf Grp	Description	Indirect	Explosion	Category
SIDM	CBP Planning-Simplified BW data model			SC

> Planning Queries for IP Profile Group

Query ID	Description	Mast Query	Inv. Query
/JBPB/APLN_M_PNL_MASTER	Plan Master Query	X	

By assigning the integrated planning profile group to a customer business plan, you can use the corresponding planning query or read query defined in BEx Query Designer to synchronize and read planning data.

2.2.2.2 Set Up Week Labels

Context

In this procedure, you configure settings required to show the week labels (for example, *CW* or *W/C Apr 22*) on the time control and planning layouts in a customer business plan.

> **Note**
>
> *CW* is delivered as the default week label in the standard solution.

Procedure

1. Define the week label profile in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *Maintain Week Label Profile*.

   Here, you choose the week label to be displayed on the planning layout.

   First, create a *Week Label Profile*, and then assign the week label description as follows:

Week Label	Description
CW	CW

2. Assign the week label profile to the relevant sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *Assign Week Label Profile to Sales Area*.

2.2.2.3 Source Indicator

In SAP Customer Business Planning, you can compare data between the following data sources:

- Latest Estimates
  Displays a combination of actuals data in past periods and plan data in future periods.
- Plan
  Displays the plan data as you maintained it in the customer business plan.

  > **i Note**
  >
  > Data for the past period cannot be changed.

- Reference Data
  Displays the historical/reference data that you may want to use as a baseline for planning. For example, for volumes this may contain your historical sales volumes, for prices this may contain your actual prices retrieved from ECC by means of inbound pricing.
- Previous Year
  The plan data for the previous year.
- Version Data
  Version data from the last approved version.

To support comparisons of plan data between sources, a new *Source Indicator* key field has been added to the plan DataStore object. The system uses the *Source Indicator* key when you:

- Request a comparison of plan data from the SAP Customer Business Planning user interface (for example latest estimate vs. reference data).
  The system uses the corresponding source indicator keys to retrieve the data.
- Copy the reference volumes and prices to your plan.
- Upload actuals to your latest estimates.

- Update a previous year plan after you have created the plan for the next year.
- Perform scenario planning.
  The system stores your scenario information as a source indicator.
- Create and approve a version of the plan. The system copies your approved version to the source indicator corresponding to the version.

The following topics describe how to set up the source indicator in SAP Customer Business Planning.

2.2.2.3.1 Set Up Source Indicator in CRM

Procedure

Maintain the source indicator that you defined in BW within your CRM system, in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Maintain Data Sources*.

> **i Note**
>
> The following default source indicator values are delivered with the solution:
>
> Default Source Indicators

Data Source ID	Source Indicator	Description
LE	1	Latest Estimate
SCENARIO1	A	Scenario 1
SCENARIO2	B	Scenario 2
SCENARIO3	C	Scenario 3

Related Information

Source Indicator [page 156]

2.2.2.3.2 Maintain BW Data Sources to be Excluded

Procedure

Maintain the data sources that you want to exclude in your implementation, in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Maintain BW Data Sources to be Excluded*.

You can exclude all data sources except `LE`, `PLAN`, `SCENARIO1`, `SCENAIRO2`, and `SCENARIO3`, as these are mandatory entries for trade management. The scenario data sources are used only when the scenario planning feature is active. You can exclude only the optional data sources, which are set in the prerequisite Customizing *Set Up Data Sources*.

> ⚠ Caution
>
> You must maintain or change this Customizing carefully as this impacts the way the system generates the BW combinations. After changing the Customizing settings, earlier plans may be impacted.

Related Information

Set Up Source Indicator in CRM [page 61]

2.2.2.3.3 Set Up Data Comparisons Between Different Sources

Context

In order to allow comparisons between data, the corresponding comparison must be defined in your CRM system. The system uses this information to prepare a list of possible comparisons that are offered on the SAP Customer Business Planning user interface. The comparisons can be maintained for a profile.

Procedure

1. Create a profile for comparisons in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Maintain Value Type Profile*.

   The delivered content for the profile is:

Value Type Profile	Value Type Profile Description
SM_VAL_PRF	Simplified Data Model Value Type Profile
VALUE_PROF	Non-Simplified Data Model Value Profile

2. Define the value types within the profile in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Maintain Value Type Profile* > *Maintain Value Types*.

   To have a comparison between *Latest Estimate* and *Plan*, the following entries are delivered for profile VALUE_PROF:

Value Type ID	Value Type Description	Value Type Indicator
LE_VS_PLAN	LE vs Plan	Operational Plan

3. You can assign data sources to value types in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Maintain Value Type Profile* > *Maintain Value Types* > *Map Data Sources*.

   The delivered entries for comparing *Latest Estimate* with *Plan* are as follows:

Data Source ID	Data Source Description
LE	Latest Estimate
PLAN	Plan Key Figure

4. Assign the value type profile to a sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Assign Value Type Profile to Sales Area*.

   The delivered entry for this Customizing is as follows:

Sales Organization ID	Distribution Channel	Division	Value Type Profile
<*>	<>	<>	VALUE_PROF

Related Information

Source Indicator [page 60]

2.2.2.4 TU, CU, and NU Key Figures

Customer business plan data is maintained in trading units (TU) or consumer units (CU) and displayed in normalized units (NU).

If you maintain your plan data in trading units and switch to consumer units, the system converts your data from trading units to consumer units and displays the data in the *Consumer Unit* view, and vice versa. If you switch from trading unit to normalized unit, the system converts your data from trading units to normalized units.

> **Example**
>
> Let's take a product *Case of 24 bottles of 100 ml shampoo*.
>
> The trading unit is *One case of 100 ml shampoo* and the consumer unit is *100 ml shampoo* weighing 20 Kgs.
>
> *1 case = 24 bottles of 100 ml shampoo*
>
> *20 Kgs = 1 case = 24 bottles of 100 ml shampoo*
>
> Now, if you plan 1000 cases as the volume for this product and switch to the *Consumer Unit* view, the system uses the conversion factor 24 and displays the corresponding *CU volume* as *24,000 units of 100 ml shampoo*.

The following topics describe how this is achieved technically in the system.

Related Information

Customer Business Planning Basics [page 57]

2.2.2.4.1 Set Up Conversion Factors between TU, CU, and NU

For information on setting up TU, CU, and NU conversion factors in SAP BW, kindly refer to Preparing TU CU Master Data [page 156] under *Configuration Settings for SAP BW* in this guide.

Related Information

Prepare Products

2.2.2.4.2 Set Up Key Figures for TU, CU, and NU Views

Context

You can display the plan data in trading, consumer, and normalized units.

When you switch between TU, CU, and NU views, the system displays the corresponding key figures on the user interface after performing the conversion.

Related Information

Customer Business Planning Basics [page 57]
Set Up Conversion Factors between TU, CU, and NU [page 64]

2.2.2.4.3 Customize TU, CU, and NU Key Figures in CRM

Context

A component in your P&L structure is represented by separate TU, CU, and NU key figures in the BW system.

> ✤ Example
>
> The *Sell-in Volume* component in your P&L structure is represented by the following key figures in your BW system:
>
> - Sell-in Volume for Trading Unit View
> - Sell-in Volume for Consumer Unit View

If you have selected the *Sell-in Volume* key figure in your *Product Tree* view and you switch from trading to consumer units, the system uses a mapping between the trading and consumer unit key figures to display the corresponding *Sell-in Volume* key figure in the *Consumer Unit* view. Similarly, this would be applicable if you switch to the NU view.

Procedure

Maintain this mapping between the TU and its corresponding CU and NU key figures in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *InfoObject Mapping* > *Map Query Key Figures*.

This Customizing setting is also used by the system to ensure that the CU/NU key figures in the CU/NU view are automatically marked as hidden for the corresponding TU key figures that were hidden by means of personalization in the TU view.

Related Information

Set Up Key Figures for TU, CU, and NU Views [page 65]

2.2.2.5 Customize Characteristics and InfoObjects Used for Synchronization with BW

Procedure

Maintain the list of characteristics and InfoObjects that must be synchronized with BW, in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *InfoObject Mapping* > *Map Scenario Application Data to BW InfoObjects*.

This section is divided into two parts: standard application data and customer application data.

This Customizing activity contains field names provided as standard by SAP. For example:

Standard Application Data

Application Data	Description	BW InfoObject
ACCOUNT	Account	0BPARTNER
ACC_NODE	Account Node	0BP_GRP
CURRENCY	Currency	0CURRENCY
DISTR_CHAN	Distribution Channel	0DISTR_CHAN
...		

Extended InfoObject: This node contains field names created by the user and is required because all the characteristics that must be sent to BW as part of filters or variables may not be present in the standard system. You can customize new characteristics here with a structure name. For example:

Structures

Structure Name	Field Name	BW InfoObject
INCL_EEW_MKTPL_HEADER	PLAN_ID_EXT	/JBPB/PLAN
INCL_EEW_MKTPL_HEADER	SHOP_FORMAT_EXT	/JBPB/SFINDIC
INCL_EEW_MKTPL_HEADER	SOURCE_IND_EXT	/JBPB/SCINDIC
INCL_EEW_MKTPL_PRD	CU_UOM	/JBPB/CUNIT
INCL_EEW_MKTPL_PRD	PRD_TU_CU	/JBPB/TUCUPRD

2.2.2.6 Shadow Key Figures

> **i** Note
>
> The functionality to display weighted averages on the *Customer Business Planning* application is not delivered with the standard solution. However, customers can chose to enable this feature based on their business needs. This section explains an example of how the feature can be configured to work in the application.

The framework to display these weighted averages in the application uses the **Shadow Key Figures** concept, which is as follows:

- You can maintain plan data at any level along the product hierarchy in the plan.
- Data at the higher levels in the product hierarchy is usually data aggregated from all the lower-level nodes. When you maintain data at higher levels in the hierarchy, the data is disaggregated to all the child nodes.

Customer business plan data contains the following types of key figure:

- Volumes
- Prices
- Rates
- Percentages

For volumes, the system aggregates the data over the hierarchy and displays it as the sum of all the lower-level nodes. A similar aggregation, however, cannot be applied to prices, rates, or percentage values. Rates and percentages are defined as *No Aggregation* or `NO2` key figures in BW. This setting does not aggregate the value of rates or percentages along the hierarchy. When a value is entered against an `NO2` key figure at a higher level, the same value is distributed down to all lower-level nodes in the hierarchy.

In order to display the rates and percentages aggregated at higher levels on the UI, the concept of **shadow key figures** can be used. Shadow key figures store the weighted average of the rate and percentage at each level and display it to the user on the UI. When the user changes the value of a rate or percentage, the value is saved against the corresponding rate or percentage key figure in the query.

At runtime, the system swaps the *No Aggregation* key figures with the shadow key figures to display the weighted average.

Customize Shadow Key Figures in CRM

You maintain shadow key figures in your SAP CRM system in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *InfoObject Mapping* > *Map Shadow Key Figure*.

For information on the BW data model setup and calculation of absolutes, kindly refer to Shadow Key Figures [page 161] under *Configuration Settings for SAP BW* in this guide.

Related Information

Customer Business Planning Basics [page 57]

2.2.2.7 Latest Estimates

Context

You use this process to display latest estimates for your plan data. Latest estimates are a combination of actual data from the past and plan data in the future.

In a customer business plan:

- A separate source indicator with the value **1** stores the latest estimates data.
- The latest estimates row is editable in the delivered content and is set up in such a way that you can change the data in the current or future year.
- If you change the latest estimates at totals level in the middle of the current planning year, the plan data is distributed to the remaining portion of the future periods.

Procedure

To understand the procedure for the setup of aDSOs for actuals data, kindly refer to Actual Data [page 163] under *Configurations Settings for SAP BW* within this guide.

Related Information

Set Up Source Indicator in CRM [page 61]

2.2.2.8 Set Up CBP BW Queries

Context

This procedure explains how to define the important planning queries (input-enabled) and read queries for customer business planning.

Procedure

1. Define planning queries (input-enabled) in SAP Customer Business Planning.

   Separate input-enabled planning queries are created in the BW system in order to maintain the plan data in each of the views. For details on the setup of the BW data model, kindly refer to Volume Planning [page 166] and Value Planning [page 168] under*Configuration Settings for SAP BW* in this guide.
2. Define read queries in SAP Customer Business Planning.

   Separate read queries are created in the BW system to read the plan data in each of the views. For details on the setup of the BW data model, kindly refer to Setting Up Budget Monitor [page 166] and Versioning [page 183] under *Configuration Settings for SAP BW* in this guide.
3. 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.
4. Customize BW query profile for SAP Customer Business Planning.

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

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

   > **i Note**
   >
   > The query profile `QR_WEEKLVL` is delivered with the solution as an example.

   b. 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* > *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.

The following table lists the queries provided as an example along with the detailed mapping between the BW query and criteria profile/Virtual View Usage for volume/value planning:

> **i Note**
>
> This is just an example. The comprehensive list is beyond the scope of this document.

Example Queries

Criteria Profile ID	Virtual View Usage	BW Query ID	Scenario
BUDMON_U	200_BUDGET_MONITOR	/JBPB/APLN_OVRVIEW_KPI_MONITOR	Plan Overview Budget Monitor
KPIMON_U	200_KPI_MONITOR	/JBPB/APLN_OVRVIEW_KPI_MONITOR	Plan Overview KPI Monitor
IMKPIMON_U	321_SCN_IMPACT_KPIS	/JBPB/APLN_SCEN_IMPCT_KPI	Scenario Planning Impact KPIs
SM_TWTU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PLNPT_TU	Simplified Data Model - Product tree - Weekly - TU
SM_TWTU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_TU	Simplified Data Model - Product tree - Weekly - TU
PL_PP_CU	320_PRODUCT_PICKER_BW	/JBPB/C_PLN_PROD_ATTR	Product Picker CU Scenario Planning
PL_PP_TU	320_PRODUCT_PICKER_BW	/JBPB/C_PLN_PROD_ATTR	Product Picker TU Scenario Planning
TGTMON_U	240_BUDGET_MONITOR	/JBPB/APLN_SCEN_IMPCT_KPI	Assortment Budget Monitor
TGTMON_U	240_KPI_MONITOR	/JBPB/APLN_SCEN_IMPCT_KPI	Assortment KPI Monitor
TGTMON_U	320_BUDGET_MONITOR	/JBPB/APLN_SCEN_IMPCT_KPI	Plan Budget Monitor
TGTMON_U	320_KPI_MONITOR	/JBPB/APLN_SCEN_IMPCT_KPI	Plan KPI Monitor

Criteria Profile ID	Virtual View Usage	BW Query ID	Scenario
VC_UP	327_PLANNING_LAYOUT	/JBPB/C_VER_COMP_PNL	Version Comparison P&L
VC_UT	327_PLANNING_LAYOUT	/JBPB/C_VER_COMP_PNL_PROD_TREE	Version Comparison Product Tree

c. Assign the query profile to the sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *System Settings* > *Map Query Profile to Sales Area*.

2.2.2.9 Set Up Manual Planning Functions

Context

Planning functions can be triggered explicitly from the planning layout or implicitly on a defined planning event. In cases where the planning functions need to be executed explicitly, you can configure these planning functions as manual planning functions. These planning functions can be triggered from the *Plan* screen by the user.

Manual planning functions are available on the *Plan* screen under the context menu *More* > *Update Plan*.

Procedure

1. You can define your own planning functions in Customizing for *Trade Management* by choosing *Trade Management* > *Customer Business Planning* > *Internal Target Planning* > *Define Semantic Planning Function*.
2. Add each new planning function to the list of available planning functions for the *Plan/Scenario Planning* screen using the following steps:
   a. Navigate to the Customizing activity *Trade Management* > *General Settings* > *System Settings* > *Maintain Virtual View Framework Customizing*, then choose *Maintain Virtual Screens*.
   b. Select the row with screen number **`3.2.0 (P&L, Baseline and Calendar)/3.2.1 (Scenario Planning)`** and choose the *Define Controls* subnode.
   c. Select the row with the control ID **`PLANNING_FUNCTION`** and choose the *Define Elements* subnode.
   d. Insert a new record and enter the name of the new planning function as the element ID.
3. For each query configured in the *Plan* screen, maintain the query for a planning profile group in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Define Integrated Planning Profile Groups*.

4. Alternatively, you can configure events directly in the BW system.

   If you have configured planning functions with *Event ID*s in the range between **200** and **225** and configured the query in integrated planning profile group, the planning functions will be available according to the query.

Results

Each event triggered from the application is uniquely identified by an event handler and the sequence key in the event configuration is used to determine the order in which the planning functions are to be executed.

The filter key (Query/Custom) is used to determine whether the data from the base InfoProvider should be filtered based on the BAdI `IMP_EVT_PLANNING_FUNCT`.

For more details on the BAdIs for BW, kindly refer to Assign Planning Functions in the Common Configuration Guide for SAP Trade Management.

2.2.2.10 Controlling Execution of Planning Functions

Control planning function execution by using planning context.

Example

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, while loading a *Plan* screen.

On the other hand, in BW, you must implement the business add-in (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 the planning functions, see the standard BAdI implementation `/JBPB/CL_RSCRM_IMP_EVENT_PF`.

For more details on the BAdIs for BW, kindly refer to Assign Planning Functions 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_SAVE_PF	After saving a plan, the system loads all data again and executes after synchronization planning functions, which are not required at all. For example, copying reference data from reference aDSO to plan aDSO.
SKIP_PLAN_LOAD_PF	While loading a Customer Business Plan, after synchronization planning functions are being executed in BW if there are no changes in the assortment, then these planning functions may not be required to be executed. Therefore, CRM sends this planning context to BW; and in BW, you can write logic in the BAdI to avoid running these planning functions.
EXECUTE_ROLL_IN	Parameter EXECUTE_ROLL_IN is to be passed to BW on opening the overlay or on selecting a value from the scenario dropdown. This parameter is passed from the UI with ICF call to execute the *Roll-In* planning function on the fast promotion screen and the detailed promotion screen in case of the scenario dropdown.
SCN_PLANNING_PF	While copying a scenario, if the user chooses an alternative assortment which is not linked to any other scenario, then the CRM system sets this parameter and sends this information to the BW system. This information is used in BW to know whether planning functions configured on or after the synchronization event should get triggered or not.

2.2.2.11 Set Up Mass Updates and Queues

Context

In SAP Customer Business Planning, the following mass processes run in the background or queues.

- Customer business plan extension runs in the background if processing is not completed in a configured time frame.
- Assortment/PPH changes

Procedure

1. Set up the wait time for background processes per sales area.

   In Customizing for *Customer Relationship Management* choose ▶ *Trade Management* ▶ *General Settings* ▶ *System Settings* ▶ *Configure Wait Time for Background Processes per Sales Area* and configure the wait

time for a process to finish. If the relevant process is not finished in the configured time, the process either runs in the background or is scheduled in a queue.

2. Set up queues for mass processing.

   Some processes like promotion update, customer business plan update in case of overlapping scenario, and copying of previous year data are executed in background queues. These queues can be registered using transaction `SMQR`.

   The `CBP_PLAN_UPD_*`, `CBP_PROMO_UPD_*`, and `CBP_PLAN_CPY_*` queues must be monitored for SAP Trade Management background jobs. You can use the standard report `RSQIWKEX` to schedule the queues to run at a certain frequency.

3. To copy the current year latest estimates to previous year source indicator of next year of the plan, configure a manual planning function in BW.

   A sample planning function is delivered in standard to implement the required functionality. This planning function is triggered while saving the plan, extending the plan or while saving the assortment.

   For more information on the BW setup for assortment change, kindly refer to Assortments [page 161] under *Configuration Setthings for SAP BW* in this guide.

2.2.3 Setting Up Plan Overview

You display an overview of your customer business plan for a selected planning year.

The overview of the plan comprises the following:

- *Recent Promotions*
  Displays the promotions that you have recently navigated to in the system.
- *Past Promotions*
  Displays promotions with an end date in a configurable number of weeks in the past.
- *Upcoming Promotions*
  Displays promotions that started on the current date or are about to start in a configurable number of weeks.
- *Search Promotions*
  You use this to search for promotions within the current plan year.
- *Budget Monitor*
  Displays both event and non-event budgets. Each type of budget displays the following information:
  - Total Budget
  - Available Budget
  - Planned Budget
- *Plan KPIs*, optionally including buyer KPIs
  Displays KPIs for the current plan year and optionally the buyer-specific KPIs. The system displays each KPI in a separate tile in the *Plan Overview* screen. The *KPI* tile displays the following information:
  - Target value
  - Latest estimates value
  - Delta between target and the latest estimates

  If you define buyer-specific KPIs, the system calculates the buyer KPIs for each buyer and displays them in the *KPI* section.

You can optionally navigate to the *Product Tree* view of the plan from the KPI in the plan overview.

- *Reports*
  Displays each configured report as a tile in the *Plan Overview*.

The following topics explain each *Plan Overview* section together with the required setup activities.

2.2.3.1 Maintain Plan Overview and Search Parameters

Context

You maintain general parameters for the *Plan Overview* screen and global search in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Home Screen* > *Maintain Parameters for Plan Overview and Global Search*.

Procedure

1. Customize maximum number of recent promotions by entering a value for the `RECENT_MAX_HITS` parameter.

   In this step, you define the maximum number of promotions to be displayed in the *Recent Promotions* section of the *Plan Overview*.

   > **Example**
   >
   > If you enter **`100`**, the system displays the last 100 promotions that you have recently accessed in the system. Click on the plus icon at the bottom of the tile to view the complete list of recent promotions.
   >
   > Example: Parameter RECENT_MAX_HITS
   >
   > | Parameter Name | Parameter Value |
   > |---|---|
   > | `RECENT_MAX_HITS` | **`100`** |

2. Customize maximum number of past promotions by entering a value for the `PAST_MAX_HITS` parameter.

   You use this step to define the maximum number of promotions to be displayed in the *Past Promotions* section on the *Plan Overview*.

   > **Example**
   >
   > If you enter **`100`**, the system displays the last 100 promotions that ended in the past.

Example: Parameter PAST_MAX_HITS

Parameter Name	Parameter Value
PAST_MAX_HITS	**100**

3. Customize date type to retrieve past promotions by entering a value for the DATE_RANGE_TYPE parameter.

   The system uses this date type to retrieve past promotions, upcoming promotions, and all promotions.

   ### Example

   If you enter **PLAN** as the date type, the system considers the plan date of the promotion to retrieve the past promotions.

   Example: Parameter DATE_RANGE_TYPE

Parameter Name	Parameter Value
DATE_RANGE_TYPE	**PLAN**

4. Customize number of weeks to retrieve past promotions by entering a value for the PASTPROMO_WEEKS_RANGE parameter.

   The system uses this number of weeks to retrieve past promotions.

   ### Example

   If you enter **2** as the week range, the system considers promotions that ended two weeks before the current date.

   Example: Parameter PASTPROMO_WEEKS_RANGE

Parameter Name	Parameter Value
PASTPROMO_WEEKS_RANGE	**2**

5. Customize maximum number of upcoming promotions by entering a value for the UPCOMING_MAX_HITS parameter.

   In this step, you specify the maximum number of promotions to be displayed in the *Upcoming Promotions* section of the *Plan Overview*.

   ### Example

   If you enter **100**, the system displays the last 100 promotions that started on the current date or are about to start in a configurable number of weeks in the future.

Example: Parameter UPCOMING_MAX_HITS

Parameter Name	Parameter Value
UPCOMING_MAX_HITS	**100**

6. Customize date type to retrieve upcoming promotions by entering a value for the DATE_RANGE_TYPE parameter.

   The system uses this date type to retrieve upcoming promotions.

   ### Example

   If you enter **PLAN** as the date type, the system considers the plan date of the promotion to retrieve the upcoming promotions.

   Example: Parameter DATE_RANGE_TYPE

Parameter Name	Parameter Value
DATE_RANGE_TYPE	**PLAN**

7. Customize number of weeks to retrieve upcoming promotions by entering a value for the UPCOMING_WEEKS_RANGE parameter.

   The system uses this number of weeks to retrieve upcoming promotions that start within this period from the current date.

   ### Example

   If you enter **2** as the week range, the system considers promotions that will start in two weeks including the current date.

   Example: Parameter UPCOMING_WEEKS_RANGE

Parameter Name	Parameter Value
UPCOMING_WEEKS_RANGE	**2**

8. Customize maximum number of promotions to be displayed in the *All Promotions* section of the *Plan Overview* by entering a value for the MAX_HITS_ALL_PROMOTIONS parameter.

   ### Example

   If you enter **100**, the system displays the first 100 promotions from the list of all promotions retrieved for the selected plan year.

   Example: Parameter MAX_HITS_ALL_PROMOTIONS

Parameter Name	Parameter Value
MAX_HITS_ALL_PROMOTIONS	**100**

9. Customize date type to retrieve all promotions by entering a value for the `DATE_RANGE_TYPE` parameter.

> **Example**
>
> If you enter **`PLAN`** as the date type, the system considers the plan date of the promotion to retrieve all promotions.
>
> Example: Parameter DATE_RANGE_TYPE
>
> | Parameter Name | Parameter Value |
> |---|---|
> | `DATE_RANGE_TYPE` | **`PLAN`** |

10. Customize maximum number of promotions to be displayed in the *Search Promotions* section (after executing a search) on the *Plan Overview* by entering a value for the `MAX_HITS_GLOBAL_SEARCH` parameter.

> **Example**
>
> If you enter **`100`**, the system displays the first 100 promotions based on your search criteria.
>
> Example: Parameter MAX_HITS_GLOBAL_SEARCH
>
> | Parameter Name | Parameter Value |
> |---|---|
> | `MAX_HITS_GLOBAL_SEARCH` | **`100`** |

11. Customize date type for searching for promotions by entering a value for the `DATE_RANGE_TYPE` parameter.

    The system uses this date type to search for promotions.

> **Example**
>
> If you enter **`PLAN`** as the date type, the system uses the plan date of the promotion to search for promotions based on the date you select in the *Search Promotions* section.

Example: Parameter DATE_RANGE_TYPE

Parameter Name	Parameter Value
`DATE_RANGE_TYPE`	**`PLAN`**

2.2.3.1.1 Maintain Filter Profile for Promotions

Context

In this procedure, you define a filter profile to filter promotions based on the promotion status on the home screen.

A filter profile is specified to set the criteria for identifying the cancel status of promotions. The cancelled promotions are not to be considered for display on the *Plan Overview* screen.

Procedure

1. Define a filter profile and maintain the promotion status in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Home Screen* > *Maintain Filter Profile for Promotions*.

   The following profile is delivered with the solution:

Profile ID	Description
GEN	Generic Profile

   You can maintain the following entry under *Maintain Cancel Status for Promotions* with the delivered filter profile to filter promotions on the home screen.

Profile ID	Type	Status Profile	User Status
GEN	STAS	/JBPC/FI	E0014

   Using this entry, you can filter the rejected promotions from being displayed on the *Plan Overview* screen.

2. Map the filter profile to a sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Home Screen* > *Assign Filter Profile to Sales Area*.

2.2.3.2 Set Up Budget Monitor

Procedure

1. Define BW query for budget monitor.

   In this step, you set up the query that is used to retrieve the information displayed in the *Budget Monitor*.

   > **i Note**
   >
   > The BW read queries `/JBPB/APLN_SCEN_IMPCT_KPI` and `/JBPB/APLN_OVRVIEW_KPI_MONITOR` are delivered for *Plan* and *Plan Overview* screens, respectively, with the solution as an example. For event budget, the total budget is retrieved from *Funds Management* in CRM, and planned budget is retrieved from the BW query. The corresponding logic to retrieve event budget from funds is implemented in BAdI `/JBPC/VVF_BW_QUERY`. The default implementation `/JBPC/VVF_BW_QUERY_FILTER` has been delivered in the standard content.
   >
   > Also, decimal settings of displayed key figures respect the settings defined in the respective query.

2. Customize the query for the *Budget Monitor* in your SAP CRM system.

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

   The following table describes the example configuration delivered for the `QR_WEEKLVL` query profile:

   Example Configuration

Criteria ID	Virtual View Usage	Query ID	Description
`BUDMON_U`	`200_BUDGET_MONITOR`	`/JBPB/APLN_OVRVIEW_KPI_MONITOR`	Plan Overview Budget Monitor
`TGTMON_U`	`320_BUDGET_MONITOR`	`/JBPB/APLN_SCEN_IMPCT_KPI`	Plan Budget Monitor

3. Customize KPIs displayed in the *Event* section of the *Budget Monitor*.

   In this step, you display the budget information retrieved from the budget monitor query in the *Event* budget section.

   You maintain this mapping 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* > *Maintain KPIs for Query*.

> **i Note**
>
> The following values are delivered with the solution for query profile `QR_WEEKLVL`, criteria profile `BUDMON_U`, and Virtual View Usage `200_BUDGET_MONITOR`:
>
> Example Values
>
> | Key Figure Description | Key Figure Technical Name | Key Figure Grouping | KPI Area |
> |---|---|---|---|
> | Event Total Budget | `JBP_BUDG_EV_BUDG` | `200_BUDGET_MON` | `EV_BUDG` |
> | Event Available Budget | `JBP_BUDG_EV_AVAIL` | `200_BUDGET_MON` | `EV_AVAIL` |
> | Event Planned Budget | `JBPB_CBP_PROM_INVT_TOT` | `200_BUDGET_MON` | `EV_PLAN` |
> | Gross Sales Value | `JBPB_CBP_GSV_01` | `200_BUDGET_MON` | `GSV` |

4. (Optional) Implement BAdI to retrieve budget information from BW.

   You can optionally implement the BAdI `/JBPC/VVF_BW_QUERY` to retrieve budget monitor information if the delivered default implementation does not meet your requirements.

   The default logic to supply the input criteria to the budget monitor query; the mapping of the BW query result to the respective budget monitor event section; and the calculation of budget KPIs are implemented in the BAdI `/JBPC/VVF_BW_QUERY`. You can access this BAdI in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Business Add-Ins (BAdIs)* > *BAdI: Modification of Query Filter and Mapping of Query Response*.

   > **i Note**
   >
   > In the default implementation, the total budget is retrieved from *Funds Management* in CRM, and planned budget is retrieved from BW query.

2.2.3.3 Set Up KPI Monitor

Procedure

1. Customize internal and buyer targets displayed in the *KPI Monitor*.

   In this step, you set up the targets for the KPIs that you want to display on the *Plan Overview* screen.
2. Define BW query for *KPI Monitor*.

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

> **i Note**
>
> The BW read query `/JBPB/APLN_OVRVIEW_KPI_MONITOR` is delivered with the solution as an example.
>
> Also, the decimal setting of displayed key figures depends upon the BW query settings in the *KPI Monitor* query.

3. Configure the query for the 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* by choosing *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination*.

   > **i Note**
   >
   > The following table describes the example configuration delivered for the `QR_SIMP_DM` query profile:
   >
   > Example Configuration
   >
   > | Criteria ID | Virtual View Usage | Query ID | Description |
   > |---|---|---|---|
   > | `KPIMON_U` | `200_KPI_MONITOR` | `/JBPB/APLN_OVRVIEW_KPI_MONITOR` | Plan Overview 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* by choosing *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination*, then *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_SIMP_DM`, criteria profile `KPIMON_U`, and Virtual View Usage `200_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	*	`200_PERF_DETAIL`	
Any KPI for which the latest estimate v/s target needs to be displayed	*	`200_PERF_TOP`	

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* by choosing *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* by choosing *Trade Management* > *Customer Business Planning* > *Targets* > *Business Add-Ins (BAdIs)* > *BAdI: Recalculation of Delta Value*.

   > **i Note**
   >
   > The example implementation `/JBPC/VVF_BW_QUERY` is provided to calculate the difference between the target and actual values. This implementation has the following logic:
   >
   > 1. The targets for a given responsibility area and year are retrieved from the SAP CRM system.
   > 2. The latest estimates for different targets for a given responsibility area and year are retrieved for the SAP BW system using a BW query.
   > 3. The difference between the plan and actual internal target is calculated and displayed along with data retrieved above in the KPI monitor on different CBP screens.

6. Implement BAdI to reload KPI monitor on time selector changes on the *Plan* screen.

   You can optionally implement the method `CHANGE_QUERY_TRIGR_ON_TIME_SEL` of BAdI `/JBPC/VVF_BW_QUERY` to determine if the KPI monitor should be reloaded on changing the date selection from the time selector on the *Plan* screen. This BAdI is available in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Business Add-Ins (BAdIs)* > *BAdI: Modification of Query Filter and Mapping of Query Response*.

   If this method is not implemented, the KPI Monitor is not reloaded on when changes are made to the time selector.

Related Information

Set Up Buyer Targets Definition [page 42]

2.2.3.4 Customize Reports

Context

In this step, you customize the reports that you want to display on the *Plan Overview* screen.

Procedure

Maintain the URLs and parameters for the reports in Customizing for *Customer Relationship Management* under *UI Framework* > *Technical Role Definition* > *Transaction Launcher* > *Define URLs and Parameters*.

The logic for retrieving the report details is implemented using the BAdI `/JBPC/CBP_HOME_REPORT_DETER` in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Home Screen* > *BAdI: Determination of Reports*.

The following is an example of a URL generated:

```
http://<host>:<port>/BOE/OpenDocument/opendoc/openDocument.jsp?
sIDType=CUID&iDocID=FjDWBVhO5QIALCkAAAD3aNEBAFBWmkEW&X_BP_GRP_HIERARCHY=R3-
CRM-01&X_CALMONTH_FROM=01.2019&X_CALMONTH_TO=12.2019&X_CALWEEK_FROM=01.2019&X_CALWE
EK_TO=01.2020&X_NORMALIZED_UNIT=KG&X_PLAN_ID=J-00001249&X_SHOP_FORMAT=SUP
```

2.2.3.5 Customize Key Figures to Navigate to Customer Business Plan from Plan Overview

Context

In this step, you map the key figures on the *Plan Overview* screen with the key figures in the *Product Tree* view in the customer business plan. The system uses this key figure mapping when you navigate from the KPI in the *Plan Overview* screen to the *Product Tree* view in your customer business plan.

Procedure

Maintain the key figure mapping in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *CBP Planning* ▶ *Key Figure Planning* ▶ *InfoObject Mapping* ▶ *Map Query Key Figures* ▶.

The following table lists the example configurations delivered with the solution.

Example Configuration

Sequence	TU Pattern	CU Pattern	Tech ID of KFs in Plan Overview Screen KPI Query
9	`*_TUI_C_TU_KFGSV_*`	`*_CUI_C_CU_KFGSV_*`	`J310_KPI_SG_11`
37	`*_TUI_C_TU_KFNPT_*`	`*_CUI_C_CU_KFNPT_*`	`J310_KPI_NNT_01`
44	`*_TUI_C_TU_KFIPT_*`	`*_CUI_C_CU_KFIPT_*`	`J310_KPI_IPT_01`
45	`*_TUI_C_TU_KFIMA_*`	`*_CUI_C_CU_KFIMA_*`	`J310_KPI_IM_01`

2.2.4 Performing Volume Planning

You use this business process to plan volumes in a customer business plan.

In the delivered solution, volume planning can be performed for the following:

- *Sell-In Volumes*
  The volume of products that you sell to your retailer.
- *Sell-Out Volumes*
  The volumes that your retailer sells to the end consumer.

During implementation, you can choose to plan your volumes based on sell-in, sell-out, or both. When implementing volume planning, consider the following:

- You can choose to plan your sell-in/sell-out volumes in trading units.
- You must have key figures for planning TU volumes.
  This is because the trading units are plannable in the solution. NU (normalized unit) volumes are displayed by using the conversion factors and dynamically converting the TU volumes to NU volumes in the BW query. These are not stored as NU volumes and are not plannable.
- In the delivered solution, the system uses conversion factors retrieved from product master data to calculate volumes when you plan in trading or consumer units. The delivered content uses self-reference for the disaggregation.
- When you plan volumes at higher levels in the product hierarchy, the system uses reference volumes to disaggregate the volumes to the lower levels in the hierarchy.
  This means that a certain sub-level node with higher reference volumes receives a greater proportion of the distributed value, and vice versa.

Baseline Building Blocks

> **i Note**
>
> The *Baseline Building Blocks* are applicable only for the *Sell-In* volumes.

To perform baseline volume planning, you can use a variant for the planning views where you can choose a required set of key figures. This set of key figures allows you to build the baseline for the planning year using the previous year volume as a base, and then maintaining the incremental factors that apply to reach the new baseline volume.

For information about how variants help you to carry out baseline volume planning, see the application help.

Baseline Building Blocks allows you to maintain data in the following views:

- *Baseline Volume Build*: In this view, the data is displayed for a selected node in your planning product hierarchy for a selected time dimension in the time control.
  - If you select an year from the time selector, the data is displayed for all months in that year.
  - If you select a period, the data is displayed for each week in that period.
- *Baseline Product Tree*: In this view, the data is displayed for a selected key figure. The data is presented for all the products in your planning product hierarchy. The data is displayed for a selected time dimension in the time control.
  - If you select an year from the time selector, the data is displayed for all months in that year.
  - If you select a period, the data is displayed for each week in that period.
- *Baseline Summary*: In this view, the data is presented for all the products in your planning product hierarchy as an aggregation of all the weeks in the selected period. The data is displayed for a selected time dimension in the time control.
  - If you select an year from the time selector, the data is displayed for all months in that year.
  - If you select a period, the data is displayed for each week in that period.
- *Baseline Extended Product Tree*: In this view, the data is displayed for all three dimensions (product, key figures, and time dimension) in a single view.
  There are two views, *Tree* view and *Flat* view, for which you can configure different queries. The *Tree* view is a hierarchical view, whereas the *Flat* view appears as a spreadsheet and is also called as the presentation hierarchy.
  The data is displayed for a selected time dimension in the time control against all key figures for a default product hierarchy.
  - If you select an year from the time selector, the data is displayed for all months in that year.
  - If you select a month or quarter, the data is displayed for each week in that period.

  The extended product tree sub screen is enabled for unit type *TU*. You can personalize the key figures to be displayed in this view.

The following are a few queries for the *Baseline Building Blocks* screen, delivered as a sample for the standard configuration. The queries are maintained for query profile `QR_SIMP_DM`:

Criteria Profile	Virtual View Usage	Query	Description
`SM_OCU`	`310_PLANNING_LAYOUT`	`/JBPB/ABBB_BVP_SUMM_CU`	Simplified Data Model - Overview - CU

Criteria Profile	Virtual View Usage	Query	Description
SM_ONU	310_PLANNING_LAYOUT	/JBPB/ABBB_PBV_SUMM_CUNU	Simplified Data Model - Overview - NU
SM_OTU	310_PLANNING_LAYOUT	/JBPB/ABBB_PBV_SUMM_TU	Simplified Data Model- Overview - TU
SM_PMCU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PNLPT_CU	Simplified Data Model - PnL - Monthly - CU
SM_PMNU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PNLPT_CUNU	Simplified Data Model - PnL - Monthly - NU
SM_PMTU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PLNPT_TU	Simplified Data Model- PnL - Monthly - TU
SM_PWCU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PNLPT_CU	Simplified Data Model - PnL - Weekly - CU
SM_PWNU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PNLPT_CUNU	Simplified Data Model - PnL - Weekly - NU
SM_PWTU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PLNPT_TU	Simplified Data Model- PnL - Weekly - TU
SM_TMCU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PNLPT_CU	Simplified Data Model - Product Tree - Monthly - CU
SM_TMNU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PNLPT_CUNU	Simplified Data Model - Product Tree - Monthly -NU
SM_TMTU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PLNPT_TU	Simplified Data Model- Product tree - Monthly - TU
SM_TWCU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PNLPT_CU	Simplified Data Model - Product Tree - Weekly - CU
SM_TWNU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PNLPT_CUNU	Simplified Data Model - Product Tree - Weekly - NU
SM_TWTU	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_PLNPT_TU	Simplified Data Model- Product tree - Weekly - TU
SM_ETMTUF	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_EPT_TU_FLAT	Simplified Data Model - Extended Product Tree - Monthly-TU-Flat View
SM_ETWTUF	310_PLANNING_LAYOUT	/JBPB/ABBB_BVP_EPT_TU_FLAT	Simplified Data Model - Extended Product Tree - Weekly-TU-Flat View

Criteria Profile	Virtual View Usage	Query	Description
SM_ETMTUT	310_PLANNING_LAYOUT	/JBPB/ ABBB_BVP_EPT_TU_TREE	Simplified Data Model - Extended Product Tree - Monthly-TU-Tree View
SM_ETWTUT	310_PLANNING_LAYOUT	/JBPB/ ABBB_BVP_EPT_TU_TREE	Simplified Data Model - Extended Product Tree - Weekly-TU-Tree View

When you change data in the planning grid and choose *Save*, the planning function /JBPB/FUN_ABBB_CUPD is executed.

The following topics describe the necessary volume planning steps and the required implementation activities. For more information on the setup of the BW data model and the details on the *Update/Save* process, kindly refer to Volume Planning [page 166] under *Configuration Settings for SAP BW* in this guide.

Related Information

Variants and Subvariants

2.2.4.1 Get Reference Sell-In Volumes

Context

In this procedure, you transfer the sell-in volumes as baselines to your customer business plan. When retrieving sell-in volumes for your customer business plan, consider the following:

- Determine the source of the baseline
  - Sales history from SAP ECC
    If you are using SAP ECC for your sales and operation process, you can transfer the baseline volumes from your internal sales history.
  - Baseline from SAP APO
    If you are using SAP APO for planning your sales volumes, you can transfer them as baselines for your plan.
  - Any other source
    If you are using neither SAP ECC nor SAP APO, you can transfer your baselines from your own internal source.
- Transfer reference baselines to your customer business plan
  In the delivered solution, the reference baselines are retrieved from aDSO /JBPB/IREF with source indicator **1**. The data is transferred to the reference aDSO through an RFC /JBPB/UPDATE_TPO_RESULTS.

If you are using SAP Advanced Trade Management Analytics for forecasting, then the reference sell-out volumes are updated during plan prediction, which updates the forecasted sell-out volumes and innovation baselines in the reference key figures (which updates the sell-in base).

Procedure

For information on the setup of the BW data model and details on the reference data, kindly refer to Reference Data [page 164] under *Configuration Settings for SAP BW* in this guide.

2.2.4.2 Get Reference Sell-Out Volumes

Context

In this procedure, you transfer the sell-out volumes as a baseline to your customer business plan.

When implementing planning based on sell-out volumes, determine the source of the baseline:

- Retailer direct data
  If your retailer shares its sales volumes, you can use them as an external source. You can also transfer the retailer sales volume.
- Syndicated data
  You can also transfer the data from an external third-party source, such as Nielsen, IRI.
- SAP Demand Signal Management (SAP DSiM)
  If you are using DSiM as the source for your external data, you can transfer the sell-out volumes from DSiM.
- Transfer reference baselines to your customer business plan
  In the delivered solution, the reference sell-out volumes are also read from the same aDSO `/JBPB/IREF` as the sell-in volumes. If you are using SAP Advanced Trade Management Analytics for forecasting, then the reference sell-out volumes are updated during plan prediction, which updates the forecasted sell-out volumes in the reference key figures.

Procedure

For information on the setup of the BW data model and details on the reference data, kindly refer to Reference Data [page 164] under *Configuration Settings for SAP BW* in this guide.

2.2.4.3 Display Reference Volumes

Context

In the delivered solution, if the user selects *Latest Estimates v/s Reference* from the comparison dropdown, the reference data is displayed on the screen together with the latest estimates.

No additional configurations are required. The necessary configurations are covered in Set Up Data Comparisons Between Different Sources [page 62].

2.2.4.4 Display Comparison Data in Planning View

Context

The comparison options displayed in the drop-down selector in the planning screen can be used to compare the key figure values maintained in the planning layout with various comparison options maintained in Customizing, such as reference data, previous year data, versions data, latest estimate, and from scenario(s) of the plan. Comparison with scenarios is only available if there are scenarios created in the plans. The configured comparison options from different data sources are visible in the drop down, which can be selected to compare the reference, previous year, version, and scenario(s) data with the plan (LE latest estimate) data.

In the BW data model, there are different aDSOs in BW to store different data sources. For example, reference data is stored in `/JBPB/IREF` aDSO. This allows the flexibility to configure different BW queries for each of the data sources. For example, for the comparison option LE versus Reference, the plan data is fetched using a BW query for the planning layout. On click of zoom, an asynchronous call is made to read the reference data. The data xml from planning layout and the reference data BW queries are later merged and shown on UI.

The following Customizing changes have been done for the BW data model:

Procedure

1. Define BW-relevant criteria.

   In the BW data model, virtual view usage `320_EXTERNAL_LAYOUT` is defined to read the external data for various data sources. The following Customizing entries are delivered with the standard solution.

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

2. Define *Criteria Profile*.

   Criteria value combinations are a set of characteristics that define the view. The combination generally consists of *Criteria ID*s, such as *Calendar Type* (*Retailer* or *Internal*), *Unit* (TU/CU/NU), time frame (weekly/quarterly), *View Type* (Tree/P&L/Summary), and comparison option (LE vs. Reference, Previous Year, Latest Estimate, Version, Scenarios). For example, the *Criteria Profile* for reference data is a combination of the *Criteria ID*s with different values as shown in the following table.

Criteria Profile ID	Virtual View Usage	Description	Criteria ID	Criteria Value
SM_PMTUR	320_EXTERNAL_LAY-OUT	Simplified Data Model- PnL - Monthly - TU - Reference	CAL	INT_CAL
SM_PMTUR	320_EXTERNAL_LAY-OUT	Simplified Data Model- PnL - Monthly - TU - Reference	CAL	RET_CAL
SM_PMTUR	320_EXTERNAL_LAY-OUT	Simplified Data Model- PnL - Monthly - TU - Reference	TC	TU

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

Similarly, criteria profiles are delivered for other comparison options.

3. Configure BW Query Determination in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination*, then choose *Maintain Query Profile*.

   In the BW data model, query profile `QR_SIMP_DM` groups together all the criteria profiles. The *Criteria Profile ID*s created for P&L TU view have the following queries configured in the standard content. For example:

Criteria Profile ID	Virtual View Usage	Query ID
SM_PMTUR	320_EXTERNAL_LAYOUT	/JBPB/AREF_PNLPT
SM_PMTULEP	320_EXTERNAL_LAYOUT	/JBPB/APLN_PNLPT_TU
SM_PMTULPY	320_EXTERNAL_LAYOUT	/JBPB/APLN_PNLPT_TU

4. Set up BW reference data.

   For information on the setup of the BW data model and details on the reference data, kindly refer to Reference Data [page 164] under *Configuration Settings for SAP BW* in this guide.

5. Get reference KPI values.

   You transfer the reference KPIs to your customer business plan. While planning based on sell-out volumes, determine the source of the baseline:

   a. Define aDSO for reading reference sell-out volumes.

      In this step, you set up the aDSO for reading the sell-out volume that you want to use as a baseline in your customer business plan.

> **Note**
>
> In the delivered solution, the reference baselines for sell-out volume are also retrieved from the same aDSO `/JBPB/IREF`, as used for sell-in volume.

b. Define the planning function to read reference sell-out baselines.

   In this step, you set up the planning function that you use to copy the reference volume from the reference volume aDSO `/JBPB/IREF` to your plan aDSO `/JBPB/IPLAN`.

   > **Note**
   >
   > In the delivered solution, the reference volumes are copied to the plan using the planning function `/JBPB/FUN_REF_COPY`.

6. Display reference volumes.

   In the delivered solution, if the user selects *Latest Estimates v/s Reference* from the comparison dropdown, the reference data is displayed on the screen together with the latest estimates. This is achieved by using a separate query `/JBPB/AREF_PNLPT`.

7. Copy or maintain reference volumes to plan.

   For information on the setup of the BW data model and details on the reference data, kindly refer to Reference Data [page 164] under *Configuration Settings for SAP BW* in this guide.

Related Information

Set Up Data Comparisons Between Different Sources [page 62]

2.2.4.5 Display Latest Estimates for Volumes

Context

You use this step to display the latest estimates for volumes in SAP Customer Business Planning. The latest estimates for volumes are prepared by combining the actual sales volumes in past periods with the customer business plan volumes in future periods.

Procedure

For information on the setup of the BW data model and details on latest estimates, kindly refer to Prepare Latest Estimates for Volumes [page 163] under *Configuration Settings for SAP BW* in this guide.

Related Information

Latest Estimates [page 68]

2.2.5 Performing Value Planning

You can use this business process if you want to plan prices and non-promotional terms within your customer business plan. The planning of prices and non-promotional terms is referred to as **value planning**.

In the content delivered as an example, you can plan the following prices:

- List price
- Cost of goods
- Retailer shelf price

In the content delivered as an example, you can plan the non-promotional term *Efficiency Discount*.

When implementing value planning, you must consider the following:

- You can plan prices and non-promotional terms in trading units.
- In the delivered solution, the system uses conversion factors retrieved from product master data to calculate prices and non-promotional terms when you plan in trading unit.
- When you plan prices and non-promotional terms (percentage and rate) at a higher level in the product hierarchy, the system copies the same price to all the lower-level nodes in the hierarchy.
- When you plan lumpsum, non-promotional terms at a higher level in the hierarchy, the system uses self-reference to distribute the lumpsum amounts to the lower levels. This means that the products with higher lumpsum amounts previously will receive a greater proportion of the distributed value, and vice versa.

The following topics describe the necessary steps in value planning and the required implementation activities.

2.2.5.1 Get Reference Prices and Non-Promotional Terms

Context

You use this step to transfer the references prices and non-promotional terms as baselines to your customer business plan.

Procedure

1. Retrieve the reference prices and terms using ECC as an internal source.

   For information on the setup of the BW data model and details on the reference data, kindly refer to Reference Data [page 164] under *Configuration Settings for SAP BW* in this guide.

   > **i** Note
   >
   > If you want to use an external source other than ECC for retrieving prices and terms, you must develop your own means as part of a customer implementation. You can use the reference rates aDSO `/JBPB/IREF` as the staging aDSO for this purpose. In the delivered content, the reference data for rates is read from this aDSO and displayed against source indicator **3**.

2. Retrieve the reference prices from executing a plan prediction

   You can update the reference volumes by executing a plan prediction which will update the plan with reference sell-out baseline volumes based on the forecasting mechanism as delivered in Advanced Trade Management Analytics.

2.2.5.2 Display Reference Prices and Non-Promotional Terms

Context

On the comparison dropdown, when the user selects *Latest Estimates v/s Reference*, the reference volumes are read from the corresponding aDSO `/JBPB/IREF` through the reference queries, which then display the reference rows.

When the user selects *Latest Estimates v/s Reference* in the dropdown in the planning layout, the data for source indicator **1** is displayed.

No additional configurations are required. The necessary configurations are covered in Set Up Data Comparisons Between Different Sources [page 62].

2.2.5.3 Copy/Maintain Reference Prices and Non-Promotional Terms to Plan

Context

You use this procedure to copy the reference prices and non-promotional terms from your reference data to your customer business plan. You have to manually trigger this process by executing the *Copy from reference data* function on the customer business plan user interface. This option is available by right-clicking on the reference row.

When you execute this step, the system calls a planning function to copy the data from the reference row to the latest estimates row. The plan data is copied over from the *Latest Estimates* data each time data is changed in the planning layout.

Procedure

Define planning function to copy reference volumes to plan.

In this step, you set up the planning function that copies the reference prices and non-promotional terms from the reference data to the plan data.

For more information on the setup of the BW data model and details on copying reference data, kindly refer to Reference Data [page 164] under *Configuration Settings for SAP BW* in this guide.

2.2.5.4 Display Latest Estimates for Prices and Non-Promotional Terms

Context

You use this step if you want to display the latest estimates for the prices and non-promotional terms in your customer business plan.

The latest estimates for prices and non-promotional terms are retrieved from the planning aDSO (`/JBPB/IPLAN`) and the promotion staging aDSO (`/JBPB/IPRSTG`), respectively.

No additional implementation is required here.

Related Information

Display Latest Estimates for Volumes [page 93]

2.2.6 Configure Retailer View Planning

Context

You can use the *Retailer View* in the customer business plan to embed an SAP Analytics Cloud (SAC) report in the page. This allows the Key Account Manager to view his retailer's P&L with the specific retailer's margin calculations.

To embed a report, you must maintain the URL of the specific report in Customizing for CRM. You can embed a single report in the *Retailer View*. These reports can have parameters dynamically mapped to the report based on the user context. For example, the plan that the user is viewing or the year in which the user was planning.

> **Example**
>
> An example of a link:
>
> ```
> https://<SAC-SERVER>/sap/fpa/ui/tenants/<TENANT>/bo/story/
> 3C599D5AE903381CE10000000A4E740E?mode=present&f01Dim=0CALYEAR&f01Model=t.S:<SAC-
> STORY-ID>&f01Val=2022&v01Model=t.S:<SAC-STORY-
> ID>&v01Par=PL_ID&v01Val=J-00002097&v02Par=LE01_WEEK_PL_WF&v02Val=202152&v03Par=LE
> 01_WEEK_PL_WT&v03Val=202252
> ```

To display an SAC report, you must configure the report URL in the CRM system.

Procedure

1. Maintain the retailer report URL in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Retailer View Planning* > *Define Retailer View Report Configuration*.
2. After defining the URL and report profile, assign the report profile to a sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Retailer View Planning* > *Assign Retailer View Report Group to Sales Area*.

2.2.7 Maintaining Plan Calendar

You use this process to set up the customer business plan calendar that you can optionally use in your plan.

The customer business plan calendar allows you to:

- Displays promotions
  - For the types configured in Customizing.
  - For the current planning year.
- Optionally, display other annual promotions or marketing events in a split calendar
- Create, copy, or delete promotions
- Display details of a promotion in a tooltip with configurable attributes
- Filter promotions based on a fixed set of attributes
- Assign external promotions to a customer business plan

The following topics describe the necessary implementation activities.

2.2.7.1 Maintain Basic Settings for CBP Calendar

Context

In this procedure, you configure all the basic calendar settings in order to use the calendar within your customer business plan.

> **i** Note
>
> You maintain the CBP calendar settings in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Calendar* > *Maintain Settings for Calendar*.

Procedure

1. Maintain the sales area for which you want to configure the calendar settings by choosing *Maintain Sales Area*.

   The system allows you to configure the CBP calendar differently for each sales area.
2. Define a list of colors that you want to use to display promotion bars in your customer business plan calendar by choosing *Available Calendar Colors*.

   The colors you maintain are offered as input help (F4) when you customize the color of your bars based on status and type.

3. Define a default color that the system uses to display the promotion bars in your customer business plan calendar by choosing *Default Calendar Colors*.

   The system uses this setting if you have not defined a different color based on your sales area. Before you define the default calendar colors, you must maintain the available calendar colors as described in the previous step.

4. Define a different color code for each status of your promotion by choosing *Maintain Sales Area* > *Assign Color to Status*.

   This setting allows you to visually differentiate your promotion bars based on their status. Before you define the color code, you must maintain the available calendar colors.

2.2.7.2 Display Promotions on Plan Calendar

Context

You use this procedure if you want to display short-term promotions and long-term agreements in your customer business plan calendar.

> **i** Note
>
> You maintain these settings in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Calendar* > *Maintain Settings for Calendar*.

Procedure

1. Configure the short-term promotion types and long-term agreement types that you want to display and maintain in your customer business plan calendar by choosing *Maintain Sales Area* > *Maintain Detailed Promotion Types and Color*.

   Before you maintain the short-term promotion types and long-term agreement types in this Customizing activity, you must define them under *Trade Management* > *Customer Business Planning* > *Promotion Planning* > *Define Allowed Promotion Types*.

2. Maintain the color code for short-term promotions and long-term agreements by choosing *Maintain Sales Area* > *Maintain Detailed Promotion Types and Color*.

   The system uses this color code to display the short-term promotion and long-term agreement bar. This setting allows you to visually differentiate between different promotion types in your customer business plan calendar.

3. After you have defined the query (to get short-term promotion and long-term agreement details for display in the CBP calendar) in your BW system, you must maintain it in Customizing by choosing *Maintain Sales Area* > *Maintain Promotion Query*.

   You set up the read query that you want to use to derive the promotion data from the BW system. Additionally, you can mention the read query for long-term agreements. The system uses this data and displays it in the promotion bar and tooltip.

   > **i** Note
   >
   > The read query `/JBPB/C_PRM_PROMO_KPI_Q004` for short-term promotions and long-term promotions is delivered with the solution as an example. It accepts the characteristic `0CRM_MKTELM` as the input and returns the total promotion investment that is displayed in the promotion toolbar.

4. After you have maintained the promotion query, you must maintain the key figure that will be read from the query to display short-term promotion and long-term agreement key figures in the promotion tooltip.

   You can maintain key figures by choosing *Maintain Sales Area* > *Maintain Promotion Query* > *Key Figures*.

2.2.7.3 Display Headquarters Promotions (Optional)

Context

You use this process if you want to display headquarters promotions in your customer business plan calendar. Headquarters promotions are also referred to as national promotions and are created at higher levels in the account hierarchy.

In SAP Customer Business Planning, you:

- Can display headquarters promotions in a split calendar.
- Can add headquarters promotions to your plan.
- Cannot change the headquarters promotion from the plan.
- Can navigate to the headquarters promotion from the plan calendar and edit it there if you have the relevant access rights.

In the delivered solution, the logic for retrieving headquarters promotions is written in a BAdI.

Procedure

Implement BAdI to get headquarters promotions.

You use this step if you want to define your own logic to determine the headquarters promotions that you want to display in your customer business plan calendar. You can do so by implementing the BAdI /

JBPC/CAL_HQ_PROMO, which you can access in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Calendar* > *Business Add-Ins (BAdIs)* > *BAdI: Calendar – Headquarters Promotion*.

> **Note**
>
> The default implementation /JBPC/CAL_GET_HQ_PROMO is delivered with the solution.

2.2.7.4 Display Marketing Events and Campaigns in Split Calendar

Context

You use this procedure if you want to display marketing events/campaigns and key timings in your customer business plan calendar. The system displays the campaigns and key timings in a split calendar that you define for your customer and that fall within the current plan year.

Campaigns are displayed in the split calendar when *Marketing Events* are selected under the *Plan Events* option of *Calendar Events*.

The logic to determine marketing events (campaigns and key timings) is available in BAdI /JBPC/CAL_SEARCH. This BAdI is accessible in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Calendar* > *Business Add-Ins (BAdIs)* > *BAdI: Determine Marketing Events*.

The following steps describe the required configuration activities.

> **Note**
>
> You maintain these settings in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Calendar* > *Maintain Settings for Calendar*.

Procedure

1. Customize campaign types and color.

   In this step, you assign the campaign types that you want to display in the customer business plan calendar. You maintain the campaign types by choosing *Maintain Sales Area* > *Maintain Campaign Types and Color*.

   If you want to visually differentiate between different campaign types, you can maintain a color for each campaign type.

After you have defined the campaign type, you can also define the status of the campaign type that should be considered for display in the marketing calendar. You can maintain this status by choosing *Maintain Sales Area* > *Maintain Campaign Types and Color* > *Status*.

2. Customize key timing types and color.

   In this step, you assign the key timing types that you want to display in the customer business plan calendar by choosing *Maintain Sales Area* > *Maintain Key Timings and Color*.

   If you want to visually differentiate between different key timing types, you can maintain a color for each key timing type.

2.2.7.5 Display Calendar Bar Texts

Context

You use this procedure if you want to display additional attributes in your calendar bar texts.

Procedure

1. Define the attribute groups that you want to display in the promotion bar in the customer business plan calendar.

   You can define the attribute groups in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Calendar* > *Define Attribute Groups for Bar Text* > *Define Attribute Group ID*.

2. Assign the attributes to an attribute group by choosing *Define Attribute Group ID* > *Assign Attributes to Attribute Group*.
3. Assign the groups to the business role and promotion type in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Calendar* > *Define Role Settings* > *Select Business Role* > *Assign Bar Text Attribute Group to Business Role*.
4. Implement the BAdI (`CRM_MCAL_TOOLTIP_BARTEXT`) to retrieve additional promotion bar attributes from the system.

   > **i** Note
   >
   > You only need this implementation if you select **`customer-specific text`** as an attribute within your attribute group. If you select other attributes from the list of available attributes, the system retrieves the value and displays it in the calendar.

You can access the BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Calendar* > *Business Add-Ins (BAdIs)* > *BAdI: Definition of Additional Tooltip and Bar Texts*.

2.2.7.6 Copy Promotions

Context

You use this procedure if you want to copy promotions within your customer business plan calendar. The system allows you to copy the promotion from the year that you have displayed in the split calendar.

The logic for copying attributes from the source to the target promotion is implemented in a BAdI.

Procedure

Implement BAdI `/JBPC/CAL_AFTER_COPY` to copy the promotion attributes from the source promotion to the target promotion.

You can access this BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Calendar* > *Business Add-Ins (BAdIs)* > *BAdI: Change DP or DTP After Copy*.

> **i** Note
>
> The default implementation `/JBPC/DEF_CAL_AFTER_COPY_DTP` of this BAdI is delivered with the solution.

2.2.7.7 Assign Promotions to Plan

Context

You use this procedure if you want to assign external promotions that were created outside SAP Customer Business Planning to your customer business plan. Promotions that are created outside SAP Customer Business Planning are not linked to your customer business plan automatically. You can assign these promotions to your customer business plan using this feature. This might be necessary if you created your customer business plan after your promotions or if you went live with SAP Trade Promotion Planning and Management before going live with SAP Customer Business Planning.

The unassigned promotions are displayed when you click *Add Promotion* > *Add Other Promotion* in the plan calendar.

The logic for determining unassigned promotions is defined in a BAdI and the logic to roll up the data from the promotion to the plan is written in a planning function in BW.

Procedure

1. Implement BAdI to determine unassigned promotions.

   You use this step if you want to implement your own logic to determine unassigned promotions that you want to link to your customer business plan.

   You can find the BAdI in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Promotion Planning* > *Business Add-Ins (BAdIs)* > *BAdI: Determine Unassigned Promotions*.

   A default implementation of the BAdI (`/JBPC/IM_UNASSIGNED_TPM`) is delivered with the solution and contains the following logic for determining unassigned promotions:

   - Promotions that exist between the start and end date of the customer business plan
   - Promotions that have a business partner hierarchy node that is the same as the hierarchy node of the responsibility area or any of its child nodes
   - Promotions that have at least one product belonging to any of the product categories of the responsibility area of the plan
   - Promotions of types short-term promotion (shipment), short-term promotion (consumption), or long-term agreement (shipment)
2. Define planning function to link unassigned promotion to plan scenario.

   You use this step to implement your custom planning function to link unassigned promotions to the customer business plan scenario.
3. Define planning function to roll up promotion data from unassigned promotion to customer business plan.

   You use this step if you want to define your own planning function to roll up the data from the unassigned promotion to your customer business plan.

   In the delivered content, the planning function `/JBPB/FUN_APRM_RU` rolls up the data from the promotion to the staging aDSO `/JBPB/IPRSTG` from the promotion aDSOs `/JBPB/ISTP and /JBPB/ILTA`.

   The planning function `/JBPB/FUN_APRM_RU` can be configured with a custom filter at event ID **25** on query `/JBPB/APLN_M_PNL_MASTER`.

2.2.8 Planning Headquarters Promotions

You can set up your own headquarters promotions for use in SAP Customer Business Planning.

A headquarters promotion is a short-term promotion created at a higher level in the customer hierarchy.

The logic for determining the headquarters promotion is implemented in a BAdI, as explained in Display Headquarters Promotions (Optional) [page 100]. The system calls the execute object method `COPY_HQ_PROMO` for the marketing object `MKT_TRADE` at this time. The corresponding action handler class is `/JBPC/CL_CRM_MKTPL_IB_HQ_PROMO`.

The delivered solution assumes that headquarters promotions are merely templates and have an effect only when you add them to the customer business plan. If you set up and define your own headquarters promotion, you must not integrate it with *Funds Management* or allow condition generation.

The following topics cover the implementation activities that are required when you add a headquarters promotion to your plan.

2.2.8.1 Set Up Headquarters Promotion

Context

In this procedure, you set up your own headquarters promotion for use in SAP Customer Business Planning.

You can create promotions using the SAPUI5 user interface. For more information, see the configuration guide for SAP Trade Promotion Planning and Management.

Procedure

Define your own promotion type for headquarters promotions in Customizing for *Customer Relationship Management* under *Marketing* > *Marketing Planning and Campaign Management* > *Basic Data* > *Define Types/Objectives/Tactics*.

In the delivered content, the system uses the following promotion types:

- **STAS**
- **STAC**
- **LTAS**

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

Related Information

Common Configurations for Promotion Planning

2.2.8.2 Add Headquarters Promotion to Plan

Context

In this procedure, you can write your own logic for adding a headquarters promotion to your plan.

Procedure

1. Implement BAdI to copy attributes from headquarters promotion to short-term promotion.

   In this step, you can write your own logic to copy the attributes from the headquarters promotion to the short-term promotion when adding a headquarters promotion to your plan. You can change the logic by implementing the BAdI `/JBPC/CRM_MKTPL_HQ_PROMOTION`, method `COPY_HQ_PROMOTION_TO_CBP`. The BAdI is filter-dependent on the promotion type. The promotion type filter contains the value of the headquarters promotion type.

   The fields in the corresponding promotions are defaulted in the implementation of BAdI `/JBPC/CRM_MKTPL_HQ_PROMO` with a filter on the short-term promotion type. Use the `COPY_HQ_PROMOTION_TO_CBP` method to enable this and refer to the example BAdI implementations /JBPC/IM_CRM_MKTPL_HQ_FINAL.

2. Define the mapping of the promotion type from headquarters to target promotion in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Promotion Planning* > *Maintain Promotion Copy Control for CBP* >, then *Mapping of Promotion Types*.

   The following example configuration is delivered with the solution:

   Mapping of Promotion Types

Source Campaign Type	Target Campaign Type
STAS	**STAS**
STAC	**STAC**
LTAS	**LTAS**

3. Define a planning function to copy the data from the headquarters promotion for type *short-term* to your customer business plan.

   In the delivered solution, the system uses planning function `/JBPB/FUN_HQP_TO_STP`.

   For more information on the setup of the BW data model, kindly refer to Headquarters Promotions under *Configuration Settings for SAP BW* in the Configuration Guide for SAP Trade Promotions and Planning Management.

2.2.9 Planning Fast Promotions

You use this business process if you want to create promotions using the promotion fast entry table in the SAP Customer Business Planning application.

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* screen.

For more information, see the configuration guide for SAP Trade Promotion Planning and Management.

Related Information

Creating Fast Promotions from Customer Business Plan

2.2.10 Versioning and Approval Plans

You use this business scenario to create, approve, and delete versions in SAP Customer Business Planning.

The system allows you to create multiple versions of a customer business plan and it's scenarios. This helps you to take a snapshot of your plan and scenario's data. You can compare your plan data with the version data using the version comparison screen.

> **i** Note
>
> In the standard solution, the version approval process is valid only for versions of an operational plan and not for versions of a scenario.

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

You can choose to compare:

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

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

Profit & Loss View

The Profit & Loss view contains the list of key figures and shows the annual data along with the planning P&L. You can expand or collapse the various nodes and use the product selector to show data for a certain category or product only. You can also choose to view the information according to the internal or retailer calendar.

Product Tree View

The Product Tree view shows the annual data along with the planning product hierarchy. You can expand or collapse the different nodes in the planning product hierarchy and use the key figure selector to restrict the information displayed. You can also choose to view the information according to the internal or retailer calendar.

When implementing versioning, you must consider the following points:

- The system allows you to create any number of versions.
- You can create a version with a version type that is configurable.
- When you create the version, the snapshot of the plan data and promotion data (IPRSTG) is taken for the selected planning year.
- Using the version comparison screen, you can compare any version with your operational plan or scenario.
- Only the last approved version can be compared within the *Profit and Loss*, *Product Tree*, or *Summary* view.
- You can implement your own logic to perform the necessary actions during version approval.
- You can delete a version for a configurable version type and status.
- You can define your own status profile for your version types that you want to use during your version approval process and version life cycle management.
- You can define if you want to approve a version automatically or externally.

Necessary steps and the required setup activities are discussed in below sub sections. For information on the setup of the BW data model, kindly refer to Versioning [page 183] under *Configuration Settings for SAP BW* in this guide.

Related Information

Performing Scenario Planning [page 116]

2.2.10.1 Customize Version Type

Context

In this step, you define your own version type for use in SAP Customer Business Planning.

Procedure

Maintain the version type for the plan version in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *CBP Planning* ▶ *Versioning* ▶ *Maintain Version Type* ▶.

The system allows you to select a version type during version creation and stores it against the created version.

The following version types are delivered with the solution.

Version Types

Version Type	Version Description
C	Customer Approval
F	Forecast
I	Internal Approval
B	Baseline Approval

2.2.10.2 Customize Status Profile for Version

Context

In this step, you define the status profile that should be used for the plan version.

Procedure

Maintain the status profile in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *Define Status Profile for User Status*.

The status profile `/JBPC/VV` is delivered with the solution as an example for all version types except the baseline approval version type. If you want to define your own status profile, you must map your user status to the following transactions:

Mapping of User Status to Transaction

Status Number	Status	Text	Transaction
10	OPEN	Open	
20	INVE	Internal Approved	INVV
30	SENN	Send for Approval	VPAR
40	EXVV	External Approved	EXVR

Status Number	Status	Text	Transaction
50	REJC	Rejected	VVRE

Similarly, profile /JBPC/VB is delivered with the solution as an example for baseline volume approval. If you want to define your own status profile, you must map your user status to the following transactions:

Mapping of User Status to Transaction

Status Number	Status	Text	Transaction
10	OPEN	Open	
20	SENN	Send for Approval	VPAR
30	EXVV	External Approved	EXVR
40	REJC	Rejected	VVRE

2.2.10.3 Assign Status Profile to Version Type

Context

In this step, you can assign a status profile to a version type.

Procedure

Assign status profiles to version types in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Versioning* > *Assign Status Profile to Version Type*.

The following status profiles are delivered with the solution:

Configured Status Profiles

Version Type	Status Profile
C	/JBPC/VV
F	/JBPC/VV

Version Type	Status Profile
I	/JBPC/VV
B	/JBPC/VB

2.2.10.4 Maintain Allowed Statuses and Type for Deletion

Context

In this step, you maintain the version types and statuses that are allowed for deletion. You maintain a mapping between version type and status for which a version can be deleted.

Procedure

Maintain the status and type in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *CBP Planning* ▶ *Versioning* ▶ *Delete Version* ▶.

The following settings are delivered with the solution:

Configured Version Types and Statuses

Version Type	Status Profile	System Status
C	/JBPC/VV	I0752
F	/JBPC/VV	I1002
I	/JBPC/VV	IV002
B	/JBPC/VB	I1002
B	/JBPC/VB	IV004

2.2.10.5 Implement BAdI to Update Version Before Saving

Context

In this step, you define your own logic that you want to implement before saving a version.

The logic can be changed by implementing the BAdI as described below:

BAdI to Update Version Before Saving

BAdI Definition	Method	Filter
/JBPC/CRM_CBP_VERSIONING	BEFORE_SAVE	VERSION_TYPE

Procedure

Implement the BAdI in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *CBP Planning* ▶ *Versioning* ▶ *BAdI: CBP Versioning* ▶.

The following example implementations are provided for all version types:

Example Implementations

BAdI Implementation	Filter
/JBPC/CBP_CUSTOMER_VERSIONING	VERSION_TYPE = ‘C’
/JBPC/CBP_FORECAST_VERSIONING	VERSION_TYPE = ‘F’
/JBPC/CBP_INTERNAL_VERSIONING	VERSION_TYPE = ‘I’
/JBPC/CBP_BASELINE_VERSIONING	VERSION_TYPE = ‘B’

The example BAdI implementation contains the following logic:

1. If the version type is **C** or **F**, set the version status to *Internal Approved* and copy the plan data to the version in the BW system.
2. Otherwise, trigger the approval process and set the version status to *Send for Approval*.

2.2.10.6 Implement BAdI to Determine Approver of Version (Optional)

Context

In this step, you implement the logic to determine the approver of your plan version.

Procedure

Implement this BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Versioning* > *BAdI: CBP Versioning*.

BAdI: CBP Versioning

BAdI Definition	Method	Filter
/JBPC/CRM_CBP_VERSIONING	DETERMINE_APPROVER	VERSION_TYPE

The following example implementations are provided for all version types:

Example Implementations

BAdI Implementation	Filter
/JBPC/CBP_CUSTOMER_VERSIONING	VERSION_TYPE = 'C'
/JBPC/CBP_FORECAST_VERSIONING	VERSION_TYPE = 'F'
/JBPC/CBP_INTERNAL_VERSIONING	VERSION_TYPE = 'I'
/JBPC/CBP_BASELINE_VERSIONING	VERSION_TYPE = 'B'

The example BAdI implementation sets the user currently logged in as the approver of the version.

2.2.10.7 Implement BAdI to Notify Approver (Optional)

Context

In this step, you define your own logic to notify the approver about a plan version approval.

The logic can be implemented in a BAdI and the method according to the table below:

BAdI to Notify Approver

BAdI Definition	Method	Filter
/JBPC/CRM_CBP_VERSIONING	NOTIFY_APPROVER	VERSION_TYPE

Procedure

Implement the BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Versioning* > *BAdI: CBP Versioning*.

The following example implementations are provided for all version types:

Example Implementations

BAdI Implementation	Filter
/JBPC/CBP_CUSTOMER_VERSIONING	VERSION_TYPE = ‘C’
/JBPC/CBP_FORECAST_VERSIONING	VERSION_TYPE = ‘F’
/JBPC/CBP_INTERNAL_VERSIONING	VERSION_TYPE = ‘I’
/JBPC/CBP_BASELINE_VERSIONING	VERSION_TYPE = ‘B’

In the default implementation, the system triggers a CRM workflow to notify the approver. Once the workflow is triggered, the approver receives the version approval in his or her inbox.

2.2.10.8 Implement BAdI to Approve Version

Context

In this step, you can implement your own logic during version approval.

The logic can be implemented in the method and the BAdI as described below:

BAdI to Approve Version

BAdI Definition	Method	Filter
/JBPC/CRM_CBP_VERSIONING	APPROVE_VERSION	VERSION_TYPE

Procedure

Implement this BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Versioning* > *BAdI: CBP Versioning*.

The following example implementations are provided for all version types:

Example Implementations

BAdI Implementation	Filter
/JBPC/CBP_CUSTOMER_VERSIONING	VERSION_TYPE = 'C'
/JBPC/CBP_FORECAST_VERSIONING	VERSION_TYPE = 'F'
/JBPC/CBP_INTERNAL_VERSIONING	VERSION_TYPE = 'I'
/JBPC/CBP_BASELINE_VERSIONING	VERSION_TYPE = 'B'

In the default implementation for filter value 'I', the following logic is implemented:

1. Determine the funds and dynamic funding rates for the products/product categories from the responsibility area of your customer business plan.
2. Get latest estimates from the plan and determine the new dynamic funding rate.
3. Post the budget to the funds using the new dynamic funding rate.
4. Copy the data from the approved version to the plan for comparison on the planning screens.

2.2.10.9 Define Planning Functions to Copy Data from Planned to Versions aDSOs

Context

In this step, you can define your own planning function to copy the plan data to the version aDSO during version creation.

Procedure

For information on the setup of the BW data model and details on copying version data, kindly refer to Copy Plan Data to Version [page 185] under *Configuration Settings for SAP BW* in this guide.

2.2.10.10 Configure Queries for Version Comparison

Context

In this step, you can configure your own queries for version comparisons.

Procedure

Maintain the BW query for comparing versions 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*.

The following configuration is delivered with the solution:

Assign Criteria Profile and Query ID

Virtual View Usage	Query ID	Description	Criteria Profile
327_PLANNING_LAYOUT	/JBPB/C_VER_COMP_PNL	Version Comparison P&L	VC_UP 327_PLANNING_LAYOUT /JBPB/C_VER_COMP_PNL
327_PLANNING_LAYOUT	/JBPB/C_VER_COMP_PNL_PROD_TREE	Version Comparison Product Tree	VC_UT 327_PLANNING_LAYOUT /JBPB/C_VER_COMP_PNL_PROD_TREE

The following configuration has been delivered for the product picker on the version comparison screen:

Virtual View Usage	Query ID	Description
320_PRODUCT_PICKER_BW	/JBPB/C_VERS_PROD_PICK_TU	Product Picker TU Plan

With this configuration, the product picker on the version comparison screen will show products from the versions that are being compared, with only the CRM attributes listed.

2.2.11 Performing Scenario Planning

You can maintain and configure scenarios for your customer business plan. You must have already created a customer business plan before you can perform scenario planning.

An operational plan is the default (or first) scenario. A scenario is a variant of your plan that is used to identify the optimal plan that balances both your requirements and those of your retailer in order to achieve the desired targets.

The system allows you to create a maximum of three scenarios (apart from the operational plan) for a given planning year. It also allows you to compare the KPIs (Key Performance Indicators) of scenarios and the operational plan for the planning year. You can activate the most suitable scenario for a planning year. Each scenario can also be displayed in the detailed view (in the same way as an operational plan).

Every scenario is represented by a unique source indicator in the SAP BW system. In the delivered solution, the three scenarios are represented by the three source indicators *A*, *B*, and *C*.

> **i** Note
>
> The *Scenario Planning* screen contains only the *TU* and *CU* views. The *NU* view is not present on the *Scenario Planning* screen.

The following topics describe the necessary steps that should be carried out to perform scenario planning.

2.2.11.1 Maintain Scenarios

Context

You can maintain scenarios and the details therein by following the various steps below. This topic covers both required and optional steps with respect to working with scenarios.

For information on the setup of the BW data model and details on creating and using scenarios for planning, kindly refer to Scenario Planning [page 179] under *Configuration Settings for SAP BW* in this guide.

Procedure

1. Prepare data for scenarios.

   This step involves generating planning combinations for scenarios in the SAP BW system. The planning combinations for scenarios are generated by the system when the operational plan is created for a given planning year.

   If the alternative assortment feature is enabled for your sales area, the planning combinations for scenarios do not get created on creation of the operational plan. In this case, the scenario combinations get created as and when a scenario is created or copied.
2. Create a new scenario for your customer business plan.

   There can be a maximum of three (3) scenarios. When creating a new scenario, the system finds the available scenario source indicator and reads the data for the selected scenario source indicator from the

SAP BW system. When a new scenario is created, it always shows the blank data (all key figures have zero values).

If the alternative assortment feature is enabled, the system gives you an option to link the new scenario with the operational assortment or alternative assortment, while creating or copying the scenario. However, the assortment data is blank, regardless of the assortment chosen.

3. (Optional) Copy reference volumes and rates.

   You can fill the volumes and rates for your scenario using reference data. You can freely maintain the values for volumes and rates. In this step, it is assumed that the reference data (relevant volumes and rates) has already been uploaded to the SAP BW system.

   The KPI values are copied using a BW planning function. You must maintain the planning events.

4. (Optional) Copy operational plan or an existing scenario.

   As a starting point for scenario planning, you can optionally copy an operational plan to a new scenario. You can also copy an existing scenario. When a scenario is copied, the system finds the available scenario source indicator to copy the data from the source scenario to the target scenario using a BW planning function. The system also copies the promotion links and related promotion KPIs, such as uplift volume and total promotion investment.

   If the alternative assortment feature is enabled, you can either copy the operational plan/scenario with the assigned assortment or you have the option to choose any assortment while copying the operational plan/scenario which will be assigned to the target scenario. In this case, the data for the common products will get copied and the data for other products will have zero values.

   Before performing this step, you must maintain the relevant planning functions and events in the SAP CRM and BW systems.

5. Compare the KPIs of your scenarios with the operational plan in the planning screens (*Profit and Loss*/*Product Tree*/*Summary*).

   This step ensures that you choose the best possible scenario to achieve your targets. You can configure the values of the KPIs that you would like to compare to arrive at the best possible scenario.

6. Activate a scenario.

   In this step, you copy the selected scenario data to your operational plan during activation.

   When activating a scenario, the system checks that all the promotions (with a particular status, for example, *RELEASED*) that are linked to a customer business plan are also linked to the scenario that is being activated. If not, the system provides the option of linking these promotions to a scenario.

   This step also uses the planning functions and events in the SAP CRM and BW systems.

   Scenario Activation with Alternative Assortments

   If the alternative assortment feature is enabled, during scenario activation, the product validity of the alternative assortment (linked to the scenario) gets copied to the operational assortment. In this process, validities from the current date to future dates will get changed for the operational assortment. All the promotions which are in an executable state must be linked to the scenario (or cancelled) before activation. The scenario activation BAdI can be implemented to influence the list of promotions to be linked with scenario or to cancel unlinked promotions.You can find the BAdI in the Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Scenario Planning* > *BAdI: Scenario Planning Activation*.

→ Tip

Cancellation of Promotions during Scenario Activation

- As scenario activation is a massive change process that includes assortments, plans and promotion updates, this would be a performance-intensive step. Hence, it is recommended that you avoid cancelling many promotions during this process.
- During scenario activation, past and running promotions will not be eligible for cancellation.

Since changes to an operational assortment can impact the plan data for several years, we ensure that such changes are reflected in the BW system, not only for the plan year in focus but also for all future planning years that use the same planning product hierarchy. These changes to the planning data are achieved by running the synchronization for all future plan years via a queued RFC in the background. Queued RFCs are used because they provide the option to restart the process in the event of failures, for example, a locking failure. SAP Customer Business Planning uses the inbound queue prefix `CBP_SCN_ACT_*`, which should be registered using transaction `SMQR`.

During activation process, if there exist other scenarios that were assigned to the operational assortment, and these scenarios contain promotions with products that were partially listed or not listed in the promotion period within the alternative assortment that is going to be copied to the operational assortment, an alert gets generated for the impacted promotions via a queued RFC in the background. SAP Customer Business Planning uses the inbound queue prefix `ASRT_SAVE_*`, which should be registered using transaction `SMQR`.

7. Delete a selected scenario.

   The system runs a delete planning function to delete the relevant data from the SAP BW system. When a scenario is deleted, the system also deletes its corresponding versions.

8. Display a scenario in its detailed view.

   On the *Scenario Planning* screen, the KPI data for the scenario can be displayed monthly/quarterly/yearly. The scenario planning view shows the totals of the KPIs but does not show the distribution of the KPIs over time. To see the KPI distribution over time for a scenario, you can navigate to a scenario detail view.

   The scenario detail view is merely the same view in which the scenario data is displayed in the same way as customer business plan data. This view helps you to understand the KPI distribution more clearly. All of the customer business planning views, such as *Calendar*, *Profit and Loss*, *Product Tree*, and *Summary* are available in the detailed scenario view.

Related Information

Get Reference Sell-In Volumes [page 88]
Get Reference Prices and Non-Promotional Terms [page 94]
Configure Scenario Planning [page 120]

2.2.11.2 Configure Scenario Planning

Context

In this procedure, you can carry out the necessary setup activities to perform scenario planning in SAP Customer Business Planning.

For information on the setup of the BW data model and details on configuring scenario planning, kindly refer to Scenario Planning [page 179] under *Configuration Settings for SAP BW* in this guide.

Procedure

1. Customize the *Scenario Planning* feature.

   In this step, you can activate scenario planning for a sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *Activate Trade Management Features*.
2. Define your own scenario types in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Scenario Planning* > *Maintain Scenario Types*.

   You can choose a scenario type when you create a new scenario (from scratch or by copying an existing one). The system uses these Customizing settings to obtain the list of possible values for the scenario type.

   The following scenario types are delivered with the solution:

   Configured Scenario Types

Scenario Type	Scenario Type Description
AG	Aggressive
NT	Neutral
CA	Cautious

3. Customize allowed TPM statuses for scenario activation in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *Scenario Planning* > *Maintain Allowed TPM Statuses to Activate a Scenario*.

   In this step, you can maintain allowed statuses for your promotions that must be met by all the promotions that are linked to the scenario before you can activate it. The system validates that all the promotions linked to the scenario contain a status maintained in this Customizing activity.

   If the alternative assortment feature is enabled, during scenario activation, you can either link the promotions to the scenario or cancel them. You can implement a BAdI to change the list of promotions

during this process, available in Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Scenario Planning* > *BAdI: Scenario Planning Activation*.

4. Maintain the mapping between CRM data sources and BW source indicators in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Maintain Data Sources*.

   If you have defined your own source indicators for scenarios, you can map them to the scenarios that you want to use in SAP Customer Business Planning. Each scenario is represented by a unique source indicator in the SAP BW system. This source indicator is also mapped to a data source in the SAP CRM system that helps the system to identify the scenario.

   > **i Note**
   >
   > In the delivered solution, the following three data sources are used to identify a scenario:
   >
   > Data Sources to Identify Scenario
   >
   > | DataSource ID | Source Indicator | Description |
   > |---|---|---|
   > | SCENARIO1 | A | Scenario 1 |
   > | SCENARIO2 | B | Scenario 2 |
   > | SCENARIO3 | C | Scenario 3 |
   >
   > If you have defined your own source indicators, these must be mapped to the data sources above in your SAP CRM system. The system uses this information to map the scenario data in your SAP BW system to the corresponding scenario representation in the SAP CRM system.

5. Define your own queries for scenario planning.

   In the delivered solution, the following queries are implemented:

   Queries for Scenario Planning

View	Criteria	Query
Scenario Planning – Profit and Loss	Selected Year/Period Trading Unit	/JBPB/APLN_PNLPT_TU Planning query with trading unit key figures in the row, source indicator corresponding to operational plan and scenarios in the column, and filter on the time period and a node in the planning product hierarchy.

View	Criteria	Query
Scenario Planning – Profit and Loss	Selected Year/Period Consumer Unit	`/JBPB/APLAN_PNLPT_CU` Planning query with consumer unit key figures in the row, source indicator corresponding to operational plan and scenarios in the column, and filter on the time period and a node in the planning product hierarchy.
Scenario Planning – Product Tree	Selected Year/Period Trading Unit	`/JBPB/APLN_PNLPT_TU` Planning query with trading unit key figures in the row, source indicator corresponding to operational plan and scenarios in the column, and filter on the time period and a key figure in the profit and loss structure.
Scenario Planning – Product Tree	Selected Year/Period Consumer Unit	`/JBPB/APLAN_PNLPT_CU` Planning query with consumer unit key figures in the row, source indicator corresponding to operational plan and scenarios in the column, and filter on the time period and a key figure in the profit and loss structure.
Scenario KPI Comparison	All Period and Unit combinations	`/JBPB/APLN_SCEN_IMPCT_KPI` Read query with source indicator corresponding to scenario and the KPIs in the row.

6. Configure scenario planning queries 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*.

   The following configuration is delivered for the query profile `QR_SIMP_DM`:

   Configured Query Profile QR_SIMP_DM

Criteria Profile	Virtual View Usage	Query	Description
`SM_PWCUTV`	`321_PLANNING_LAYOUT`	`/JBPB/APLAN_PNLPT_CU`	Simplified Data Model - PnL - Weekly - CU - Table view
`SM_PWTU`	`321_PLANNING_LAYOUT`	`/JBPB/APLN_PNLPT_TU`	Simplified Data Model- PnL - Weekly - TU

Criteria Profile	Virtual View Usage	Query	Description
SM_TWCUTV	321_PLANNING_LAYOUT	/JBPB/APLAN_PNLPT_CU	Simplified Data Model - Product Tree - Weekly - CU - Table view
SM_TWTU	321_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_TU	Simplified Data Model- Product Tree - Weekly - TU
IMKPIMON_U	321_SCN_IMPACT_KPIS	/JBPB/ APLN_SCEN_IMPCT_KPI	Impact KPIs

Additionally, you must maintain the above BW queries in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *System Settings* > *Define BW Queries*.

7. Configure your own KPIs that you want to display on the scenario KPI comparison screen and write your own logic to calculate the KPIs.

   For your scenario comparison query, you must maintain the technical names of key figures 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* > *Maintain KPIs for Query*.

   The input for the BW query, the mapping of the BW query result, and the calculation of scenario comparison KPIs can be achieved with the BAdI `/JBPC/VVF_BW_QUERY`, which you can access in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Business Add-Ins (BAdIs)* > *BAdI: Modification of Query Filter and Mapping of Query Response*.

   The following KPIs are configured for the scenario comparison query `/JBPB/APLN_SCEN_IMPCT_KPI` in the delivered solution:

   Configured KPIs for Scenario Comparison Query /JBPB/APLN_SCEN_IMPCT_KPI

Key Figure Description	Key Figure Technical Name	Comment
GSV Growth	J310_IMP_KPI_KFGSV_03 J310_IMP_KPI_GSV_PY_01	GSV growth is calculated in BAdI `/JBPC/VVF_BW_QUERY_FILTER`, method `CHANGE_QUERY_OUTPUT`. Refer to the implementation `/JBPC/VVF_BW_QUERY_FILTER`.
Total Turnover	JBPB_CBP_TOT_TURNOVER	Retrieved from query and sent as an output

Key Figure Description	Key Figure Technical Name	Comment
Event Budget		Retrieved in the BAdI `/JBPC/VVF_BW_QUERY_FILTER`, method `CHANGE_QUERY_OUTPUT`. Refer to the implementation `/JBPC/VVF_BW_QUERY_FILTER`.
Internal Profit Total	`JBPB_CBP_INT_PROF_TOT`	Retrieved from query and sent as an output
Net Net Total	`JBPB_CBP_NNVT_01`	Retrieved from query and sent as an output
Return of Investment – ROI	`JBPB_CBP_ROI_01`	Retrieved from query and sent as an output
Customer Margin	`JBPB_CBP_CUST_MARGIN`	Retrieved from query and sent as an output
Baseline Volume Growth	`JBPB_APLN_CBP_CHNG_BVOL`	
Uplift Volume Growth	`JBPB_CBP_CHNG_UPLIFT`	

8. Define your own planning function to copy one scenario to another, or to delete a scenario.

   Additionally, if the alternative assortment feature is enabled, planning function `/JBPB/FUN_SCN_ACT_CP` is called for the features related to *Scenario Planning*.

   For information on the setup of the BW data model and details on scenario maintenance and configuration, kindly refer to the relevant topics below, described under *Configuration Settings for SAP BW* in this guide:

   - Copy Scenario
   - Delete Scenario
   - Scenario Planning with Alternative Assortments

9. Configure the planning functions relevant for scenario planning in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Planning Functions* > *Define Semantic Planning Function*.

   You use this step if you have defined your own planning functions that you want to manually execute from the *Scenario Planning* screen, and if you want to make them available in the list of possible planning functions that can be selected for execution.

2.2.12 Planning Event Budgets

In this business process, you display and manage the event budget in your customer business plan. The event budget is displayed in the *Event* section of the *Budget Monitor* in your customer business plan. An event budget is considered as the portion of your budget that you want to consume through trade promotions.

In the application, the system uses Funds Management to plan and manage event budgets. You can manage an event budget in the following ways:

- **Fixed Budget**: You decide on a fixed budget amount that is posted to your funds and that you want to use only for promotion planning.
- **Dynamic Budget**: You define a dynamic rate based on a parameter in your plan (for example, certain percentage of *Gross Sales Value*) and want to use this rate to calculate the budget amount that you want to use for promotion planning.
- **Combination of Fixed and Dynamic Budget**: You can optionally combine the fixed and dynamic portion of the budget and use it for promotion planning.

In the delivered example for planning an event budget, the system uses a combination of fixed and dynamic portion to constitute the event budget that you want to use for planning. The delivered example manages the event budget as follows:

- When you create your plan, the system retrieves the fixed portion of the budget from Funds Management and displays it against the *Total Budget* within the *Event* section of the budget monitor.
- When you plan multiple promotions from your customer business plan, the system combines the *Total Promotion Investment* from all the promotions and displays this against the *Planned* budget.
- If you remain within your total budget, the system displays the remaining budget under *Available*; however, if you exceed the budget, the system displays the delta between planned and total budget as *Overspent*.
- When your plan is approved, the system determines the dynamic funding rate that is calculated as the percentage of your *Total Promotional Investment* from the *Gross Sales Value*, and uses this rate to post the extra budget to your funds.
- After you have approved your plan and a dynamic funding rate is defined, the system uses this rate to calculate the *Total Budget* available for planning and does not display the delta as overspent in the budget monitor as long as your *Total Promotion Investment* stays within the defined percentage of the *Gross Sales Value*.

The following topics describe the necessary setup activities.

2.2.12.1 Set Up Event Budget Using Funds Management

Procedure

1. Set up the funds to use for event budget planning.

   You configure the funds using Funds Management in SAP CRM.

   If you also want to plan dynamic event budget, you must configure the dynamic funds.
2. Implement BAdI to display event budget.

   In this step, you can write your own logic to determine the event budget that you want to display in your *Budget Monitor*. The total budget is read from Funds Management in SAP CRM within the BAdI `/JBPC/VVF_BW_QUERY`. The BAdI is filter dependent on `VV_USAGE`.

> **i Note**
>
> An example implementation is delivered for this BAdI with the following details:
>
> Example Implementation
>
> | BAdI Implementation | Filter Value |
> |---|---|
> | `/JBPC/VVF_BW_QUERY_FILTER` | `320_BUDGET_MONITOR` |
>
> This BAdI implementation contains the following logic:
>
> 1. Retrieve the event budget from Funds Management using the account hierarchy node of the customer business plan and the products or product categories in your planning product hierarchy.
> 2. Get the dynamic funding rate from the dynamic fund plan and calculate the new rate again using *Total Promotion Investment* and *Gross Sales Value* from the customer business plan.
> 3. If the new rate stays within the rate determined from the dynamic funding rate, use the new rate to calculate the total available budget for planning; otherwise, display the delta as overspent.

3. Define your own queries to read the *Dynamic Funding Rate*, *Gross Sales Value*, and *Total Promotion Investment*.

   You use the query to calculate the new rate based on your current promotional investment that you want to show in the event budget.

   In the delivered content, the query `/JBPB/APLN_SCEN_IMPCT_KPI` is used to read the dynamic funding rate, which is calculated as the ratio of the total promotional investment to the gross sales value.

   Rows

InfoObject	Description
`/JBPB/PLAN`	JBP Plan

   Free Characteristics

InfoObject	Description
`/JBPB/SCEN`	JBP Scenario
`0CALYEAR`	Calendar Year
`0CALWEEK`	Calendar Year/Week

   Columns

InfoObject	Description	Type	Visibility	Input Readiness
Formula	Total Promotion Investment	Formula	Hide (Can be Shown)	Default
Formula	TPI/GSV	Formula	Hide (Can be Shown)	Default

InfoObject	Description	Type	Visibility	Input Readiness
/JBPB/AGSV	Gross Sales Value	Selection	Hide (Can be Shown)	Default
Formula	Budget	Formula	Hide (Can be Shown)	Default
/JBPB/PRM_REV	Promo Revenue - Total	Selection	Hide	Default
/JBPB/EDLP_D	EDLP Discount Total	Selection	Hide	Default
/JBPB/EDLP_R	EDLP Rebate Total	Selection	Hide	Default
/JBPB/PROMO_D	Promo Discount Total	Selection	Hide	Default
/JBPB/PROMO_R	Promo Rebate Total	Selection	Hide	Default
/JBPB/LPRM_R	Promo Rebates - Fixed	Selection	Hide	Default
/JBPB/LPRM_RD	Promo Rebates - Display	Selection	Hide	Default
/JBPB/AVOLU_T	JBP Uplift Volume	Selection	Hide	Default
/JBPB/UPLSTST	S	Selection	Hide	Ready

The query /JBPB/APRM_PL_DF_Q001 is used to read the total promotional investment for each product.

Rows

InfoObject	Description
0BP_GRP	BP: Group (Hierarchy)
0CRM_PROD	Product

Columns

InfoObject	Description	Type	Visibility	Input Readiness
Formula	Total Promotion Investment	Formula	Hide (Can be Shown)	Default
Formula	TPI/GSV	Formula	Hide (Can be Shown)	Default
/JBPB/AGSV	Gross Sales Value	Selection	Hide (Can be Shown)	Default
Formula	Budget	Formula	Hide (Can be Shown)	Default
/JBPB/PRM_REV	Promo Revenue - Total	Selection	Hide	Default

InfoObject	Description	Type	Visibility	Input Readiness
/JBPB/EDLP_D	EDLP Discount Total	Selection	Hide	Default
/JBPB/EDLP_R	EDLP Rebate Total	Selection	Hide	Default
/JBPB/PROMO_D	Promo Discount Total	Selection	Hide	Default
/JBPB/PROMO_R	Promo Rebate Total	Selection	Hide	Default
/JBPB/LPRM_R	Promo Rebates - Fixed	Selection	Hide	Default
/JBPB/LPRM_RD	Promo Rebates - Display	Selection	Hide	Default
/JBPB/AVOLU_T	JBP Uplift Volume	Selection	Hide	Default
/JBPB/UPLSTST	Short Term Uplift Volume	Selection	Hide	Default

Free Characteristics

InfoObject	Description
/JBPB/SCEN	JBP Scenario
0CALYEAR	Calendar Year
0CALWEEK	Calendar Year/Week
/JBPB/SFINDIC	Shop Format Indicator

4. Implement BAdI to define dynamic funding rate and post event budget on plan approval.

   In this step, you can write your own logic to define the dynamic funding rate, which you want to use to post the event budget to your funds at the time of approving your plan. You define the new logic in the BAdI /JBPC/CRM_CBP_VERSIONING, method APPROVE_VERSION.

   > **i Note**
   >
   > An example implementation /JBPC/CBP_INTERNAL_VERSIONING is delivered with the solution.
   >
   > This BAdI is implemented with the following logic:
   >
   > 1. Determine the dynamic funding plan and the corresponding funds based on the product and account dimension from your customer business plan.
   > 2. Determine the *Total Promotion Investment* and *Gross Sales Value* using the query described in the previous step.
   > 3. Calculate the dynamic funding rate using *Total Promotion Investment* and *Gross Sales Value*.
   > 4. Define the new dynamic funding rate in the funds plan.
   > 5. Use the new dynamic funding rate to calculate the new event budget and post the corresponding delta to the funds.

5. Set up the event budget without using Funds Management.

   If you do not want to use Funds Management to set up your event budget, you must change the implementation of the BAdI as described in step 2, and use your own logic.

Related Information

Funds Management

2.2.13 Extending Plan

In this business process, you extend the plan from the current year to the next year.

The data to be copied to the next year can be customized as required. If the online/synchronous execution time exceeds a configured time, the plan extension process is executed asynchronously. During plan extension, a dialog box displays options to specify data. The following default options are available:

- Copy all promotions.
- LE baseline volume data (sell-in) of the previous year is copied week by week to the extended year.

Re-trigger mass copy of failed promotions

In case multiple promotions are copied via the extend plan scenario and some of the promotions fail to get copied due to errors, you can run a report program to trigger a mass copy for the failed promotions.

You can find the report (`/JBPC/MASS_COPY_TPM`) in the *SAP Easy Access* menu by choosing *Customer Business Planning* > *Administrator* > *Retrigger Mass Copy for Failed Promotions*. In this report you provide the `SLG1` logs *External ID* for the failed promotions.

The same report program can also be used to trigger mass copy of promotions that failed during bulk action from the overlay present in the *Plan* screen, *Scenario Planning* screen, and *Promotion* landing screen.

2.2.13.1 Configure Plan Extension Options

Context

In this procedure, you can set up your own options for plan extension:

Procedure

1. Define the options by choosing in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Plan and Scenario* > *Plan Extension* > *Maintain Extend Plan Options*, then *Maintain Options for Extend Plan*.
2. Collect the options into a plan extension profile by choosing *Maintain Profile to Extend Plan* in the same Customizing.
3. Assign the extension profile to a sales area in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Plan and Scenario* > *Plan Extension* > *Assign Plan Extension Profile to Sales Area*.

2.2.13.2 Define Planning Function to Copy Latest Estimates for Baselines

Context

In this procedure, you can enable the option *LE baseline volume data (sell-in) of the previous year is copied week by week to the reference data of the new year* and define your own planning function.

Procedure

For information on the setup of the BW data model setup and details on the planning function for copying estimates, kindly refer to Define Planning Function to Copy Latest Estimates for Baselines [page 186] under *Configuration Settings for SAP BW* in this guide.

2.2.13.3 Define Plan Extension Queries

Context

The application uses the same master queries as configured for the plan and promotion during plan extension.

Procedure

For information on the setup of the BW data model setup and details on the planning function for copying estimates, kindly refer to Define Plan Extension Queries [page 186] under *Configuration Settings for SAP BW* in this guide.

2.2.13.4 Configure Wait Time for Synchronous Processing of Plan Extension

Context

You can define the maximum processing time that the system must wait before it moves the plan extension into a background job.

Procedure

Specify the maximum processing time in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *CBP Planning* ▶ *Plan and Scenario* ▶ *Plan Extension* ▶ *Assign Plan Extension Profile to Sales Area* ▶.

If a wait time is specified and the execution time for copying the selected options exceeds the configured time, plan extension switches to asynchronous mode and the planning data is locked to prevent changes. The user can navigate between screens and use the *Refresh* button to confirm that the plan extension is complete. Once the plan extension is complete, the lock is released from the background process and the plan is extended to the next year along with the selected options chosen during extension.

2.2.14 Configure Settings for Promotion Power

Context

Promotion power is an indicator that reflects the amount of impact the promotions have on a particular week or month in the plan. Promotion power is shown on the user interface by means of a colored circle that is filled according to the percentage impact of the promotion.

In this procedure, you can display the promotion power in the *Profit and Loss* view of your customer business plan. Within the *Profit and Loss* view, the system displays the promotion power against each combination of key figure and the selected time period.

The following steps describe the necessary set up activities required to display promotion power.

Procedure

1. Configure the key figures that indicate promotion power in the *Profit and Loss* view.

   In this step, you define the key figures in your *Profit and Loss* view to display promotion power. You define the key figures in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *InfoObject Mapping* > *Map Query Key Figures*.
2. Configure the type of indicator to display the promotion power.

   You can maintain these settings in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *InfoObject Mapping* > *Map Query Key Figures*.
3. Configure the key figure patterns relevant for promotion power.

   In this step, you define the pattern of the key figures based on which the promotion power is determined. You can maintain these settings in Customizing for *Trade Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *InfoObject Mapping* > *Map Query Key Figures*.
4. Configure the date type to filter the promotions.

   When you click the promotion power icon on the profit and loss screen, the promotion overlay opens and displays the promotions that are filtered based on the date maintained in Customizing for *Trade Management* under *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *InfoObject Mapping* > *Map Query Key Figures*.

   The delivered content for this Customizing is as follows:

CU Pattern	TU Pattern	NU Pattern	Show Promo Indicator	Indicator Type	Promo Power Pattern	Promo Power Filter Date
*_CUI_C_CU_KFVOLTT_*	*_TUI_C_TU_KFVOLTT_*	*_TUI_C_TU_KFVOLTT_*	True	Harvey balls	*_UPLIFT_PROMOPWR_*	Sell-In
*_CUI_C_CU_KFTPI_*	*_TUI_C_TU_KFTPI_*	*_TUI_C_TU_KFTPI_*	True	Harvey balls	*_PROMOSPEND_PROMOPWR_*	Sell-In

   As per the delivered Customizing, the promotion power icon is shown on the CU view on the key figure with pattern **`*_CUI_C_CU_KFVOLTT_*`**. The promotion power value is based on the key figure with pattern

_UPLIFT_PROMOPWR_. On clicking the promotion power icon, promotions on the overlay are filtered based on the sell-in dates.

5. Configure the promotion power queries.

   The BW queries fetch the result for promotion power. You can maintain these queries in Customizing for *Trade Management* by choosing *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination*

   The following queries have been configured for the query profile **QR_SIMP_DM**:

   Query Profile ID: QR_SIMP_DM

Criteria Profile ID	Virtual View Usage	Query ID	Description
PP_AU_M	320_PROMO_POWER	/JBPB/APLN_PROMO_PWR_NU_M	Promotion Power – AU – Monthly
PP_AU_W	320_PROMO_POWER	/JBPB/APLN_PROMO_PWR_NU_W	Promotion Power – AU – Weekly
PP_CU_M	320_PROMO_POWER	/JBPB/APLN_PROMO_PWR_CU_M	Promotion Power – CU – Monthly
PP_CU_W	320_PROMO_POWER	/JBPB/APLN_PROMO_PWR_CU_W	Promotion Power – CU – Weekly
PP_TU_M	320_PROMO_POWER	/JBPB/APLN_PROMO_PWR_TU_M	Promotion Power -TU – Monthly
PP_TU_W	320_PROMO_POWER	/JBPB/APLN_PROMO_PWR_TU_W	Promotion Power – TU – Weekly

   For information on the setup of the BW data model setup and promotion power queries, kindly refer to Promotion Power [page 171] under *Configuration Settings for SAP BW* in this guide.

6. Implement BAdI to determine promotion power

   In this step, you can write your own logic to determine the promotion power. The logic for determining the promotion power is implemented in BAdI `/JBPC/CRM_MKTPL_PLN_PROMOTIONS`.

   In the delivered implementation, promotion power is calculated based on key figure calculations. For example, for total volume the promotion power is calculated based on the uplift volume, and for total promotion investment promotion power is calculated based on promo spend and list price. You can find this BAdI in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *Customer Business Planning* > *CBP Planning* > *Key Figure Planning* > *Business Add-Ins (BAdIs)* > *BAdI: Determination of Promotion Power for the Plan*.

Related Information

Promotion Power BW Queries [page 171]

2.2.15 Configure Mass Update of Promotions

Context

When you update data within a customer business plan, for instance baseline volume, it is rolled in to the linked promotions. In addition, funds are updated if the promotions have fund integration. The data for each plan is processed separately and sent to BW via a queued RFC. Queued RFCs provide an option to restart the process in case of failures; for example, a locking failure.

Procedure

1. Using transaction `SMQR`, register the inbound queue prefix `MASS_PROMO_UPD_PLAN _*`.

   SAP Customer Business Planning uses the inbound queue prefix `MASS_PROMO_UPD_PLAN _*` for updates related to planning data.
2. Define the wait time that the system must wait to complete this task.

   The default fallback time is 5 seconds if you have not defined the wait time in Customizing. If the update is not finished within 5 seconds or within the configured wait time, an information message is displayed to the user. The user has to refresh the plan UI to acquire plan locks.

Related Information

Configure Wait Time for Synchronous Processing of Plan Extension [page 131]

2.2.16 Planning Structured Products

This section describes how you can plan structured products in Customer Business Plans and Trade Promotions.

2.2.16.1 Define Structured Product in Product Master

Context

If you are using SAP ECC as the source system for your master data, you can define your structured products in SAP ECC and then transfer them to your SAP CRM system.

The following middleware objects can be used to download structured products from SAP ECC to SAP CRM system:

- `DNL_CUST_PROD0`
- `DNL_CUST_PROD1`
- `DNL_CUST_PROD3`
- `BOM_ERP`

Related Information

Replication of Bills of Material from SAP ERP to SAP CRM

2.2.16.2 Set Up Item Category for Structured Products

Context

To identify a product as a structured product, the system uses an item category that is defined in Customizing.

Procedure

Define the item category in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▶ *Basic Data* ▶ *Products* ▶ *Select Item Category Groups for Display Pallets* ▶.

2.2.16.3 Prepare TU and CU Master Data for Structured Products

Context

The system uses the same data sources, as used for the normal products, to also transfer the TU and CU master data for structured products:

- `/JBPB/JBP_PRODUCT_TU_CU_LINK`: TU CU Master Data
- `/JBPB/JBP_PRODUCT_TU_CU_TEXT`: TU CU Text

Details on the master data are available in the Common Configuration Guide for SAP Trade Management.

> **i Note**
>
> The only difference is that for a normal product there exists one record in the TU CU master data. However, a structured product there can be multiple records based on the number of components in the structured product.

> **Example**
>
> A structured product with three components:

Structure Product/Component	Trading Unit	Consumer Unit
Hair Care Pallet	PAL	-
1 Case of 50 – Shampoo 100ml	CS	EA
2 Cases of 20 – Conditioner 100 ml	CS	EA
3 Cases of 10 – Hair Oil 100 ml	CS	EA

For the *Hair Care Pallet* structured product, the system generates three records in the TU CU master data with the following keys:

- <TU GTIN for 'Hair Care Pallet'>-<CU GTIN for 'Shampoo 100ml'>
- <TU GTIN for 'Hair Care Pallet'>-<CU GTIN for 'Conditioner 100ml'>
- <TU GTIN for 'Hair Care Pallet'>-<CU GTIN for 'Hair Oil 100ml'>

The corresponding TU CU factors for components in *Hair Care Pallet* are described in the following table:

Structured Product Component	TU Factor	CU Factor
Shampoo 100 ml	1	50
Conditioner 100 ml	1	40

Structured Product Component	TU Factor	CU Factor
Hair Oil 100 ml	1	30

2.2.16.4 Add Structured Product to Planning Product Hierarchy

Context

You can add structured products to planning product hierarchies in the same way as normal products. No additional configuration is required.

2.2.16.5 Add Structured Product to Assortment

Context

You can add structured products to assortments in the same way as normal products. No additional configuration is required.

2.2.16.6 Display Details of Structured Product in Customer Business Plan

Context

Structured products are indicated by the  icon on the user interface. This icon is available only in the *TU* view of the *Product Tree* and *Summary* screens.

Procedure

To view details about the structured product, double-click the  icon.

The popup screen displays details of the components together with factors.

2.2.16.7 Plan Structured Product in Trading Unit

Context

You can plan structured products in the same way as normal products in the *Trading Unit* view. No additional configuration is required.

2.2.16.8 Plan Structured Product in Consumer Unit

Context

The system does not allow you to plan structured products in a *Consumer Unit* view because structured products are composed of multiple components. If the corresponding components come from different product categories, the BOM components may be distributed in multiple branches in the CU hierarchy. Therefore, allowing planning in the *CU* view may potentially break the composition of structured products.

> **i** Note
>
> In the standard delivery, structured products are non-plannable out-of-the-box. However, if you wish to set up CU as plannable, you must setup your own BW data model. Sample content is not available for structured products.

2.2.17 Planning Innovation Products

You use this business process if you want to plan innovation products in customer business planning. Innovation products are placeholder products that you want to plan on before they are defined in your product master.

> **Example**
>
> You have a new product or a new pack for an existing product that is to be launched next year. However, the corresponding product is not defined in the product master data, and you want to include this new product in your customer business plan. Once the actual products are defined in the system, you want to replace the innovation products with the actual products.

In this delivered content, you create innovation products in SAP CRM and use them for planning. Once the actual product is available, innovation products are replaced with actual products by executing a report. This example process delivered with the solution includes the following steps:

1. Define innovation product in the *Products Workbench* in SAP CRM.
2. Maintain innovation products in a table so that these are identified as placeholder products by the system.
3. Replicate innovation products to the BW system for planning.
4. Upload reference data and prices for innovation products.
    - Innovation products are planned in the same way as all other products.
    - Only draft promotions can be created for innovation products.
5. Replace innovation products with the actual products.

The following topics describe the necessary setup activities. For more information on extraction of innovation products to BW and upload of reference data and prices for such products, refer to Planning for Innovation Products [page 187] under *Configuration Settings for SAP BW* in this guide.

2.2.17.1 Define Innovation Product in CRM Products Workbench

Context

You use this step to define innovation products in the SAP CRM system.

Procedure

You can define innovation products by using transaction `COMMPR01` or by accessing the *Products Workbench* in the CRM WebClient UI.

You must maintain the reference product in the *Pricing Reference Product* field on the *Sales and Distribution* tab. The system uses this reference product to determine the baseline and list price of the innovation product. You must also maintain the corresponding TU and CU GTINs for the corresponding innovation product. The system requires this information to enable planning in the *Trading Unit*, *Consumer Unit*, and *Normalized Unit* views.

2.2.17.2 Determine Innovation Products

Context

You use this step to define your own logic to determine innovation products for planning.

The corresponding logic to determine the innovation products is implemented in BAdI `/JBPC/CRM_DUMMY_PRODUCT`.

Procedure

You can access this BAdI in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Customer Business Planning* ▶ *Basic Settings* ▶ *Business Add-Ins (BAdIs)* ▶ *BAdI: Determine Innovation Products* ▶.

> **i** Note
>
> A default implementation of this BAdI is delivered with the solution that reads the innovation products from the table `/JBPC/DUMMY_PROD`.

2.2.18 Setting Up Alerts (Optional)

Context

You use this business process to manage alerts in SAP Trade Management.

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

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

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

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

Procedure

1. Define alert classification in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Alerts* > *Maintain Alert Categories*.

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

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

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

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

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

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

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

4. Customize the key figure thresholds to raise alerts.

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

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

5. Assign the threshold profile to sales area in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Alerts* > *Assign Planned versus Predicted Key Figure Threshold Profiles to Sales Area*.

6. Implement the BAdI for target object determination.

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

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

You can find the BAdI in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Alerts* > *BAdI: Target Object Determination*.

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

Example Implementations

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

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

> **Note**
>
> You must maintain only the required sales areas in Customizing to indicate that these are active for customer business planning. Alerts are generated for plans with generic sales area in the system.
>
> If a product was not valid for a sales area earlier, but now it is valid, then no alert is raised.

2.2.19 Query Simplification

Context

Query simplification reduces the number of queries used for the planning views.

The steps below describe the settings required to set up and enable query simplification. For more information, refer to Query Simplication [page 175] under *Configuration Settings for SAP BW* in this guide.

Procedure

1. Maintain the criteria profiles for each planning view in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *System Settings* > *Maintain BW-Relevant Criteria for VVF*.

   The sample content delivered for the criteria profiles is as follows:

Criteria Profile ID	Virtual View Usage	Description
SM_PMCU	320_PLANNING_LAYOUT	Simplified Data Model - PnL - Monthly - CU
SM_TMCU	320_PLANNING_LAYOUT	Simplified Data Model - Product Tree - Monthly - CU
SM_OCU	320_PLANNING_LAYOUT	Simplified Data Model - Overview - CU
SM_PWCU	320_PLANNING_LAYOUT	Simplified Data Model - PnL - Weekly - CU
SM_TWCU	320_PLANNING_LAYOUT	Simplified Data Model - Product Tree - Weekly - CU
SM_PMNU	320_PLANNING_LAYOUT	Simplified Data Model - PnL - Monthly - NU
SM_TMNU	320_PLANNING_LAYOUT	Simplified Data Model - Product Tree - Monthly -NU
SM_ONU	320_PLANNING_LAYOUT	Simplified Data Model - Overview - NU
SM_PWNU	320_PLANNING_LAYOUT	Simplified Data Model - PnL - Weekly - NU
SM_TWNU	320_PLANNING_LAYOUT	Simplified Data Model - Product Tree - Weekly - NU
SM_PMTU	320_PLANNING_LAYOUT	Simplified Data Model- PnL - Monthly - TU
SM_TMTU	320_PLANNING_LAYOUT	Simplified Data Model- Product tree - Monthly - TU
SM_OTU	320_PLANNING_LAYOUT	Simplified Data Model- Overview - TU

Criteria Profile ID	Virtual View Usage	Description
SM_PWTU	320_PLANNING_LAYOUT	Simplified Data Model- PnL - Weekly - TU
SM_TWTU	320_PLANNING_LAYOUT	Simplified Data Model- Product tree - Weekly - TU

2. Activate query simplification for a specific sales area in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Activate Trade Management Features*.
3. Maintain InfoObject profiles for query simplification.

   In query simplification, there is only one BW query for the different views. To execute the query for a particular view, BW requires the layout (row InfoObjects and column InfoObjects and their position in the query) for each view. The layout information is transferred from CRM to BW to execute the query. You maintain this layout information for each view in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *System Settings* > *Maintain InfoObject Profiles for Query Simplification*.

   > **i Note**
   >
   > The position of an InfoObject is the position where it is shown in the planning grid on the UI. If the position of the InfoObject is changed in this Customizing activity for any view, the UI of that view must also be changed to render the planning grid. This shall be a UI extension.

4. Maintain the InfoObject profile.

   The layout information is stored in a profile. This profile is assigned to the query profile for query simplification.

   The delivered content is as follows:

InfoObject Profile	InfoObject Profile Text
IP_SIDM_PL	Row and Col InfoObj. for Query Simp.

5. Assign criteria profiles and VV usage.

   The InfoObject profile contains information on all the views (criteria profile) and their layout.

   The table below lists a few entries delivered as sample content:

   InfoObject Profile: IP_SIDM_PL

Criteria Profile ID	Virtual View Usage
SM_PMCU	320_PLANNING_LAYOUT
SM_TMCU	320_PLANNING_LAYOUT
SM_OCU	320_PLANNING_LAYOUT

Criteria Profile ID	Virtual View Usage
SM_PWCU	320_PLANNING_LAYOUT
SM_TWCU	320_PLANNING_LAYOUT
SM_PMNU	320_PLANNING_LAYOUT
SM_TMNU	320_PLANNING_LAYOUT
SM_ONU	320_PLANNING_LAYOUT
SM_PWNU	320_PLANNING_LAYOUT
SM_TWNU	320_PLANNING_LAYOUT
SM_PMTU	320_PLANNING_LAYOUT
SM_TMTU	320_PLANNING_LAYOUT
SM_OTU	320_PLANNING_LAYOUT
SM_PWTU	320_PLANNING_LAYOUT
SM_TWTU	320_PLANNING_LAYOUT

6. Maintain the InfoObjects row.

   The layout information for each view is stored in the form of rows and columns. For each view, maintain the InfoObjects to be present in the row and their position in the query.

   The delivered content is as follows:

   InfoObject Profile: IP_SIDM_PL

   Criteria Profile: SM_PMCU

   Virtual View Usage: 320_PLANNING_LAYOUT

BW InfoObject	InfoObject Position
/JBPB/CUNIT	3
/JBPB/SCINDIC	2
KEYFIG_STRUCT	1

   InfoObject Profile: IP_SIDM_PL

   Criteria Profile: SM_TMCU

   Virtual View Usage: 320_PLANNING_LAYOUT

BW InfoObject	InfoObject Position
/JBPB/CUNIT	4
/JBPB/SCINDIC	3
/JBPB/TUCUPRD	1
KEYFIG_STRUCT	2

Similarly, the row InfoObjects are delivered for all the criteria profiles.

7. Maintain the column InfoObjects.

   For each view, maintain the column InfoObjects with their position in the query.

   The delivered content is as follows:

   InfoObject Profile: IP_SIDM_PL

   Criteria Profile: SM_PMCU

   Virtual View Usage: 320_PLANNING_LAYOUT

BW InfoObject	InfoObject Position
0CALMONTH	2
0CALQUARTER	1

InfoObject Profile: IP_SIDM_PL

Criteria Profile: SM_TMCU

Virtual View Usage: 320_PLANNING_LAYOUT

BW InfoObject	InfoObject Position
0CALMONTH	2
0CALQUARTER	1

Similarly, the column InfoObjects are delivered for all the criteria profiles.

8. Define the query simplification queries.

   You define the BW queries for query simplification corresponding to each criteria profile in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination*.

9. Maintain the query profile.

   Create a new query profile for query simplification. The query profile contains all the queries for query simplification and the relevant InfoObject profile.

The delivered content is as follows:

Query Profile ID	Profile Description	Level Indicator	InfoObject Profile
QR_SIMP_DM	Query Simplification	No Overlap	IP_SIDM_PL

10. Assign the criteria profile to a query profile.

    Assign the BW-relevant query to the criteria profile.

    The table below lists a few entries from the Customizing:

    Query Profile: QR_SIMP_DM

Criteria Profile ID	Virtual View Usage	Query ID	Description
SM_PMCU	320_PLANNING_LAYOUT	/JBPB/APLAN_PNLPT_CU	Simplified Data Model - PnL - Monthly - CU
SM_TMCU	320_PLANNING_LAYOUT	/JBPB/APLAN_PNLPT_CU	Simplified Data Model - Product Tree - Monthly - CU
SM_OCU	320_PLANNING_LAYOUT	/JBPB/APLN_SUMM_CU	Simplified Data Model - Overview - CU
SM_PWCU	320_PLANNING_LAYOUT	/JBPB/APLAN_PNLPT_CU	Simplified Data Model - PnL - Weekly - CU
SM_TWCU	320_PLANNING_LAYOUT	/JBPB/APLAN_PNLPT_CU	Simplified Data Model - Product Tree - Weekly - CU
SM_PMNU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_CUNU	Simplified Data Model - PnL - Monthly - NU
SM_TMNU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_CUNU	Simplified Data Model - Product Tree - Monthly -NU
SM_ONU	320_PLANNING_LAYOUT	/JBPB/APLN_SUMM_CUNU	Simplified Data Model - Overview - NU
SM_PWNU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_CUNU	Simplified Data Model - PnL - Weekly - NU
SM_TWNU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_CUNU	Simplified Data Model - Product Tree - Weekly - NU
SM_PMTU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_TU	Simplified Data Model- PnL - Monthly - TU
SM_TMTU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_TU	Simplified Data Model- Product tree - Monthly - TU

Criteria Profile ID	Virtual View Usage	Query ID	Description
SM_OTU	320_PLANNING_LAYOUT	/JBPB/APLN_SUMM_TU	Simplified Data Model- Overview - TU
SM_PWTU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_TU	Simplified Data Model- PnL - Weekly - TU
SM_TWTU	320_PLANNING_LAYOUT	/JBPB/APLN_PNLPT_TU	Simplified Data Model- Product Tree - Weekly - TU

11. Map the query profile to a sales area.

    Assign the query profile for query simplification to the sales area for which query simplification is activated.

    You can maintain this configuration in Customizing for *Customer Relationship Management* under *Trade Management* > *General Settings* > *System Settings* > *Map Query Profile to Sales Area*.

2.2.20 Configuring Wholesaler-Indirect Relationships

Context

You use the Wholesaler-Indirect Relationship Maintenance application to maintain:

- Indirect accounts corresponding to the wholesaler as well as the volume percentage distributed to each indirect account corresponding to the product category or the product.
- Wholesalers corresponding to the indirect accounts as well as the percentage received from each wholesaler corresponding to the product category or the product.

The following Customizing settings are necessary to be able to use the Wholesaler-Indirect Relationship Maintenance application:

Procedure

1. Maintain the BW InfoProvider, which contains the wholesaler-indirect data, in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *Wholesaler-Indirect Relationship* > *Maintain BW InfoProviders*.

   You need to install the mentioned InfoObjects and aDSO /JBPB/INDREL available in standard content in case you want to store the indirect relationship data in BW to activate the Wholesaler-Indirect Relationships functionality.

   InfoProvider: /JBPB/INDREL

2. Map the InfoObjects of the InfoProvider maintained in the previous step to the corresponding CRM field names in Customizing for *Customer Relationship Management* by choosing *Trade Management* > *General Settings* > *Wholesaler-Indirect Relationship* > *Maintain BW InfoObjects* .

CRM Field Name	BW InfoObject
BP: Relshp Direction	0BP_RELDIR
Division	0DIVISION
Record GUID	/JBPB/INDGUID
Indirect Account	/JBPB/INDRECT
Percentage	0INDPERCENT
Product	0CRM_PROD
Product Category	0PROD_CATEG
Distribution Channel	0DISTR_CHAN
Sales Organization	0CRM_SALORG
Calendar Week From	/JBPB/CWFROM
Calendar Week To	/JBPB/CWTO
Wholesaler Account	/JBPB/WSALER

3. Maintain the promotion type for exclusion.

   You must define promotion types which are not relevant for a specific responsibility area (RA) type in the Customizing for *Customer Relationship Management* under *Trade Management* > *Trade Promotions Planning and Management* > *Key Figure Planning with Planning Applications Kit* > *Define Sales Areas and Exclude Promotions Types for RA Type* > .

   You must first maintain the sales area and for the specific sales area, you can define the RA type and promotion type that need to be excluded.

   A generic saled area entry has been delivered in the example content.

2.2.20.1 Setting Up Wholesaler-Indirect Planning

This section details out the settings required to use the indirect planning functionality.

Procedure

1. Assign criteria profile to query profile.

   Maintain the BW queries relevant to the criteria profile for the respective query profile.
2. Create new queries to assign the query profile.

   Using query simplification techniques the same query can be configured in multiple view.
3. Maintain wholesaler/indirect responsibility areas.

   You have to maintain the specific responsibility areas for wholesalers and indirects to be able to plan for these. Different responsibility areas are available for this purpose.

   The following responsibility area types are used to map wholesaler-indirect relationships:

   - *Wholesaler Plannable*: The sell-through volume is distributed to *Indirect Non-Plannable*.
   - *Wholesaler Non-Plannable*: The sell-through volume is retrieved from the corresponding *Indirect Plannable* responsibility area and the sell-through base volume will be non-editable.
   - *Indirect Plannable*: The sell-through volume is distributed to *Wholesaler Non-Plannable*.
   - *Indirect Non-Plannable*: The sell-through volume is retrieved from the corresponding *Wholesaler Plannable* responsibility area and the sell-through base volume will be non-editable.
4. Register the queue with prefixes `CBP_WH_*` and `CBP_IN_*` in your system using transaction **SMQR**.

   On saving the wholesaler/indirect plan or scenario, a queue is generated to update baselines in the indirect plan and uplifts in corresponding wholesaler plan. This queue is only generated if the simplified data model feature is active.

   If the RA is of type *Wholesaler Plannable* or *Wholesaler Non-Plannable*, a queue with prefix `CBP_WH_*` is generated. This queue pushes down the volumes to the indirect plan. Conversely, if the RA is of type *Indirect Plannable* or *Indirect Non-Plannable*, a queue with prefix `CBP_IN_*` is generated, rolls up the uplifts to the wholesaler plan.
5. Use the following Business Add-Ins to configure specific settings for your indirect planning:
   - You can define the target profile to be used for *Indirect Plannable* or *Indirect Non-Plannable* RAs in the Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Targets* > *Business Add-Ins (BAdIs)* > *BAdI: Modification of Target Profiles*.

     > **i Note**
     >
     > A default implementation is delivered with the solution that determines the target profile `SM_PROF_IK` if the RA is of type *Indirect Plannable* or *Indirect Non-Plannable*.
   - You can control the visibility of the screen with the BAdI `/JBPC/VVF_CBP`. The BAdI has been added in the Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Business Add-Ins (BAdIs)* > *BAdI: Modify CBP Screen on VVF Layer*.

In the example content, the Baseline Building Blocks is hidden screen for wholesaler/indirect plans using this BAdI.

- To obtain the child nodes of a given hierarchy node based on the chosen sales area on the UI, you can use the BAdI `/JBPC/WS_IND_REL` available in the Customising for *Customer Relationship Management* under *Trade Management* > *General Settings* > *Wholesaler-Indirect Relationship* > *BAdI: Wholesaler Indirect Relationship*, with the implementation `/JBPC/WS_IND_REL`.

The BW query profile changes are delivered in the BAdI implementation `/JBPC/EX_VVF_BW_QRY_FLT_PROMO` of BAdI `/JBPC/VVF_BW_QUERY`.

For more information on the setup of the BW data model, kindly refer to Configuring Wholesaler-Indirect Planning [page 188] under Configuration Settings for SAP BW in this guide.

2.2.20.2 Query Profiles for Wholesale-Indirect Responsibility Areas

The following responsibility area types are used for indirect planning:

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

The query profile *Simplified Planning* is used for the responsibility area types *Wholesaler Plannable* and *Indirect Plannable*; and the query profile *Indirect* is used for the responsibility area types *Wholesaler Non-Plannable* and *Indirect Non-Plannable*.

The following query profiles, along with the corresponding criteria profiles, have been maintained for wholesaler and indirect plans:

- `QR_SIMP_ID`: *New Data Model In-Direct*
- `QR_SIMP_WS`: *New Data Model Wholesaler*

After selecting the query profile, you can assign the relevant criteria profile virtual view usage and query ID.

For indirect promotions, the following query profiles and the corresponding criteria profiles have been delivered:

- `QR_IN_SCPC`: *Indirect-Product Category STA - Consump*
- `QR_IN_SSPC`: *Indirect-Product Category STA – Shipment*
- `QR_IN_STAC`: *Indirect-Short Term Promotion – Consump*
- `QR_IN_STAS`: *InDirect-Short Term Promotion – Shipment*

2.2.21 Configuring Overlapping Planning

Overlapping plans allow you to create customer business plans at different levels in a customer business partner hierarchy. These plans can then be managed at different levels of the responsibility area hierarchy. For example, there can be a customer business plan at the HQ level with regional plans below.

Overlapping Planning Using Top-Down Approach

In this business process, certain key figures, such as baselines, are planned at a higher level and are copied to lower-level plans. These key figures, therefore, cannot be edited in the lower-level plans. Planned volumes (for example, uplifts from promotions or baseline adjustments) can be rolled up from the lower-level plans to the higher-level plan.

Overlapping Planning Using Bottom-Up Approach

In this business process, certain key figures, such as uplifts, are planned at the lower levels and aggregated to the higher-level plan.

> **i** Note
>
> When pushing down or rolling up numbers, only the listed products in the receiving responsibility area are copied over. These key figures, therefore, cannot be edited in the higher-level plan.

For BW-relevant configuration settings for overlapping planning, refer to Configuring Overlapping Planning [page 194] in the section on Configuration Settings for SAP BW [page 155] in this guide.

2.2.21.1 Configuring Overlapping Plan Queries

Procedure

1. 1. Maintain the queries defined in the BW system for overlapping plans in Customizing for *Customer Relationship Management* > *Trade Management* > *General Settings* > *System Settings* > *Define BW Queries*.
2. Maintain a query profile.

   A BW query profile is created to group together all the queries for a given country or sales area. Maintain the BW query profile for volume/value planning in Customizing for *Customer Relationship Management*

Trade Management > *General Settings* > *System Settings* > *BW Query Determination* > *Maintain Query Profile*.

Queries are assigned to the query profile using a criteria profile. A query is then assigned to a combination of a criteria profile and a virtual view usage. You can do this in Customizing for *Customer Relationship Management* > *Trade Management* > *General Settings* > *System Settings* > *BW Query Determination* > *Maintain Query Profile* > *Assign Criteria Profile and Query ID*.

The following query profiles, along with the corresponding criteria profiles, have been assigned and delivered for overlapping plans.

- `QR_SIM_KAM`: Planning with New Data Model - KAM
- `QR_SIM_NAM`: Planning with New Data Model - NAM

The following query profiles, along with corresponding criteria profiles have been assigned and delivered for overlapping promotions:

- `QR_IN_SCPC`
- `QR_IN_SSPC`
- `QR_IN_STAC`
- `QR_IN_STAs`

2.2.21.2 Setting Up Responsibility Areas for Overlapping Plans

The hierarchy of overlapping plans is defined using the *Related Responsibility Area* attribute of the responsibility areas. For the overlapping plans feature to work correctly, the *Related Responsibility Area* attribute of the lower-level plans should refer to the *Responsibility Area ID* of the corresponding higher-level plan.

Ensure that the *Query Profile ID* assigned to the responsibility area of the higher-level plan has been assigned the level indicator of the higher-level plan when it is created. Similarly, the *Query Profile ID* assigned to the responsibility area of the lower-level plan should have the level indicator of the lower-level plan.

You must maintain the responsibility area type as overlapping plan, for use with the simplified data model.

2.2.21.3 Registering Queues for Executing Planning Functions

On saving the overlapping plan or scenario, a queue is generated to update baselines in the lower-level plan and uplifts in corresponding higher-level plan. This queue is only generated if the simplified data model feature is active.

Register the queue with prefix `CBP_OVERLAP_*` in your system using transaction **SMQR**.

2.2.21.4 Business Add-Ins for Overlapping Planning

The following business add-ins (BAdIs) are relevant to the overlapping planning functionality:

- You can define the target profile to be used for lower-level overlapping plan responsibility area in the Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Targets* > *Business Add-Ins (BAdIs)* > *BAdI: Modification of Target Profiles*.

  > **Note**
  >
  > A default implementation is delivered with the solution that determines the target profile `SM_PROF_IK`.

- You can maintain the visibility of the screen with the BAdI `/JBPC/VVF_CBP`. The BAdI has been added in the Customizing for *Customer Relationship Management* under *Trade Management* > *Customer Business Planning* > *Basic Settings* > *Business Add-Ins (BAdIs)* > *BAdI: Modify CBP Screen on VVF Layer*.

The BW query profile changes are delivered in the BAdI implementation `/JBPC/EX_VVF_BW_QRY_FLT_PROMO` of BAdI `/JBPC/VVF_BW_QUERY`.

3 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 Customer Business Planning.

3.1 System Setup

Before you can use SAP Customer Business Planning, you must install and configure the relevant content and objects relevant to 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.

3.2 CBP Concepts

3.2.1 Planning Product Hierarchy

A planning product hierarchy is a product hierarchy specifically defined for use in SAP Customer Business Planning. It allows you to structure your products in a hierarchy that fits your own planning and your retailer's view of the product hierarchy.

For more information on the PPH, kindly refer to Defining a Planning Product Hierarchy [page 9].

The plan data for a customer business plan is stored in the SAP BW system connected to your SAP CRM system. This means that the product information required to calculate plan data must be available in trading unit, consumer unit, and normalized unit in your sysBWtem.

Once a PPH is saved, it triggers RFC `/JBPB/SAVE_AND_ACT_HIERARCHY` in the BW system which updates the hierarchy of the infoobject *TU CU Product* (`/JBPB/TUCUPRD`). This process generates three types of hierarchies (P* , C* and T*) in the BW system for each PPH.

In the *Product Tree* view (TU, CU, or NU), the plan data is presented in a hierarchy that is defined when the planning product hierarchy is created. In the NU view, the system uses the TU hierarchy, which is always non-editable as it only displays the conversion from TU to NU.

The product hierarchy that you use in trading units can have a different structure as compared to the hierarchy in the consumer unit view if you have the same consumer unit in multiple products.

3.2.2 Source Indicator

The characteristic `/JBPB/SCINDIC` is used to store the source indicator information in a plan aDSO. The sample data model that has been delivered uses `/JBPB/IPLAN` as the plan aDSO.

The *Source Indicator* should be added as a key field in the plan aDSO. This characteristic helps identify the source of the data.

Source Indicator Values

Source Indicator	Value
Latest Estimate	1
Scenario	A, B and C

For more information, refer to Source Indicator [page 60] under *Configuration Setttings for SAP CRM* in this guide.

3.2.3 Distribution Ratio

Distribution ratio, `0DISTRATIO`, is a key figure which represents the number of days for which a product dimension is valid. It is used for distributing the values when you are planning at the week level. This key figure is automatically filled in during the combination generation process in SAP BW.

3.2.4 Preparing TU CU Master Data

In SAP Customer Business Planning, the system uses conversion factors retrieved from the product master data to calculate volumes in CU and NU unit on the respective screens when you plan in trading units. Therefore, conversion factors should be maintained in the product master data, `/JBPB/TUCUPRD`.

The conversion factor type used for NU conversion is `/JBPB/AU` and for CU conversion is `/JBPB/CU`. The conversion factor types can be accessed via transaction **RSUOM**. This conversion type is used in the queries to convert the TU numbers to the corresponding NU/CU numbers at runtime.

> ### Example
>
> If you have selected the *Sell-in Volume* key figure in your *Product Tree* view and you switch from trading to consumer units, the system uses a mapping between the trading and consumer unit key figures to display the corresponding *Sell-in Volume* key figure in the *Consumer Unit* view. Similarly, this would be applicable if you switch to the NU view.

3.2.4.1 Data Sources for TU CU Master Data

The master data setup for TU CU products requires the following data sources:

- TU CU Product Attributes (/JBPB/JBP_PRODUCT_TU_CU_LINK)
- TU CU Product Text (/JBPB/JBP_PRODUCT_TU_CU_TEXT)

Data Source: TU CU Product Attributes (/JBPB/JBP_PRODUCT_TU_CU_LINK)

This data source is also used to store data in aDSO /JBPB/TUCUNU, and then in turn to aDSO /JBPB/UCF. Both the aDSOs are used to store Units of Measure (UoM) for TU CU products.

aDSO /JBPB/TUCUNU is used during roll-up planning functions to derive the CU products against each TU. The aDSO /JBPB/UCF is the base UoM aDSO for the InfoObject /JBPB/TUCUPRD. The attribute /JBPB/CUNIT of info object /JBPB/TUCUPRD is used to determine the conversion factor.

DataSource Field	Description
PRODUCT_ID	Product ID
TU_GUID	Product GUID
SALES_ORG	Sales Org. ID
DIST_CHANNEL	Distribution Channel
DIVISION	Division
PRD_TU_CU	Product TU/CU GTIN
BASE_UOM	Base UoM
CU_NUM_FACTOR	CU Factor Numerator
CU_DEN_FACTOR	CU Factor Denom.
CU_SUM_FACTOR	CU Sum Factor
AU_DEN_FACTOR	AU Factor Denom.
AU_NUM_FACTOR	AU Factor Numerator
TU_GTIN	Prod. TU GTIN
CU_GTIN	Prod. CU GTIN
SALES_UOM	Sales UoM
CU_UOM	Prod. CU UOM

DataSource Field	Description
AU_UOM	Alt. AU UOM
/JBPB/INDI	Indicator
BOM_PROD_INDICATOR	BOM Indicator

Data Source: TU CU Product Text (/JBPB/JBP_PRODUCT_TU_CU_TEXT)

This data source is used to store texts for /JBPB/TUCUPRD. The texts are displayed against the products in the *Product Picker* in the application.

DataSource Field	Description
PRODUCT_ID	Product ID
PROD_GUID	Product GUID
PRD_TU_CU	Product TU/CU GTIN
LANGU	Language
DESCRIPTION	Description

3.2.4.2 Advanced DataStore Objects for TU CU Master Data

The master data setup for TUCU requires the following Advanced DataStore Objects (aDSOs) to store the conversion factors:

- /JBPB/TUCUNU
- /JBPB/UCF

The following subsections explain the usage of these aDSOs.

aDSO: /JBPB/TUCUNU

This aDSO is used to store the details of mapping between 0CRM_PROD and the TU-CU components that it contains. The details are used to store mapping of /JBPB/TUCUPRD to the CRM product (0CRM_PROD) with sales organization (as it can vary with each sales org) and the sales unit to consumer unit and normalized unit mapping, along with corresponding numerator and denominator factors.

The aDSO plays an important role during the roll-up of promotional data to CBP plan to derive the components of each CRM product.

Structure of aDSO /JBPB/TUCUNU

InfoObject	Description	Key Field
/JBPB/TUCUPRD	TU CU Product	X
0CRM_PROD	Product	X
0CRM_SALORG	Sales Organization CRM	X
0DISTR_CHAN	Distribution Channel	X
0DIVISION	Division	X
0RECORDMODE	BW Delta Process: Update Mode	
0SALES_UNIT	Sales Unit	
/JBPB/CUFACTS	Product CU Sum Factor	
/JBPB/CUFACTD	Product CU Factor Denominator	
/JBPB/CUFACTN	Product CU Factor Numerator	
/JBPB/AUFACTD	Product AU Factor Denominator	
/JBPB/AUFACTN	Product AU Factor Numerator	
/JBPB/GTINCU	Global Trade Item Number CU	
/JBPB/GTINTU	Global Trade Item Number TU	
/JBPB/CUNIT	Consumer Unit	
/JBPB/AUNIT	Alternative Unit	
0PROD_ID	Product ID	
/JBPB/BOM_FLG	BOM_INDICATOR	
/JBPB/TUQUANT	TU Quantity	
/JBPB/CUQUANT	CU Quantity	

aDSO: /JBPB/UCF

This aDSO is used to store the unit of measure mapping for the consumer unit (CU) and normalized unit (NU) to each sales unit with the corresponding numerator and denominator factors. The aDSO is used to derive the unit conversion factors for the plan queries in consumer unit and alternative unit. These are used in the unit conversion types /JBPB/CU (Consumer Unit Quantity Conversion Type) and /JBPB/AU (Normalized Unit Quantity Conversion Type).

This aDSO is configured in the *Business Explorer* tab for InfoObject /JBPB/TUCUPRD.

Structure of aDSO /JBPB/UCF

InfoObject	Description	Key Field
/JBPB/TUCUPRD	TU CU Product	X
0UNIT	Unit of Measure	X
0SALES_UNIT	Sales Unit	
0UOMZ1D	Quantity – Counter	
0UOMN1D	Quantity – Denominator	

Quantity Conversion Type and Data Transformation

Quantity Conversion Type: /JBPB/CU

This quantity conversion type is used to convert the TU values to CU. The quantity conversion works based on the reference object /JBPB/TUCUPRD.

The quantity conversion type /JBPB/CU converts the sales quantity associated with the base unit of measure from the data record (in our case 0SALES_UNIT) to a target quantity in /JBPB/CUNIT (Consumer Unit). The /JBPB/CUNIT to be used is derived from the attribute /JBPB/CUNIT of InfoObject /JBPB/TUCUPRD. **Please ensure the master data extraction populates the /JBPB/CUNIT attribute in the InfoObject** /JBPB/TUCUPRD. The conversion factors are stored in the aDSO /JBPB/UCF.

The conversion type is used in the queries for Consumer Unit. For example, *Previous Year Baseline Volume* uses the conversion type during query design.

Quantity Conversion Type: /JBPB/AU

This quantity conversion type is used to convert the TU values to NU. The unit conversion works based on the reference object /JBPB/TUCUPRD.

It converts the sales quantity associated with the base unit of measure from the data record (in our case 0SALES_UNIT) to a target quantity associated with the unit received in variable /JBPB/AU_UNIT. The conversion factors are stored in the aDSO /JBPB/UCF.

The conversion type is used in the queries for Normalized Unit. For example, *Previous Year Baseline Volume* uses the conversion type during query design.

Data Transformation for /JBPB/TUCUNU

The data is loaded into /JBPB/TUCUNU from the data source /JBPB/JBP_PRODUCT_TU_CU_LINK. The transformational mapping is a direct mapping from DataSource fields to the aDSO fields.

Data Transformation for /JBPB/UCF

The data is loaded from /JBPB/TUCUNU in the delivered content. You can choose to load it from any other source as well, such as a flat file or SAP delivered DataSource, or through a third-party (external) DataSource. The delivered transformation mapping is a one-to-one direct mapping from one aDSO to the other.

3.2.5 Assortments

An assortment is a list of products that can be planned for a given customer for a given time frame. For more details on assortments, kindly refer to Defining Assortments [page 32] under *Configuration Settings for SAP CRM* in this guide.

Once you hhave defined your assortment, and you save it, event 33 is triggered on the plan master query. The sample data model that has been delivered uses the following configuration settings:

Plan Master Query: `/JBPB/APLN_M_PNL_MASTER`

Configuration Settings

Event ID	Planning Function	Description	Sequence	Filter
33	`/JBPB/CPY_PREV_YR_NW`	Copy Previous Year Data	1	Custom

For more information on the planning function, refer to .

3.2.6 Shadow Key Figures

The functionality to display the weighted average on the *Customer Business Planning* application is achieved through shadow key figures. It is not delivered with the standard solution, however you can choose to enable this feature based on your business needs.

To store the weighted averages in the aDSO, you need to add the required key figures in the planning aDSO. This key figure needs to be calculated on every change of the referenced key figure and the key figure used for the weighting. This can be achieved in a planning function that is executed on cell update. This key figure will have to be included in the planning query.

For more information on shadow key figures and the relevant CRM Customizing, kindly refer to Shadow Key Figures [page 67] under *Configuration Settings for SAP CRM* in this guide.

Calculation of Absolutes

The system calculates absolutes for every rate and percentage key figure. These values are also persisted in the aDSO in a separate key figure. The key figures with an 'A' after the namespace typically represent absolute key figures for the corresponding rate or percentage.

> **Example**
>
> If the list price is `/JBPB/RLIST`, the corresponding absolute key figure is `/JBPB/ARLIST`.

The following table shows an example of the calculation of absolutes.

Example: Calculation of Absolutes

Hierarchy	Volume	List Price (NO2)	Absolute Value (=Volume*List Price)	Calculated Value (UI) (=Abs Value / Volume)
Root Node	4500	*	20000	4.45
Category 1	3000	*	14000	4.67
Product 1	1000	5	5000	5
Product 2	2000	4.5	9000	4.5
Category 2	1500	4	6000	4
Product 3	1500	4	6000	4

The table uses a simple hierarchy comprising two (2) products under the *Category 1* node and one (1) product under *Category 2*. If the *List Price* key figure `/JBPB/RLIST` is used in the query, the value at the aggregated root node will be displayed as * because it is a `NO2` key figure. For this reason, a weighted average is calculated and displayed on the UI (the value of the list price shown at the root node will be 4.45).

If the user now updates the value of the *List Price* to 5.5 at the root node, the same value is assigned to all the levels in the hierarchy. The value is first updated for the *List Price* key figure and a planning function is then executed to recalculate the absolute values.

Product Hierarchy

Hierarchy	Volume	New List Price (NO2)	Absolute Value (=Volume*List Price)	Calculated Value (UI) (=Abs Value / Volume)
Root Node	4500	5.5	24750	5.5
Category 1	3000	5.5	16500	5.5
Product 1	1000	5.5	5500	5.5
Product 2	2000	5.5	11000	5.5
Category 2	1500	5.5	8250	5.5
Product 3	1500	5.5	8250	5.5

3.2.7 Prepare Latest Estimates for Volumes

Context

You use this step to display the latest estimates for volumes in SAP Customer Business Planning. Thse estimates are prepared by combining the actual sales volumes from the past periods with the customer business plan volumes in future periods.

To prepare these estimates, you must consider the following during implementation:

- Determine the source of the actual volumes based on sell-in versus sell-out planning.
- Transform the actual sales volumes from the source and store them in the format in which they can be consumed by your customer business plan.
- If the actuals are loaded using process chains or scheduled jobs, define the frequency for triggering the process of transferring actual volumes to the plan (for example, weekly, bi-weekly, monthly).
- The plan query is built on the composite provider `/JBPB/C_PLN`, which contains the plan, promotion, and actual aDSOs. When the query is executed, the actual data is fetched from the actual aDSO.

Procedure

1. The planning query is built on the composite provider that has aDSOs `/JBPB/IPLAN` (plan), `/JBPB/IPRSTG` (promotion staging), and `/JBPB/IACT` (actual).
2. The actual KPIs are restricted with actual aDSO as well as exit variables (`/JBPB/ACT_CALMONTH_RANGE`, `/JBPB/LE01_WEEK_AC_W`) so that it fetches the volumes and prices for the past period.

3.3 Integration with External Data

3.3.1 Actual Data

Latest estimates are a combination of actual data from the past and plan data in the future.

The actuals aDSO `/JBPB/IACT` is delivered with the solution to store actuals data and `/JBPB/IPLAN` to store the plan data. aDSO `/JBPB/IACT` can be sourced to retrieve the data from internal or external sources against source indicator **`1`**.

When setting up the aDSO for actuals data, it should have the following key characteristics:

- `0BP_GRP`: Represents a node in the account hierarchy
  The account hierarchy node should be the same as for your customer business plan.
- `0CALWEEK`: Represents a week

The week definition should be the same as the one you use in your customer business plan.

- `/JBPB/TUCUPRD`: A unique key representing the product
  In the delivered content, this key is formed by combining TU and CU GTINs retrieved from the product master.
- `0CRM_PROD`: Product key from the product master
  This is also an attribute of `/JBPB/TUCUPRD` and can be used to retrieve the TU CU key.

Planning queries have been created on top of the composite provider `/JBPB/C_PLN`, which contains the plan, promotion, as well as the actual aDSOs. The sample plan PNL query, `/JBPB/APLN_PNLPT_TU`, that has been delivered, contains the actual as well as plan data. While the query is executed for the past period, it extracts the data from `/JBPB/IACT` based on the restrictions provided for the actual KPIs and displays the data.

Query `/JBPB/C_VERS_PROD_PICK_TU` is used to fetch the list of products against which actual data is present (assorted/non-assorted) which is then further used by CRM to build up the product picker. For more details, refer to Integrating Actuals with Plan Data in the Common Configuration Guide for SAP Trade Management.

3.3.2 Reference Data

The aDSO `/JBPB/IREF` contains the reference data for KPIs such as *Sell-In Base*, *Sell-Out Base*, *List Price*, *Efficiency Rate*, *Cost of Goods Sold*, and *Retail Shelf Price*. In the solution delivered, the reference baselines are retrieved from the aDSO */JBPB/IREF* and stored with source indicator value **1** in your customer business plan.

The data is transferred to the reference aDSO through an RFC `/JBPB/UPDATE_TPO_RESULTS`. If you are using SAP Advanced Trade Management Analytics for forecasting, then the reference sell-out volumes are updated during plan prediction, which updates the forecasted sell-out volumes and innovation baselines in the reference key figures (which updates the sell-in base).

On the *Comparison* dropdown, when the user selects *Latest Estimates v/s Reference*, the reference volumes are read from the corresponding aDSO `/JBPB/IREF` through the reference queries, which then display the reference rows. You must transfer your reference volumes from your source into this aDSO. The granularity at which the aDSO /JBPB/IREF expects this information is as follows:

- Account key – account hierarchy node in your customer business plan
- Time granularity – month and week
- Product key – combination of TU and CU GTINs

Innovation Product

Each innovation product has an indicator distinguishing it as a placeholder product along with its reference product. You have the following options to load the reference data for innovation products:

- Data for the innovation products fetched from ECC directly (if maintained)
- End routine in transformation from this aDSO to itself fetch the price of each innovation product by looking up the price and data for the reference product

Copy Reference Data

Reference volume/prices and non-promotional terms from reference data can be copied to the customer business plan. You can manually trigger this process by using the *Copy Reference Data* context menu option. This option is available on all editable cells including the *Totals* column. The function copies data for the key figure and the time duration that is selected.

When the copy from reference step is executed, the system triggers event `14` at the plan screen query which calls the planning function `/JBPB/FUN_REF_COPY` to copy the data from the reference row to the latest estimates row, that is copy the data from `/JBPB/IREF` aDSO to `/JBPB/IPLAN` aDSO. The plan data is copied over from the latest estimates data each time data is changed in the planning layout.

Queries:

- **Plan P&L and Product Tree TU Query**: `/JBPB/APLN_PNLPT_TU`
- **Plan P&L Query**: `/JBPB/APLN_PNL_TU`

Configuration Settings for Query

Event ID	Planning Function	Description	Sequence	Filter
14	`/JBPB/FUN_REF_COPY`	Copy Reference Key Figures	1	Custom

For more details on planing functions, kindly refer to Copy Reference Key Figures [page 196].

3.4 Setting Up KPI Monitor

You can set up the targets for the KPIs that you want to display on any of the following screens:

- *Plan Overview*
- *Assortment*
- *Plan*
- *Baseline Building Blocks*
- *Scenario Planning*

The BW read query *KPI Monitor for Overview Screen* (`/JBPB/APLN_OVRVIEW_KPI_MONITOR`), that has been delivered with the sample data model, is used to retrieve the latest estimates that are displayed in the KPI monitor and are also used to calculate the delta with the targets.

This query has been created on the aggregate level plan data `/JBPB/APLN`, with TU CU product `/JBPB/TUCUPRD` in the rows and key figures in the columns.

For more information on the CRM Customizing, kindly refer to Set Up KPI Monitor [page 81] under *Configuration Settings for SAP CRM* in this guide.

3.5 Setting Up Budget Monitor

The BW read queries mentioned below are delivered with the solution as an example, for the listed screens respectively. For event budget, the total budget is retrieved from **Funds Management** in CRM, and planned budget is retrieved from the BW query.

- Plan Overview/Assortment/Plan screens: `/JBPB/APLN_SCEN_IMPCT_KPI`
- Baseline Building blocks screen: `/JBPB/APLN_OVRVIEW_KPI_MONITOR`

Additionally, the decimal settings of the displayed key figures consider the settings defined in the respective query. For more information on budget monitor related CRM Customizing, kindly refer to Set Up Budget Monitor [page 80] under *Configuration Settings for SAP CRM* in this guide.

3.6 Plan Overview

You can display an overview of your customer business plan for a selected planning year. For more information, refer section Setting Up Plan Overview [page 74] under *Configuration Settings for SAP CRM* in this guide.

You can customize the reports that we want to display as a tile in the *Plan Overview* screen. The details are available under Customize Reports [page 84].

For details on SAC reports, refer to Configuring Authorizations for SAC Stories in the Common Configuration Guide for SAP Trade Management.

3.7 Volume Planning

The *Baseline Building Blocks* are applicable only for the *Sell-In* volumes. To perform baseline volume planning, you can use a variant for the planning views where you can choose a required set of key figures. This set of key figures allows you to build the baseline for the planning year using the previous year volume as a base, and then maintaining the incremental factors that are applicable to reach the new baseline volume.

The planning query configured for the respective screen is triggered using method `IF_RSCRM_IMP_OBJECT~EXECUTE_QUERY` of class `CL_RSCRM_IMP_OBJECT` in the BW system to load the data on screen.

For more information about how variants can help you to carry out baseline volume planning, kindly refer to the Application Help for SAP Customer Business Planning, and for CRM Customizing, you can refer to Performing Volume Planning [page 85].

When you change data in the planning grid for any of the baseline building block view and choose *Recalculate* or *Save*, the cell update process is triggered from the method `IF_RSCRM_IMP_OBJECT~UPDATE_CELL` of class `CL_RSCRM_IMP_OBJECT`. The cell update triggers the planning function `/JBPB/FUN_ABBB_CUPD`, which then copies the sell-in baseline volume to the *Plan* screen.

Queries:

- **Baseline Volume Planning**: /JBPB/ABBB_BVP_PLNPT_TU
- **BVP Summary TU Query**: /JBPB/ABBB_PBV_SUMM_TU
- **Baseline Volume Planning EPT Flat View**: /JBPB/ABBB_BVP_EPT_TU_FLAT
- **Baseline Volume Planning EPT Tree View**: /JBPB/ABBB_BVP_EPT_TU_TREE

Configuration Settings

Event ID	Plannning Function	Description	Sequence	Filter
3	/JBPB/FUN_ABBB_CUPD	Baseline Volume Planning Cell Update	1	Custom

For more details on planing functions, kindly refer to Baseline Volume Planning Cell Update [page 195].

The subsections describe the various views that you can maintain within *Baseline Building Blocks*.

3.7.1 Baseline Volume Build

In this view, the data is displayed for a selected node in your planning product hierarchy for a selected time dimension in the time control.

The following queries are used for both weekly and monthly layouts on the *Baseline Volume Build* screen:

Query	Description
/JBPB/ABBB_BVP_PNLPT_CU	*Simplified Data Model - PnL – Weekly/Monthly - CU*
/JBPB/ABBB_BVP_PNLPT_CUNU	*Simplified Data Model - PnL – Weekly/Monthly - NU*
/JBPB/ABBB_BVP_PLNPT_TU	*Simplified Data Model- PnL – Weekly/Monthly - TU*

3.7.2 Baseline Product Tree

In this view, the data is displayed for a selected key figure. The data is presented for all the products in your planning product hierarchy, for a selected time dimension in the time control.

The following queries are used for both weekly and monthly layouts on the *Baseline Product Tree* screen:

Query	Description
/JBPB/ABBB_BVP_PNLPT_CU	*Simplified Data Model - PnL – Weekly/Monthly - CU*
/JBPB/ABBB_BVP_PNLPT_CUNU	*Simplified Data Model - PnL – Weekly/Monthly - NU*

Query	Description
/JBPB/ABBB_BVP_PLNPT_TU	*Simplified Data Model- PnL – Weekly/Monthly - TU*

3.7.3 Baseline Summary

In this view, the data is presented for all the products in your planning product hierarchy as an aggregation of all the weeks in the selected period, for a selected time dimension in the time control.

The following queries are delivered for the *Baseline Summary* screens for TU, CU and NU views:

Query	Description
/JBPB/ABBB_BVP_SUMM_CU	*Simplified Data Model - Overview - CU*
/JBPB/ABBB_PBV_SUMM_CUNU	*Simplified Data Model - Overview - NU*
/JBPB/ABBB_PBV_SUMM_TU	*Simplified Data Model- Overview - TU*

3.7.4 Baseline Extended Product Tree

In this view, the data is displayed for all three dimensions (product, key figures, and time dimension) in a single view.

The following queries are used for both weekly and monthly layouts for *Baseline Volume Build Extended Product Tree* screen:

Query	Description
/JBPB/ABBB_BVP_EPT_TU_FLAT	*Simplified Data Model - Extended Product Tree – Monthly/ Weekly-TU-Flat View*
/JBPB/ABBB_BVP_EPT_TU_TREE	*Simplified Data Model - Extended Product Tree – Monthly/ Weekly-TU-Tree View*

3.8 Value Planning

You can use this business process if you want to plan prices and non-promotional terms within your customer business plan. This type of planning is referred to as value planning. The planning query configured

for the respective screen is triggered using method `IF_RSCRM_IMP_OBJECT~EXECUTE_QUERY` of class `CL_RSCRM_IMP_OBJECT` in the BW system to load the data on the screen.

For more information on value planning and the relevant CRM Customizing, kindly refer to Performing Value Planning [page 94] under *Configuration Setttings for SAP CRM* in this guide.

When you change data in the planning grid for the *Value Planning* or *Plan* view and choose *Recalculate* or *Save*, the cell update process is triggered from the method `IF_RSCRM_IMP_OBJECT~UPDATE_CELL` of class `CL_RSCRM_IMP_OBJECT`. The cell update triggers the planning function `/JBPB/APLN_CU_CELLUP` which then copies the sell-in baseline volume into the *Plan* screen.

Queries:

- **Plan PNL and Product Tree TU Query**: `/JBPB/APLN_PNLPT_TU`
- **Plan PNL and Product Tree TU Query**: `/JBPB/APLN_PNL_TU`

Configuration Settings

Event ID	Planning Function	Description	Sequence	Filter
3	`/JBPB/APLN_CU_CELLUP`	CBP Plan Cell Update	1	Custom

For more details on planing functions, kindly refer to CBP Plan Cell Update [page 196].

The subsections describe the various views that you can maintain within *Value Planning*.

3.8.1 Product Tree

In this view, the data is displayed for a selected key figure, and presented for all the products in your planning product hierarchy for a selected time dimension in the time control.

The following queries are used for both weekly and monthly layouts on the plan *Product Tree* screen:

Query	Description
`/JBPB/APLN_PNLPT_TU`	*Plan PNL and Product Tree TU Query*
`/JBPB/APLAN_PNLPT_CU`	*Plan Pnl CU Query*
`/JBPB/APLN_PNLPT_CUNU`	*Plan PNL NU Query*

3.8.2 Profit & Loss

In this view, the data is displayed for a selected node in your planning product hierarchy for a selected time dimension in the time control.

→ Tip

This screen doesn't need product in the rows or columns hence any variable or hierarchical display on the product infoobject should be avoided to gain optimal performance.

The TU view of this screen has a sample query `/JBPB/APLN_PNL_TU` which is a copy of `/JBPB/APLN_PNLPT_TU`, however without any hierarchical display or variable on TU CU Product `/JBPB/TUCUPRD`.

For the CU and NU views, this additional query hasn't been delivered, however it is recommended to create similar queries for these views as well, to gain optimal performance.

The following queries are used for both weekly and monthly layouts on the plan *Profit & Loss* screen:

Query	Description
`/JBPB/APLN_PNL_TU`	*Plan PNL and Product Tree TU Query*
`/JBPB/APLAN_PNLPT_CU`	*Plan Pnl CU Query*
`/JBPB/APLN_PNLPT_CUNU`	*Plan PNL NU Query*

3.8.3 Summary

In this view, the data is presented for all the products in your planning product hierarchy as an aggregation of all the weeks in the selected period, for a selected time dimension in the time control.

The following queries are used for both weekly and monthly layouts on the plan *Summary* screen:

Query	Description
`/JBPB/APLN_SUMM_TU`	*Plan Summary View TU*
`/JBPB/APLN_SUMM_CUNU`	*Plan Summary View NU*
`/JBPB/APLN_SUMM_CU`	*Plan summary View CU*

3.8.4 Calendar

The bars for short-term promotions and long-term agreements are displayed on the CBP *Calendar* screen based on the color chosen in the CRM Customizing settings.

You can set up the read query that you want to use to derive the promotion data from the BW system. The system uses this data and displays it in the promotion bar and tooltip.

The read query `/JBPB/C_PRM_PROMO_KPI_Q004` for short-term promotions and long-term agreements is delivered with the solution as an example. It accepts the characteristic `0CRM_MKTELM` as the input and returns the total promotion investment that is displayed on the promotion toolbar.

3.9 Promotion Power

Promotion power is an indicator that reflects the amount of impact the promotions have on a specific week or month in the plan. It is shown on the user interface by means of a colored circle that is filled according to the percentage impact of the promotion.

For more information on promotion power and the relevant CRM Customizing, kindly refer to Configure Settings for Promotion Power [page 131] under *Configuration Settings for SAP CRM* in this guide.

3.9.1 Promotion Power BW Queries

The following queries are defined in the SAP BW system to show the promotion power icon on the plan screen:

BW Query	Description
`/JBPB/APLN_PROMO_PWR_TU_M`	Promotion Power TU Monthly
`/JBPB/APLN_PROMO_PWR_TU_W`	Promotion Power TU Weekly
`/JBPB/APLN_PROMO_PWR_CU_M`	Promotion Power CU Monthly
`/JBPB/APLN_PROMO_PWR_CU_W`	Promotion Power CU Weekly
`/JBPB/APLN_PROMO_PWR_NU_M`	Promotion Power NU Monthly
`/JBPB/APLN_PROMO_PWR_NU_W`	Promotion Power NU Weekly

These BW queries show the KPIs *Uplift – Promotion Power* and *Spend – Promotion Power* based on the logic implemented in the query, and as shown in the following tables:

Uplift – Promotion Power	Uplift Volume Contribution to Total Volume
-1	<= 0
0	> 0 AND < 25
25	> = 25 AND < 40
50	>= 40 AND < 50
75	>= 50 AND < 60
100	>= 60

> **Note**
>
> *Uplift Volume Contribution to Total Volume* is calculated as follows:
>
> `Uplift Volume / (Uplift Volume + Baseline Volume) * 100`

Spend – Promotion Power	Promotion Spend Contribution to List Price
-1	<= 0
0	> 0 AND < 10
25	> = 10 AND < 20
50	>= 20 AND < 30
75	>= 30 AND < 40
100	>= 40

> **Note**
>
> *Promotion Spend Contribution to List Price* is calculated as follows:
>
> `(Promotion Investment Total / Sell-In Total) / List Price * 100`

Related Information

Promotion Power TU Queries [page 172]
Promotion Power CU Queries [page 173]
Promotion Power NU Queries [page 175]

3.9.1.1 Promotion Power TU Queries

Promotion Power for Monthly TU

In the delivered content, the query `/JBPB/APLN_PROMO_PWR_TU_M` is used to show the promotion power for monthly TU.

The query is defined with the following details:

Rows

InfoObject	Description
0SALES_UNIT	Sales Unit
0CALMONTH	Calendar Year/Month

Columns

InfoObject	Description	Type	Visibility	Input Readiness
J310_UPLIFT_PROMO_PWR	Uplift Promotion Power	Formula	Display	Default
Sell-In Uplift Volume	Sell-In Uplift Volume	Formula	Display	Default

Promotion Power for Weekly TU

In the delivered content, the query /JBPB/APLN_PROMO_PWR_TU_W is used to show the promotion power for weekly TU.

The query is defined with the following details:

Rows

InfoObject	Description
0SALES_UNIT	Sales Unit
0CALWEEK	Calendar Year/Week

Columns

The Columns [page 173] are the same as those of the monthly query /JBPB/APLN_PROMO_PWR_TU_M.

3.9.1.2 Promotion Power CU Queries

Promotion Power for Monthly CU

In the delivered content, the query /JBPB/APLN_PROMO_PWR_CU_M is used to show the promotion power for monthly CU.

The query is defined with the following details:

Rows

InfoObject	Description
/JBPB/CUNIT	Consumer Unit
0CALMONTH	Calendar Year/Month

Columns

InfoObject	Description	Type	Visibility	Input Readiness
J310_UPLIFT_PROMO_PWR	Uplift Promotion Power	Formula	Display	Default
Sell-In Uplift Volume	Sell-In Uplift Volume	Formula	Display)	Default

Promotion Power for Weekly CU

In the delivered content, the query /JBPB/APLN_PROMO_PWR_CU_W is used to show the promotion power for weekly CU.

The query is defined with the following details:

Rows

InfoObject	Description
/JBPB/CUNIT	Consumer Unit
0CALWEEK	Calendar Year/Week

Free Characteristics

Same as those of the monthly query /JBPB/APLN_PROMO_PWR_CU_M

Columns

Same as those of the monthly query /JBPB/APLN_PROMO_PWR_CU_M

3.9.1.3 Promotion Power NU Queries

Promotion Power for Monthly NU

In the delivered content, the query `/JBPB/APLN_PROMO_PWR_NU_M` is used to show the promotion power for monthly NU.

The Rows [page 173] and Columns [page 173] of this query are the same as those for the TU query for monthly (`/JBPB/APLN_PROMO_PWR_TU_M`). In addition, the *Conversion Type* for the column "J310_UPLIFT_PROMO_PWR(Uplift Promotion Power)" is maintained as **`JBPB Alternative UOM`**.

Promotion Power for Weekly NU

In the delivered content, the query `/JBPB/APLN_PROMO_PWR_NU_W` is used to show the promotion power for weekly NU.

The Rows [page 173] and Columns [page 173] of this query are the same as those for the TU query for weekly (`/JBPB/APLN_PROMO_PWR_TU_W`). In addition, the *Conversion Type* for the column `J310_UPLIFT_PROMO_PWR` (Uplift Promotion Power) is maintained as **`JBPB Alternative UOM`**.

Related Information

Promotion Power TU Queries [page 172]

3.10 Query Simplication

Query simplification reduces the number of queries used for the planning views.

For more information on query simplification and the relevant CRM Customizing, kindly refer to Query Simplification [page 142] under *Configuration Settings for SAP CRM* in this guide.

3.10.1 Simplification for Planning Queries

On the SAP Customer Business Planning screens, data can be viewed across the following dimensions:

- Time
- Product
- Key Figure
- Unit (TU/CU/NU)

Query simplification dynamically changes the drill characteristics in rows and columns, which helps to reduce the number of queries used for the views on the UI. The drill characteristics change dynamically at runtime to display data with the necessary granularity.

For example, one query contains all the calendar dimensions and the product dimension. When the user opens the weekly view on the *Profit & Loss* view, all the time dimensions except for CALWEEK are removed dynamically from the columns. The product dimension is then removed from the rows.

Similarly, when the user navigates to the weekly view in the *Product Tree* view, all the time dimensions except for CALWEEK are removed. The product dimension is added back to the rows.

A Customizing setting is provided in CRM that allows you to define which characteristics need to be displayed in the rows and columns on the respective UI views.

The Unit characteristic is not dynamically changed as each unit requires a separate key figure structure. This results in 6 queries for each of the different unit views and the *Summary* view which requires a different key figure grouping.

Type of Plan	Query Categorization	Current No. of Queries without Query Simplification	Current No. of Queries with Query Simplification
Normal Plan – (Non-Overlapping Plans)	TU Views	6	1
	CU Views	6	1
	NU Views	4	1
	Summary TU	1	1
	Summary CU	1	1
	Summary NU	1	1

The following queries replace the planning queries as a result of query simplification:

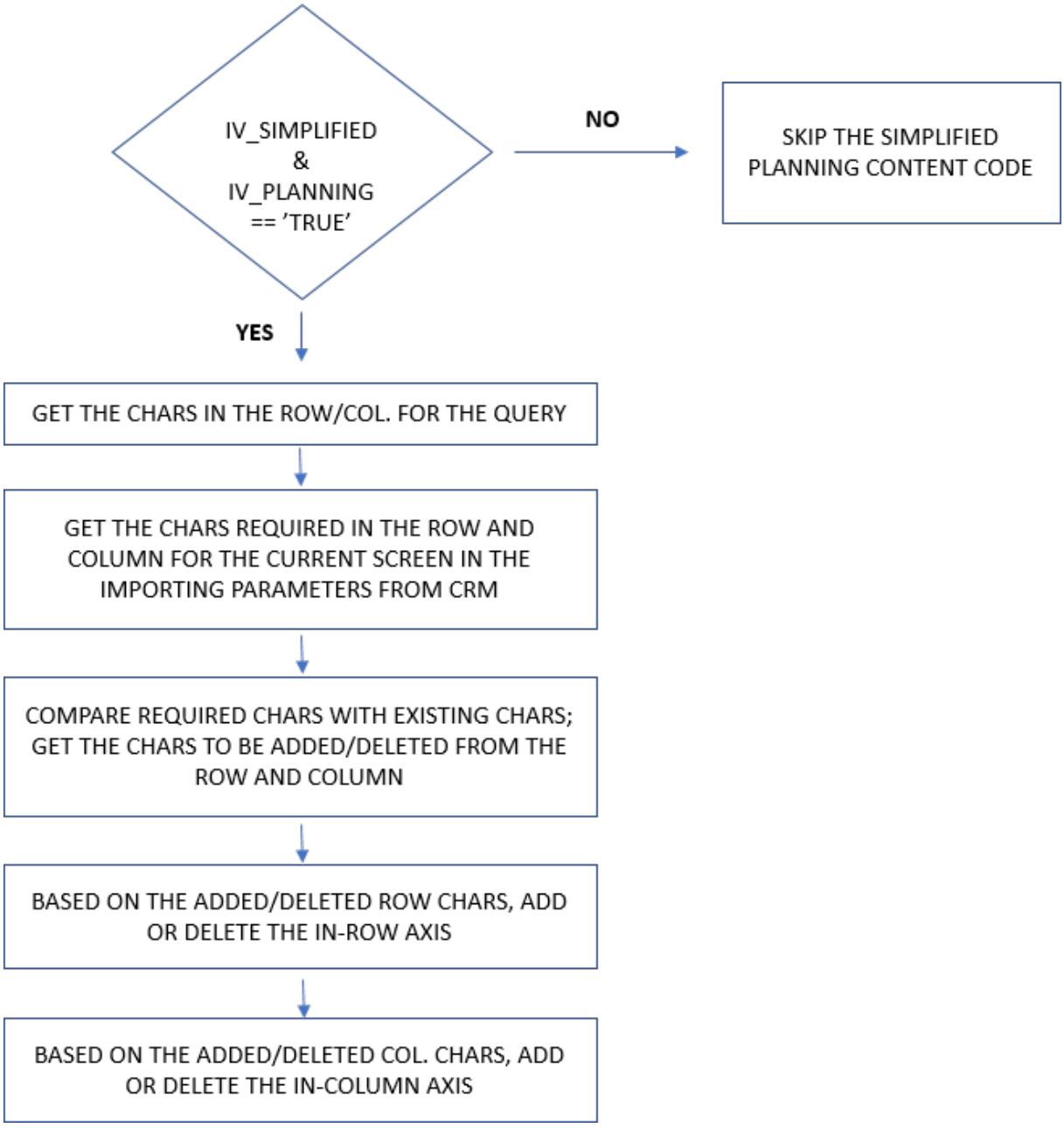
- `/JBPB/APLN_PNLPT_TU`
- `/JBPB/APLAN_PNLPT_CU`
- `/JBPB/APLN_PNLPT_CUNU`
- `/JBPB/APLN_SUMM_TU`
- `/JBPB/APLN_SUMM_CU`
- `/JBPB/APLN_SUMM_CUNU`

3.10.2 Optional Parameters to Achieve Dynamic Property of Queries

The following optional parameters are available in the function modules and methods to achieve the dynamic property of the queries:

- `RSCRM_IMP_EXEC_QUERY`
  The following three optional importing parameters are available in the function module:
  - `IT_ROW_NEEDED` (which InfoObjects are required in rows for the query)
  - `IT_COL_NEEDED` (which InfoObjects are required in columns for the query)
  - `IV_SIMPLIFIED` (**X** or blank indicates whether or not simplified planning functionality is required)
- `IF_RSCRM_IMP_ACTION_MANAGER~EXECUTE_QUERY`
  The following three optional importing parameters are retrieved from the function module `RSCRM_IMP_EXEC_QUERY`:
  - `IT_ROW_NEEDED` (which InfoObjects are required in rows for the query)
  - `IT_COL_NEEDED` (which InfoObjects are required in columns for the query)
  - `IV_SIMPLIFIED` (**X** or blank indicates whether or not simplified planning functionality is required)
- `IF_RSCRM_IMP_OBJECT~EXECUTE_QUERY`
  The following three optional importing parameters are retrieved from `IF_RSCRM_IMP_ACTION_MANAGER~EXECUTE_QUERY`:
  - `IT_ROW_NEEDED` (which InfoObjects are required in rows for the query)
  - `IT_COL_NEEDED` (which InfoObjects are required in columns for the query)
  - `IV_SIMPLIFIED` (**X** or blank indicates whether or not simplified planning functionality is required)
- `IF_RSCRM_IMP_ACTIONS_SERVICE~EXECUTE_QUERY`
  The following four optional importing parameters are retrieved from `IF_RSCRM_IMP_OBJECT ~EXECUTE_QUERY`:
-
  - `IT_ROW_NEEDED` (which InfoObjects are required in rows for the query)
  - `IT_COL_NEEDED` (which InfoObjects are required in columns for the query)
  - `IV_SIMPLIFIED` (**X** or blank indicates whether or not simplified planning functionality is required)
  - `IV_PLANNING` (will be enabled for the planning query only so that the read query skips the query dynamism code)

Logic of Query Simplification



3.11 Scenario Planning

Prerequisites

You must have already created a customer business plan before you can perform scenario planning.

Context

You can maintain and configure scenarios for your customer business plan.

An operational plan is the default (or first) scenario. A scenario is a variant of your plan that is used to identify the optimal plan that balances both your requirements and those of your retailer in order to achieve the desired targets.

For more information on scenario planning and the relevant CRM Customizing, kindly refer to Performing Scenario Planning [page 116] under *Configuration Settings for SAP CRM* in this guide.

There can be a maximum of three scenarios in the system. When creating a new scenario, the system finds the available scenario source indicator and reads the data for the selected scenario source indicator from the SAP BW system. When a new scenario is created, it always shows blank data (all key figures have zero values).

Note:

> **i Note**
>
> In the delivered solution, the following three data sources are used to identify a scenario:
>
> Data Sources to Identify Scenario

DataSource ID	Source Indicator	Description
SCENARIO1	A	Scenario 1
SCENARIO2	B	Scenario 2
SCENARIO3	C	Scenario 3

If you have defined your own source indicators, these must be mapped to the data sources above in your SAP CRM system. The system uses this information to map the scenario data in your SAP BW system to the corresponding scenario representation in the SAP CRM system.

In the delivered solution, the following queries are implemented:

View	Query
Scenario Planning – Profit and Loss	/JBPB/APLN_PNLPT_TU
Scenario Planning – Profit and Loss	/JBPB/APLAN_PNLPT_CU
Scenario Planning – Product Tree	/JBPB/APLN_PNL_TU
Scenario Planning – Product Tree	/JBPB/APLAN_PNLPT_CU
Scenario KPI Comparison	/JBPB/APLN_SCEN_IMPCT_KPI

3.11.1 Create Scenario

This process creates a new scenario in the SAP CRM system. Records for this scenario were created when products were assorted from the *Assortment* screen. Hence at this step, only the existing records are read from SAP BW and no planning function is triggered.

3.11.2 Copy Scenario

This process copies the selected scenario and creates a new scenario. Technically, it creates a new scenario in the CRM system and copies the key figure values from an existing scenario to a new scenario in the BW system. Event 18 is triggered for the plan master query to further trigger the planning function for the copy process.

Plan Master Query: /JBPB/APLN_M_PNL_MASTER

Configuration Settings

Event ID	Planning Function	Description	Sequence	Filter
18	/JBPB/FUN_SCEN_COPY	Scenario Planning-Copy Data from One Scen to other	1	Custom
18	/JBPB/FUN_SCEN_CPY_P	Scenario Copy - Promotion Data	2	Custom

For more details on planing functions, kindly refer to:

- Scenario Planning - Copy Data from One Scenario to Another [page 197]
- Scenario Copy - Promotion Data [page 197]

3.11.3 Delete Scenario

This process deletes the selected scenario. It clears the key figure values from the plan aDSO and physically deletes the records from staging aDSO for the selected scenario. Event 19 is triggered for the plan master query to further trigger these operations through configured planning functions.

Plan Master Query: /JBPB/APLN_M_PNL_MASTER

Configuration Settings

Event ID	Planning Function	Description	Sequence	Filter
19	/JBPB/FUN_SCEN_DELE	Scenario Planning: Delete Data for a Scenario	1	Custom
19	/JBPB/FUN_SCEN_DEL_P	Scenario Planning: Delete Data for a Scenario in Promotion	2	Custom

For more details on planing functions, kindly refer to:

- Scenario Planning - Delete Data for a Scenario [page 197]
- Scenario Planning - Delete Data for a Scenario in Promotion [page 197]

3.11.4 Activate Scenario

In this step, the data for the selected scenario is copied to the operational plan during activation. It is also a copy process, and therefore, the planning functions of the copy process are reused here. Refer to Activate Scenario [page 181] for more details.

3.11.5 Scenario Planning with Alternative Assortments

If the alternative assortment feature is enabled, planning function /JBPB/FUN_SCN_ACT_CP is called for the features related to **Scenario Planning**.

Create Scenario

This process creates the records if the linked assortment of the new scenario to be created has already been linked to operational plan or an existing scenario. The planning function /JBPB/FUN_SCN_ACT_CP, configured at event 47 of master query /JBPB/APLN_M_PNL_MASTER, creates the new records from the existing operational plan/scenario records with 0 key figure values (except 0DISTRATIO, 0KYF_IND, /JBPB/

CUFACTD, /JBPB/CUFACTN and day flags of promotion). Method CREATE_SCEN is called which creates the target source indicator data in the plan /JBPB/IPLAN and shadow /JBPB/IPRSTG aDSOs.

Copy Scenario

This process creates the records if the linked assortment of the new scenario to be created has already been linked to operational plan or an existing scenario. The planning function /JBPB/FUN_SCN_ACT_CP, configured at event 47 of master query /JBPB/APLN_M_PNL_MASTER, creates the new records from the existing operational plan/scenario and copies the key figure values as well. Method COPY_SCEN is called, which creates the target source indicator data in the plan /JBPB/IPLAN and shadow /JBPB/IPRSTG aDSO.

However, if the target scenario has been linked to an assortment which hasn't been linked to any existing operational plan or scenario, the synchronization process is triggered to generate the combinations. Planning function /JBPB/FUN_SCN_ACT_CP, configured at event 1 of master query /JBPB/APLN_M_PNL_MASTER, is called to copy the key figure values of the common products from the source scenario. Method LINK_SCEN of the planning function is called which uses parameter /JBPB/SCINDIC_KPI to decide the source scenario from which the KPIs should be copied.

Delete Scenario

This process deletes the scenario. Method DELETE_SCEN of the planning function /JBPB/FUN_SCN_ACT_CP, configured at event 47 of master query /JBPB/APLN_M_PNL_MASTER, physically deletes the scenario source indicator data from the plan /JBPB/IPLAN and staging /JBPB/IPRSTG aDSO.

Activate Scenario

This process copies the selected scenario to operational plan. The alternative assortment linked to the selected scenario is also copied to the assortment of the operational plan. The planning function /JBPB/FUN_SCN_ACT_CP, configured at event 47 of master query /JBPB/APLN_M_PNL_MASTER, activates the selected scenario. Method ACTIVATE_SCEN copies the key figure values from the source scenario to the operational plan source indicator. Post the data copy, method DELETE_ACT_SCEN is called to delete the records which are not part of alternative assortment linked to the source scenario, which were, however, present in the existing operational plan assortment.

Update Scenario

While activating a scenario, the system will prompt you to either update the scenario or activate it. The section above explains the case of activating a scenario.

While updating a scenario, you have the option to link those promotions with the said scenario which are not currently linked to it. You can also evaluate the scenario with the new promotion linkage to assess the impact

of the promotions. In this case, scenario data is not copied to the operational plan. To copy that data, you must choose *Activate* in the dialog box displayed, and only then the data from the scenario will be copied to the operational plan.

3.12 Versioning

The system allows you to create multiple versions of a customer business plan and its scenarios. This helps you to take a snapshot of your plan and scenario's data. You can compare your plan data with the version data using the *Version Comparison* screen.

For more information on versioning and the relevant CRM Customizing, kindly refer to Versioning and Approval Plans [page 107] under *Configuration Settings for SAP CRM* in this guide.

3.12.1 BW Objects for Versioning

Queries for Version Comparison

The following queries are used for version comparison:

- `/JBPB/C_VER_COMP_PNL`: Version Comparison PNL Query
- `/JBPB/C_VER_COMP_PNL_PROD_TREE`: Version Comparison PNL Product Tree

These queries are built on the Composite Provider `/JBPB/C_VER` (Version Comparison Data), and this Composite Provider is built on the HANA calculation view `CV_CBP_VERS_COMP`. All KPIs are calculated at the HANA calculation view and these are directly used in the Composite Provider.

Advanced DSOs in Calculation View

The following aDSOs are consumed in the calculation view:

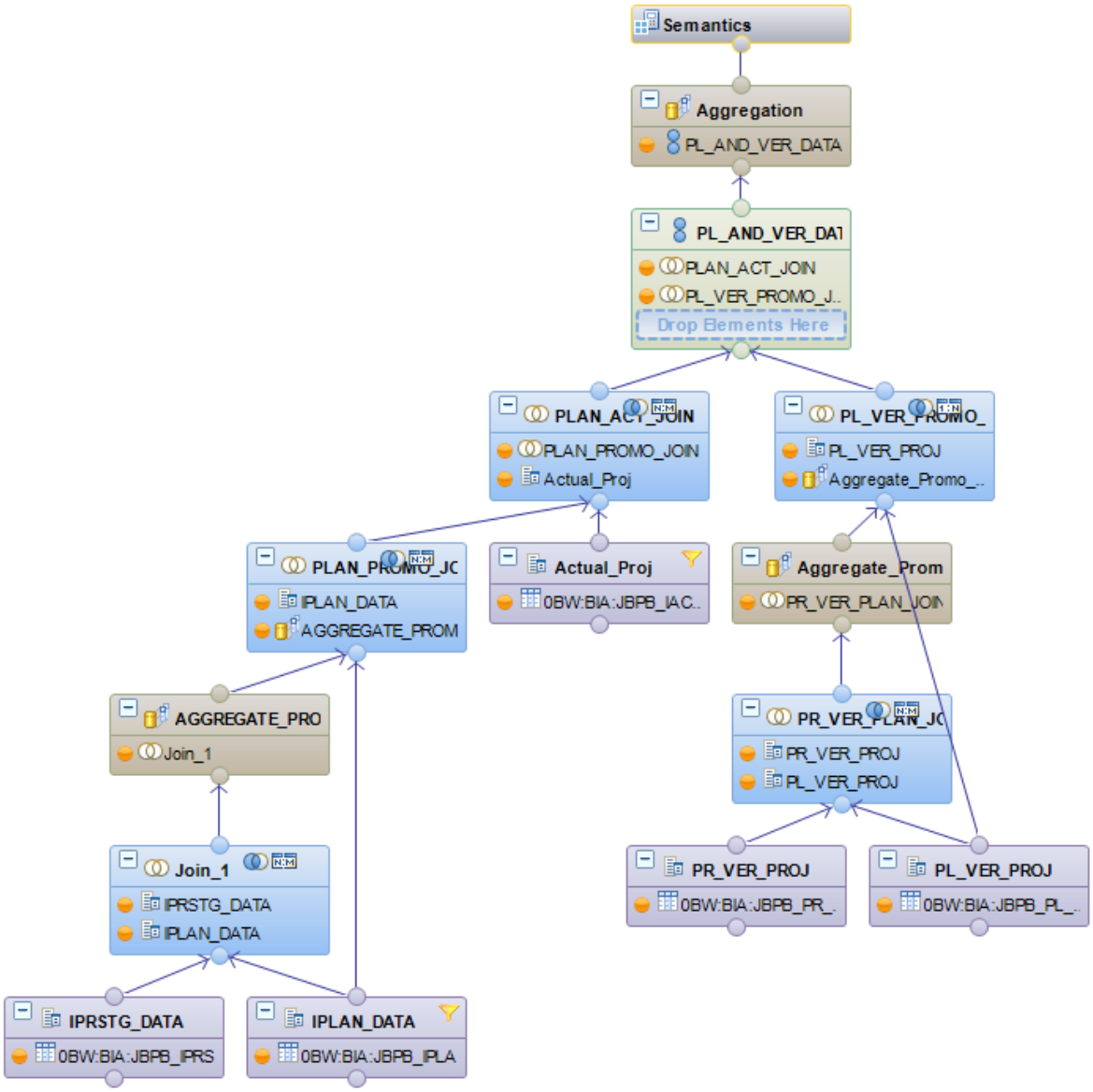
- `/JBPB/IPLAN`: Contains the CBP plan related data
- `/JBPB/IPRSTG`: Stores all information related to promotion data
- `/JBPB/PL_VER`: Stores the, versions created for the plan
- `/JBPB/PR_VER`: Stores the promotion data for the plan versions
- `/JBPB/IACT`: Contains data for the actuals of the plan

> **i Note**
>
> The aDSO `/JBPB/PL_VER` is a copy of the aDSO `/JBPB/IPLAN`, and similarly the aDSO `/JBPB/PR_VER` is a copy of the aDSO `/JBPB/IPRSTG`.

HANA Calculation View CV_CBP_VERS_COMP

The development details of the HANA calculation view are as follows:

1. As first level, aDSO `/JBPB/IPRSTG` as base is joined with aDSO `/JBOB/IPLAN` as left outer join to get KPIs for *Promo Discount Total*, *Promo Discount Rebate*, *EDLP Discount Total*, and *EDLP Discount Rebate*.
2. Similarly, these KPIs are calculated for version as well, taking base aDSO as `/JBPB/PR_VER` and left outer join on aDSO `/JBPB/PL_VER`.
3. At the next level, we have aDSO `/JBPB/IPLAN` as base and left outer join on the node achieved in step 1, to get all the operational data from `/JBPB/IPLAN` together with the KPIs calculated in step 1.
   At this node, other base KPIs are calculated, such as *Sell-In Total*, *Sell-Out Total*, *Gross Sales Value*, *Net Invoice Total*, *Net Net Total*, and so on.
4. Similarly for version, aDSO `/JBPB/PL_VER` as base and left outer join on node achieved in step 2 to get all the operation data from `/JBPB/PL_VER` together with the KPIs calculated in step 2.
   At this node, other base KPIs are calculated, such as *Sell-In Total*, *Sell-Out Total*, *Gross Sales Value*, *Net Invoice Total*, *Net Net Total*, and so on.
5. At the next level, data from *Plan* and *Version* is union.
6. Finally at the aggregation level, others KPIs are calculated, such as *Internal Profit Total* and other customer-related KPIs.



HANA Calculation View CV_CBP_VERS_COMP Design

3.12.2 Copy Plan Data to Version

In this step, you can define your own planning function to copy the plan data to the version aDSO during version creation. Event `11` is triggered at the plan master query to create the versions.

In the delivered solution, the planning function `/JBPB/FUN_VER_CREATE` copies the operational plan data to the version aDSOs `/JBPB/PL_VER` and `/JBPB/PR_VER`. The data in these aDSOs is stored with the version GUID that is generated in CRM. This value is passed to BW in the variable `/JBPB/VERSION_01`. This planning function uses the standard copy planning function type. It copies data from `/JBPB/IPLAN` to `/JBPB/PL_VER` and `/JBPB/PR_VER` for the selected year.

Plan Master Query: `/JBPB/APLN_M_PNL_MASTER`

Configuration Settings

Event ID	Planning Function	Description	Sequence	Filter
11	/JBPB/FUN_VER_CREATE	Plan and Promotion Version	1	Custom

For more details on planing functions, kindly refer to Plan and Promotion Version [page 198].

3.13 Extending Plan

In this business process, you extend the plan from the current year to the next year.

For more information on the plan extension process and the relevant CRM Customizing, kindly refer toExtending Plan [page 129] under *Configuration Settings in SAP CRM* in this guide.

3.13.1 Define Planning Function to Copy Latest Estimates for Baselines

In this procedure, you can enable the option for the LE baseline volume data (sell-in) of the previous year to be copied week by week to the reference data key figures of the new year and define your own planning function. Event 33 is triggered for the plan master query to further trigger the planning function for the copy process.

Plan Master Query: /JBPB/APLN_M_PNL_MASTER

Configuration Settings

Event ID	Planning Function	Description	Sequence	Filter
33	/JBPB/CPY_PREV_YR_NW	Copy Previous Year Data	1	Custom

For more details on planing functions, kindly refer to Copy Previous Year Data [page 195].

3.13.2 Define Plan Extension Queries

The application uses the same master queries as configured for the plan and promotion during plan extension.

The following master queries are used for copying promotions:

- /JBPB/AISTP_701_MASTER: STP Master Query
- /JBPB/AILTA_701_MASTER: LTA Master Query

The following master query is used from the plan for copying volumes/prices:

- `/JBPB/APLN_M_PNL_MASTER`: Master Query for PnL and BVP

3.14 Planning Structured Products

TU CU Master Data for Structured Products

The system uses the same data sources, as used for the normal products, to also transfer the TU and CU master data for structured products:

- `/JBPB/JBP_PRODUCT_TU_CU_LINK`: TU CU Master Data
- `/JBPB/JBP_PRODUCT_TU_CU_TEXT`: TU CU Text

For more information on structured products and the relevant CRM Customizing, kindly refer to Planning Structured Products [page 134] under *Configuration Settings for SAP CRM* in this guide.

Planning Structured Products in Trading Unit

You can plan structured products in the same way as normal products in the Trading Unit view. No additional configuration is required.

Planning Structured Products in Consumer Unit

The system does not allow you to plan structured products in a Consumer Unit view because structured products are composed of multiple components. If the corresponding components come from different product categories, the BOM components may be distributed in multiple branches in the CU hierarchy. Therefore, allowing planning in the CU view may potentially break the composition of structured products.

> ! Restriction
>
> In the standard delivery, the structured products are non-plannable out-of-the-box. However, if you want to set up CU as plannable, you need to setup your own BW data model. Sample content is not available for structured products.

3.15 Planning for Innovation Products

You can plan innovation products in customer business planning. These are placeholder products that you want to plan for, before they are defined in your product master.

For more details and the relevant CRM settings, refer to Planning Innovation Products [page 138] under *Configuration Settings for SAP CRM* in this guide.

3.15.1 Extract Innovation Products to BW

Context

You use this step to extract the innovation products defined in SAP CRM to your SAP BW system.

The innovation products are extracted to BW using the same extractors as the normal products:

- `0CRM_PRODUCT_ATTR` for InfoObject `0CRM_PROD`
- `/JBPB/JBP_PRODUCT_TU_CU_LINK` for InfoObject `/JBPB/TUCUPRD`

Further details on the master data are available in the Common Configuration Guide for SAP Trade Management.

3.15.2 Upload Reference Data and Price for Innovation Products

Context

You can upload reference volumes and prices for innovation products to SAP BW.

The Advanced DataStore object `/JBPB/IREF` stores reference data of volumes and prices for products. Each innovation product has an indicator distinguishing it as a placeholder product along with its reference product. There are two methods by which reference data can be uploaded:

- End routine in self-transformation from this aDSO to itself can fetch the price of each innovation product by looking up the price and data for the reference product
- Fetch data for the innovation products from ECC directly (if maintained)

3.16 Configuring Wholesaler-Indirect Planning

This section talks about the BW-relevant configuration settings required to use the *Wholesaler-Indirect Relationship Maintenance* application.

For more information on the functionality and the CRM Customizing, refer to Configuring Wholesaler-Indirect Relationships [page 148] and Setting Up Wholesaler-Indirect Planning [page 150] under *Configuration Settings for SAP CRM* in this guide.

3.16.1 Advanced DataStore Objects for Wholesaler-Indirect Relationship

The Wholesaler-Indirect Relationships functionality is not delivered as part of the standard solution. If you wish to use this feature, you must create your own planning functions and other necessary objects to make this feature work.

The advanced DataStore Object `/JBPB/INDREL`, which is used to store the data for the wholesaler-indirect relationship from CRM, is the only object available for this feature in SAP BW. The active table data is updated from CRM with the wholesaler-indirect BP groups, sales area information, product information, time ranges, relationship direction (either W or I), and the percentage needs for distribution. This information is updated based on the entries made in the *Wholesaler-Indirect Relationship Maintenance* application.

The advanced DataStore Object contains the following fields:

Field Name	Data Type	Length	Decimal	Description
`/BJBPB/S_INDGUID`	CHAR	32	0	Indirects GUID
`RECORDMODE`	CHAR	1	0	BW Delta Process: Record Mode
`0CRM_SALORG`	CHAR	8	0	Sales Organization
`DISTR_CHAN`	CHAR	2	0	Distribution Channel
`DIVISION`	CHAR	2	0	Division
`/BJBPB/S_WSALER`	CHAR	32	0	BP: Group (Hierarchy)
`/BJBPB/S_INDRECT`	CHAR	32	0	BP: Group (Hierarchy)
`PROD_CATEG`	CHAR	32	0	Product Category
`CRM_PROD`	CHAR	32	0	Product
`/BJBPB/S_CMFROM`	NUMC	6	0	Calendar Month From
`/BJBPB/S_CWFROM`	NUMC	6	0	Week valid-from
`/BJBPB/S_CMTO`	NUMC	6	0	Calendar Month To
`/BJBPB/S_CWTO`	NUMC	6	0	Week valid-to
`BP_RELDIR`	CHAR	1	0	BP: Relshp Direction
`INDPERCENT`	DEC	17	3	Indirect %

3.16.2 KPIs for Indirect Planning in CBP Planning Layout

If you wish to use the indirect functionality, you must install the following InfoObjects from the standard content, and include these InfoObjects into the respective aDSO and composite providers.

- Base Sell-Through Volume: Volume that the indirect account receives from the wholesalers.
- Uplift Sell-Through Volume: Volume that the indirect account receives from the wholesalers.
- Total Sell-Through Volume: Volume that the indirect account receives from the wholesalers.
- Sell-Through Price: Price that the retailer pays the wholesaler for the product. This can be the wholesaler's list price plus a surcharge.

> **i Note**
>
> In the currently delivered Simplified Data Model, *Sell-Through Price* is not distributed to the indirect accounts from the respective wholesalers. The logic to distribute the price can be achieved via a custom implementation, according to business requirments.

InfoObject Name	Description
/JBPB/ARSTP	Sell-Through Price Absolute
/JBPB/ARSTPP	Sell-Through Promoted Price Absolute
/JBPB/AVSTB_C	Sell-Through Baseline (CU)
/JBPB/AVSTB_T	Sell-Through Baseline (TU)
/JBPB/AVSTT_C	Sell-Through Total (CU)
/JBPB/AVSTT_T	Sell-Through Total (TU)
/JBPB/AVSTU_C	Sell-Through Uplift (CU)
/JBPB/AVSTU_T	Sell-Through Uplift (TU)
/JBPB/CMFROM	Calendar Month From
/JBPB/CMTO	Calendar Month To
/JBPB/INDGUID	Indirect Relationship GUID
/JBPB/RSTPP_C	Sell-Through Promoted Price CU
/JBPB/RSTPP_T	Sell-Through Promoted Price TU
/JBPB/RSTP_C	Sell-Through Price CU
/JBPB/RSTP_T	Sell-Through Promo Price TU
/JBPB/RSTP_TS	Summation for Sell-Through Price Reference

For the Simplified Data Model, the following infoobjects are used:

InfoObjects for Simplified Data Model

InfoObject Name	Description
/JBPB/AVSTB_T	Sell-Through Baseline (TU)
/JBPB/AVSTT_T	Sell-Through Total (TU)
/JBPB/AVSTU_T	Sell-Through Uplift (TU)
/JBPB/CMFROM	Calendar Month From
/JBPB/CMTO	Calendar Month To
/JBPB/INDGUID	Indirect Relationship GUID
/JBPB/RSTP_T	Sell-Through Promo Price TU

3.16.3 Table and Function Modules for Indirect Planning

To implement the wholesaler-indirect functionality and enable indirect planning, the following table and function modules are used for the planning functions:

- /JBPB/T_PROD_PER (Table)
- /JBPB/IND_PROD_CATEG_GET (RFC FM)
- /JBPB/IND_PRODUCT_GET (FM)

The RFC function module /JBPB/IND_PROD_CATEG_GET reads the product category in the active table /BJBPB/AINDREL2. The CRM system reads the product category, explodes it into the relevant products, and sends the list of products to the SAP BW system. The RFC /JBPB/IMP_SET_QUERY_FILTERS contains the importing parameter IT_PRODUCTS, which retrieves the list of products from CRM. In the BAdI for the planning function filter, /JBPB/CL_CRM_IMP_ACTION_MANAGR=>GET_QUERY_FILTERS is called to retrieve the products for the product category and the function module /JBPB/IND_PRODUCT_GET fills the table /JBPB/T_PROD_PER. This table is also used to retrieve the data for the planning function to enable indirect planning.

Logic of the Function Module

The function module retrieves the importing parameters BP group of either Wholesaler or Indirect, the relationship direction, and the products.

Based on this input, it retrieves all the details from the /JBPB/AINDREL2 table and updates the table /JBPB/T_PROD_PER.

When the *Indirect Non-Plannable* responsibility area is being loaded, the importing parameters for the function module are the BP group of the corresponding Wholesaler responsibility area, the relationship direction W,

and the products. When the *Wholesaler Non-Plannable* responsibility area is being loaded, the importing parameters are the BP group of the corresponding *Indirect Plannable* responsibility area, the relationship direction I, and the products.

Based on this information, the function module retrieves the data from `/JBPB/AINDREL2` and updates the table with the following fields.

If CRM sends the product category for any of the indirects or wholesalers, this function module explodes the product category and updates the table with n number of rows, where n is the number of products present in the product category.

Field	Data Type	Length	Description
`MANDT`	CLNT	3	Client ID
`S_WSALER`	CHAR	32	BP: Group (Hierarchy)
`S_INDRECT`	CHAR	32	BP: Group (Hierarchy)
`CRM_PROD`	CHAR	32	Product
`S_CMFROM`	NUMC	6	Calendar Month From
`S_CWFROM`	NUMC	6	Week valid-from
`S_CMTO`	NUMC	6	Calendar Month To
`S_CWTO`	NUMC	6	Week valid-to
`BP_RELDIR`	CHAR	1	BP: Relshp Direction
`SALESORG`	CHAR	4	Sales Organization
`DISTR_CHAN`	CHAR	2	Distribution Channel
`DIVISION`	CHAR	2	Division
`INDPERCENT`	DEC	17	Indirect %

3.16.4 Planning Functions for Indirect Planning

You need to create two new planning functions to achieve the indirect planning functionality.

- Planning function for *Indirect Non-Plannable* responsibility area
- Planning function for *Wholesaler Non-Plannable* responsibility area

For the simplified data model, you must also create the following additional new planning functions for indirect planning:

- Planning function for *Indirect Non-Plannable* responsibility area
- Planning function for *Wholesaler Plannable* responsibility area

Planning Function for *Indirect Non-Plannable* Responsibility Area

This planning function is triggered when the *Indirect Non-Plannable* responsibility area is loaded. It fetches the data for a single wholesaler or all wholesalers present and, based on the percentage distribution, distributes the data in the plan. The BP relationship direction value is **W**.

In the simplified data model, the sell-through baselines from the respective wholesalers are distributed to the indirect accounts. In the delivered solution, this is achieved via planning function `/JBPB/APLN_IND_DISTR`, configured on event `42` on the master query of the plan.

Planning Function for *Wholesaler Non-Plannable* Responsibility Area

This planning function is triggered when the *Wholesaler Non-Plannable* responsibility area is loaded. It fetches the data for a single indirect or all indirects present and, based on the percentage distribution, distributes the data in the plan. The BP relationship direction value is **I**.

Implementation: This planning function is used to distribute the sell-through base volume from the *Indirect Plannable* responsibility area to the *Wholesaler Non-Plannable* responsibility area. The following tasks are performed in this planning function:

- Based on the relationship direction value **I**, it fetches all the indirect information for the *Wholesaler Non-Plannable* responsibility area which has been loaded. The information includes all wholesalers, percentage distribution, and the time period.
- The sell-through base volume for the indirect is fetched from the corresponding aDSO with the applied percentage distribution defined for the indirect.
- Rounding logic can be applied for disaggregating the sell-through volume for the wholesaler.

Sample BW planning functions are not available for the indirect planning functionality, and need to be created as custom solutions.

Planning Function for *Wholesaler Plannable* Responsibility Area

This planning function is triggered when the *Wholesaler Plannable* responsibility area is loaded. It fetches the data for a single indirect or all indirects present and, based on the percentage distribution, distributes the data in the plan. The BP relationship direction value is **I**.

In the simplified data model, the sell-through uplifts from the respective indirects are rolled up to the wholesaler. In the delivered solution, this is achieved via planning function `/JBPB/APLN_WS_AGG`, configured on event `41` on the master query of the plan.

Scenario Planning in Wholesaler-Indirect Planning for Simplified Data Model

The planning functions for *Wholesaler Plannable* and *Indirect Non-Plannable* for the Simplified Data Model also handle updating the respective sell-through baselines/sell-through uplifts in the scenario options present in the plan.

The aDSO */JBPB/SRCIND* stores the scenario options created for each year of the plan.

The planning function configured on the wholesaler plan load updates the sell-through uplifts in the respective scenario options and the planning function configured on the indirect plan load updates the sell-through baselines in the respective scenario options as well.

3.17 Configuring Overlapping Planning

This section talks about the BW-relevant configuration settings required to use overlapping planning in SAP Customer Business Planning.

3.17.1 KPIs for Overlapping Planning in CBP Planning Layout

If you wish to use overlapping planning, you must install the following InfoObjects from the standard content, and include these in the respective aDSO and composite providers:

- Base Sell-Through Volume: Volume that the lower level plan receives from the higher level plan
- Uplift Sell-Through Volume: Volume that the higher level plan receives from the promotions of lower level plan
- Total Sell-Through Volume: Volume in the plan which is sum of Base Sell Through and Uplift Sell Through

For the Simplified Data Model, the following InfoObjects are used:

InfoObject Name	Description
/JBPB/AVSTB_T	Sell-Through Baseline (TU)
/JBPB/AVSTT_T	Sell-Through Total (TU)
/JBPB/AVSTU_T	Sell-Through Uplift (TU)

3.17.2 Planning Functions for Overlapping Planning

For the Simplified Data Model, you need to create a new planning function to be able to use the overlapping planning functionality. This planning function will handle the following scenarios:

- On a lower-level plan load, it will update the sell-through baseline volumes from the higher-level plan. These volumes are distributed equally among all the lower-level plans.
  In the delivered solution, this is achieved via planning function `/JBPB/APLN_ID_OVRLAP`, configured on event 48 on the master query of the plan.

- On a higher-level plan load, it will update the sell-through uplift volumes from the promotions of the lower-level plans. These uplifts from the promotions of the lower-level plans are summed up and updated in the higher-level plan.
  In the delivered solution, this is achieved via planning function `/JBPB/APLN_ID_OVRLAP`, configured on event `49` on the master query of the plan.

Scenario Planning with Overlapping Planning for Simplified Data Model

The planning function for overlapping planning for the Simplified Data Model also handles updating the respective sell-through baselines/sell-through uplifts in the scenario options present in the plan.

The aDSO `/JBPB/SRCIND` stores the scenario options created for each year of the plan.

The planning function configured on the higher-level plan load updates the sell-through uplifts in the respective scenario options and the lower-level plan load updates the sell-through baselines in the respective scenario options as well.

3.18 Technical Details of Planning Functions

3.18.1 Copy Previous Year Data

The planning function `/JBPB/CPY_PREV_YR_NW` is used to copy the latest estimate data from the previous year, week by week, to all the weeks of the next year's reference data key figure for the sell-in baseline volume.

Planning Function Type: `/JBPB/CPY_PR_YR_NEW`

Class: `/JBPB/CL_PREV_YEAR_COPY_SCRIPT`

Parameters:

- *Current Week*: This parameter is passed by CRM and is used in planning function to read data for actuals from actual DSO, `/JBPB/IACT`, for duration less than current week and from current week onwards data is read from plan aDSO, `/JBPB/IPLAN`. These two set of data are merged in a table. Post this step, previous year baseline volume will be calculated from last year's baseline volume which will come either from the actuals or plan data depending on the year you are are working in.

3.18.2 Baseline Volume Planning Cell Update

The planning function `/JBPB/FUN_ABBB_CUPD` updates the *Sell-In Base Volumes* on the *Plan* screen based on the KPIs available in the *Baseline Volume Planning* screen.

Planning Function Type: Formula

3.18.3 CBP Plan Cell Update

The planning function `/JBPB/APLN_CU_CELLUP` updates the plan key figures based on the information entered on *Plan* screen and it also uses promotion information from staging aDSO `/JBPB/IPRSTG` to update the promotion dependent key figures. Additionally, to handle key figure updates in lower-level plans within overlapping planning and indirect plans within indirect planning, the logic can be adjusted based on the responsibility area type which is maintained in the master data table of the InfoObject `/JBPB/SCEN`.

Planning Function Type: `/JBPB/PLAN_CELL_UPD`

Class: `/JBPB/CL_PLAN_CELL_UPD`

3.18.4 Copy Reference Key Figures

The planning function `/JBPB/FUN_REF_COPY` copies the data from the reference key figures that are selected from the CBP reference row from the aDSO `/JBPB/IREF` to the `/JBPB/IPLAN` aDSO with source indicator `1`. The past data is not changed as the data slice continues to lock the past data. The KPIs that can be copied from the reference row to LE row are *Sell-In Base*, *Sell-Out Base*, *List Price*, *Efficiency Rate*, *Cost of Goods Sold*, and *Retail Shelf Price*.

Planning Function Type: `/JBPB/COPY_RFKF_DATA`

Class: `/JBPB/CL_COPY_REF_KF_DATA`

Parameters:

- *Key Figure Name*: Based on the key figure selected by the user while copying the reference data, this parameter is filled by CRM, and therefore, the reference data for the corresponding key figure is copied to the latest estimate.

3.18.5 Scenario Planning - Create Scenario

On creating a scenario option while working with overlapping plans and wholesaler-indirect plans, the following planning functions handle the updates of the sell-through volumes in the new scenario option:

- `/JBPB/APLN_ID_OVRLAP`:
  - Higher- Level Plan - This planning function will update the sell-through uplifts in the new scenario option.
  - Lower- Level Plans - This planning function will update the sell-through baselines in the new scenario option.
- `/JBPB/APLN_WS_AGG`: This planning function will be triggered in the wholesaler plan, and will copy the sell-through uplifts in the new scenario option.
- `/JBPB/APLN_IND_DISTR`: This planning function will be triggered in the indirect plan, and will copy the sell-through baselines in the new scenario option.

3.18.6 Scenario Planning - Copy Data from One Scenario to Another

The planning function `/JBPB/FUN_SCEN_COPY` copies all the key figure data from the source scenario to the target scenario in the `/JBPB/IPLAN` aDSO.

Planning Function Type: Copy `0RSPL_COPY`

Parameters:

- Source indicator from `/JBPB/SCINDIC_03`: This variable stores the source indicator from which the scenario must be copied.
- Source indicator to `/JBPB/SCINDIC_02`: This variable stores the target source indicator.

3.18.7 Scenario Copy - Promotion Data

The planning function `/JBPB/FUN_SCEN_CPY_P` copies all the key figure data from the source scenario to the target scenario in the `/JBPB/IPRSTG` aDSO.

Planning Function Type: Copy `0RSPL_COPY`

Parameters:

- Source indicator from `/JBPB/SCINDIC_03`: This variable stores the source indicator from which the scenario must be copied.
- Source indicator to `/JBPB/SCINDIC_02`: This variable stores the target source indicator.

3.18.8 Scenario Planning - Delete Data for a Scenario

The planning function `/JBPB/FUN_SCEN_DELE` clears the key figure values (except `0DISTRATIO` and `0KYFIND`) of the selected scenario source indicator from the `/JBPB/IPLAN` aDSO.

Planning Function Type: Delete `0RSPL_DELETE`

Parameters:

- Source indicator `/JBPB/SCINDIC_01`: This variable stores the source indicator against which data should be deleted.

3.18.9 Scenario Planning - Delete Data for a Scenario in Promotion

The planning function `/JBPB/FUN_SCEN_DEL_P` deletes the promotion data for the given source indicator from the `/JBPB/IPRSTG` aDSO. This deletion is a physical deletion from the staging aDSO.

Planning Function Type: Delete DSO data physically `0RSPL_DELETE_DSO`

Parameters:

- Source indicator `/JBPB/SCINDIC_M`: This variable stores the source indicator against which data should be deleted.

3.18.10 Copy and Activate Scenario

The planning function `/JBPB/FUN_SCN_ACT_CP` is used in scenario planning with the alternative assortment feature switched on. It has different methods for *Copy*, *Create*, *Delete* and *Activate Scenario* processes.

Planning Function Type: `/JBPB/COPY_ACT_SCEN`

Class: `/JBPB/CL_COPY_ACT_SCEN`

Parameters:

- `/JBPB/SCEN_ACT` - Depicts the behavior/method to be called in the planning function
- `/JBPB/SCINDIC_SRC` - Source indicator from which records should be copied
- `/JBPB/SCINDIC_TGT` - Target indicator to which records should be copied
- `/JBPB/SCINDIC_KPI` - Source indicator from which key figure values should be copied

3.18.11 Plan and Promotion Version

The planning function `/JBPB/FUN_VER_CREATE` copies the data from actual aDSO, `/JBPB/IACT` and plan aDSO, `/JBPB/IPLAN`, to plan version, `/JBPB/PL_VER`, and staging aDSO, `/JBPB/IPRSTG`, to promotion version, `/JBPB/PR_VER`.

Planning Function Type: Copy `0RSPL_COPY`

Parameters:

- `/JBPB/SCINDIC_01`: This variable stores the source indicator from which data should be copied to create a version. Versions are always created against source indicator `9`.
- `/JBPB/VERSION_01`: This variable stores the version GUID against which data should be stored in plan version aDSO `/JBPB/PL_VER` or promotion version aDSO `/JBPB/PR_VER`.

3.19 Configuring GTIN Updates

Use the following customizing path to maintain BW configuration for GTIN updates: *SAP Customizing Implementation Guide* > *SAP NetWeaver* > *Business Warehouse* > *SAP Trade Management* > *Define Event for Planning Queries*

Planning Functions

- GTIN Plan Data Update (/JBPB/APL_GTIN_UPD) – This function will update the GTIN values in the existing combinations present in planning ADSOs. All the relevant planning ADSOs having combinations with old GTIN values will be updated with new GTIN values. Master data of the products having new GTIN values should be extracted in the BW system before executing the function.
- GTIN Promotion Data Update (/JBPB/APL_GTIN_UPD) - This function will update the GTIN values in the existing combinations present in promotion ADSOs. All the relevant promotion ADSOs having combinations with old GTIN values will be updated with new GTIN values. Master data of the products having new GTIN values should be extracted in the BW system before executing the function.

4 Glossary

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

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

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

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