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SAP Trade Promotion Planning and Management
SAP Trade Management 4.0 (Feature Package 2)

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Content

1 SAP Trade Promotion Planning and Management

SAP Trade Promotion Planning and Management is a functional area of the SAP Trade Management add-on (TMAC300) and provides extensive functionality for planning and managing trade promotions, generating conditions, processing rebates, and for dynamic funding. The TMAC300 add-on runs on CRM 7.0 EhP3 and EhP4.

2 What's New in Release 4.0 Feature Package 2

This section provides an overview of new features that have been introduced in SAP Trade Promotion Planning and Management for SAP Trade Management 4.0 Feature Package 2.

Function	Type of Change	Description	More Information
Promotion fast entry table: Filter function	Enhanced	The Filter function in the promotion fast entry table has been enhanced to include a tactics filter.	Promotion Fast Entry Table in SAP UI5 [page 10]
Responsibility area dropdown list	Enhanced	You can search for a specific responsibility area in the dropdown list using the search function.	Promotion Fast Entry Table in SAP UI5 [page 10]
User Settings: Manage Private Links	New	This function enables you to set a private link to a report that you have personalized.	Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 24] For more information on managing private links, see https://help.sap.com/tma ▶ *Application Help for SAP Trade Management* ❯ *SAP Trade Management* ❯ *Common Concepts* ❯ *Managing Private Links* ❯.
Predictive planning	New	This type of planning offers advanced forecasting capabilities to give you greater flexibility.	Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 24]

3   Tactics and Causal Factors

3.1   Tactics in SAP UI5

If you are working with SAP UI5, you will come across the term *tactic*. A tactic combines the concepts of causal factor type and causal factor. In the past, the casual factor type and causal factor were selected separately. These are now combined as customizable options, for example, Feature + Display, where feature is the causal factor type and display is the causal factor.

3.2   Causal Factors in the WebClient UI

Use

You can use causal factors in trade promotions management (TPM) to capture information about how products are promoted to consumers. You can create one causal factor for each product that is assigned to a trade promotion.

You can maintain causal factors at the individual product, product category, or product group level. This availability depends on the product planning basis of your trade promotion. If, for example, your product planning basis is *Product Group and Product*, you can maintain causal factors at the product level and the product group level.

Prerequisites

- You have defined causal factor profiles, types, and default values in Customizing for *Customer Relationship Management* under ⏵ *Trade Promotion Management* ⏵ *Trade Promotions* ⏵ *Causal Factors for TPM* ⏵ *Define Causal Factor Profiles, Types, and Default Values* ⏴.
- You have assigned your causal profile to your marketing planning project in Customizing for *Customer Relationship Management* under ⏵ *Trade Promotion Management* ⏵ *Trade Promotions* ⏵ *Causal Factors for TPM* ⏵ *Assign Causal Factor Profiles for Marketing Planning* ⏴.
- You have maintained attributes and key values for causal fields in Customizing for *Customer Relationship Management* under ⏵ *Trade Promotion Management* ⏵ *Trade Promotions* ⏵ *Causal Factors for TPM* ⏵ *Maintain Attributes and Key Values for Causal Factor Fields* ⏴.
- If you would like to map key figures from your trade promotion to key figures for causal factors, you have done so in Customizing for *Customer Relationship Management* under ⏵ *Trade Management* ⏵ *Trade*

Promotion Planning and Management > *Key Figure Planning with the Planning Applications Kit* > *InfoObject Mapping* > *Map Key Figures for Causal Factors* >.

Features

- Causal factor types
  There are many types of causal factors, such as retail, display, feature ad, or media. Each causal factor type captures a different set of data. The causal factor type *Display*, for example, captures data about the type of promotional display used for the trade promotion and the location of the display in the store.

  > **i Note**
  >
  > Only retail causal factors are synchronized with the planning layout.

- Assigning trade spends
  You can assign one or more trade spends to each causal factor type. When the first causal factor record is added to the trade promotion, the system displays all the trade spends assigned to the trade promotion. Only the trade spends defined in planning for the trade promotion are available for assignment to a causal factor type.
- Copying causal factor attributes
  You can select the product, product category, or product group and copy the causal factor attributes to a new causal factor.
- Store segments
  If the trade promotion includes different stores or segments of stores, you can assign store segments to causal factors to facilitate planning.
  You can create multiple causal factors for the same product if each causal factor you create is assigned to a different store segment.

4 Spend Value Overview and Promotion Fast Entry Table

4.1 Spend Value Overview in the WebClient UI

Use

If you are working with the WebClient UI, you can use the spend value overview assignment block in trade promotion management (TPM) to enter spend values for multiple products and trade spends.

The spend value overview is structured with either trade spends or products as the organizational basis. You determine the organizational basis in Customizing. When trade spends are the basis for the spend value overview, the system organizes the assignment block with product information in a tree structure, with the relevant products, product categories, and product groups listed below each trade spend. When products are the basis for the spend value overview, the system organizes the assignment block as a simple table with trade spend information shown in columns, and product information in rows. The only difference in the information displayed in either layout is that volume information is only available when products are the organizing basis.

> **i Note**
>
> We recommend using spend value overview only when using rates in SAP CRM.
>
> The spend value overview is intended for simple trade promotions only. You cannot use the spend value overview for trade promotions with more than one trade spend exception, such as repeated trade spends with different date ranges for a single product, product category, or product group. Furthermore, the spend value overview does not support exception-based planning. In exception-based planning, you assign products, along with the product categories or product groups to which they belong, to a trade promotion. If you are using exception-based planning, you create trade spend exceptions for products by choosing *Go to Exceptions* in the assignment block for products.
>
> Trade spends of type purchasing are not supported in the spend value overview:

Prerequisites

You have defined the following in Customizing for *Customer Relationship Management*:

- You have indicated whether trade spend information in the spend value overview is organized according to product or trade spend information under ▌▶ *Trade Promotion Management* ❯ *Trade Promotions* ❯ *Trade Spends* ❯ *Spend Value Overview* ❯ *Define Spend Value Overview* ▐.

- If you have chosen to organize the spend value overview according to product information, you have performed the following:
  - You have defined the trade spend information that appears under ⏵ *Trade Promotion Management* ⏵ *Trade Promotions* ⏵ *Trade Spends* ⏵ *Spend Value Overview* ⏵ *Settings for Product-Based Spend Value Overview* ⏵ *Define Trade Spend Position* ⏴.
  - You have defined that volume information is entered in the trade spends planning layout under ⏵ *Trade Promotion Management* ⏵ *Trade Promotions* ⏵ *Trade Spends* ⏵ *Spend Value Overview* ⏵ *Settings for Product-Based Spend Value Overview* ⏵ *Define Volume Maintenance* ⏴.

    > **i Note**
    >
    > SAP Accelerated Trade Promotion Planning only supports the editing of volume in SAP NetWeaver BW. Volume maintenance in SAP CRM is not supported.

  - You have defined the volume key figure under ⏵ *Trade Promotion Management* ⏵ *Trade Promotions* ⏵ *Trade Spends* ⏵ *Spend Value Overview* ⏵ *Settings for Product-Based Spend Value Overview* ⏵ *Define Key Figure for Volume* ⏴.
  - You have assigned a read query with the query context VOLUME to your integrated planning profile group in Customizing for *Customer Relationship Management* under ⏵ *Trade Management* ⏵ *Trade Promotion Planning and Management* ⏵ *Key Figure Planning with Planning Applications Kit* ⏵ *Define Integrated Planning Profile Groups* ⏴.
    This allows the SAP CRM system to read volume from the SAP NetWeaver Business Warehouse system.

To use this function, you must activate the business function Trade Promotion Management (CRM_TPM_1).

Features

- You can edit spend values for a trade promotion.
  You edit spend values after you have created the trade promotion and entered the necessary basic information, including the header data, dates, products, and trade spends.
- The system disaggregates trade spends automatically.
  For fixed trade spends, the system disaggregates the total amount entered in the spend value overview evenly among the products. You can manually change the amount and the system updates the total. For variable trade spends, you enter a single rate in the spend value overview, which is then copied down to all products. You can manually change the amount for a product. If desired, you can use a business add-in (BAdI) to configure more complex distributions for both fixed and variable trade spends in Customizing for *Customer Relationship Management* under ⏵ *Trade Promotion Management* ⏵ *Trade Promotions* ⏵ *Trade Spends* ⏵ *Spend Value Overview* ⏵ *Business Add-Ins (BAdIs)* ⏵ *BAdI: Additional Settings for Trade Spend Exceptions* ⏴.
- You can enter list or retail price.
  You can enter amounts manually for the list or retail price in the spend value overview. You can also use a BAdI to configure the system to fill the fields automatically from, for example, information retrieved from a pricing condition table. This is done in Customizing for *Customer Relationship Management* under ⏵ *Trade Promotion Management* ⏵ *Trade Promotions* ⏵ *Trade Spends* ⏵ *Spend Value Overview* ⏵ *Business Add-Ins (BAdIs)* ⏵ *BAdI: Additional Marketing Assignment Checking and Controlling Options* ⏴.

- You can export data from the spend value overview to a spreadsheet application.
- When trade spends are the basis for the spend value overview, you can delete trade spends and trade spend exceptions directly in the spend value overview.
- When products are the basis for the spend value overview, you can delete all exceptions for products directly in the spend value overview.

More Information

For more information about trade spends and dates, see SAP Library for SAP CRM at http://help.sap.com/crm ⤳ ▶ *SAP CRM* ❭ *Marketing* ❭ *Trade Promotion Management* ❭ *Trade Spends and Dates* ❭ .

For more information about exception-based planning, see SAP Library for SAP CRM at http://help.sap.com/crm ⤳ ▶ *SAP CRM* ❭ *Marketing* ❭ *Trade Promotion Management* ❭ *Key Figure Planning* ❭ *Exception-Based Planning* ❭ .

4.2   Promotion Fast Entry Table in SAP UI5

If you are working with SAP UI5, the promotion fast entry table offers you a quick and easy way of creating a new promotion (✚) and entering your planning data, including selecting a tactic and the required products. You can also edit the promotions you have already created.

Elements of the table:

- Responsibility area dropdown list
  The dropdown in the top left of the screen contains a list of all the responsibility areas you're assigned to for the respective years. The list is sorted alphabetically based on the name of the responsibility areas.
  If the list contains a lot of entries, you can search for a specific responsibility area using the *Search* field at the top. The list is filtered as you type in the field based on the responsibility area description.
- Create variant
  You can save frequently-used filters and personalization settings as a variant to avoid having to make the settings repeatedly. *Standard* appears on the dropdown if you haven't yet created a variant. When you create a variant, you can specify that it is to be set as default whenever you open the promotion fast entry table.

> **i** Note
>
> The variants you create on the *Plan* screen can only be used here and are not copied over to the *Scenario Planning* screen (and vice versa).

Once you've created your variant and saved it, you can apply further temporary filters to it. These temporary filters remain in place while you're working in the same screen. But if you exit this screen and go to a different one, the temporary filters won't be saved. When you go back to the first screen, your default variant and the filters it includes is applied again but not with the temporary filters you added on top.

> **i Note**
>
> If you change any data on the screen, you must save these changes before you can set your temporary filters or change the variant currently applied. If you don't save them, the system displays an error.

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

- Search (🔍)
  If you know a specific item of information relating to a promotion, such as the trade promotion ID or product name, you can search for this using the *Search* field. To cancel your search and display all of your promotions again, click ⊗ in the *Search* field.

- Filter Promotions (▽)
  Search for a specific promotion based on selectable criteria (promotion ID/description/type, status, employee responsible, product, planning account, start/end dates for sell-in/sell-out, tactic, causal group, funds plan, sales organization, distribution channel, and division). The filter criteria shown depend on your Customizing settings.

- Create Promotion (➕)
  This is a fast and easy way of creating a new promotion. Choose the promotion type and enter a description, sell-out dates, sell-in dates, a tactic (only for draft and detailed promotions), products, and your planning data.

- Show All Spends (🔍⊕)
  This option is used to display all of the trend spends for the promotions in the table.

- Bulk Actions
  Allow you to perform mass copy (with a time shift, if required), mass change, and mass roll-in operations on promotions.

- Select Columns to Display (⚙)
  You can choose which columns you want to see in the table and the order in which they appear.

Functions Available in the Promotion Rows

- *Actions*
  The *Actions* column contains functions for copying (📑) and deleteing (🗑) promotions as well as deriving (📊) a detailed promotion from a draft promotion.

- *ID/Description*
  Clicking on the link displayed in the *ID/Description* column takes you directly to the detailed promotion screen where you can enter further data.

- *Type*
  Indicates the type of promotion, for example, draft promotion, detailed promotion, or long-term agreement.

- *Customer*
  The picker (🗗) in this column allows you to choose a different customer.

- *Status*
  Indicates the status of your promotion (for example, *New*, *Draft*, *Released* and so on) and allows you to choose the next status in the dropdown list.

- *Sell-Out Start/End Date* and *Sell-In Start/End Date*
  The sell-out dates indicate when the promotion is active in the store. The sell-in dates represent the period during which the discounts normally apply. Products are ordered during the sell-in range in order to benefit from a better price. As it takes time from order placement to the products being on the shelf, the sell-in period starts before the agreed start time of the promotion in the store (sell-out period).

- *Objective*
  Select the relevant objective here. The following objectives are delivered with the standard solution:
  - New Product Introduction
  - Drive Volume
  - Drive Share
  - Trial
  - Competitive Response
- *Tactic*
  Select the relevant tactic here. You can only select a tactic for a draft or detailed promotion but not for a long-term agreement. Depending on your Customizing settings, the *Tactic* column displays either the legacy tactic field or the *Tactics* popup The following tactics are delivered with the standard solution:.
  - Display & TPR
  - Feature Ad & Coupon
  - Feature & Display
  - Feature & Multibuy
  - Feature & Display & TPR
  - TPR Only
- *Product*
  The product picker (⛶) allows you to search for products and to display detailed information on them.
  In the *Select Products* dropdown, you choose the planning product hierarchy you want to display below. The tree view displays the product categories and products in a hierarchy. You can expand and collapse the planning product hierarchy, level by level, using the level selectors (L1, L2, L3, and so on). Checkboxes are displayed to the left of the product categories and products. Select the checkboxes of the products you require and choose *Selected* to see just those products. This is helpful if you are dealing with a large number of products.
  Alternatively, you can choose the flat list view so that only the nodes and associated data of the level you choose with the relevant L button are visible.
  The product attributes in the columns to the right of the products contain important information such as the product ID, category description, category ID, and so on. The contents of each column can be sorted in ascending and descending order, and filtered if more than one product is displayed. You can configure which standard attributes are displayed here and define your own. You do this in Customizing for Customer Relationship Management under ▌ *Trade Management* ⟩ *General Settings* ⟩ *Product Picker* ⟩ *Maintain Product Picker Attribute Profiles* ▙ .
  In the global search field (🔍), you can enter a string and search for this in the hierarchy and attribute columns.

Column Grouping Feature

To keep the columns for the trade spends in the table to a manageable number, a grouping concept combines the key figures assigned to the various trade spends. The key figures can be edited separately in a popup and the total of these is displayed in the column field for the relevant trade spend.

5 Condition Generation

Use

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

There are two types of conditions:

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

You can create the following using conditions:

- Short-term trade promotions
  You create short-term trade promotions for a period of several weeks. These trade promotions increase sales volume and include both conditions for price determination and conditions for campaign determination. The system creates the condition records for price determination when you start the condition generation in the *Volume and Value Planning* section. The system creates the condition records for campaign determination automatically when you release the trade promotion.
- Long-term agreements
  You create long-term agreements for a period of several months to one year. This type of promotion does not increase sales volume and includes only conditions for price determination. The system creates the conditions for price determination automatically when you release the agreement. The planning layout for long-term agreements is much simpler than for a short-term promotion, for example, you do not need to select a tactic.
  It is possible to run one or more short-term promotions on top of a long-term agreement. The uplift volume generated as a result of the short-term promotion(s) is synchronized to the long-term agreement and is indicated separately in the planning layout. The total volume is then calculated in the long-term agreement and is correctly reflected in funds consumption. The link between the short-term promotion and the long-term agreement is shown in the *Admin* section of the short-term promotion on the detailed promotion screen (*Long-Term Agreement* field). Although a long-term agreement can have many short-term promotions associated with it, a short-term promotion can only be linked to one long-term agreement.

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

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

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

Prerequisites

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

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

Constraints

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

Features

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

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

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

Activities

In the SAPUI5 client, do the following:

1. Check the planning account, sales area, and campaign type fields are populated. The customer can be changed, if necessary.
2. Determine a planning profile group.
   The planning profile group and the corresponding planning queries define the key figure planning in the *Volume and Value Planning* section.
3. Include the products for the trade promotion in the corresponding sections.
   The product dimension of the trade promotion is determined by the product planning basis *Product*.
4. Assign trade spends to the trade promotion in the *Volume and Value Planning* section.
   Your entries determine the key figure planning and control the condition types and condition tables, which the system uses when generating conditions.

Conditions for Price Determination

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

Conditions for Campaign Determination

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

Reports

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

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

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

More Information

Key Figure Planning with the Planning Applications Kit [page 21]

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

6 Rebates

Use

A rebate is a special discount granted to an account as a trade promotion incentive. You pay the rebate amount out to the account after the trade promotion has been executed. A rebate depends on the account's sales volume within a specified time period. Generally the account has to provide you with some proof of performance such as promotional pricing, displays used, product visibility in the store, and so on.

You normally define a rebate in a particular sales area with an account, which functions as the rebate recipient. A rebate usually consists of several individual rebate agreements in the form of condition records. Each rebate has a unique number and a globally unique identifier (GUID). Rebates and rebate conditions both refer to a trade promotion.

Integration

In SAP Customer Relationship Management (SAP CRM), you can use two different forms of rebate:

- SAP ERP rebates
  For the SAP ERP rebate, you perform Customizing in SAP ERP and download the Customizing to SAP CRM. The trade promotion generates a rebate agreement with rebate condition records that are transferred to SAP ERP automatically when you save the trade promotion.
- SAP CRM rebates
  The SAP CRM rebate functions the same way as the SAP ERP rebate. You use these rebates if you are using an SAP CRM standalone scenario without any SAP ERP integration. In this scenario, you do all the Customizing in SAP CRM. The conditions and rebate agreements that are generated are not transferred to SAP ERP. You also create sales orders and complete billing in SAP CRM.

> **i Note**
>
> For simplicity's sake, we use the term "rebates" to refer to both forms of rebate in Marketing. From a technical point of view, the SAP CRM rebates, generated in Marketing, are entries in the rebate due list, which is the central object in the SAP CRM rebate application for managing all the data that is relevant for rebate settlements. The SAP ERP rebates generated here are rebate agreements.

Rebates are a specific type of trade spend. For more information about trade spends, see SAP Library for SAP CRM at http://help.sap.com/crm ▶ *SAP CRM* ▶ *Marketing* ▶ *Trade Promotion Management* ▶ *Trade Spends and Dates* ▶.

Prerequisites

- The type of rebate processing you use depends on the sales area and the campaign type. You can maintain these settings in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▷ *Trade Promotions* ▷ *Condition Maintenance* ▶.
- You have maintained trade spends for rebates in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▷ *Trade Promotions* ▷ *Trade Spends* ▷ *Define Trade Spends for Values* ▶.
- You have mapped your key figures to your trade spends in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▷ *Trade Promotion Planning and Management* ▷ *Key Figure Planning with the Planning Applications Kit* ▷ *InfoObject Mapping* ▷ *Map Key Figures for Trade Spends* ▶.
- You have completed the settings depending on your scenario (integration with SAP ERP or SAP CRM standalone) in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▷ *Trade Promotions* ▷ *Condition Maintenance* ▶:
  - *ERP Rebate Processing*
  - *CRM Rebate Processing*
- You have completed the relevant settings in Customizing for *Customer Relationship Management* under *Rebate Processing*.

Features

Rebate Recipient

The standard rebate recipient is determined during the condition generation. The planning account is used in the determination:

- Account
  The planning account is selected.
- Account hierarchy node
  When only one account is assigned to the hierarchy node, this account is selected and the rebate recipient is determined as described above.
  When more than one account is assigned a random selection is made and the rebate recipient is determined using account rules.

Rebate Status in Trade Spends

The rebate status is displayed together with the associated trade spend. The following rebate statuses are possible for trade spends:

- *Open*
- *For Settlement*
- *Settled*

The assignment of the SAP ERP rebate status *For Settlement* depends on the minimum status you defined in Customizing.

Rebate Status in Trade Promotions

SAP ERP and SAP CRM Rebates

Action	Required Status
Delete trade promotion	• Trade promotion date range must be in the future • No rebates are generated • If rebates are generated, they must have the status *Open*
Delete SAP ERP rebates	Rebates have status *Open*, not status *For Settlement* or *Settled* i Note You can delete rebates by deleting the associated trade spends
Delete trade spends associated with SAP ERP rebates	• Trade promotion date range must be in the future • Rebates have status *Open*, not status *For Settlement* or *Settled*
Archive trade promotions	Rebates have status *Settled*

> i Note
>
> When you **lock** a trade promotion, this has no effect on rebates and rebate conditions. Only the campaign determination conditions are affected. With long-term agreements, the rebates are deleted if permitted.
>
> When you **finish** or **reject** a trade promotion, the status of the associated rebates is automatically set to *For Settlement*.

Split Criteria

Having split criteria for rebate agreements in trade promotions means that a new rebate agreement is created for each trade spend.

The trade spends are separated from each other because the payment time can differ for each trade spend. Payment is also often linked to a certain requirement that has to be checked, for example, reserving a certain shelf space for a product. The variable rebate agreements are normally settled separately for all accounts at the end of a trade promotion.

Hierarchy Nodes

When account hierarchy nodes are used, the system can expand the hierarchies. If you have defined:

- An account hierarchy for the rebate in the variable key of the condition table, the system uses the account hierarchy node that is assigned to the trade promotion
- A condition table containing an account ID or payer in the variable key for the rebate condition type, then the account hierarchy node is expanded into individual accounts

You can make the required settings in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ❯ *Trade Promotions* ❯ *Condition Maintenance* ❯ *Define Condition Generation* ❯ and then select *Condition Tables*.

More Information

Condition Generation [page 13]

Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 24]

7 Planning Trade Promotions

Use

You plan your trade promotions using the planning applications kit. The Business Planning and Simulation (BPS) technology used with SAP Accelerated Trade Promotion Planning does not function with the SAPUI5 client for SAP Trade Promotion Planning and Management You define which sales areas or promotion types use the planning applications kit in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Define Sales Areas and Promotion Types* ◀.

> **i Note**
>
> If your promotion type or sales area are not defined, your promotion uses Business Planning and Simulation (BPS) for planning. BPS does not function with the SAPUI5 client.

Prerequisites

To carry out planning with the planning applications kit, you have configured SAP Trade Promotion Planning and Management.

For more information, see the Administrator's Guide for SAP Trade Promotion Planning and Management.

More Information

Key Figure Planning with the Planning Applications Kit [page 21]

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Rebates [page 17]

7.1 Key Figure Planning with the Planning Applications Kit

Use

You can use SAP Trade Promotion Planning and Management, powered by SAP HANA, to enhance performance while planning your trade promotions.

Integration

SAP Trade Promotion Planning and Management is integrated with the planning applications kit and uses SAP HANA appliance software.

For more information about using BW Integrated Planning with the planning applications kit, see SAP Note 1637199 .

Prerequisites

- You have installed SAP Trade Promotion Planning and Management.
- You have performed all the relevant configuration steps.
- You have made the necessary settings in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ⟩ *Trade Promotion Planning and Management* ⟩ *Key Figure Planning with the Planning Applications Kit* ◀.

Features

- Planning dimensions
  You can plan on the product dimension **Product** and the account dimension **Account Hierarchy Node**.
- Planning layouts
  An integrated planning profile group groups together the different queries that can be used for the planning layouts Summary, Sell-in, and Sell-out within your trade promotions. You can display one planning layout at a time.
  You define integrated planning profile groups in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ⟩ *Trade Promotion Planning and Management* ⟩ *Key Figure Planning with the Planning Applications Kit* ⟩ *Define Integrated Planning Profile Groups* ◀. The integrated planning profiles defined in this Customizing activity appear under *Planning Profile Group* in the general data of the trade promotion in the SAPUI5 client.

  > **i Note**
  >
  > If you change the planning profile group of an existing trade promotion, all of the planning data associated with that trade promotion is deleted.

- Height of planning layout (this function only works with the WebClient UI and not with SAP UI5)
  You can adjust the height of the planning layout by defining the number of rows to be displayed. You do this in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ⟩ *Trade Promotion Planning and Management* ⟩ *Key Figure Planning with the Planning Applications Kit* ⟩ *UI Settings* ⟩ *Define the Height of the Planning Layout* ◀.
- Queries
  Queries are used to display the key figures and characteristics that are used to structure the planning layout. You can use read queries to retrieve information from SAP NetWeaver BW and you can use planning queries to access and update planning information from SAP NetWeaver BW.

You define queries in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *Define BW Queries* ◀. When defining an integrating planning profile group, you assign queries.

- Eventing mechanism
  You can define events for a planning query and define which planning functions you want to run for a particular event and in what sequence. Optionally, you can also identify which planning filter you want to use. For more information, see Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *Define Events for Queries* ◀.

- Volume/value and trade spends planning
  You can use volume/value and trade spends planning to plan several trade spends for a trade promotion and for a particular planning account or target group, and the relevant product dimension. For more information, see Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 24].

- Additional date ranges
  You can synchronize pre-dip and post-dip date ranges to the P&L Sell-in layout and the Plan period with the Sell-out layout. The Summary layout uses the Buying period. For more information, see Synchronization of Additional Date Ranges with the Planning Applications Kit [page 31].

- Distribution and redistribution of planning values
  When you add or delete products, or make changes to the time duration of your trade promotion, the planning values are redistributed accordingly. For more information, see Distribution and Redistribution of Planning Values with Rates in SAP NetWeaver BW [page 33].

- Buying patterns
  You can use an account's buying pattern, which describes how much an account typically buys over a particular period of time, when planning your trade promotions. For more information, see Buying Patterns in Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 57].

- Factory calendar
  You can implement a Business Add-In (BAdI) to use the factory calendar. For information about using factory calendar with buying patterns, see Using the Factory Calendar for Buying Patterns [page 61].

- Advanced save (this function only works with the WebClient UI and not with SAP UI5)
  You can activate the advanced save so that synchronization with SAP NetWeaver BW is called during the save when you make changes to a trade promotion that affect planning data. For more information, see Customizing for Customer Relationship Management under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *Activate Advanced Save* ◀.

- XML validation (this function only works with the WebClient UI and not with SAP UI5)
  The XML validation compares the XML file against the XML schema to ensure that the XML content is not tampered with.

- Logging of critical situations (this function only works with the WebClient UI and not with SAP UI5)
  You can view a log of critical situations that can help analyze the issues that caused the error. The log includes details on the affected objects that can help the user to correct (or reprocess) the affected objects.

More Information

For more information about the planning applications kit, see SAP Library for SAP NetWeaver on SAP Help Portal at http://help.sap.com/netweaver 🔗. In SAP Library, choose ▶ *SAP NetWeaver Library: Function-Oriented View* ▶ *Business Warehouse* ▶ *Analytic Engine* ▶ *Planning Engine* ▶.

7.2 Volume/Value and Trade Spends Planning with the Planning Applications Kit

Use

Volume/value and trade spends planning allows you to make forecasts for trade promotions. You can use volumes/trade spends planning to perform the following tasks:

- Plan several trade spends for a trade promotion and for a particular planning account
- Plan volume for promoted products, for example, uplift
- Apply the buying pattern defined for the planning account to the trade spend key figures
- Calculate promotion costs based on list price or net price list, or any other key figures combinations
- Calculate promotion revenue based on baseline sales (from SAP Customer Business Planning, for example)
- Use the promotions sidebar to obtain at-a-glance information on your plan, budget, and promotion KPIs as well as various reports

Prerequisites

- You have completed all the settings necessary to set up SAP Trade Promotion Planning and Management. For more information, see the Configuration Guide for SAP Trade Promotion Planning and Management.
- You have made the settings in Customizing for *Customer Relationship Management* under:
  - ○ ▶ *Marketing* ▶ *Marketing Planning and Campaign Management* ▶ *Basic Data* ▶ *Define Types/ Objectives/Tactics* ▶
  - ○ ▶ *Marketing* ▶ *Marketing Planning and Campaign Management* ▶ *Basic Data* ▶ *Define Additional Date Ranges* ▶
    To plan volumes/values and trade spends, you must define a date range of period type *Buying*.

    > **i Note**
    >
    > You cannot have gaps or overlaps between pre-dip, buying, and post-dip date ranges.

  - ○ ▶ *Trade Promotion Management* ▶ *Trade Promotions* ▶ *Trade Spends* ▶ *Define Trade Spends for Values* ▶
  - ○ ▶ *Trade Promotion Management* ▶ *Trade Promotions* ▶ *Condition Maintenance* ▶ *Define Condition Generation* ▶

- You have made the Customizing settings to use the reference product list price (from SAP Customer Business Planning, for example) in trade promotion planning. For more information, see SAP Solution Manager.
- To use volume/trade spends planning, your trade promotion must have the following details:
  - Account type
  - Product planning basis
  - Planning profile group
  - Sales organization
  - Dates
  - Promoted products, products groups, or product categories
  - Trade spends
  - Optional: Tactic

> **i Note**
>
> A tactic combines the concepts of causal factor type and causal factor. In the past, the casual factor type and causal factor were selected separately. These are now combined as customizable options, for example, Feature + Display, where feature is the causal factor type and display is the causal factor.

- You have made the following Customizing settings for Predictive Planning:
  - ▶ *Trade Management* ❯ *Advanced Trade Management Analytics* ❯ *System Settings* ❯ *TPM Integration* ❯ *Define TPM to TPO Mapping* ❯
  - ▶ *Trade Management* ❯ *Advanced Trade Management Analytics* ❯ *System Settings* ❯ *Define BW Mapping Profile* ❯
  - ▶ *Trade Management* ❯ *Advanced Trade Management Analytics* ❯ *System Settings* ❯ *Map Causals to BW Key Figures (DEFLT_CBP)* ❯
  - ▶ *Trade Management* ❯ *Advanced Trade Management Analytics* ❯ *System Dependent Settings* ❯ *Assign Customizing Profiles to Sales Area* ❯
  - ▶ *Trade Management* ❯ *Advanced Trade Management Analytics* ❯ *System Dependent Settings* ❯ *Define Forecast Configurations* ❯
  - ▶ *Trade Management* ❯ *Advanced Trade Management Analytics* ❯ *System Dependent Settings* ❯ *Define Forecast Systems* ❯
  - ▶ *Trade Management* ❯ *Advanced Trade Management Analytics* ❯ *System Dependent Settings* ❯ *Define Forecast Client* ❯
  - ▶ *Trade Management* ❯ *Advanced Trade Management Analytics* ❯ *System Dependent Settings* ❯ *Assign Forecast Client and Forecast Configuration to TPO Type* ❯

Features

- The editable promotion fast entry table that appears when you launch the Promotion Planning application offers you a quick and easy way of creating a new promotion and entering your planning data, including selecting a tactic and the required products. You can also edit the promotions you have already created.

Features of the table:

- ○ Column grouping:
  To keep the columns for the trade spends in the table to a manageable number, a grouping concept combines the key figures assigned to the various trade spends. The key figures can be edited separately in a popup and the calculated total of these is displayed in the column field for the relevant trade spend.
- ○ Bulk actions allow you to perform a mass copy (with a time shift, if required) and mass change operations on promotions.
- ○ You can save frequently-used filters and search parameters as a variant to avoid having to make the settings repeatedly. "Standard" appears on the dropdown if no filters or search parameters have been applied.
- ○ Individual promotions can be copied or deleted. There is also a function for deriving a detailed promotion from a draft promotion.
- ○ The product picker in the *Product* column allows you to search for products and to display detailed information on them. You can find out more about the product picker in Promotion Fast Entry Table in SAP UI5 [page 10].
- ○ The columns to be displayed can be personalized.
- ○ There is a Google-like filter on the trade promotions in the table (key attributes only).
- ○ Additional promotions can be displayed by selecting the promotion ID and promotion type.

For more information on the settings for fast promotions, see Customizing for Customer Relationship Management under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Settings for Fast Promotions and Promotion Planning* ▶.

- The promotion life cycle at the top of the screen uses a customizable group of statuses that alert you about the current stage of a promotion's life. For more information, see Customizing for Customer Relationship Management under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Trade Promotion Planning* ❯ *Promotion Life Cycle Phases* ❯ *Maintain Promotion Life Cycle Phases/Assign Promotion Life Cycle Phase to Sales Area* ▶.
- The 🖳 *(User Settings)* dropdown list can contain the following options:
  - ○ *Personalize Product Picker*
    You can personalize the product picker by defaulting the tree or flat view as well as the hierarchy level using the L buttons.
  - ○ *Manage Private Links*
    If you have created a personalized version of a report or SAC story, you can create a private link to this so that it is always loaded instead of the standard version of the report or story.
    For more information on managing private links, see https://help.sap.com/tma ▶ *Application Help for SAP Trade Management* ❯ *SAP Trade Management* ❯ *Common Concepts* ❯ *Managing Private Links* ▶.
- Using the *Find* (🔍) function in the *Volume and Value Planning* section, you can search for a product, product category, or product attribute by entering a full or partial string. The application searches in all nodes regardless of whether they are expanded or collapsed, so that even products and product categories that are hidden will be found. The application expands the tree just to the subtree node where the first hit is located and highlights the entire row including the plan data.
  You can scroll through the screen and expand any levels you need to. If more than one hit is found, arrow buttons appear with which you can move forwards and backwards through the hits.
  The search works for all product information shown in the description but not for product attributes that are not part of the description.
- Tree/flat view

On the *Summary* view of the *Volume and Value Planning* section, you can display your product categories and products in the tree or flat view.

When you choose the tree view, the product categories and products are displayed in a hierarchy. You can expand or collapse the planning product hierarchy, level by level, using the level selectors (L1, L2, L3, and so on). If you click L3 in the tree view, for example, the complete tree is expanded to level 3.

Alternatively, you can choose the flat list view so that only the nodes and associated data of the level you choose with the relevant L button are visible. This makes it easier to copy and paste planning data from an external source such as Microsoft Excel, for example, because the nodes in between are not displayed.

- The promotions sidebar gives you an instant overview of key information relating to your planning activities. Depending on how it has been customized, it can contain the following data:
  o The plan ID and any scenarios created for the plan.
  o The KPIs assigned to the plan.
  o The Budget/Funds Monitor provides details of the budget and funds assigned to the promotion.
  o The report categories assigned to you can be opened to launch the reports they contain in a new window.
- If you need to store additional information on your promotion from an external source, you can do this by adding attachments. In the *Attachments* popup, which you open by clicking ⌔, you upload an attachment by clicking ✛ and navigating to the file you want to upload. You can also search for and delete a particular attachment.
- The Forecast feature in the promotion allows you to trigger the predict functionality from SAP Advanced Trade Management Analytics. When you click the *Forecast* button, the Advanced Trade Management Analytics module forecasts uplift volumes for the selected promotion. The prediction engine also takes into account the planned retailer shelf price to forecast the volumes.
- The *Predictive Planning* tab in the *Volume and Value Planning* section provides advanced forecasting capabilities, offering a weekly view of the entire promotion forecast. When you create a promotion, the account defaults mechanism defaults the TPR and tactic values at header level and distributes them to the planning layout. The baseline and prior year distributions can be reviewed to derive more accurate input for the ACV distributions while the historical volume decomposition can be used to examine a much broader time frame. You use the product picker to drill down to the relevant product categories and products. The planning result sell-out is distributed, for example, with the buying pattern mechanism to the sell-in total. You forecast the promotion using the familiar UDF functionality (choose *More Options* and *Forecast*) and use the *Recalculate* button to redistribute and recalculate the values.

> ⁘ Example
>
> You want to create a promotion that runs for four weeks to forecast the sell-out uplift volume for two product categories. For the first category *Premium*, you enter a promoted retailer shelf price of $1.99. The products will be on display, so you maintain the tactic Display ACV:
>
> | | Calendar Week 1 | Calendar Week 2 | Calendar Week 3 | Calendar Week 4 |
> | --- | --- | --- | --- | --- |
> | Premium | | | | |
> | Promoted RSP | 1.99 | 1.99 | 1.99 | 1.99 |
> | Display ACV | 8 | 8 | 8 | 8 |

For the second product category *Basic*, you enter a promoted retailer shelf price of $1.69. The products will not be on display, so you maintain the tactic Display ACV accordingly:

	Calendar Week 1	Calendar Week 2	Calendar Week 3	Calendar Week 4
Basic				
Promoted RSP	1.69	1.69	1.69	1.69
Display ACV	0	0	0	0

In the first and second week of the promotion, you want to run a feature for both product categories:

	Calendar Week 1	Calendar Week 2	Calendar Week 3	Calendar Week 4
Overall Result				
Feature ACV	12	12	0	0

Choose *More Options* and *Forecast* to forecast the sell-out uplift volume:

	Calendar Week 1	Calendar Week 2	Calendar Week 3	Calendar Week 4
Overall Result				
Sell-Out Uplift	90.82K	92.52K	20.68K	7.49K

- The trade spend data is validated against the Customizing settings made for condition generation. The trade spends table includes a new trade spend selector.
  The condition information corresponding to the trade spend is defined in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* > *Trade Promotions* > *Condition Maintenance* > *Define Condition Generation* ▶.
- Conditions are generated automatically based on the status configured. For more information about using volumes and trade spends with conditions, see Condition Generation [page 13].
- You may not want to offer all the products that have been assigned to a promotion for the entire duration of the promotion. Under *Products* in the *Admin* section on the detailed promotion screen, you can restrict the period during which the product is offered in the promotion by entering the relevant dates in the date field in the *Effective Start Date/ End Date* column. If you want to exclude a product entirely from the promotion, click the checkbox in the *Exclude Ind.* column. The product remains assigned to the promotion but is simply not included when you plan the promotion.
- You can define the period during which a trade spend is valid. Under *Trade Spends* in the *Admin* section on the detailed promotion screen, enter the relevant dates in the date field in the *Start Date / End Date* column.
- The application supports a flexible and dynamic way of mapping different units of measure and the conversions between them. If multiple units of measure have been defined (for example, case, each, pack, carton, and so on), you can expand the *Units* column in the *Volume and Value Planning* section on the detailed promotion sceen to display the various units and plan against them for each of the KPIs.

> i Note
>
> An asterisk is used on the UI to show that multiple units of measure are available for planning. This is because it is not possible to aggregate across different units. To show the individual units, simply click on ❯ for the KPI in question. Asterisks are used for this purpose consistently across the application.

Activities

1. In the promotion fast entry table, create a new promotion and enter your planning data.
2. Click the promotion ID to navigate to the promotion planning screen.
3. Enter general data, a tactic, as well as volume/value and trade spend planning data.
4. The dates can be viewed in a Gantt view or as individual fields.
5. Click *Admin* to display the trade promotion details.

More Information

7.3   Promotion Optimization

The *Promotion Optimization* function on the detailed promotion screen enables you to generate scenarios of a particular promotion to find the promotion that best suits your needs.

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

You can adjust the KPIs of the scenarios until you find the optimum result.

The *Promotion Optimization* function comprises:

- The *Promotion Optimization – Fast View* for entering the simulation parameters.
- The *Results List View* which displays a complete list of the scenarios generated as well as the promotion KPIs. You can select any of the scenarios as the current promotion.
  You can personalize (⚙) this view to display the columns you want see. This view includes a *Delete All* icon (🗑) with which you can delete all the scenarios listed with just one click.
- The *Analysis* view which provides the following dashboards to visualize and compare the results:
  - Basic Analysis
  - Scenarios
  - Volume Decomposition
- The *Product-Specific Run Results* view which you display by clicking on the scenario ID (*ID* column) in the *Results List View*. This view shows the scenario broken down into its individual products and their respective time dimensions.

Variant Creation

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

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

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

Related Information

7.3.1 Optimizing Promotions

Context

You run a promotion optimization in order to generate scenarios of a particular promotion.

Procedure

1. In the detailed promotion screen, click ⤴ *(More)* , or ⬆ in certain UI5 versions, and choose *Promotion Optimization*.
2. Open the *Promotion Optimization – Fast View* and make the following settings (most of these may already be set based on your account defaults):

Setting	Description
Simulate Best <...> Options	Enter the number of scenarios you want to simulate, for example, 5.
By	Specify the optimization goal, for example, you want to increase the promotion profit.

Setting	Description
For	Enter the tactic to be applied. Click the field to call up the *Tactics* screen in which you can make the following settings: - The *Available Tactics* area contains the tactics that have been customized and are available based on the plan context. - In the *Planned Tactics* area, you make your settings for temporary price reduction (TPR) and multi buy, as well as the total reduction and total price, expressed as a range. - The *Merchandising Tactics* area breaks the tactics down into their individual components (for example, Display could comprise generic display, end of aisle, and so on) and allows you to specify the associated ACV and trade spends.
In Time Horizon	This specifies the optimization time frame and is defaulted from the time selector in your plan. For example, if Q1 is selected in the time selector, Q1 will be defaulted here.
For Duration	Enter the number of days or weeks for the duration of the scenarios.
With Restrictions	Enter any restrictions to be applied. Multiple selections are possible.

3. Click *Run Optimization* to generate the scenarios. The number of scenarios generated depends on the setting you made in *Simulate Best <...> Options*.

4. On the *Results List View*, select the checkbox(es) at the start of the row(s) containing the scenario(s) you're interested in.

   The promotion KPIs on the left show the scenarios you've selected in the form of colored bar charts allowing you to compare them directly. Due to space restrictions, only four scenarios can be displayed here.

5. To select one of the scenarios as the current promotion, go to the *Actions* column and click ⟲ *(Update Promotion)*.

7.4 Synchronization of Additional Date Ranges with the Planning Applications Kit

Use

You can assign additional date ranges in trade promotion management in SAP Customer Relationship Management (SAP CRM) that are synchronized to the planning layout. Additional date ranges include dates

that are synchronized in addition to the buying dates, which are always synchronized by default. For example, you can assign pre-dip dates or post-dip dates, as well as other date ranges, such as goods receipt.

You can synchronize pre-dip and post-dip date ranges to the P&L Sell-in layout and the Plan period with the Sell-out layout. The Summary layout uses the Buying period

> ℹ️ **Note**
>
> There cannot be a gap or overlap between pre-dip, buying, and post-dip additional date ranges.

Prerequisites

- You have defined valid date ranges and assigned a period type in Customizing for *Customer Relationship Management* under ▶ *Marketing* ❯ *Marketing Planning and Campaign Management* ❯ *Basic Data* ❯ *Define Additional Date Ranges* ❯.
  Date ranges that you define here are made available in the *Define Integrated Planning Profile Groups* Customizing activity. You must define a period type for the date range in this Customizing activity for it to be available to be identified for synchronization in the *Define Integrated Planning Profile Groups* Customizing activity.

  > ℹ️ **Note**
  >
  > *Not Assigned* is not a valid period type.

- You have specified the additional date ranges to be synchronized to the planning layout in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Define Integrated Planning Profile Groups* ❯ *Assign Additional Date Ranges* ❯.
- You have set the restrictions to the necessary period types for all key figures for your query in the BEx Query Designer. For more information, see the Administrator's Guide for SAP Trade Promotion Planning and Management.

Activities

- You can enter dates in the *Dates* fields in the *General Data* section of the promotion details.
  For example, the pre-dip dates are synchronized to SAP NetWeaver Business Warehouse when you enter pre-dip dates in the *Dates* fields. The pre-dip dates are then displayed on the planning layout.

More Information

Buying Patterns in Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 57]

7.5   Distribution and Redistribution of Planning Values with Rates in SAP NetWeaver BW

Use

When you are planning your promotion and you navigate to the planning page, the values entered in the planning layout are maintained in SAP NetWeaver Business Warehouse (SAP NetWeaver BW). When you make changes that affect the planning layout, such as adding or removing a product from the trade promotion or modifying the trade promotion dates, the system adjusts the planning values accordingly. For example, if you remove a product from a trade promotion, the values that were originally distributed to that product are redistributed to the remaining products that are included in the trade promotion.

Prerequisites

- You have set your rates origin as *BI* in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ❯ *Basic Data* ❯ *Define Rates' Origin* ❯.
- If you are planning at week level, you have set the distribution ratio (0DISTRATIO) key figure in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *InfoObject Mapping* ❯ *Map Key Figure for Distribution Ratio* ❯.

Features

The following sections explain distribution and redistribution of planning values when you plan with rates in SAP NetWeaver BW.

> **i Note**
>
> Trade spend dates have no effect on the planning layout when rates are planned in SAP NetWeaver BW.
>
> Product effective dates affect products within the buying date range. For example, if you have a two-week buying period, but a product is only effective for one of those weeks, the values for the days or weeks on which the product is not valid are set to zero and are read-only. The cells for the days or weeks in the buying date range for which the product is valid are open for input.
>
> The following examples assume that you are not using a buying pattern.

Distribution

The way values are distributed in the planning layout depends on which of the following types of key figures you are using:

- Aggregating key figures

When you use aggregating key figures, the way values are distributed depends on the type of distribution you have defined in the query definition for each key figure (for example, *Equal Distribution*, *Analog Distribution (Self-Reference)*, or *Analog Distribution (With Reference to Following Structure Element)*). By default, the system distributes the values entered at the total level across all rows and columns for that key figure based on the distribution rules in your query definition. For example, if your query definition specifies that the distribution of key figure X is *Analog Distribution (Self-Reference)*, any values entered in the planning layout are distributed proportionally to existing values for this key figure.

For more information about distribution types, see SAP Library for SAP NetWeaver on SAP Help Portal at http://help.sap.com/netweaver. In SAP Library, choose ▶ *SAP NetWeaver Library: Function-Oriented View* ▶ *SAP Business Warehouse* ▶ *SAP Business Explorer* ▶ *BEx Query Designer* ▶ *Properties of Query Components* ▶ *Selection/Formula/Cell Properties* ◀.

Aggregating key figures sum all lower-level values up to a total value. Values are distributed across the time dimension based on the number of calendar days or calendar weeks for which the trade promotion is valid. For example, you are planning at day level. You create a trade promotion with dates spanning three weeks. The first week starts on Tuesday (the trade promotion is applied for six days), the second week is a full week (the trade promotion is applied for seven days), and the third week contains only one day where the trade promotion applies. This means that there are 14 days in the trade promotion. The values are therefore equally distributed across the 14 days. This results in a different total value for each week.

If you are planning at week level, the distribution ratio key figure is used to represent the number of valid days in a calendar week. The values are distributed over the calendar week according to the key figure. For more information, see Distribution Ratio for Aggregating Key Figures [page 64].

- Non-aggregating key figures
  Values entered at the total level are copied to the underlying products. These values are also set across all days or weeks in the trade promotion.
  For example, if you enter 10 at the total level, products 1, 2, and 3 are each assigned a value of 10. For each product, a value of 10 is assigned for each day or week that the product is valid.
  If the values under the total level are not equal, the system assigns an asterisk (*) as the total level value.

Redistribution

The following sections explain the default redistribution behavior if you are planning at day level. Unless otherwise noted, if you are planning at week level, the same behavior applies if you were to substitute days for weeks.

If necessary, you can use a business add-in (BAdI) to specify the key figures to be redistributed or to deactivate the redistribution behavior. To do so, implement the BAdI in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *Business Add-Ins (BAdIs)* ▶ *BAdI: Modification of Planning Behavior* ◀.

Deleting Products

When you delete a product from a trade promotion, the key figure values are redistributed as follows:

- If you are using aggregating key figures and are using products with categories for your planning, all values belonging to the deleted product are redistributed proportionally to the other products under the same product category. If there are no products remaining under the product category of the deleted product, the values are deleted and are not redistributed.

❖ Example

The following example illustrates a trade promotion with three products in one product category and one product in another product category, with a total volume of 100:

Product Category	Product	Value	Total Volume
Product Category 1			90
	Product 1	60	
	Product 2	10	
	Product 3	20	
Product Category 2			10
	Product 4	10	

If you delete product 1, by default the values for that product are redistributed proportionally to the other products in product category 1, as follows:

Product Category	Product	Value	Total Volume
Product Category 1			90
	Product 2	30	
	Product 3	60	
Product Category 2			10
	Product 4	10	

i Note

You can implement *BAdI: Modification of Planning Behavior* so that the values from a product that is deleted are redistributed to all products instead of only the products within the same product category. In this case, the values of a deleted product are redistributed proportionally across the rest of the products in the trade promotion.

- If you are using aggregating key figures and are using product categories or product groups for your planning, if you delete a product category or a product group, the values are redistributed across the other product categories or product groups.
- If you are using non-aggregating key figures, all values belonging to the product dimension being deleted are set to zero, and this product dimension is removed from the layout.

Adding Products

When you add a product to a trade promotion, the key figure values are set to zero. This is the case for both aggregating and non-aggregating key figures.

Changing Dates

When you modify the duration of a trade promotion by extending or reducing the time period that is synchronized to the planning layout, the system redistributes the total values over the new time period as follows:

- If you are using aggregating key figures, when you extend a trade promotion, the system redistributes the values based on the new number of calendar days.

  > ❖ Example
  >
  > You have a one-week trade promotion applied on *Calendar Week 1*. The total volume is 70. In this case, each day of the trade promotion has a volume of 10, as shown in the following table:
  >
  > **Calendar Week 1**
  >
  > | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. |
  > |------|-------|------|--------|------|------|------|
  > | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
  >
  > If you extend this trade promotion to two weeks so that it is applied on *Calendar Week 1* and *Calendar Week 2*, the values are redistributed so that each calendar day has a value of 5, and the total value is still 70, as shown in the following table:
  >
  > **Calendar Week 1** / **Calendar Week 2**
  >
  > | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. |
  > |------|-------|------|--------|------|------|------|------|-------|------|--------|------|------|------|
  > | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |

- When you change the dates of a trade promotion (a time shift) but do not extend or reduce the number of days the trade promotion is valid for, the system shifts the same values to the new dates, regardless of whether you are using aggregating or non-aggregating key figures.

  > ❖ Example
  >
  > The following example illustrates how the system shifts the values when the trade promotion dates are shifted by two days. The number of days the trade promotion is valid for remains the same, as shown in the following table:
  >
  > **Calendar Week 1** / **Calendar Week 2**
  >
  > | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. |
  > |------|-------|------|--------|------|------|------|------|-------|------|--------|------|------|------|
  > | | | 1 | 10 | 15 | 5 | 5 | 2 | 5 | | | | | |
  > | | | | 1 | 10 | 15 | 5 | 5 | 2 | 5 | | | | |

If you are planning at week level, a time shift can only occur in increments of weeks. For example, you have a two-week trade promotion with a value of 10 in the first week and a value of 20 in the second week. You shift the trade promotion by one week. The result is as follows:

Calendar Week 1	Calendar Week 2	Calendar Week 3
10	20	
	10	20

- If you are using aggregating key figures, when you shift the trade promotion dates and reduce the duration of the trade promotion, the system redistributes the values equally across the new time period.
- If you are using non-aggregating key figures, when you shift the dates of a trade promotion and extend the number of days the trade promotion is valid for, the system copies the original values to the new dates. The system copies the original value either of the first day or last day to the extended dates, depending on whether you set the trade promotion start date earlier or set the trade promotion end date later.

⠿ Example

You have a trade promotion that has a duration of two weeks. You set the end date of the trade promotion to one week later. The value of the last day is copied to the new days, as follows:

Calendar Week 1							Calendar Week 2							Calendar Week 3						
Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.
2	2	3	3	4	4	5	5	6	6	7	7	8	8							
2	2	3	3	4	4	5	5	6	6	7	7	8	8	8	8	8	8	8	8	8

⠿ Example

You have a trade promotion that has a duration of two weeks. You set the start date of the trade promotion to one week earlier with the same end date. The value of the first day is copied to the new days, as follows:

Calendar Week 1							Calendar Week 2							Calendar Week 3						
Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.
							2	2	3	3	4	4	5	5	6	6	7	7	8	8
2	2	2	2	2	2	2	2	2	3	3	4	4	5	5	6	6	7	7	8	8

> **⁂ Example**
>
> You have a trade promotion that has a duration of two weeks. You shift the start date of the trade promotion to begin one week later, and you extend the duration by one week, resulting in a three-week trade promotion. The system copies the values exactly from the original days to new days, while the additional days get the value of the last day, as follows:
>
> | Calendar Week 1 | | | | | | | Calendar Week 2 | | | | | | | Calendar Week 3 | | | | | | | Calendar Week 4 | | | | | | |
> |---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
> | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. |
> | 2 | 2 | 3 | 3 | 4 | 4 | 5 | 5 | 6 | 6 | 7 | 7 | 8 | 8 | | | | | | | | | | | | | | |
> | | | | | | | | 2 | 2 | 3 | 3 | 4 | 4 | 5 | 5 | 6 | 6 | 7 | 7 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 | 8 |

- If you are using non-aggregating key figures, when you shift the trade promotion dates and reduce the duration of the trade promotion, the system copies the values of the original days to the new days, beginning from the first day, for as long as there are valid dates in your trade promotion. The system keeps the original values for the reduced duration of the trade promotion, as follows:

> **⁂ Example**
>
> | Calendar Week 1 | | | | | | | Calendar Week 2 | | | | | | |
> |---|---|---|---|---|---|---|---|---|---|---|---|---|---|
> | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. | Mon. | Tues. | Wed. | Thurs. | Fri. | Sat. | Sun. |
> | 2 | 2 | 3 | 3 | 4 | 4 | 5 | 5 | 6 | 6 | 7 | 7 | 8 | 8 |
> | | | | | | | | 2 | 2 | 3 | 3 | 4 | 4 | 5 |

Using the Factory Calendar with Key Figures in SAP NetWeaver BW

If you are using the factory calendar, the behavior for planning at day level is as follows:

- If you are using aggregating key figures, when you change the dates of your trade promotion, the system redistributes values over the new time period, and skips any removed days. This is also true if you shift the dates of your trade promotion without changing the duration.
- If you are using non-aggregating key figures, days that are removed by the factory calendar are skipped.

> **⁂ Example**
>
> You have a one-week trade promotion. You exclude two days from the trade promotion using the factory calendar. You shift the start date of the trade promotion to begin one week later, and you extend the trade promotion by setting the end date to one week later. The system copies the values of the

original days to the new days, but skips the days that are excluded by the factory calendar. The system copies the new value of the last day to the additional days, as follows:

Calendar Week 1							Calendar Week 2							Calendar Week 3						
Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.
2	2	3	3	4	4	5														
							2	2	-	3	3	-	4	4	4	4	4	4	4	4

⁛ Example

You have a two-week trade promotion in which you have skipped three days using the factory calendar. You shift the start date of the trade promotion to begin one week later, and you set the previously skipped days as valid. The system uses the original values to fill in the skipped days, and uses the value of the last day to fill in the additional days, as follows:

Calendar Week1							Calendar Week 2							Calendar Week 3						
Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.
2	2	-	-	-	4	5	5	6	6	7	7	8	8							
							2	2	4	5	5	6	6	7	7	8	8	8	8	8

If you are planning at week level, and you use BAdI method GET_REMOVED_DAYS_DATE_RANGES to remove days with the factory calendar, this affects the distribution ratio key figure (0DISTRATIO). For example, you have a one-week trade promotion that begins on a Wednesday, resulting in a trade promotion spanning two calendar weeks: calendar week 1 (Wednesday - Sunday) and calendar week 2 (Monday - Tuesday). Calendar week 1 has a ratio of 5/7, as it has 5 working days, while calendar week 2 has a ratio of 2/7. You remove one day of the week (Tuesday) using the factory calendar. The distribution ratio was originally 7, but removing the Tuesday changes the ratio to 6. This results in calendar week 1 having a ratio of 5/6, while calendar week 2 has a ratio of 1/6. For more information, see Using the Factory Calendar for Buying Patterns [page 61] and Distribution Ratio for Aggregating Key Figures [page 64].

More Information

Key Figure Planning with the Planning Applications Kit [page 21]

Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 24]

Buying Patterns in Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 57]

7.6 Distribution and Redistribution of Planning Values with Rates in SAP CRM

Use

This functionality works with the WebClient UI but not with SAP UI5.

When you plan your trade promotions using rates in SAP Customer Relationship Management (SAP CRM), you plan trade spends in SAP CRM, while you can plan other key figures in SAP NetWeaver Business Warehouse (SAP NetWeaver BW) in the planning layout. When you make changes, such as adding or removing a product from the trade promotion, modifying the trade promotion dates, or modifying trade spends, the system adjusts the planning values accordingly in SAP CRM and reflects the changes in SAP NetWeaver BW during synchronization. For example, if you remove a product from a trade promotion, the values that were originally distributed to that product are redistributed to the remaining products that are included in the trade promotion. You can see this reflected in SAP CRM and in the planning layout.

> **i** Note
>
> This document only describes the behavior of key figures mapped to trade spends planned in SAP CRM. For information about the behavior of key figures planned in SAP NetWeaver BW, see Distribution and Redistribution of Planning Values with Rates in SAP NetWeaver BW [page 33].

Prerequisites

- You have set your rates origin as *CRM* in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▷ *Basic Data* ▷ *Define Rates' Origin* ▷.
- If you are planning at week level, you have set the distribution ratio (`0DISTRATIO`) key figure in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▷ *Key Figure Planning with the Planning Applications Kit* ▷ *InfoObject Mapping* ▷ *Map Key Figure for Distribution Ratio* ▷.

Features

The following sections explain distribution and redistribution of planning values when you plan with rates in SAP CRM.

> **i** Note
>
> We recommend that you set all trade-spend relevant key figures as read-only in the planning layout during your query setup using the BEx Query Designer.

Product effective dates affect products within the buying date range. For example, if you have a two-week buying period, but a product is only effective for one of those weeks, the values for the days or weeks on which the product is not valid are set to zero.

The following examples assume that you are not using a buying pattern. For more information about buying patterns, see Buying Patterns in Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 57].

Distribution

The way values are distributed in the planning layout depends on which of the following types of key figures you are using:

- **Aggregating key figures**
  Aggregating key figures are, for example, fixed trade spends. When you use aggregating key figures, the values are distributed to product dimensions by equal distribution.
  The values are distributed in two steps:
  1. The total value is distributed at product dimension level.
  2. The total at each product dimension level is distributed across the time dimension, based on the number of calendar days for which the product dimension is valid. When planning at week level, the distribution to the time level is done using the distribution ratio (0DISTRATIO) key figure.

> ⁘ Example
>
> The following example is relevant for day level planning. You have a trade promotion that spans two calendar weeks with two products. You define a trade spend of 600 for six days. The values are distributed equally between the product dimensions available in the trade promotion, and then are distributed across the date ranges based on the number of valid days for each product dimension. In this example, for Product 1, a total value of 300 is distributed to 6 days, resulting in 50 a day. The total for the product category for each week is 300, which results in a sum of 600.
>
> | Calendar Weeks | Calendar Week 1 | | | Calendar Week 2 | | |
> |---|---|---|---|---|---|---|
> | **Promotion Buy Days** | Day 5 | Day 6 | Day 7 | Day 1 | Day 2 | Day 3 |
> | **Total Trade Spend Amount** | 600 | | | | | |
>
> The following table shows how the total trade spend value is applied to the products and then to the days.
>
> | - | Calendar Week 1 | - | - | - | Calendar Week 2 | - | - | - |
> |---|---|---|---|---|---|---|---|---|
> | - | - | Day 5 | Day 6 | Day 7 | - | Day 1 | Day 2 | Day 3 |

-	Calendar Week 1	-	-	-	Calendar Week 2	-	-	-
Product Category Total	300	-	-	-	300	-	-	-
Product 1	150	50	50	50	150	50	50	50
Product 2	150	50	50	50	150	50	50	50

i Note

When working with day level planning, as in the above example, aggregating key figures are stored at the day level. The weekly value is the sum of the values from the days in that week that the trade spend affects.

For week level planning, values are stored by week and not by day. When working with trade spends that span multiple calendar weeks, the weekly values are calculated as follows:

⁘ Example

The following example is relevant for week level planning. The weekly distribution is calculated using the number of promotion days for the weeks that the trade spend overlaps with and not the number of days that the trade spend is valid. You have a trade promotion with a duration of 8 days that spans 2 calendar weeks with 2 products. You define a fixed trade spend of 600 for 4 days that spans 2 calendar weeks. In this example, there are 8 days used in the calculation. The calculations for the trade spend values for each product for each week are as follows:

○ The calculation for Product 1 for Week 1 is as follows: 1/8 X 300 = 37.50. The trade spend is valid for 1 day in Week 1 out of the total of 8 days for the promotion. 1 day is divided by 8 days and then multiplied by the trade spend amount of 300 to determine the amount to allocate to Product 1 in Week 1.

○ The calculation for Product 1 for Week 2 is as follows: 7/8 X 300= 262.50. The trade spend is valid for 3 days in Week 2, which has a total duration of seven days. 7 days are divided by 8 days, then multiplied by the trade spend amount to obtain the total amount that is allocated to the Product 1 in Week 2.

The following table shows that the trade spend is valid for 4 days over 2 calendar weeks.

Calendar Weeks	Calendar Week 1	Calendar Week 2						
Promotion Buy Days	Day 7	Day 8	Day 9	Day 10	Day 11	Day 12	Day 13	Day 14

Calendar Weeks	Calendar Week 1	Calendar Week 2				
Total Trade Spend Amount	600		-	-	-	-

The following table shows how the total trade spend value is applied to the products for each week.

-	Calendar Week 1	Calendar Week 2
Product Category Total	75	525
Product 1	37.50	262.50
Product 2	37.50	262.50

> i Note
>
> Product effective dates take precedence over promotion dates when the system calculates weekly values. For example, if your promotion is valid for 8 days but the product is only effective for 7 days, then the system uses 7 days to calculate the weekly trade spend value for the product.

- **Non-aggregating key figures**
  Non-aggregating key figures are key figures that are not summed up, for example, variable trade spends. The spend value of the trade spend is copied to the products. These values are set across all days or weeks in the trade promotion.
  For example, if your trade spend has a value of 10, products 1, 2, and 3 are each assigned a value of 10 for each day or week that the product is valid.

  > i Note
  >
  > If a single calendar week has two trade spends of the same type with different rates and non-overlapping dates, then an average discount is given. Non-promoted days are not considered when calculating the average.

Redistribution

The following sections explain the default redistribution behavior.

Deleting Products

When you delete a product, product category, or product group from a trade promotion, the trade spend values are redistributed as follows:

- If you are using aggregating key figures and you delete a product, the total value is redistributed equally across the remaining product dimensions in your trade promotion.

The following example illustrates a trade promotion with four products, with a total volume of 120:

Product Category	Product	Value	Total Volume
Product Category 1			90
	Product 1	30	
	Product 2	30	
	Product 3	30	
Product Category 2			30
	Product 4	30	

If you delete *Product 1*, by default the value for that product is divided equally and redistributed across the remaining product dimensions that are planned in your trade promotion (products 2, 3, and 4), as follows:

Product Category	Product	Value	Total Volume
Product Category 1			80
	Product 2	40	
	Product 3	40	
Product Category 2			40
	Product 4	40	

- If you are using non-aggregating key figures, all values belonging to the product dimension being deleted are removed from the layout.

i Note

For key figures planned in SAP CRM, we recommend you deactivate the redistribution using *BAdI: Modification of Planning Behavior*, unless you are planning additional key figures using SAP NetWeaver BW, which require specific redistribution behavior from the BAdI. If the default distribution behavior is active, the key figures mapped to trade spends should not be specified as key figures to be redistributed during a deletion and a time shift.

Adding Products

When you add a product to a trade promotion, the key figure values are redistributed as follows:

- If you are using aggregating key figures planned in SAP CRM, the current total key figure value is redistributed over the new set of product dimensions.

- If you are using non-aggregating key figures, key figures planned in SAP CRM get the value of the respective trade spend.

  For example, if your variable trade spend is 5, then all products have a trade spend of 5, including any new products that are added.

Changing Dates

- For week level planning, when you extend a trade promotion, the system redistributes the values using the distribution ratio (`0DISTRATIO`) key figure.
- For day level planning, if you are using aggregating key figures, when you extend a trade promotion, the system redistributes the values based on the new number of calendar days.

> ❖ Example
>
> The following example is relevant for day level planning:
>
> You have a one-week trade promotion applied on Calendar Week 1. The total volume is 70. In this case, each day of the trade promotion has a volume of 10, as shown in the following table:
>
> **Calendar Week 1**
>
> | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
> | --- | --- | --- | --- | --- | --- | --- |
> | 10 | 10 | 10 | 10 | 10 | 10 | 10 |
>
> If you extend this trade promotion to two weeks so that it is applied on Calendar Week 1 and Calendar Week 2, the values are redistributed so that each calendar day has a value of 5, and the total value is still 70, as shown in the following table:
>
> | Calendar Week 1 | | | | | | | Calendar 2 | | | | | | |
> | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
> | Mon-day | Tues-day | Wed-nes-day | Thurs day | Friday | Satur-day | Sun-day | Mon-day | Tues-day | Wed-nes-day | Thurs day | Friday | Satur-day | Sun-day |
> | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |

- If you are using non-aggregating key figures planned in SAP CRM, when you extend a trade promotion, the values are copied to the new days or weeks based on the value of your trade spends. When you reduce the duration of a trade promotion, the relevant values and days are removed and are not visible on the planning layout.

The following example is relevant for day level planning:

You have a one-week trade promotion applied on Calendar Week 1. Each day of the trade promotion is assigned an off-invoice discount of 0.75, as shown in the following table:

Calendar Week 1

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
0.75	0.75	0.75	0.75	0.75	0.75	0.75

If you extend this trade promotion to two weeks so that it is also applicable to Calendar Week 2, the new days are assigned values of 0.75 in Calendar Week 2, as shown in the following table:

Calendar Week 1							Calendar Week 2						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75

i Note

The same distribution behavior applies to trade promotion dates, trade spend dates, trade spend exception dates, and product effective dates.

- When you change the dates of a trade promotion (a time shift) but do not extend or reduce the number of days the trade promotion is valid for, the system shifts the same values to the new dates, regardless of whether you are using aggregating or non-aggregating key figures.

❖ Example

The following example is relevant for day level planning. The following example illustrates how the system shifts the values of a non-aggregating key figure with exceptions planned in SAP CRM when the trade promotion dates are shifted by two days. The number of days the trade promotion is valid for remains the same, as shown in the following table:

Calendar Week 1							Calendar Week 2						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
		1	10	15	5	5	2	5					

Calendar Week 1			Calendar Week 2			
1	10	15	5	5	2	5

- If you are using aggregating key figures, when you shift the trade promotion dates and reduce the duration of the trade promotion, the system redistributes the trade spend or trade spend exception values equally across the new time period. When planning at the week level, the system distributes the trade spend or trade spend exception values according to the distribution ratio (0DISTRATIO) key figure.
- If you are using non-aggregating key figures, when you shift the trade promotion dates and reduce the duration of the trade promotion, the system assigns the respective trade spend or trade spend exception values to the new time periods.

> **i Note**
>
> The same distribution behavior applies to trade promotion dates, trade spend dates, trade spend exception dates, and product effective dates.

Using the Factory Calendar with Key Figures in SAP CRM

If you are planning at week level, and you use BAdI method `GET_REMOVED_DAYS_DATE_RANGES` to remove days with the factory calendar, the behavior for calculating the key figure values is as follows:

- Non-Aggregating Key Figures
  The system calculates an average when two trade spends of the same type have different rates and non-overlapping dates in the same week. When you use the BAdI method `GET_REMOVED_DAYS_DATE_RANGES` to remove days with the factory calendar, with week level planning and non-aggregating key figures, a calendar week that has varying rates will not include any removed days when it calculates the average.
- Aggregating Key Figures

> **⁘ Example**
>
> You have a two-week trade promotion (14 days). You have two trade spends of the same type with different rates and non-overlapping dates. The first trade spend of 100 is within the first week. The second trade spend of 200 spans the first and second week. You exclude the last day of each week from the trade promotion using the factory calendar. The system does not include the days that have been removed by the factory calendar when it calculates the key figure values.
>
> For trade spends of the same type with different rates and non-overlapping dates, their spend values are added together to determine the weekly values unless an entire calendar week separates the two trade spends, then they are treated separately. The following example calculates the spend values for each week in the promotion as follows:
>
> - The calculation to determine the trade spend for Calendar Week 1 is as follows:
>   The number of valid days in Week 1 is divided by the total number of valid days of the promotion and then multiplied by the total trade spend value. 6/12 X 300= 150.
> - The calculation to determine the trade spend for Calendar Week 2 is as follows:
>   The number of valid days in Week 2 is divided by the total number of valid days of the promotion and then multiplied by the total trade spend value. 6/12 X 300= 150.

	Calendar Week 1							Calendar Week 2						
Buy Dates	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Excluded with Factory Calendar	Day 8	Day 9	Day 10	Day 11	Day 12	Day 13	Excluded with Factory Calendar
Trade Spend Value	100					200								

Trade Spend Total		Calendar Week 1		Calendar Week 2
300		150		150

More Information

7.7 Planning for Target Groups with the Planning Applications Kit

Use

This functionality works with the WebClient UI but not with SAP UI5.

If you select a target group as a planning account, you can choose whether or not your business partners are exploded on the planning layout. You do this according to the integrated planning profile group in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Define Integrated Planning Profile Groups* ❳. When business partners are exploded, you can plan different rates for each business partner within the trade promotion.

If the planning account is a target group, there are no partner/product range checks or listing checks.

Prerequisites

The target group must have the status *Modeling Completed* to be assigned to a trade promotion.

7.8 Displaying the List Price in the Promotion

To display the list price, perform the following steps:

- Complete the standard configuration settings for condition generation.
- Map the key figures for list price and net price list subtotals in Customizing for Customer Relationship Management under ▶ *Trade Management* ❭ *Trade Promotion Planning and Management* ❭ *Key Figure Planning with the Planning Applications Kit* ❭ *InfoObject Mapping* ❭ *Map Key Figures for List Price and Net Price List* ❭.
- Assign a read query with the query context CONDITION to your integrated planning profile group in Customizing for Customer Relationship Management under ▶ *Trade Management* ❭ *Trade Promotion Planning and Management* ❭ *Key Figure Planning with the Planning Applications Kit* ❭ *Define Integrated Planning Profile Groups* ❭. This query should also contain the list price and net price list subtotal key figures and all key figures representing all possible trade spends for condition generation.

7.9 Planning Display Pallets in Trade Promotions

Use

This functionality works with the WebClient UI but not with SAP UI5.

You can include display pallets in your trade promotions. Display pallets are defined in the SAP CRM product master as structured products. You can plan trade spends or uplift quantities for display pallets as you would for standard products and product categories.

Integration

When you include display pallets in your trade promotion, these products can be included in the sales order process in SAP ERP Central Component (SAP ECC).

Prerequisites

You have completed the following activities:

- Created bills of material (BOMs) in the *Create Material BOM* (CS01) transaction in SAP ECC and replicated them in SAP CRM as structured products by using the middleware adapter BOM.
- Ensured that the item category group that your products are assigned to is defined as display pallet-relevant in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▶ *Basic Data* ▶ *Products* ▶ *Select Item Category Group for Display Pallets* ◀.
- Set your rates origin to BI in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ▶ *Basic Data* ▶ *Define Rates' Origin* ◀

Features

The following features are available when you are planning with structured products:

Promotion Type

- You can include structured products in a trade promotion that also includes products or product categories.
- You do not have to choose a specific promotion type to include structured products in a trade promotion.

Product Assignment Block

- You can view the components of structured products in the product assignment block.
  You can view the following component information: product ID, product description, number of components in the structured product, and the unit of measure.

Planning

- A structured product does not explode to its component products or product categories. Component products are not available in the planning layout.
- You plan for structured products as you would plan for standard products.
- You can enter trade spend values and uplift quantities for the header product.
  If you want to plan for the components of the structured product, you add them to the trade promotion as separate products.
- Conditions are generated on the header product of the structured product.
- Funds are determined for the header of the structured product.

7.10   Planning Indirect Trade Promotions

Use

This functionality works with the WebClient UI but not with SAP UI5.

In addition to direct trade promotions, where a manufacturer promotes directly to a retailer, you can also plan indirect trade promotions, where the retailer receives financial compensation for promotional performance from the manufacturer, even though the retailer purchases their goods from wholesalers or distributors.

You can plan indirect trade promotions using indirect relationships.

Integration

This function is closely related to trade promotion planning, funds, and claims.

Prerequisites

You have made the following settings:

- You have set your rates origin to *BI* in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ❯ *Basic Data* ❯ *Define Rates' Origin* ▶.
- You have set up a query that includes the `0WHOLESALER` InfoObject and the `0INDPERCENT` key figure and adjusted any other relevant BI content objects, for example, aggregation levels and DataStore Objects.
- You have made an entry for the `0WHOLESALER` InfoObject in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning for the Planning Applications Kit* ❯ *InfoObject Mapping* ❯ *Map CRM Application Data to BW InfoObjects* ▶.
- You have mapped a key figure for indirect percentage in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *InfoObject Mapping* ❯ *Map Key Figure for Indirect Percentage* ▶.
- You have created indirect relationships if you want to use automatic wholesaler determination. For more information, see Indirect Relationships [page 52].

Features

The following features are available when you plan indirect trade promotions:

Trade Spends and Sales Volumes

Build a total trade spending and sales volume plan for a wholesaler, including incremental sales volumes originating from promotions with an indirect account as well as the related spending. By keeping track of the amount of trade spending that is allocated to a particular wholesaler during each time period - either directly or through investments in indirect accounts - and the resulting increase in sales volumes that this generates, you are in a position to evaluate the profitability of your business with a given wholesaler.

Planning and Forecasting

You can plan trade promotions for indirect accounts serviced by one or more wholesalers. Here you use the details of the indirect account → wholesaler relationship to determine the wholesaler for a particular promotion involving an indirect account. For small indirect accounts, you can plan trade promotions for wholesalers and attach related indirect accounts as the target groups.

Trade Funds Management

Draw funding for indirect promotions either from the indirect account or the related wholesaler. Indirect promotions draw their funding from either a specific fund for the indirect account or from the fund of the corresponding wholesaler. When determining funds usage for an indirect account, if the system does not find funds maintained for the indirect account then funds usage is determined for the wholesaler.

Trade Claims Management

Match trade claims raised by a wholesaler with the respective indirect promotion.

Automatic Wholesaler Determination

When you create your trade promotion and you assign the necessary attributes to identify it as an indirect trade promotion (planning account, promotion type, sales area, plan dates, and product dimension), the system automatically sets the promotion to "indirect". Once you add a product to the promotion, the system determines if there are any indirect relationships with wholesalers defined, then adds them to the *Parties Involved* assignment block.

Synchronization of Wholesaler and Indirect Percentage

A single wholesaler for each product dimension is synchronized to the planning layout. The wholesaler with the highest percentage for each product and the indirect percentage that is derived from the indirect relationship are synchronized to the planning layout.

> **i Note**
>
> The wholesaler that is derived from an indirect relationship and is identified as the main partner in the *Parties Involved* assignment block is synchronized to the planning layout, even if there is another wholesaler with a higher percentage.

More Information

7.11   Indirect Relationships

Use

This functionality works with the WebClient UI but not with SAP UI5.

This function helps you manage your indirect lines of business by enabling you to establish links between indirect accounts and the wholesaler(s) from whom those indirect accounts buy. You can use this information about indirect consumption to build total trade spending and plan sales volumes for a wholesaler, carry out volume planning for a wholesaler, and plan trade promotions for indirect accounts.

Integration

This function is closely related to trade promotion planning, funds, and claims.

Prerequisites

You have made the following Customizing settings:

- You have made the necessary settings for trade promotion management in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ◢.

- You have specified the product dimension that has to be used to maintain indirect account → wholesaler relationships, in Customizing for *Customer Relationship Management*, by choosing ▶ *Trade Promotion Management* ◢ *Trade Promotions* ◢ *Indirect Relationships* ◢ *Define Business Line Levels.* ◢

Features

A single indirect account can source different products from different wholesalers and therefore be linked to one or more wholesalers. This is an indirect account → wholesaler relationship with details about indirect consumption from different wholesalers for a particular product dimension and time period.

Establishing indirect relationships also allows you to specify the percentage split of the volume that the manufacturer ships to a wholesaler down to the indirect accounts serviced by the corresponding wholesaler, called Wholesaler Split. When a wholesaler ships to indirect accounts, the quantity is usually significant enough for the manufacturer to keep track of individually or as part of a target group, but the wholesaler also ships to a large number of small stores, which the manufacturer does not keep track of. Therefore wholesaler → indirect account relationships are not just the converse of the indirect account → wholesaler ones.

With a link set up both ways, that is, an indirect account → wholesaler and wholesaler → indirect account, you have information that helps you with planning, execution and reporting functions in the following ways:

Example

The following are sample structures of the various kinds of indirect relationships:

Legend

Indirect Account → Wholesaler Relationship

The following are possible indirect account → wholesaler relationships:

Exclusive Indirect Account
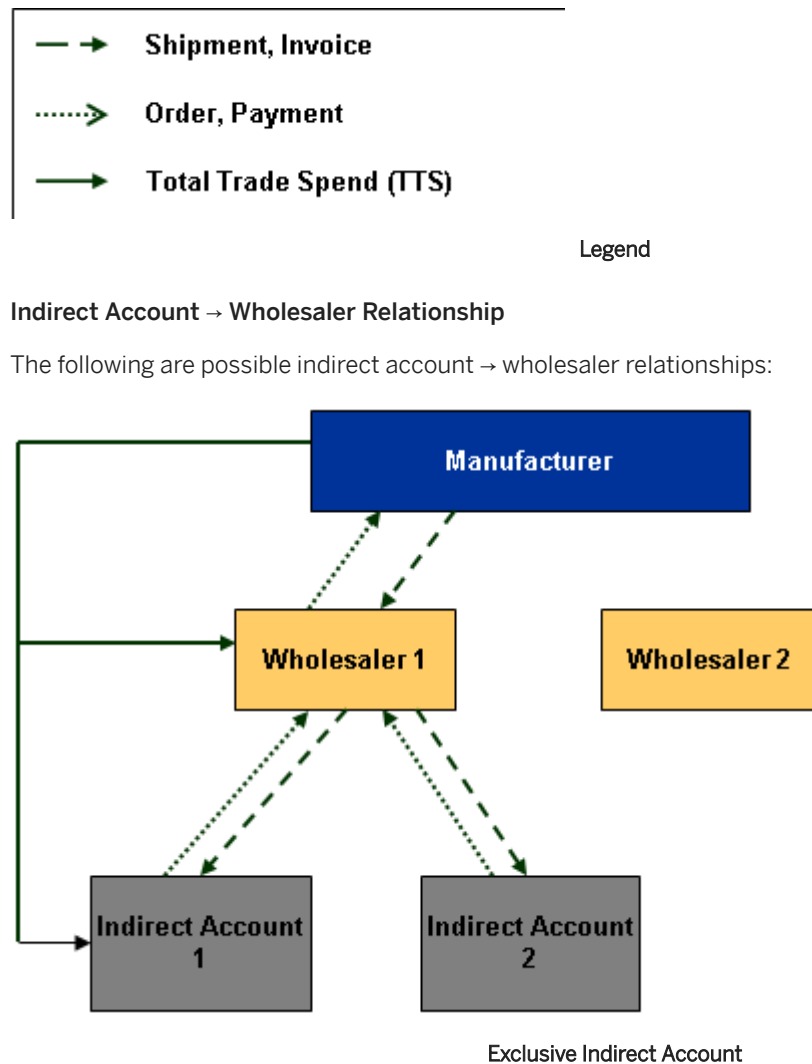
Here, the indirect account does not buy directly from the manufacturer, but orders all products through a single wholesaler or distributor.
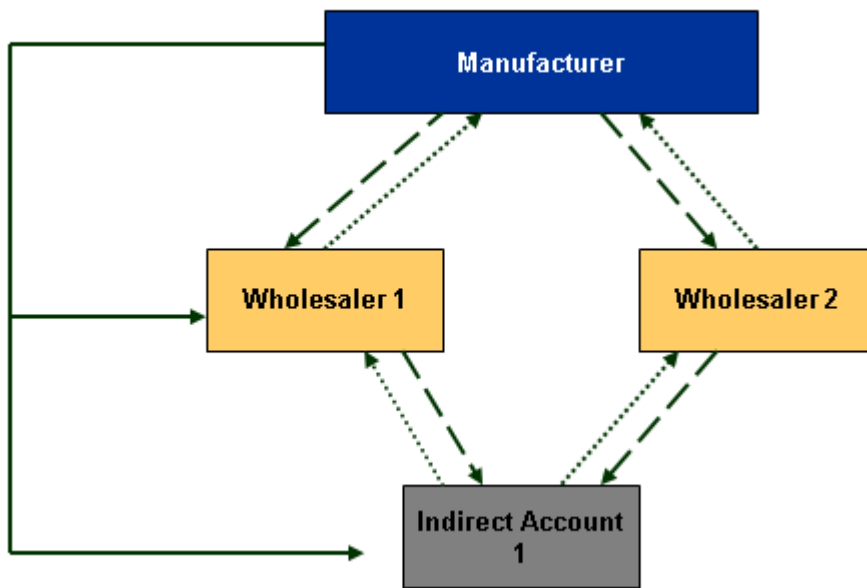
Non-Exclusive Indirect Account

Here the indirect account does not buy directly from the manufacturer. He or she orders products through several wholesalers and/or distributors instead.
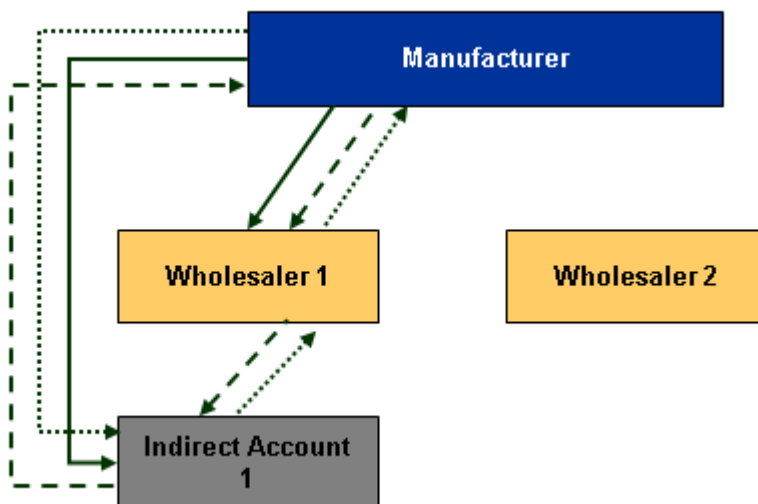
Combination of Direct and Indirect Account

Since different products may call for different distribution methods, an account can be both a direct and an indirect account. For example, a particular account could source only chilled products from a wholesaler, or it may be that the relationship between the manufacturer and the account is time dependent.

Wholesaler → Indirect Account Relationship or Wholesaler Split
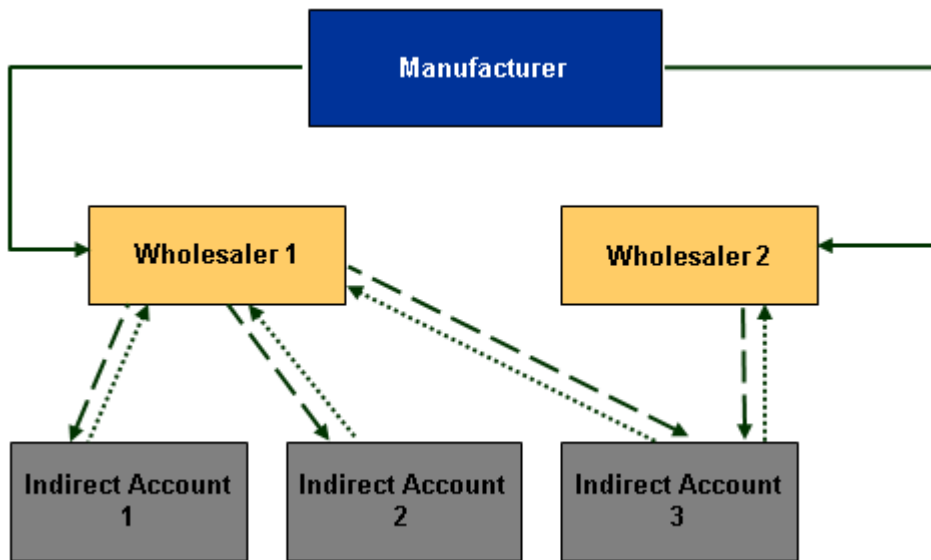
Wholesaler→ Indirect Account Relationship

For top down planning as well as reporting purposes, the manufacturer needs to understand which indirect account(s) the wholesaler supplies goods to. So when goods are shipped to a wholesaler, the wholesaler → indirect account relationship can give you information about the percentage that is distributed to the various indirect accounts.

More Information

For more information about the following topics, see SAP Library on SAP Help Portal at http:// help.sap.com/crm ⤳ ▶ *SAP Enhancement Package 2 for SAP CRM 7.0* ❯ *Application Help* ❯ in the following locations:

Topic	Location in SAP Library
Trade Promotions	▶ *Marketing* ❯ *Trade Promotion Management* ❯ *Trade Promotions* ❯
Account Planning	▶ *Sales* ❯ *Account Planning* ❯
Fund Determination	▶ *Marketing* ❯ *Trade Promotion Management* ❯ *Funds Management* ❯ *Fund Determination* ❯
Claims	▶ *Marketing* ❯ *Trade Promotion Management* ❯ *Claims Management* ❯ *Claims* ❯

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

Use

This functionality works with the WebClient UI but not with SAP UI5.

In trade promotion management, you can use an account's buying pattern for volume/value and trade spends planning. A buying pattern describes how much an account typically buys over a particular period of time. For more information about account defaults for trade promotions, see SAP Library for SAP CRM at http://help.sap.com/crm 🔗 ▶ *SAP CRM* ▶ *Marketing* ▶ *Trade Promotion Management* ▶ *Trade Promotions* ▶ *General Data for TPM* ▶ *Account Defaults for Trade Promotions* ❯. If you do not use a buying pattern, the system distributes key figures (such as volume) equally across time periods. By assigning a buying pattern, you can distribute the volumes in a way that better suits your business needs.

Prerequisites

- You have entered a period type and selected the *Buying Pattern* checkbox in Customizing for *Customer Relationship Management* under ▶ *Marketing* ▶ *Marketing Planning and Campaign Management* ▶ *Basic Data* ▶ *Define Additional Date Ranges* ❯.
  Note that when you select period types relevant for the buying pattern, you can only select pre-dip and post-dip period types in combination with the buying period type. For any other period types, you must select only one period type as relevant for the buying pattern. For example, you enter the goods receipt period type and select the *Buying Pattern* checkbox only for that period type.
- If you use date ranges other than the buying period indicated above, you have entered them in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *Define Integrated Planning Profile Groups* ▶ *Assign Additional Date Ranges* ❯.
  For more information, see Synchronization of Additional Date Ranges with the Planning Applications Kit [page 31].
- You have mapped a key figure to the buying pattern in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *InfoObject Mapping* ▶ *Map Key Figure for Buying Patterns* ❯.
  The key figure mapped to the buying pattern must be defined with enough decimal places to avoid any rounding of numbers with decimals. For example, decimal numbers can occur during the calculations for the amount of items purchased per calendar day.
- You have chosen which key figures the buying pattern is applied to in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ▶ *Trade Promotion Planning and Management* ▶ *Key Figure Planning with the Planning Applications Kit* ▶ *Business Add-ins (BAdIs)* ▶ *BAdI: Modification of Planning Behavior* ❯.
  You must use the method `GET_KEYFIGURES_BUYING_PATTERN` to apply buying patterns to key figures. By default, the buying pattern is applied to all key figures.

- Optionally, you have excluded days from the planning layout based on your factory calendar using the BAdI in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Business Add-ins (BAdIs)* ❯ *BAdI: Modification of Planning Data* ◀.
  You must use the method `GET_REMOVED_DAYS_DATE_RANGES` to exclude days using the factory calendar. Implementing this BAdI to use the factory calendar can influence the buying pattern behavior. For more information, see Using the Factory Calendar for Buying Patterns [page 61].
- If you want to see the buying pattern in the query, you have made the relevant key figure visible in the query.

Activities

Determining a Buying Pattern

In the Account Defaults application, you can define a buying pattern by week or by day. During trade promotion processing when a buying pattern is applied, the system first checks whether the duration of the period relevant to the buying pattern is a multiple of 7 and then does the following:

- If a buying pattern exists for the number of weeks covered by the buying pattern duration, the system applies that buying pattern.
- If there are no buying patterns defined at the week level, the system evaluates if there are buying patterns at the day level, and if so, applies the appropriate buying pattern.

> **i Note**
>
> If you are planning at week level, the system does not consider buying patterns defined for day level in Account Defaults.

- If two buying patterns exist for both week and day for the same duration, the system selects the buying pattern at week level.
- If no existing buying patterns are found for the defined time period, an equal distribution is applied across time periods.
- If the duration of your buying pattern and promotion are not identical, the system will attempt a best fit to match the buying pattern to the promotion. For example, if your buying pattern is 1 week and your promotion is 1 week and 2 days, they will still be matched.

> **i Note**
>
> If a product, product category, or product group has effective dates that are shorter than the buying dates, no buying pattern is applied, and an equal distribution is applied across time periods.
>
> When you shift the dates of a trade promotion with the same duration, the buying pattern is not reapplied. The values are simply shifted to the new dates.

The diagram below shows the procedure for determining a buying pattern at day level for a trade promotion:
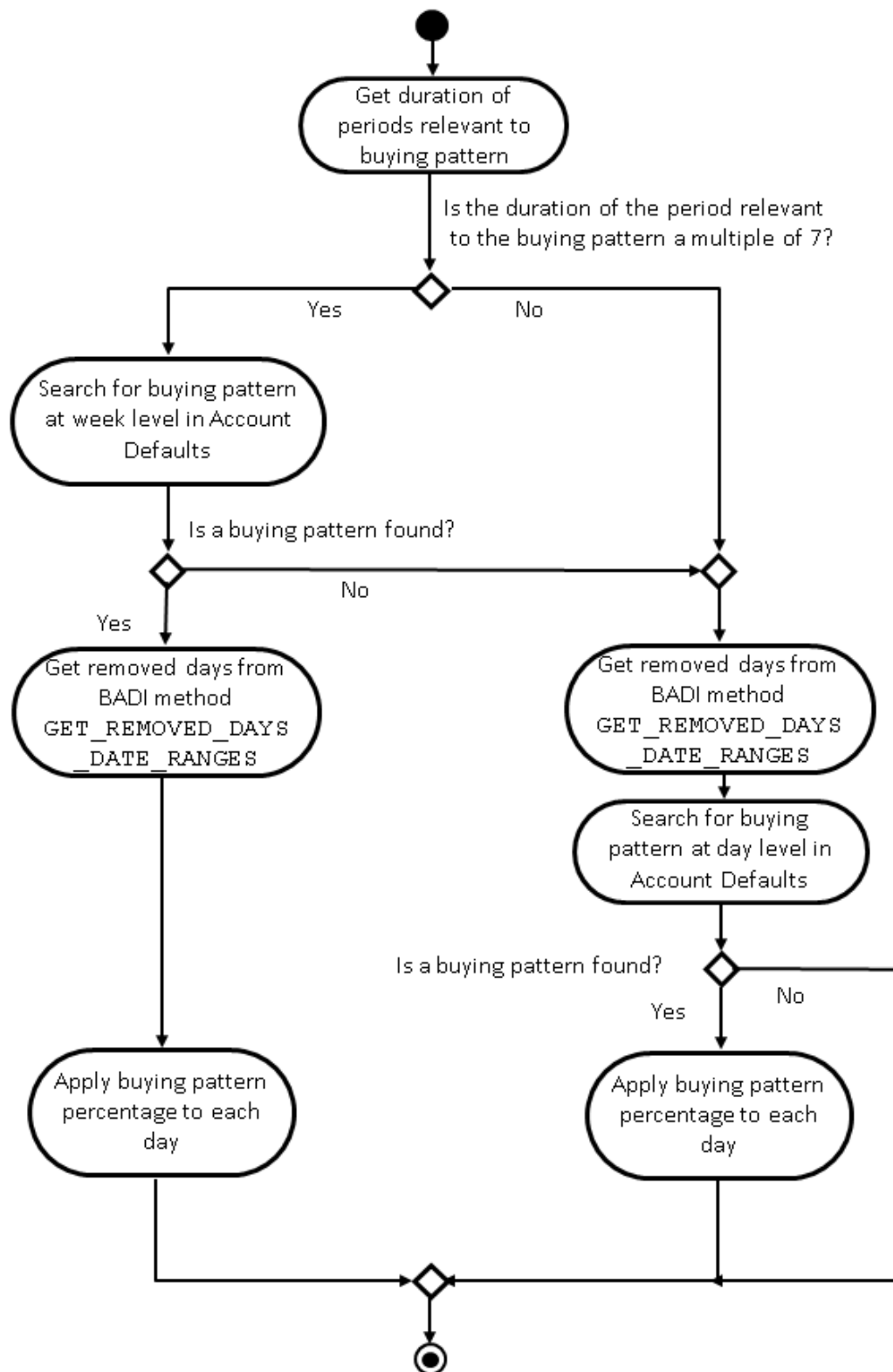
Triggering a Buying Pattern

The system triggers the buying pattern when you enter a value at the total level of all period types and time dimensions. The current total must be zero to trigger the buying pattern. The system does not trigger the buying pattern when you enter a value at the total level of a specific period type (for example, the buying period), or at the total level of a specific time dimension (for example, calendar week 36).

For example, if you enter a value for the uplift volume of a category that contains the value 200, the system does not trigger the buying pattern function, because a value already exists. In this case, the new value you have entered is distributed to the lowest level in reference to the existing data. On the other hand, if the value of the category is 0 and you enter a value of 200, the buying pattern is applied.

The system also triggers a buying pattern if you change the account, add or remove date ranges, or change the duration of existing date ranges in a trade promotion. For example, if you extend or reduce the duration of a trade promotion by a number of weeks or days, the system looks for a new buying pattern that matches the time duration and applies the buying pattern if a suitable one is found.

Example

You have a trade promotion that is two weeks long, but begins on a Wednesday. The system always considers a one-week duration as seven days, without considering the days of the week. The system searches for and applies buying patterns according to the number of days they include. In this case, even though the promotion spans over three calendar weeks, a two-week buying pattern is applied.

The customer wants to buy 100 items: 40% the first week, and the remaining 60% the following week. If the buying pattern started on a Monday, the customer would buy 40 items in the first week and 60 in the second. If the buying pattern is distributed by day, the amount per week, in this case either 40% or 60%, is distributed over the seven days in the week.

Since the buying pattern starts on a Wednesday, the following table shows how planning for both calendar week and calendar day is performed for these amounts:

Calendar Week	Formula for Calculating Buying Pattern for Calendar Week	Calendar Day	Formula for Calculating Buying Patterns for Calendar Day	Comments
1	4/7 x 40% x 100	1	No calculation	As the buying pattern starts on a Wednesday, the planning period is not a full week, and the system only calculates 4/7 of the total.
		2	No calculation	
		3	No calculation	
		4	1/7 x 40% x 100	
		5	1/7 x 40% x 100	
		6	1/7 x 40% x 100	

Calendar Week	Formula for Calculating Buying Pattern for Calendar Week	Calendar Day	Formula for Calculating Buying Patterns for Calendar Day	Comments
		7	1/7 x 40% x 100	
2	3/7 x 40% x 100 4/7 x 60% x 100	1	1/7 x 40% x 100	The system takes the remainder of the calendar week that already started followed by the first part of the following calendar week.
		2	1/7 x 40% x 100	
		3	1/7 x 40% x 100	
		4	1/7 x 60% x 100	
		5	1/7 x 60% x 100	
		6	1/7 x 60% x 100	
		7	1/7 x 60% x 100	
3	3/7 x 60% x 100	1	1/7 x 60% x 100	The system calculates the remainder.
		2	1/7 x 60% x 100	
		3	1/7 x 60% x 100	
		4	No calculation	
		5	No calculation	
		6	No calculation	
		7	No calculation	

i Note

It is also possible that the percentages of a buying pattern can be negative if an account purchases less than usual, typically preceding the buying period (pre-dip dates) and in the period after the buying period (post-dip dates).

7.13   Using the Factory Calendar for Buying Patterns

Concept

This functionality works with the WebClient UI but not with SAP UI5.

In trade promotion management, if you have excluded days in a week to correspond to your factory calendar using the Business Add-In (BAdI) method GET_REMOVED_DAYS_DATE_RANGES, the system still searches for a buying pattern that is valid for the duration of the initial time period (before days are excluded). If there is no valid buying pattern found at week level for the complete duration of the period relevant for the buying pattern, the system looks for a buying pattern at day level that is relevant for the reduced duration of the period. You find this BAdI in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Business Add-ins (BAdIs)* ❯ *BAdI: Modification of Planning Data* ◀. If you implement this BAdI, the buying pattern behavior is as follows:

- For buying patterns at week level, the buying pattern percentages are applied to the remaining days of each week.
  For example, you have a buying pattern of two weeks that starts on a Wednesday. 30% of the items are purchased in the first week, and 70% of the items are purchased in the second week. If you are not using the factory calendar, the percentages are distributed evenly over the seven days of each week. However, if two days are excluded from the first week and one day in the second week due to the factory calendar, the pattern is applied over 11 days. If you want to buy 100 items in total, the formulas for the percentage of items purchased per day (if you are planning at day level) and at total week level (if you are planning at week level) are calculated as follows:

Calendar Week	Total Percentage Distribution at Week Level	Calendar Day	Percentage Distribution at Week Level by Calendar Day
1	3/5 x 30% x 100	1 - Monday	N/A
		2 - Tuesday	N/A
		3 - Wednesday	0 (removed by factory calendar)
		4 - Thursday	1/5 x 30% x 100
		5 - Friday	1/5 x 30% x 100
		6 - Saturday	1/5 x 30% x 100
		7 - Sunday	0 (removed by factory calendar)
2	2/5 x 30% x 100 5/6 x 70% x 100	1 - Monday	1/5 x 30% x 100
		2 - Tuesday	1/5 x 30% x 100
		3 - Wednesday	1/6 x 70% x 100
		4 - Thursday	1/6 x 70% x 100
		5 - Friday	1/6 x 70% x 100

Calendar Week	Total Percentage Distribution at Week Level	Calendar Day	Percentage Distribution at Week Level by Calendar Day
		6 - Saturday	1/6 x 70% x 100
		7 - Sunday	1/6 x 70% x 100
3	1/6 x 70% x 100	1 - Monday	0 (removed by factory calendar)
		2 - Tuesday	1/6 x 70% x 100
		3 - Wednesday	N/A
		4 - Thursday	N/A
		5 - Friday	N/A
		6 - Saturday	N/A
		7 - Sunday	N/A

- If a week-level buying pattern is not found, a day-level buying pattern with the reduced timeline is selected. Following the example above, the system selects and applies an 11-day buying pattern if one exists. The buying pattern percentages you define in Account Defaults are used to calculate the amount of items to be purchased, as shown in the following example:

> i Note
>
> The below example only applies if you are planning at day level.

Calendar Day	Percentage Distribution at Day Level
1	0 (removed by factory calendar)
2	5% x 100
3	10% x 100
4	10% x 100
5	0 (removed by factory calendar)
6	10% x 100
7	15% x 100
1	0 (removed by factory calendar)
2	10% x 100

Calendar Day	Percentage Distribution at Day Level
3	5% x 100
4	5% x 100
5	15% x 100
6	10% x 100
7	5% x 100

> **i Note**
>
> The days that are excluded due to the factory calendar are not displayed in the planning layout.

More Information

Buying Patterns in Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 57]

7.14 Distribution Ratio for Aggregating Key Figures

When you are planning at week level with aggregating key figures, the distribution ratio is the number of days that are valid in each week. Based on this number, the values can be distributed accordingly over each week.

For example, you have a two-week trade promotion that begins on Saturday and spans three calendar weeks. A value of 140 is entered at the total level. The values are distributed as follows:

Calendar Week	Calendar Day	Distribution Ratio	Total Items Purchased in Each Calendar Week
1	6 - Saturday	2	2/14 x 140 = 20
	7 - Sunday		
2	1 - Monday	7	7/14 x 140 = 70
	2 - Tuesday		
	3 - Wednesday		
	4 - Thursday		
	5 - Friday		

	6 - Saturday		
	7 - Sunday		
3	1 - Monday	5	5/14 x 140 = 50
	2 - Tuesday		
	3 - Wednesday		
	4 - Thursday		
	5 - Friday		

7.15 Deriving Monthly Values when Planning by Week

Use

In addition to planning trade promotions by week (or by day if you are working with the WebClient UI), you can derive monthly planning values from weekly planning values. This is useful when you plan by week but want the ability to more easily report by month.

Prerequisites

You have made the following settings:

- You have set your rates origin as *BI* in Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ❯ *Basic Data* ❯ *Define Rates' Origin* ❯.
- You have mapped your source and target time characteristics in the RSCRM_MULT_TIME transaction in SAP NetWeaver BW. For more information see, Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *InfoObject Mapping* ❯ *Map Time Characteristics for InfoProviders* ❯.
- You have an InfoProvider in SAP NetWeaver BW that includes the time characteristics 0CALWEEK and 0CALMONTH.

Features

The following features are available:

- Monthly Reporting
  You can create reports that accurately aggregate values based on month even when you plan by week.
- Monthly Planning
  Optionally, you can display the month characteristic in the planning layout.

> **i Note**
>
> If you are deriving monthly planning values from weekly planning values, it is possible that you have two different values for the same calendar week if the week spans two months. If you shift the dates of your trade promotion, the system uses the following rules to map the values to the new dates:
>
> - If the original week overlaps two months and the new week is within one month, the system uses the value from the first part of the original week to map the value for the new week.
> - If the original and new weeks overlap two months, then the system keeps the same mapping and uses the same values.
> - If the original week is within one month and the new week overlaps two months, then the values from the original week are mapped to both parts of the new week.
>
> For more information about shifting the dates of your trade promotion and the effect on non-aggregable key figures, see Distribution and Redistribution of Planning Values with Rates in SAP NetWeaver BW [page 33].

Example

The following example illustrates that the monthly planning values that are derived can be different than the weekly planning values.

You have a 7 day promotion from January 30, 2014 to February 5, 2014. It spans two calendar weeks and two different months. You define a total fixed trade spend of USD 70. The following table illustrates how the trade spend is distributed if you are planning by week and deriving the monthly values.

Result

A value of 10 is distributed for each day of the 7 day promotion. Calendar week 5 has a value of 40 since that week has 4 out of the 7 days. Calendar week 6 has a value of 30 since that week has 3 out of the 7 days.

A value of 20 is distributed to the month of January since it has 2 days in the month of January. A value of 50 is distributed to the month of February since it has 5 days.

Day	Date	Month	Trade Spend for Calendar Week 5	Trade Spend for Calendar Week 6	Derived Trade Spend Distribution by Month
Thursday	30	January	40	-	20

Day	Date	Month	Trade Spend for Calendar Week 5	Trade Spend for Calendar Week 6	Derived Trade Spend Distribution by Month
Friday	31	January		-	
Saturday	1	February		-	50
Sunday	2	February		-	
Monday	3	February	-	30	
Tuesday	4	February	-		
Wednesday	5	February	-		

More Information

Distribution and Redistribution of Planning Values with Rates in SAP NetWeaver BW [page 33]

Buying Patterns in Volume/Value and Trade Spends Planning with the Planning Applications Kit [page 57]

Distribution Ratio for Aggregating Key Figures [page 64]

Planning Trade Promotions [page 21]

8 Analytics

8.1 Attributes of a Marketing Element

DataSource Attributes `0CRM_MKTELM5_ATTR`

Use

This DataSource is used to extract all marketing elements (marketing plans, marketing plan elements, campaigns and so on).

Technical Data

Application Component	Master Data for CRM Marketing (0CRM_MKT-IO)
Exchange Available as of Release	SAP CRM 4.0 SP03, enhanced with CRM 5.0
Shipment	N/A
Content Versions	N/A
RemoteCube-Capable	No
Delta-Capable	Yes
Extraction from Archives	No
Verifiable	Yes

Data Modeling

Delta Update

Unspecific Delta Via Extractor (Not ODS-Compatible)

Fields of Origin for the Extraction Structure

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
CLIENT	Client	CRM_MKTPL_ATTR	CLIENT

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
GUID	Project Planning: 16-Character GUID for Projects and Activts	CRM_MKTPL_ATTR	CLIENT
EXTERNAL_ID	Project Planning: External Identifier of an Element	CGPL_PROJECT or CGPL_TASK	EXTERNAL_ID
PROJECT_ID	Project Planning: External Identifier of an Element	CGPL_PROJECT or CGPL_TASK	EXTERNAL_ID
OBJECT_TYPE	Object Type in Project Planning	CGPL_PROJECT or CGPL_TASK	EXTERNAL_ID
DELFLAG	BW Deletion Indicator	–	–
PRIORITY	Priority	CGPL_PROJECT or CGPL_TASK	PRIORITY
PLANSTARTDATE	Planned Start (Date)	CGPL_PROJECT or CGPL_TASK	PLANSTART
PLANFINISHDATE	Planned Finish Date	CGPL_PROJECT or CGPL_TASK	PLANFINISH
ACTUALSTARTDATE	Actual Start (Date)	CGPL_PROJECT or CGPL_TASK	ACTUALSTART
ACTUALFINISHDATE	Actual Finish (Date)	CGPL_PROJECT or CGPL_TASK	ACTUALFINISH
COMPLETION	Degree of Processing in Percent	CGPL_PROJECT or CGPL_TASK	COMPLETION
MILESTONE	Milestone indicator	CGPL_PROJECT or CGPL_TASK	MILESTONE
CONSTRAINT_TYPE	Type of Scheduling Constraint	CGPL_PROJECT or CGPL_TASK	CONSTRAINT_TYPE
CONSTRAINTDATE	Constraint Date (Date)	CGPL_PROJECT or CGPL_TASK	CONSTRAINTDATE
CREATED_BY	Name of Person Who Created Object	CGPL_PROJECT or CGPL_TASK	CREATED_BY
CREATED_ON	Date When the Object Was Created	CGPL_PROJECT or CGPL_TASK	CREATED_ON
CHANGED_BY	Name of Person Who Changed Object	CGPL_PROJECT or CGPL_TASK	CHANGED_BY
CHANGED_ON	Date on Which Object was Last Changed	CGPL_PROJECT or CGPL_TASK	CHANGED_ON
POSID	Work Breakdown Structure Element (WBS Element)	CGPL_R3_ATTRIBUT	POSID
CAMP_TYPE	CRM Marketing Planning - Campaign Type	CRM_MKTPL_ATTR	CAMP_TYPE
CHANNEL	Communication Medium	CRM_MKTPL_ATTR	CHANNNEL

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
RESPONSIBLE_NAME	Business Partner Number	CRM_MKTPL_ATTR	RESPONSIBLE
SMARTFORM	Form for E-mail	CRM_MKTPL_ATTR	SMARTFORM
MAIL_FORM	Form for letter	CRM_MKTPL_ATTR	MAIL_FORM
FAX_FORM	Form for Fax	CRM_MKTPL_ATTR	FAX_FORM
SMS_FORM	Form for SMS	CRM_MKTPL_ATTR	SMS_FORM
ADDRESS_ID	E-mail Address ID	CRM_MKTPL_ATTR	ADRESS_ID
SHORTCUT	Campaign Code	CRM_MKTPL_ATTR	SHORTCUT
PRINT_ID	Profile for Print Parameters	CRM_MKTPL_ATTR	PRINT_ID
SEND_PARTNER	Business partner for Sender Address Determination	CRM_MKTPL_ATTR	SEND_PARTNER
BWSTMKTSYS0	BW Status	CRM_JEST	STAT
BWSTMKTSYS1	BW Status	CRM_JEST	STAT
BWSTMKTSYS2	BW Status	CRM_JEST	STAT
BWSTMKTSYS3	BW Status	CRM_JEST	STAT
PLANGROUP	Planning Profile Group	CGPL_PROJECT or CGPL_TASK	PLANGROUP
TACTICS	Tactic	CRM_MKTPL_ATTR	TACTICS
OBJECTIVE	Objective(s)	CRM_MKTPL_ATTR	OBJECTIVE
AUTH_GROUP	Authorization Group	CRM_MKTPL_ATTR	AUTH_GROUP
SCRIPT_TREEID	Name of Interaction Center (IC) WinClient Script	CRM_MKTPL_ATTR	SCRIPT
SURVEYID	CRM Surveys: Survey ID	CRM_MKTPL_ATTR	SURVEYID
SURVEYVERSION	CRM Surveys: Survey Version	CRM_MKTPL_ATTR	SURVEYVERSION
RECURRING	Indicator Recurring Campaign for Camp. Automation	CRM_MKTPL_ATTR	RECURRING
CAMP_PERIOD	Period for Campaign	CRM_MKTPL_ATTR	CAMP_PERIOD
N_CAMP_PERIODS	No. of Processing Periods	CRM_MKTPL_ATTR	N_CAMP_PERIODS
CALENDAR_ID	Factory calendar	CGPL_PROJECT or CGPL_TASK	CALENDAR_ID
SALES_ORG	Sales Organization	CRM_MKTPL_TPATTR	SALES_ORG
DIS_CHANNEL	Distribution channel	CRM_MKTPL_TPATTR	DIS_CHANNEL
DIVISION	Division	CRM_MKTPL_TPATTR	DIVISION
BP_ID	Business Partner Number	CRM_MKTPL_TPATTR	BP_GUID
BP_NODE	UUID in character form	CRM_MKTPL_TPATTR	NODE_GUID
TARGETGRP_GUID	CRM Marketing: Target Group ID	–	–

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
ACTION_PROFILE	PPF: Name of Action Profile	CRM_MKTPL_ATTR	ACTION_PROFILE
CAMP_LINK_EXTID	Project Planning: External Indentifier of an Element	CRM_MKTPL_TPATTR	CAMPAIGN_LINK
CURRENCY	MKTPL: Currency object	CRM_MKTPL_TPATTR	CURRENCY
TERR_PATH_GUID	Territory Path GUID	CRM_MKTPL_TPATTR	TERR_PATH_GUID
TERR_PATH_ID	Territory Hierarchy ID	CRM_MKTPL_ATTR	TERR_PATH_ID
TERR_GUID	Territory GUID 32	–	–
CPT_TYPE	Type of Campaign Element Used	CRM_MKTPL_ATTR	CPT_TYPE
APO_ELEM_EXTID	APO Integration: Campaign ID in APO	CRMA_MKTPL_CPGNM	APO_ELEM_EXTID
APO_LOGSYS	Logical destination (specified in function call)	CRMA_MKTPL_CPGNM	APO_LOGSYS
R3_LOGSYS	Marketing Planning: Logical System for R/3 Integration	CRM_MKTPL_R3MAP	R3_LOGSYS
PARTNER01_BP	Business Partner Number	CRMD_MKTPL_PAR	PARSET_GUID
PARTNER02_BP	Business Partner Number	CRMD_MKTPL_PAR	PARSET_GUID
PARTNER03_BP	Business Partner Number	CRMD_MKTPL_PAR	PARSET_GUID
PARTNER04_BP	Business Partner Number	CRMD_MKTPL_PAR	PARSET_GUID
PARTNER05_BP	Business Partner Number	CRMD_MKTPL_PAR	PARSET_GUID
PARTNER06_BP	Business Partner Number	CRMD_MKTPL_PAR	PARSET_GUID
FILE_EXPORT_FORM	File Export Form	–	–
INACTIVE	Inactive Marketing Project	–	–
MKT_ORG	Marketing Organization	–	–
DISTMETHOD	Distribution Method for Coupon	–	–
EXP_DATE	Expiration Date for Coupon	–	–
OFRCODE	Coupon Code	–	–
CLEARING_HOUSE	Business Partner Number	–	–
FCO_COUNTRY	Country of the Family Code for a Coupon	–	–
FAMCODE	Family Code for Coupon	–	–
CHECK_DIGIT	Check Digit of Coupon Code for Coupon	–	–
VALCODE	Value Code for Coupon	–	–
MANUFACTCODE	Manufacturer Code for Coupon	–	–

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
BARCODE_TYPE	Barcode Type for Coupon	–	–
SAVE_COUPON_IND	Save Coupon Indicator	–	–
RETAIL_SAVE_IND	Sorted Coupons by Retailer	–	–
DATE_RANGE_ST01	From Date (Search)	–	–
DATE_RANGE_ST02	From Date (Search)	–	–
DATE_RANGE_ST03	From Date (Search)	–	–
DATE_RANGE_ST04	From Date (Search)	–	–
DATE_RANGE_ST05	From Date (Search)	–	–
DATE_RANGE_ST06	From Date (Search)	–	–
DATE_RANGE_ST07	From Date (Search)	–	–
DATE_RANGE_ST08	From Date (Search)	–	–
DATE_RANGE_ST09	From Date (Search)	–	–
DATE_RANGE_ST10	From Date (Search)	–	–
MDF_PROGRAM_ID	Program Identification	–	–
ADI_FLAG	Abnormal Demand Indicator	–	–
REF_TYPE	Usage Type	–	–
ENROLLMENT_REQ	Indicator, that enrollment is required	–	–
AGREEMENT_GUID	Project Planning: 32 Character GUID for Projects and Tasks	–	–
PPG_STATUS	PPG Status	–	–
LOY_FLAG	Loyalty Scenario	–	–
LOY_PGM_ID	Project Planning: External Indentifier of an Element	–	–
LOY_CPG_ID	Project Planning: External Indentifier of an Element	–	–
LOY_RRG_ID	Project Planning: External Indentifier of an Element	–	–
CCM_CCPG_GUID	Project Planning: 16 Character GUID for Projects	–	–
CCM_CCPG_ID	Project Planning: External Indentifier of an Element	–	–
CCM_CHPART	Business Partner Number	–	–
CCM_CORP_CHPART	Business Partner Number	–	–
PLANNING_MODE	Planning Mode	CRMD_MKTPL_PSM	PLANNING_MODE

8.2 Marketing Planning: Integrated Planning Profile Group - Text

DataSource Texts `0CRM_IMP_PLGRP_TEXT`

Use

This DataSource is used to extract the text for the integrated planning profile groups for SAP Trade Promotion Planning and Management.

Technical Data

Application Component	Master Data for CRM Marketing (0CRM_MKT-IO)
Exchange Available as of Release	SAP CRM 7.0 EhP1
Shipment	N/A
Content Versions	N/A
RemoteCube-Capable	No
Delta-Capable	No
Extraction from Archives	No
Verifiable	No

Prerequisites

You have made all the required settings in Customizing for *Customer Relationship Management* under *Trade Management* *Trade Promotion Planning and Management* *Key Figure Planning with the Planning Applications Kit* *Define Integrated Planning Profile Groups* .

Data Modeling

Delta Update

Delta Only Via Full Upload (ODS or InfoPackage Selection)

Fields of Origin for the Extraction Structure

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
CLIENT	Client	/BI0/TCRM_PLGRP	CLIENT
LANGU	Language ID	/BI0/TCRM_PLGRP	LANGU
INTEG_PLAN_PROF	Integrated Planning Profile Group	/BI0/TCRM_PLGRP	CRM_PLGRP
INTEG_PLAN_PROFT	Integrated Planning Profile: Description	/BI0/TCRM_PLGRP	TXTMD

Extractor Logic

Both the descriptions of this DataSource (`0CRM_IMP_PLGRP_TEXT`) used for SAP Trade Promotion Planning and Management and the DataSource `0CRM_PLGRP_TEXT` used for Business Planning and Simulation (BPS) are mapped to the text table `/BI0/TCRM_PLGRP` of InfoObject `0CRM_PLGRP` in SAP NetWeaver Business Warehouse. Transformations ensure that the descriptions from both DataSources are mapped to text table `/BI0/TCRM_PLGRP`.

9 SOA Services

Use

The following SOA service documentation provides you with information regarding the use of the standard trade promotion management SOA services with SAP Trade Promotion Planning and Management. Only the documentation that has been modified from the standard documentation is included here. Otherwise, the standard documentation is relevant for SAP Trade Promotion Planning and Management.

More Information

For more information about the standard SOA documentation for trade promotion management, see SAP Help Portal at http://help.sap.com/crm 🔗 ▌▶ *SAP Library* ❯ *Marketing* ❯ *Trade Promotion Management* ▌.

9.1 Read Trade Promotion

Definition

To read specified trade promotions.

Technical Data

Entity Type	Service Operation
Software Component Version	SAP CRM ABAP 7.02
Release State	released
Technical Name	TradePromotionCRMByIDQueryResponse_In
Namespace	http://sap.com/xi/CRM/Global2
Application Component	CRM-MKT-MPL-TPM-SRV
Web Service Definition (Back End)	TradePromotionCRMByIDQueryResp

Category	SAP A2A
Direction	inbound
Mode	synchronous
Idempotency	no
P2P Communication Enabled	true

Business Context and Use

In a typical trade promotion life cycle, once a trade promotion is created, it is developed and details such as prices, volumes and timescales are agreed. When trade promotion development is completed, optionally it can be revised or marked as being in process, but it must be approved and released before it is published. It can then be finished or archived. At any point the trade promotion can be locked or made inactive.

The *Read Trade Promotion* inbound service operation reads the data from one or many specified trade promotions.

Further business context is provided in the documentation for the Trade Promotion Management process component and the Trade Promotion business object.

Related Service Operations

- The Create Trade Promotion inbound service operation creates a trade promotion.
- The Create Trade Promotion as Bulk inbound service operation creates one or many trade promotions.
- The Change Trade Promotion inbound service operation changes a trade promotion.
- The Confirm Trade Promotion outbound service operation confirms whether a create or change of a trade promotion was successful or not.
- The Confirm Trade Promotion as Bulk outbound service operation sends a message confirming whether one or many trade promotions were created successfully or not.
- The Notify of Trade Promotion outbound service operation notifies subscribed parties of trade promotion events triggered by a change in system status.

Features

The *Read Trade Promotion* synchronous service operation reads the data from one or many specified trade promotions.

To read a trade promotion the following information is required.

- An identifier of the trade promotion (TradePromotionID data element).

Note that multiple trade promotions can be specified in a single request.

Error Handling

For every error from validation, mapping and API Adapter phases, an appropriate error message that often helps to understand and correct the error is sent to the GDT Log. This is returned as part of the response message.

Typical errors include the following.

- No TradePromotionID given in the query message
- No trade promotion corresponds to the ID of the query message

Message Types

- TradePromotionCRMByIDQuery_sync
- TradePromotionCRMByIDResponse_sync

Notes on SAP Implementation

Configuration

The mass read of trade promotions can be optimized by using parallel processing. Parallel processing increases the efficiency of mass processing jobs because it divides the list of trade promotions into different buckets. Each bucket is then associated with a specific thread to be processed individually and asynchronously on different servers. The efficiency of parallel processing depends on the available capacity of the dedicated hardware.

Parallel processing customizing has to be set to increase the efficiency of mass processing jobs. This customizing contains the bucket size and the available server group. The customizing is project-specific and depends on the available system resources. If no customizing is set, trade promotions are read serially on the local server.

Note: It is strongly recommended that you perform a stress test to determine the settings that would be best suited to your installation.

For more information see Customizing for *Customer Relationship Management* under ▶ *Trade Promotion Management* ❯ *Trade Promotions* ❯ *SOA Services* ❯ *Parallel Processing* ❯ *Define Settings for Bulk Read Service* ◣

Planning with the planning applications kit

By default, the *Read Trade Promotion* synchronous service operation returns the non-zero values of all key figures of the associated read query. This can inadvertently affect performance if the number of key figures in this query is very high. To reduce the impact, create a read query containing only the key figures required and ensure that they are set as always visible. To do this, create a new query using BEX Query Designer in SAP NetWeaver BW and then assign this read query to your integrated planning profile group using the appropriate query context in Customizing: ▶ *SAP Customizing Implementation Guide* ❯ *Customer Relationship Management* ❯ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Define Integrated Planning Profile Groups* ◣.

The read query should be assigned to the integrated planning profile group that is assigned to the trade promotions to be read using the query context *SOA_READ*.

Constraints

Constraints for Key Figures

- When working with overlapping dates ranges for key figures planned in SAP NetWeaver BW (key figures not tied to trade spends), it is not possible to retrieve values for a specific period type.

Enhancements

The Business Add-In (BAdI) definition CRM_SE_CRMTPM_BYIDQR_IN can be used to change the standard inbound and outbound mapping or pre- and post-processing for the synchronous *Read Trade Promotion* service operation. This BAdI offers the BAdI interface IF_CRM_SE_CRMTPM_BYIDQR_IN with the methods INBOUND_PROCESSING and OUTBOUND_PROCESSING.

- INBOUND_PROCESSING is called during inbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMT_MKTPL_EAI_EXTID is used as a structure of the changing parameter of the INBOUND_PROCESSING method and can be enhanced by new fields in a customer SAP CRM back-end system.
- OUTBOUND_PROCESSING is called during outbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMS_MKTPL_SE_TPM_BYIDQR_OUT is used as a structure of the importing parameter of the OUTBOUND_PROCESSING method and can be enhanced by new fields in a customer SAP CRM back-end system.

No service mapping tool is available for this service operation.

More Information

SAP Help Portal at http://help.sap.com ▶ *SAP Business Suite* ▶ *SAP Customer Relationship Management* ▶ *Marketing* ▶ *Objects and Functions for Business Scenarios in Marketing* ▶ *Trade Promotion Management* ▶.

9.2 Create Trade Promotion

Definition

To create a trade promotion.

Technical Data

Entity Type	Service Operation
Software Component Version	SAP CRM ABAP 7.02
Release State	released
Technical Name	TradePromotionCRMCreateRequest_In
Namespace	http://sap.com/xi/CRM/Global2
Application Component	CRM-MKT-MPL-TPM-SRV
Web Service Definition (Back End)	TradePromotionCRMCreateRequest
Category	SAP A2A
Direction	inbound
Mode	asynchronous
Idempotency	not applicable
P2P Communication Enabled	yes

Business Context and Use

In a typical trade promotion life cycle, once a trade promotion is created, it is developed and details such as prices, volumes and timescales are agreed. When trade promotion development is completed, optionally it can be revised or marked as being in process, but it must be approved and released before it is published. It can then be finished or archived. At any point the trade promotion can be locked or made inactive.

The *Create Trade Promotion* inbound service operation creates a trade promotion.

Further business context is provided in the documentation for the Trade Promotion Management process component and the Trade Promotion business object.

Related Service Operations

- The Create Trade Promotion as Bulk inbound service operation creates one or many trade promotions.
- The Change Trade Promotion inbound service operation changes a trade promotion.
- The Confirm Trade Promotion outbound service operation confirms whether a create or change of a trade promotion was successful or not.
- The Confirm Trade Promotion as Bulk outbound service operation sends a message confirming whether one or many trade promotions were created successfully or not.
- The Notify of Trade Promotion outbound service operation notifies subscribed parties of trade promotion events triggered by a change in system status.
- The Read Trade Promotion inbound service operation reads the data from one or many specified trade promotion.

Features

The *Create Trade Promotion* service operation creates a trade promotion.

To create and to save a trade promotion, no specific information is required. If no trade promotion identifier (TradePromotionID data element) is supplied, a trade promotion identifier is generated by the CRM back-end system and returned together with default data (such as planning product basis, person responsible).

The following data is optional but commonly specified depending on the use case scenario.

- An identifier for a trade promotion agreement (TradePromotionAgreementID data element).
- Date ranges (StartDate and EndDate data element).
- Descriptive text of the trade promotion (Description data element).
- Product data such as the ProductID and ProductTypeCode data elements, key figure data and tactic data.
- Product category data such as the ProductCategoryID data element, key figure data and tactic data.
- Product group data such as the SalesSpecificationProductGroupCode data element, key figure data and tactic data.
- Trade spend data such as TypeCode, CategoryCode and MethodCode data elements.
- Partner information (PartyID and PartyRoleCode data elements).

The following points describe the minimum required fields to add certain assignments during the creation of a trade promotion. Note that there are no minimum required fields to create a trade promotion itself. The following are meant for specific objects/items that are part of the trade promotion.

- To successfully add descriptions during the creation of a trade promotion, the following information is mandatory:
  - Description Language Code
    Tag attribute: `languageCode = "??"`
  - Description
    Tag: `<Description>`
- To successfully add dates (period term) during the creation of a trade promotion the following information is mandatory:
  - Period Role Code
    Tag: `<TradePromotionPeriodRoleCode>`
  - Start Date
    Tag: `<StartDate>`
  - End Date
    Tag: `<EndDate>`
  - Period Term
    Tag: `<PeriodTerm>`
- To successfully add a product during the creation of a trade promotion, the following information is mandatory:
  - Product ID
    Tag: `<ID>`
    Tag: `<Product>`
    Remarks: Located under the `<PlanningInformation>` tag.
    If the CRM system finds a duplicate product, the following fields can be used to determine its uniqueness:
  - Product Type

Tag: `<TypeCode>`

- ○ Logical System
  Tag: `<OriginBusinessSystemID>`
- ○ Object Family
  Tag: `<FamilyCode>`

> **i Note**
>
> The trade promotion product planning basis should support this product dimension. Tag:
> `<MarketingProjectPlanningProductBasisCode>`

- To successfully add a product category during the creation of a trade promotion the following information is mandatory:
  - ○ Product Category ID
    Tag: `<ID>`
    Tag: `<ProductCategory>`
    Remarks: Located under the `<PlanningInformation>` tag.

    > **i Note**
    >
    > The trade promotion product planning basis should support this product dimension. Tag:
    > `<MarketingProjectPlanningProductBasisCode>`

- To successfully add a product group during the creation of a trade promotion, the following information is mandatory:
  - ○ Product Group ID
    Tag: `<SalesSpecificationProductGroupCode>`
    Tag: `<ProductGroup>`

    > **i Note**
    >
    > The trade promotion product planning basis should support this product dimension. Tag:
    > `<MarketingProjectPlanningProductBasisCode>`

- To successfully add a key figure value during the creation of a trade promotion, the following information is mandatory:
  - ○ Key Figure Name
    Tag: `<ID>`
  - ○ Key Figure Value
    Tag: `<Value>`
  - ○ Year
    Tag: `<Year>`
  - ○ Calendar Period
    Tag: `<CalendarPeriodOrdinalNumberValue>`

    > **i Note**
    >
    > The integrated planning profile group and calendar unit that identifies a day should also be
    > provided (`<PlanningProfileGroupCode>` and `<CalendarUnitCode>`).

    Remarks: Located under the `<KeyFigure>` tag, under the tags for `<Product>` `<ProductCategory>`,
    and `<Product Group>`.

- To successfully add a trade spend during the creation of a trade promotion, the following information is mandatory:
  - Cost Type
    Tag: `<TypeCode>`
  - Cost Category
    Tag: `<CategoryCode>`
  - Spend Method
    Tag: `<MethodCode>`
    Tag: `<TradeSpend>`
- To successfully add a product causal factor (causal trade spend) during the creation of a trade promotion, the following information is mandatory:
  - Product ID
    Tag: `<ProductId>`
    Tag: `<ProductCausalFactor>`
    Remarks: Located under the `<TradeSpend>` tag.
- To successfully add a product category causal factor (causal trade spend) during the creation of a trade promotion, the following information is mandatory:
  - Product Category ID
    Tag: `<ProductCategoryID>`
    Tag: `<ProductCategoryCausalFactor>`
    Remarks: Located under the `<TradeSpend>` tag.
- To successfully add a product group causal factor (causal trade spend) during the creation of a trade promotion, the following information is mandatory:
  - Product Group ID
    Tag: `<SalesSpecificationProductGroupCode>`
    Tag: `<ProductGroupCausalFactor>`
    Remarks: Located under the `<TradeSpend>` tag.
- To successfully add a partner (Party / Parties Involved) during the creation of a trade promotion, the following information is mandatory:
  - Partner ID
    Tag: `<ID>`
  - Partner Function
    Tag: `<RoleCode>`

Status

- A trade promotion created by this service has a system status 'Created'.
- User status is optional. If used, its initial status is assigned as in the User Status Profile.

Asynchronous service operations The execution of this asynchronous service operation triggers a confirmation message from the Confirm Trade Promotion service operation. This contains information on whether the creation of trade promotion was successful or not.

Error Handling

The *Create Trade Promotion* service operation supports Forward Error Handling (FEH). The following error categories are used.

- DCE: Determination & Conversion

Errors in this category normally indicate that the information sent is not in the correct format or not within acceptable ranges, for example as follows.

- The request passes alphanumeric characters for a data element that takes only numeric values
- The request passes a value of 8 for a data element that has a value range of 1-7
- PRE: Processing errors in this category indicate errors in business logic processing for example as follows.
- The request is to create a trade promotion that already exists.

Message Types

- `TradePromotionCRMCreateRequest`

Constraints

Constraints for Key Figures

- When working with overlapping date ranges for key figures planned in SAP NetWeaver BW (key figures not tied to trade spends), for example, *Uplift*, their values are equally distributed across all period types when there are overlapping date ranges. It is not possible to specify values for a period type.

Notes on SAP Implementation

Configuration

Before using this operation, disable trade spend defaulting for trade promotions in the SAP CRM back-end system. For information on how to do this, see Customizing under ▶ *Customer Relationship Management* ▶ *Trade Promotion Management-* ▶ *Trade Promotions* ▶ *Trade Spends* ▶ *Define Trade Spends for Values* ▶.

In the node **Spend Method, take rate, Off Invoice Cap** , uncheck the column **Prepopun** for all valid spends.

Enhancements

The Business Add-In (BAdI) definition CRM_SE_CRMTPM_CRTRQ_IN can be used to change the standard inbound and outbound mapping or pre- and post- processing of the asynchronous *Create Trade Promotion* service operation. This BAdI offers the BAdI interface IF_CRM_SE_CRMTPM_CRTRQ_IN with the methods INBOUND_PROCESSING and OUTBOUND_PROCESSING.

- INBOUND_PROCESSING is called during inbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMS_MKTPL_SE_TPM_CRTRQ_IN is used as a structure of the changing parameter of the INBOUND_PROCESSING method and can be enhanced by new fields in a customer SAP CRM back-end system.
- OUTBOUND_PROCESSING is called during the outbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMS_MKTPL_SE_TPM_CO_OUT is used as a structure of the importing parameter of the OUTBOUND_PROCESSING method and can be enhanced by new fields in a customer SAP CRM back-end system.

No service mapping tool is available for this service operation.

More Information

For more information about Trade Promotion Management, see SAP Help Portal at http://help.sap.com
▌ *SAP Business Suite* ❭ *SAP Customer Relationship Management* ❭ *SAP CRM* ❭ *Marketing* ❭ *Trade Promotion Management* ❭.

9.3 Create Trade Promotion as Bulk

Definition

To create one or many trade promotions.

Technical Data

Entity Type	Service Operation
Software Component Version	SAP CRM ABAP 7.02
Release State	released
Technical Name	TradePromotionCRMBulkCreateRequest_In
Namespace	http://sap.com/xi/CRM/Global2
Application Component	CRM-MKT-MPL-TPM-SRV
Web Service Definition (Back End)	TradePromotionCRMBulkCreateReq
Category	SAP A2A
Direction	inbound
Mode	asynchronous
Idempotency	not applicable
P2P Communication Enabled	yes

Business Context and Use

In a typical trade promotion life cycle, once a trade promotion is created, it is developed and details such as prices, volumes and timescales are agreed. When trade promotion development is completed, optionally it can

be revised or marked as being in process, but it must be approved and released before it is published. It can then be finished or archived. At any point the trade promotion can be locked or made inactive.

The *Create Trade Promotion as Bulk* inbound service operation creates one or many trade promotions.

Further business context is provided in the documentation for the Trade Promotion Management process component and the Trade Promotion business object.

Related Service Operations

- The Create Trade Promotion inbound service operation creates a trade promotion.
- The Change Trade Promotion inbound service operation changes a trade promotion.
- The Confirm Trade Promotion outbound service operation confirms whether a create or change of a trade promotion was successful or not.
- The Confirm Trade Promotion as Bulk outbound service operation sends a message confirming whether one or many trade promotions were created successfully or not.
- The Notify of Trade Promotion outbound service operation notifies subscribed parties of trade promotion events triggered by a change in system status.
- The Read Trade Promotion inbound service operation reads the data from one or many specified trade promotion.

Features

The *Create Trade Promotion as Bulk* inbound service operation creates one or many trade promotions based on the specified data.

To create and to save a trade promotion, no specific information is required. If no trade promotion identifier (TradePromotionID data element) is supplied then for each specified trade promotion, a trade promotion identifier is generated by the CRM back-end system and returned together with default data (such as planning product basis and person responsible).

The following data is optional but commonly specified depending on the use case.

- An identifier for a trade promotion agreement (TradePromotionAgreementID data element).
- Date ranges (StartDate and EndDate data element).
- Descriptive text of the trade promotion (Description data element).
- Product data such as the ProductID and ProductTypeCode data elements, key figure data and tactic data.
- Products category data such as the ProductCategoryID data element, key figure data and tactic data.
- Product group data such as the SalesSpecificationProductGroupCode data element, key figure data and tactic data.
- Trade spend data such as TypeCode, CategoryCode and MethodCode data elements.
- Partner information (PartyID and PartyRoleCode data elements).

Note that coding excerpts are available in the documentation for the service operation.

Status

- All trade promotions created by this service have a system status 'Created'.
- User status is optional. If used, its initial status is assigned as in the User Status Profile.

The outbound message for this service operation uses the TradePromotionCRMBulkConfirmation_Out service to broadcast all the trade promotions newly created.

Asynchronous Service Operations

The execution of this asynchronous service operation triggers a confirmation message from the service operation. This contains information on whether the creation of each individual trade promotion was successful or not.

Error Handling

The *Create Trade Promotion as Bulk* service operation supports Forward Error Handling (FEH). The following error categories are used.

- DCE: Determination & ConversionErrors in this category normally indicate that the information sent is not in the correct format or not within acceptable ranges, for example as follows.- The request passes alphanumeric characters for a data element that takes only numeric values- The request passes a value of 8 for a data element that has a value range of 1-7

- PRE: Processing ErrorErrors in this category indicate errors in business logic processing for example as follows.- The request is to create a trade promotion that already exists.

Message Types

- TradePromotionCRMBulkCreateRequest

Constraints

Constraints for Key Figures

- When working with overlapping date ranges for key figures planned in SAP NetWeaver BW (key figures not tied to trade spends), for example, *Uplift*, their values are equally distributed across all period types when there are overlapping date ranges. It is not possible to specify values for a period type.

Notes on SAP Implementation

Configuration

Before using this operation, disable trade spend defaulting for trade promotions in the SAP CRM back-end system.For information on how to do this, see Customizing for Customer Relationship Management under
▶ *Trade Promotion Management* ❯ *Trade Promotions* ❯ *Trade Spends* ❯ *Define Trade Spends for Values* ❩.

In the node **Spend Method, take rate, Off Invoice Cap** , uncheck the column **Prepopu** for all valid spends.

Parallel Processing

The bulk creation of trade promotions can be optimized by using parallel processing. Pparallel processing increases the efficiency of mass processing jobs because it divides the list of trade promotions into different buckets. Each bucket is then associated with a specific thread to be processed individually and asynchronously on different servers. The efficiency of parallel processing depends on the available capacity of the dedicated hardware.

Customizing is project-specific and depends on the available system resources. If no customizing is set, trade promotion agreements are created serially on the local server.

> **i Note**
>
> It is strongly recommended that you perform a stress test to determine the settings that would be best suited to your installation.

For more information, see Customizing for Customer Relationship Management under ▶ *Trade Promotion Management* ❯ *Trade Promotions* ❯ *SOA Services* ❯ *Parallel Processing* ❯ *Define Settings for Bulk Create Service* ❮.

Enhancements

The Business Add-In (BAdI) definition CRM_SE_CRMTPM_BLKCRTRQ_IN can be used to change the standard inbound or pre-processing of the *Create Trade Promotion as Bulk* service operation.

This BAdI offers the BAdI interface IF_CRM_SE_CRMTPM_BLKCRTRQ_IN with the methods INBOUND_PROCESSING and OUTBOUND_PROCESSING.

- INBOUND_PROCESSING is called during inbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMT_MKTPL_SE_TPM_BLKCRTRQ_IN is used as a structure of the changing parameter of the INBOUND_PROCESSING method and can be enhanced by new fields in a customer SAP CRM back-end system.
- OUTBOUND_PROCESSING is called during outbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMS_MKTPL_SE_TPM_BLKCO_OUT is used as a structure of the importing parameter of the OUTBOUND_PROCESSING method and can be enhanced by new fields in a customer SAP CRM back-end system.

No service mapping tool is available for this service operation.

More Information

For more information about Trade Promotion Management, see SAP Help Portal at http://help.sap.com↗ ▶ *SAP Business Suite* ❯ *SAP Customer Relationship Management* ❯ *SAP CRM* ❯ *Marketing* ❯ *Trade Promotion Management* ❮.

9.4   Change Trade Promotion

Definition

To change a trade promotion.

Technical Data

Entity Type	Service Operation
Software Component Version	SAP CRM ABAP 7.02
Release State	released
Technical Name	TradePromotionCRMChangeRequest_In
Namespace	http://sap.com/xi/CRM/Global2
Application Component	CRM-MKT-MPL-TPM-SRV
Web Service Definition (Back End)	TradePromotionCRMChangeRequest
Category	SAP A2A
Direction	inbound
Mode	asynchronous
Idempotency	not applicable
P2P Communication Enabled	yes

Business Context and Use

In a typical trade promotion life cycle, once a trade promotion is created, it is developed and details such as prices, volumes and timescales are agreed. When trade promotion development is completed, optionally it can be revised or marked as being in process, but it must be approved and released before it is published. It can then be finished or archived. At any point the trade promotion can be locked or made inactive.

The *Change Trade Promotion* inbound service operation changes a trade promotion.

Further business context is provided in the documentation for the Trade Promotion Management process component and the Trade Promotion business object.

Related Service Operations

- The Create Trade Promotion inbound service operation creates a trade promotion.
- The Create Trade Promotion as Bulk inbound service operation creates one or many trade promotions.
- The Confirm Trade Promotion outbound service operation confirms whether a create or change of a trade promotion was successful or not.
- The Confirm Trade Promotion as Bulk outbound service operation sends a message confirming whether one or many trade promotions were created successfully or not.
- The Notify of Trade Promotion outbound service operation notifies subscribed parties of trade promotion events triggered by a change in system status.
- The Read Trade Promotion inbound service operation reads the data from one or many specified trade promotion.

Features

The *Change Trade Promotion* inbound service changes a specified trade promotion.

To change a trade promotion, the following information is mandatory.

- An identifier for the trade promotion (TradePromotionID data element)

The following data is optional but commonly specified depending on the use case scenario.

- An identifier for a trade promotion agreement (TradePromotionAgreementID data element).
- Date ranges (StartDate and EndDate data element).
- Descriptive text on of the trade promotion (Description data element).
- Product data such as the ProductID and ProductTypeCode data elements, key figure data and tactic data.
- Product category data such as the ProductCategoryID data element, key figure data and tactic data.
- Product group data such as the SalesSpecificationProductGroupCode data element, key figure data and tactic data.
- Trade spend data such as TypeCode, CategoryCode and MethodCode data elements.
- Partner information (PartyID and PartyRoleCode data elements).

Asynchronous Service Operations

- A change to a trade promotion using the *Change Trade Promotion* inbound service operation triggers the asynchronous Confirm Trade Promotion outbound service operation.
- When configured as delivered, the Notify of Trade Promotion outbound service is triggered by a change to a trade promotion that gives it a system status of one of the notified values such as Approved.
- The Notify of Trade Promotion service operation is triggered whether the change is made using the Change Trade Promotion service operation or made using the SAP CRM back-end system.

Error Handling

The *Change Trade Promotion* service operation supports Forward Error Handling (FEH). The following error categories are used.

- DCE: Determination & ConversionErrors in this category normally indicate that the information sent is not in the correct format or not within acceptable ranges, for example as follows: The request passes alphanumeric characters for a data element that takes only numeric values; the request passes a value of 8 for a data element that has a value range of 1-7

- PRE: Processing ErrorErrors in this category indicate errors in business logic processing for example as follows: The request is to change a trade promotion that does not exist.

Message Types

- TradePromotionCRMChangeRequest

Prerequisites

- To use the *Change Trade Promotion* service operation, a trade promotion with the identifier provided must already exist in the SAP CRM back-end system.
- The *Change Trade Promotion* service operation can only change a specified trade promotion if it can be set to edit mode. If it is locked by another process, for example, no change is possible.
- The user must have the proper authorization to make a change.
- The rules that apply to status management of the UI also apply for the *Change Trade Promotion* service operation.

Constraints

Constraints for Header Data:

- It is possible to change a description only when the language is also provided
- In Planning Account, only provide one entry <CustomerInternalID> or <BusinessPartnerGroupID> not both
- It is not possible to change the system status and the user status at the same time
- Only one system status or one user status can be provided per change request

Constraints for Dates:

- Key field(s) must be provided: <TradePromotionPeriodRoleCode>

Constraints for Products:

- Key field(s) must be provided: <ID>
- For duplicate Product IDs, beside the Product ID, the payload needs the Product Type, the Logical System and/or the Object Family. Any of these fields that would contribute to make the Product ID unique becomes mandatory

Constraints for Product Categories:

- Key field(s) must be provided: <ID>

Constraints for Product Groups:

- Key field(s) must be provided: <SalesSpecificationProductGroupCode>

Constraints for Key Figures:

- When working with overlapping date ranges for key figures planned in SAP NetWeaver BW (key figures not tied to trade spends), for example, *Uplift*, their values are equally distributed across all period types when there are overlapping date ranges. It is not possible to specify values for a period type.

Constraints for Causals:

- Key field(s) must be provided: Product <ID> or Product category <ID> or Product group <SalesSpecificationProductGroupCode>
- Since a causal shares its action code with the product dimension it is associated with, it is not possible to delete only a causal without deleting also its product dimension. Instead, to delete a causal the external application has to do the following:o use action code 02 for "Change" or action code 04 for "Save"o specify the causal key fields (product dimension ID)o clear all the causal fields

Constraints for Partners:

- Key field(s) must be provided: <ID> and <RoleCode>

Constraints for Trade Spends:

- Key field <UUID> must be provided to change an existing trade spend. <UUID> remains empty for new trade spends.

Constraints for Causal Trade Spends:

- Complete Transmission Indicators must always be set to "true"
    - If the change request is for Product Causal Trade Spends, productCausalFactorListCompleteTransmissionIndicator="true"
    - If the change request is for Product Category Causal Trade Spends, productCategoryCausalFactorListCompleteTransmissionIndicator="true"
    - If the change request is for Product Group Causal Trade Spends, productGroupCausalFactorListCompleteTransmissionIndicator="true"
- Key field(s) must be provided:
    - If the change request is for Product Causal Trade Spends, <ProductID> and <CausalFactorTypeCode>
    - If the change request is for Product Category Causal Trade Spends, <ProductCategoryID> and <CausalFactorTypeCode>
    - If the change request is for Product Group Causal Trade Spends, <SalesSpecificationProductGroupCode> and <CausalFactorTypeCode>
- Only action code 01 is allowed

Additional Information regarding Planning data (Key Figures and Product dimensions):

- When a product is added to an existing trade promotion, the trade spends are automatically applied to this product (a fixed rebate would be re-distributed to all products of the trade promotion). The key figures that do not have associated trade spends (the uplift for example) would be set to zero if no key figure data values are defined in the planning information of the product. It is advisable to specify the planning information of all key figures when a new product is assigned to a trade promotion.

- When a trade spend is added, it is recommended that all products of the trade promotion also have their planning information updated. Key figure values must be specified for the associated key figure of the trade spend.

- When a product is deleted from a trade promotion, the fixed rebates and total uplift are re-distributed to the remaining products.

Notes on SAP Implementation

Enhancements

The Business Add-In (BAdI) definition CRM_SE_CRMTPM_CHGRQ_IN can be used to change the standard inbound mapping or pre-processing of the asynchronous *Change Trade Promotion* service operation. This BAdI offers the BAdI interface IF_CRM_SE_CRMTPM_CHGRQ_IN with the methods INBOUND_PROCESSING and OUTBOUND_PROCESSING.

- INBOUND_PROCESSING is called during inbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMS_MKTPL_SE_TPM_CHGRQ_IN is used as a structure of the changing

parameter of the INBOUND_PROCESSING method and can be enhanced by new fields in a customer SAP CRM back-end system.

- OUTBOUND_PROCESSING is called during the outbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMS_MKTPL_SE_TPM_CO_OUT is used as a structure of the importing parameter of the OUTBOUND_PROCESSING method and can be enhanced by new fields in a customer SAP CRM back-end system.

No service mapping tool is available for this service operation.

More Information

For more information about Trade Promotion Management, see SAP Help Library under ▎▶ *SAP Business Suite* ▎ *SAP Customer Relationship Management* ▎ *Marketing* ▎ *Objects and Functions for Business Scenarios in Marketing* ▎ *Trade Promotion Management* ▎.

9.5   Notify of Trade Promotion

Definition

To notify subscribers of an event triggered by a change to a trade promotion.

Technical Data

Entity Type	Service Operation
Software Component Version	SAP CRM ABAP 7.02
Release State	released
Technical Name	TradePromotionCRMNotification_Out
Namespace	http://sap.com/xi/CRM/Global2
Application Component	CRM-MKT-MPL-TPM-SRV
Category	SAP A2A
Direction	outbound

Mode	asynchronous
Idempotency	not applicable
P2P Communication Enabled	yes

Business Context and Use

In a typical trade promotion life cycle, once a trade promotion is created, it is developed and details such as prices, volumes and timescales are agreed. When trade promotion development is completed, optionally it can be revised or marked as being in process, but it must be approved and released before it is published. It can then be finished or archived. At any point the trade promotion can be locked or made inactive.

The *Notify of Trade Promotion* outbound service operation notifies subscribed parties of an event triggered by a change to a trade promotion.

Further business context is provided in the documentation for the Trade Promotion Management process component and the Trade Promotion business object.

Related Service Operations

- The Create Trade Promotion inbound service operation creates a trade promotion.
- The Create Trade Promotion as Bulk inbound service operation creates one or many trade promotions.
- The Change Trade Promotion inbound service operation changes a trade promotion.
- The Confirm Trade Promotion outbound service operation confirms whether a create or change of a trade promotion was successful or not.
- The Confirm Trade Promotion as Bulk outbound service operation sends a message confirming whether one or many trade promotions were created successfully or not.
- The Read Trade Promotion inbound service operation reads the data from one or many specified trade promotion.

Features

The *Notify of Trade Promotion* service sends a notification message informing subscribers of a trade promotion event. An event is triggered by a successful save of a trade promotion that has a system status value on the list of notified values.

In standard Customizing, the list of notified values for the system status is as follows.

- Approved
- Released
- Published
- In Simulation
- Revised

Note that in standard Customizing, no notification message is sent when a change is made to a trade promotion that has a system status of Created.

For information on changing standard Customizing and the list of possible values, see the **Notes on SAP Implementation** keyblock under **Configuration**.

The notification message consists of the entire data from the affected trade promotion and an action code. The action code indicates the action that triggered the notification as follows.

- 01 - Trade Promotion Created
- 02 - Trade Promotion Changed
- 03 - Trade Promotion Deleted

In addition, the notification message includes a message log.

Notes

- This service operation sends a notification indicating whether the trade promotion event is triggered using a service or directly in the SAP CRM back-end system.
- When the trade promotion event is triggered more than once by a single request to a bulk service, multiple notification messages are sent, one for each event.

Error Handling

Since notifications are sent only when a trade promotion event occurs, there are no error situations.

Message Types

- TradePromotionCRMNotification

Prerequisites

To receive notifications from the *Notify of Trade Promotion* service operation, an external party must already subscribe to the service operation.

There are two ways to subscribe.

- **XI system**: As part of configuring the XI system to send messages to the CRM back-end system, configure it to receive the notifications.
- **Web services**: Create a logical port through transaction SOAMANAGER. All notifications are then sent to that logical port.

Notes on SAP Implementation

Configuration

To change the values of the system status that trigger a notification message, use the Business Activity ENOT in Customizing. The possible values are listed using the following format. The values that trigger a notification with the standard Customizing delivered have the status "Allowed".

The items in the following list are shown in the order: **System Status (Abbreviation) Number, Status**

- Created (CRTE) I1001, No influence
- In Process (EXEC) I1123, No influence
- Approved (APPR) I1122, Allowed
- Released (REL) I1004, Allowed
- Finished (FSHD) I1008, No influence
- Rejected (CNC) I1124, No influence
- Locked (LCK) I1121, No influence
- Object Moving Locked (SCLC) I1320, No influence
- Can be archived (ARCR) I1100, No influence
- Archived (DELA) I1101, No influence
- Obsolete (COBS) I1324, No influence
- Published (CPUB) I1323, Allowed
- Inactive (CINA) I1321, No influence
- In Simulation (CSIM) I1327, Allowed
- Simulation Rejected (CSIR) I1328, No influence
- Revised (RVST) I2950, Allowed

By default, the *Notify of Trade Promotion* asynchronous service operation returns the non-zero values of all key figures of the associated read query. This can inadvertently affect performance if the number of key figures pertaining to the master layout is high. To reduce the impact, create a read query containing only the key figures required and ensure that they are set as always visible. To do this, create a new query using BEX Query Designer in SAP NetWeaver BW and then assign this read query to your integrated planning profile group using the appropriate query context in Customizing: ▶ *SAP Customizing Implementation Guide* ❯ *Customer Relationship Management* ❯ *Trade Promotions* ❯ *Trade Promotion Management* ❯ *Key Figure Planning with the Planning Applications Kit* ❯ *Define Integrated Planning Profile Groups* ◀.

The read query should be assigned to the integrated planning profile group that is assigned to the trade promotions to be read using the query context *SOA_READ*.

Enhancements

The Business Add-In (BAdI) definition CRM_SE_CRMTPM_NOTIF_EVENT can be used to change the standard outbound mapping or post-processing of the asynchronous *Notify of Trade Promotion* service operation.

This BAdI offers the BAdI interface IF_CRM_SE_CRMTPM_NOTIF_EVENT with the method MAP_EXECUTE_ASYNCHRONOUS. This method is called during outbound data mapping and can be used to overwrite the existing mapping or to map additional data if new elements were added to the message. The internal communication structure CRMTPM_NOTIF_MESSAGE_TYPE is used as a structure of the importing parameter of the MAP_EXECUTE_ASYNCHRONOUS method and can be enhanced by new fields in a customer SAP CRM back-end system.

No service mapping tool is available for this service operation.

More Information

For more information about Trade Promotion Management, see SAP Help Portal at http://help.sap.com ⤤
▎ *SAP Business Suite* ❯ *SAP Customer Relationship Management* ❯ *SAP CRM* ❯ *Marketing* ❯ *Trade Promotion Management* ▌.

10 Dynamic Funding

Use

This functionality works with the WebClient UI but not with SAP UI5.

You use dynamic funding to maintain dynamic funding rates and to calculate and post performance budget to funds management. Budget is calculated by multiplying the latest estimate (planned or actual sales volume or revenue) by a dynamic funding rate.

As retailers order more products, they receive a proportionately larger promotional budget than the manufacturer set aside for them. The more successful the promotions, the more budget the key account manager is given to allocate to the retailer to run promotions.

Companies use this method to give incentives to retailers to purchase and sell more products, and to plan budget as proportionately as possible to actual revenues.

Integration

Dynamic funding is integrated with the following:

- Funds Management in SAP Customer Relationship Management (SAP CRM)
  Dynamic funding posts performance budget to multiple funds. Finance professionals can also post fixed amounts of budget to funds from within the dynamic funding application.
- Territory Management
  You can use territory management with responsibility management to define the responsibilities of financial professionals for maintaining dynamic funding rates. These responsibilities control which dynamic funding rates the finance professional can maintain. Responsibilities are based on account and product dimensions, such as combinations of account hierarchy nodes and product categories.
- SAP Business Warehouse (SAP BW)
  The information required to calculate performance budget, including dynamic funding rates and latest estimates, is stored in SAP BW. The performance budget is calculated in SAP BW, and the audit trail captures the data related to the budget calculation.
- SAP ERP Central Component (SAP ECC)
  SAP ECC is indirectly integrated with dynamic funding. Actual sales volumes and revenues for combinations of account and product hierarchies are loaded from SAP ECC into SAP BW and used in the budget calculation process. Standard tools in SAP BW can be used to load the sales values from SAP ECC.
- Design Layer
  The design layer is enabled for dynamic funding plans and dynamic funding rates.

Prerequisites

You have completed the required configuration activities for dynamic funding. For more information, see the Configuration Guide for SAP Trade Promotion Planning and Management.

Features

The following features are available with dynamic funding:

- Dynamic funding plans
  You use dynamic funding plans to define dynamic funding rates for a combination of sales area, time period, and funds plan. For more information, see Dynamic Funding Plans [page 110].
- Responsibility management
  You use responsibility management to determine the combinations of accounts and products for which an employee can maintain dynamic funding rates in dynamic funding plans. For more information, see Responsibility Management for Dynamic Funding [page 101].
- Dynamic funding rates
  You maintain dynamic funding rates in your dynamic funding plan. You can maintain rates for combinations of account and product hierarchies for specific time periods. These rates are used to calculate performance budget that can be used to fund your trade promotion activities. For more information, see Dynamic Funding Rates [page 116].
- Adding fixed budget
  You can add a fixed amount of budget to a fund from a dynamic funding plan. For more information, see Adding Fixed Budget to a Fund [page 140].
- Performance budget calculation
  You use the *Dynamic Funding Posting* batch job in SAP CRM to trigger the budget calculation process in SAP BW. As a result, performance budget amounts are calculated. For more information, see Performance Budget Calculation [page 121].
- Posting to funds management
  The system posts performance budget amounts to funds management using fund postings. For more information, see Posting Performance Budget to Funds [page 138].
- Upload rates from external source
  You can use an application programming interface (API) to load dynamic funding rates from an external source. For more information, see Upload API for Dynamic Funding Rates [page 119].
- Audit trail
  You can use an InfoProvider in SAP BW to record the data that is used for each budget calculation run, such as the dynamic funding plan ID, fund ID, dynamic fund rate type, and so on. You can use this information to validate the budget calculation process. For more information, see Performance Budget Calculation [page 121].
- Archiving
  You can use the standard archiving processes to archive dynamic funding plans. For more information, see Archiving Dynamic Funding Plans (CRM_FM_DFP) [page 115].
- BI Content
  Standard BI content is available to use as a basis for creating your own content for dynamic funding.

**More Information**

10.1 Dynamic Funding Process

Use

This functionality works with the WebClient UI but not with SAP UI5.

You use dynamic funding to calculate budget for trade promotion activities by multiplying the latest estimate by a rate. The budget calculation process results in performance budget being posted to funds in funds management, where it can then be used, for example, to fund trade promotion activities. Performance budget is posted to the *Performance Budget* and *Budget* value categories. You can view these value categories in the fund checkbooks.

Process

The following figure illustrates the dynamic funding process:
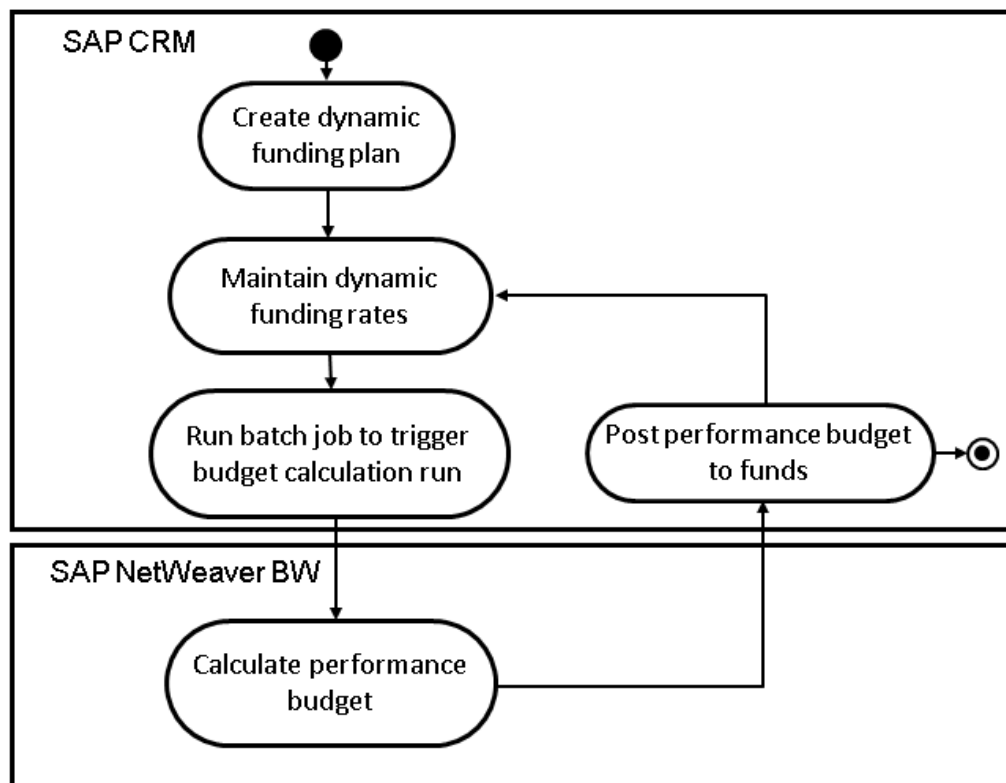
Dynamic Funding Process

The following outlines the main steps that result in performance budget being posted to funds management:

1. Finance professionals maintain dynamic funding rates in dynamic funding plans based on their responsibilities.
2. Dynamic funding rates are saved in SAP Customer Relationship Management (SAP CRM) and in SAP Business Warehouse (SAP BW).
3. You run a batch job to trigger budget calculation, which uses data stored in SAP NetWeaver BW, such as dynamic funding rates, latest estimates, and master data to calculate performance budget amounts.
4. Budget calculation results in performance budget amounts being posted to specific funds within a funds plan.
5. The fund checkbook reflects the updated budget amounts for each fund.

More Information

10.2   Responsibility Management for Dynamic Funding

Use

This functionality works with the WebClient UI but not with SAP UI5.

Responsibility management is used to determine the combinations of accounts or account hierarchy nodes and products or product categories for which an employee can maintain dynamic funding rates in dynamic funding plans. Responsibility engines are assigned to sales areas. Finance professionals can only search for and maintain dynamic funding rates for the areas they are responsible for.

> **i Note**
>
> Account and product hierarchies are assigned to funds plan types. The type of funds plan that is assigned to the dynamic funding plan allows the system to identify the accounts, account hierarchies, products, and product categories that can be maintained for the dynamic funding plan. The responsibility engine provides additional restrictions to identify which set of accounts, account hierarchy nodes, products, and product categories that finance professionals can maintain rates for.

Prerequisites

- You have assigned the responsibility engine you are using to each sales area in Customizing for *Customer Relationship Management* under ▮ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Dynamic Funding* ❯ *Basic Settings* ❯ *Assign Responsibility Engine* ❯.
- If you are using territory management as your responsibility engine, you have configured territory management to be used with dynamic funding. For more information, see the Configuration Guide for SAP Trade Promotion Planning Management and Example: Responsibility Management Using Territory Management [page 104].

Features

The following responsibility engines are available:

- Territory Management
  The rules assigned to the territory determine the accounts, account hierarchy nodes, products, or product categories that can be used.
- Sales Area

The sales area of the dynamic funding plan determines the accounts, account hierarchy nodes, products, or product categories that can be used.

- No Responsibility
  The complete account hierarchy and product hierarchy that is assigned to the funds plan type of the funds plan that is assigned to the dynamic funding plan can be used. There are no restrictions.

- Custom
  You can define a new responsibility engine using a Business Add-In (BAdI) implementation to define how you manage responsibility for dynamic funding plans. For more information, see *BAdI: Responsibility Management*.

Responsibility Using Territory Management

The following diagram illustrates the process of determining user responsibility for dynamic funding plans using territory management as the responsibility engine.
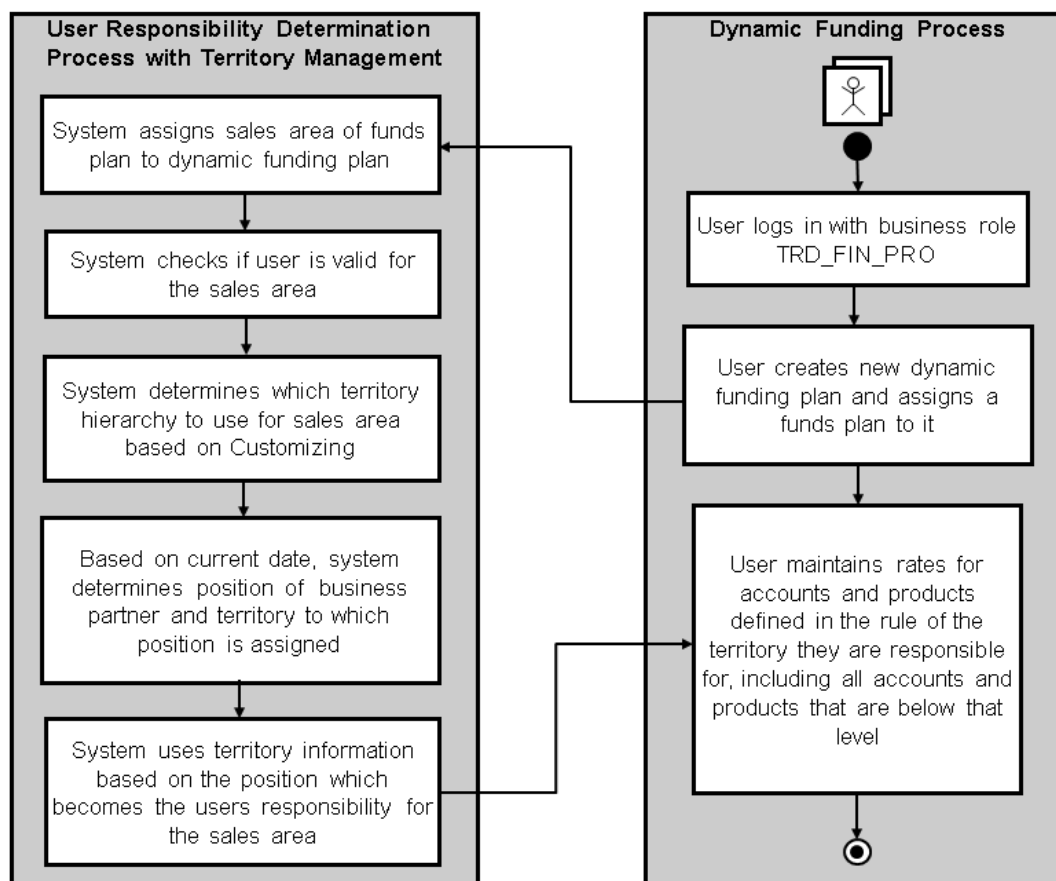
Responsibility for Maintaining Dynamic Funding Rates Using Territory Management

For examples about determining responsibility using Territory Management as the responsibility engine, see Example: Responsibility Management Using Territory Management [page 104].

Responsibility Using Sales Area

The following diagram illustrates the process of determining user responsibility for dynamic funding plans using sales area as the responsibility engine.
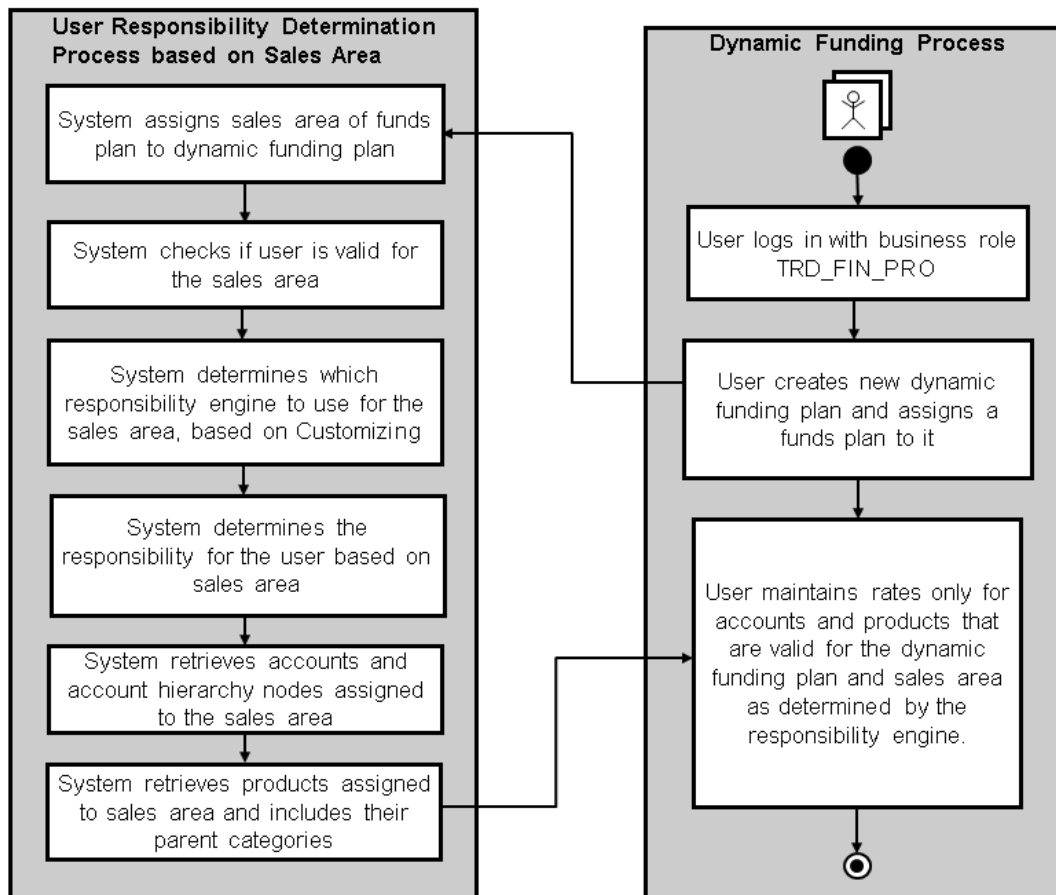
Diagram content (transcribed):

User Responsibility Determination Process based on Sales Area

- System assigns sales area of funds plan to dynamic funding plan
- System checks if user is valid for the sales area
- System determines which responsibility engine to use for the sales area, based on Customizing
- System determines the responsibility for the user based on sales area
- System retrieves accounts and account hierarchy nodes assigned to the sales area
- System retrieves products assigned to sales area and includes their parent categories

Dynamic Funding Process

- User logs in with business role TRD_FIN_PRO
- User creates new dynamic funding plan and assigns a funds plan to it
- User maintains rates only for accounts and products that are valid for the dynamic funding plan and sales area as determined by the responsibility engine.
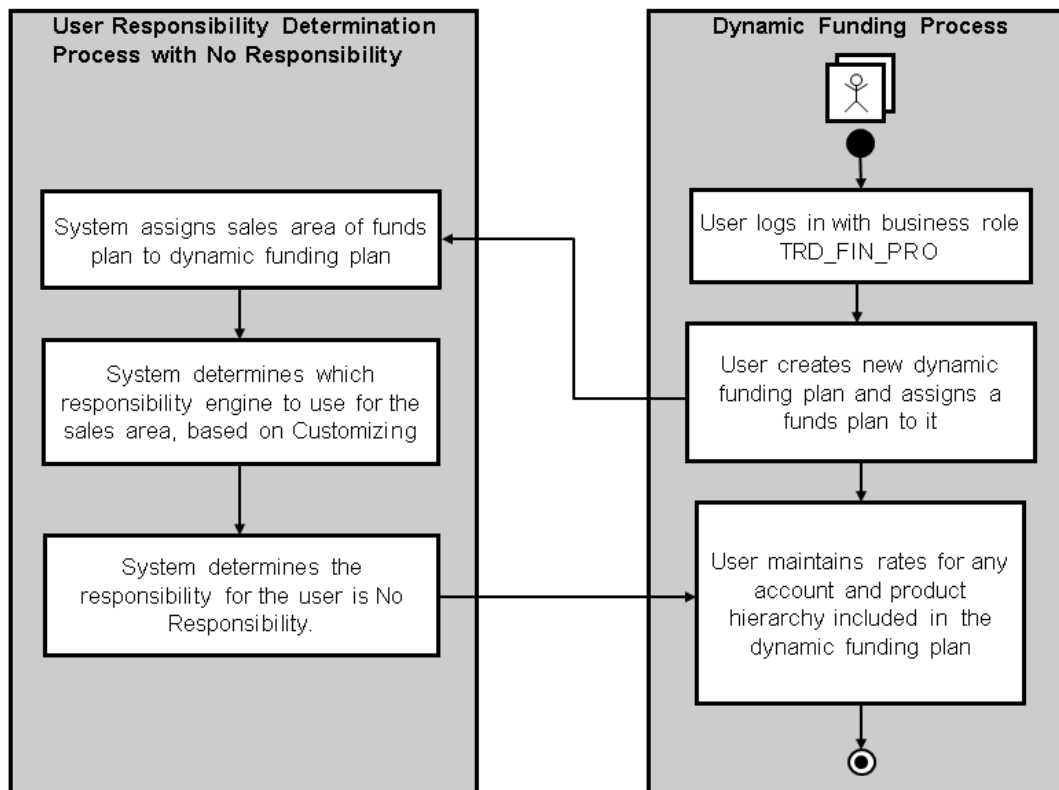
Responsibility for Maintaining Dynamic Funding Rates Using Sales Area

For examples about determining responsibility using *Sales Area* as the responsibility engine, see Example: Responsibility Management Using Sales Area or No Responsibility [page 108].

Responsibility Using No Responsibility

The following diagram illustrates the process of determining user responsibility for dynamic funding plans using *No Responsibility*.

User Responsibility Determination Process with No Responsibility

- System assigns sales area of funds plan to dynamic funding plan
- System determines which responsibility engine to use for the sales area, based on Customizing
- System determines the responsibility for the user is No Responsibility.

Dynamic Funding Process

- User logs in with business role TRD_FIN_PRO
- User creates new dynamic funding plan and assigns a funds plan to it
- User maintains rates for any account and product hierarchy included in the dynamic funding plan

Responsibility for Maintaining Dynamic Funding Rates Using No Responsibility

For examples about determining responsibility using *No Responsibility* as the responsibility engine, see Example: Responsibility Management Using Sales Area or No Responsibility [page 108].

More Information

Dynamic Funding [page 97]
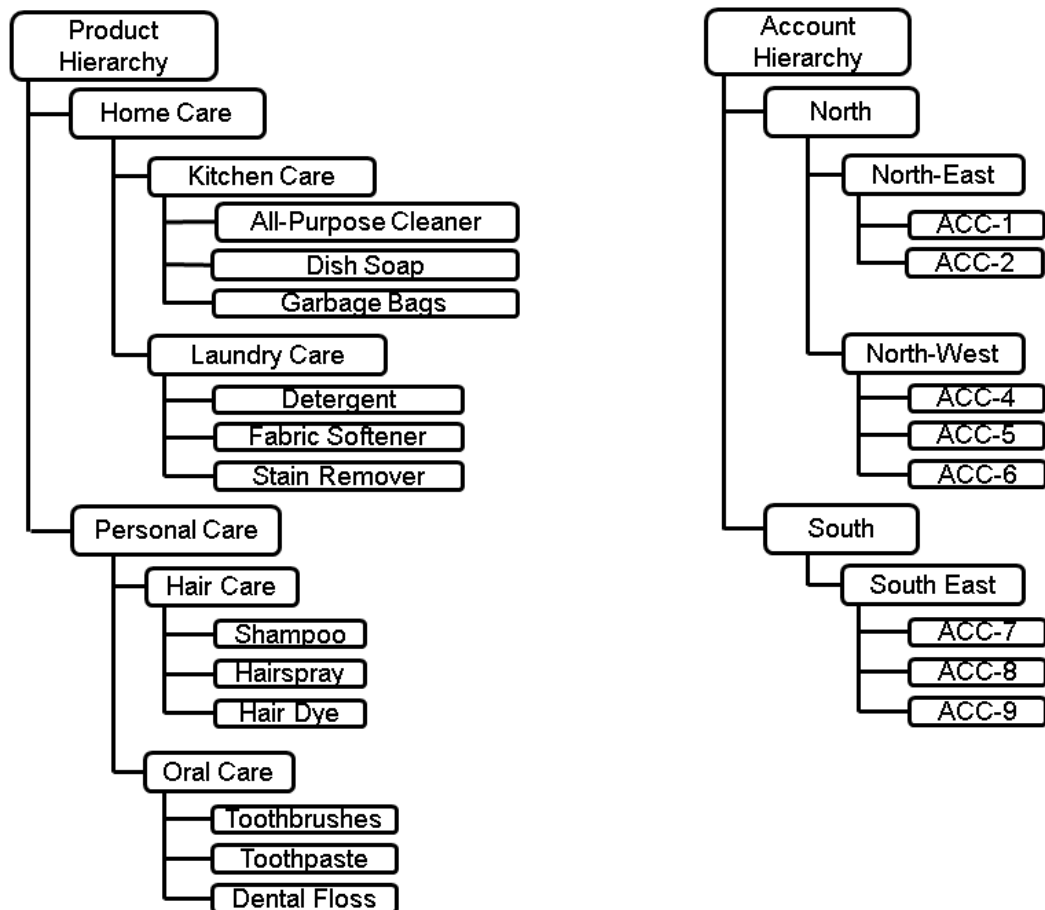
Dynamic Funding Rates [page 116]

10.2.1 Example: Responsibility Management Using Territory Management

Use

The following example uses product, account, and territory hierarchies to illustrate responsibility management using territory management. It only applies to the WebClient UI and not SAP UI5.

Features

The following figure illustrates a product and account hierarchy that can be assigned to a territory to use for dynamic funding. Account and product hierarchy nodes are assigned to territories to determine the responsibilities of the finance professions who maintain dynamic funding rates.
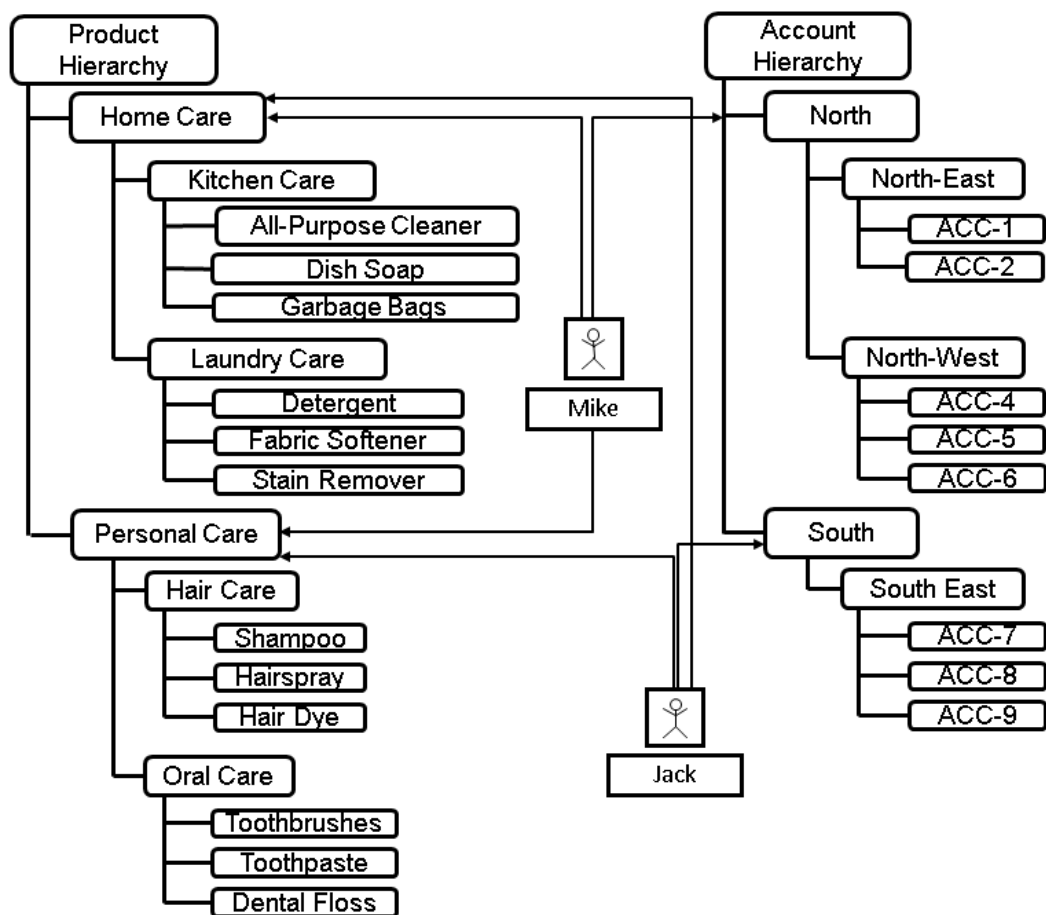

Example Hierarchy for Dynamic Funding

Responsibility Assignment

Mike and Jack are financial professionals who are responsible for maintaining dynamic funding rates for *Company X*. The following table and diagram illustrate their responsibility assignments:

Employee	Position in Organization	Account Hierarchy Node	Product Hierarchy Node
Mike	Finance Professional N	North	Home Care
			Personal Care
Jack	Finance Professional S	South	Home Care
			Personal Care

Responsibility Assignments of Mike and Jack

Territory Management

To use territory management as your responsibility engine, you must define a territory to use for dynamic funding. The following territory is used in this example.
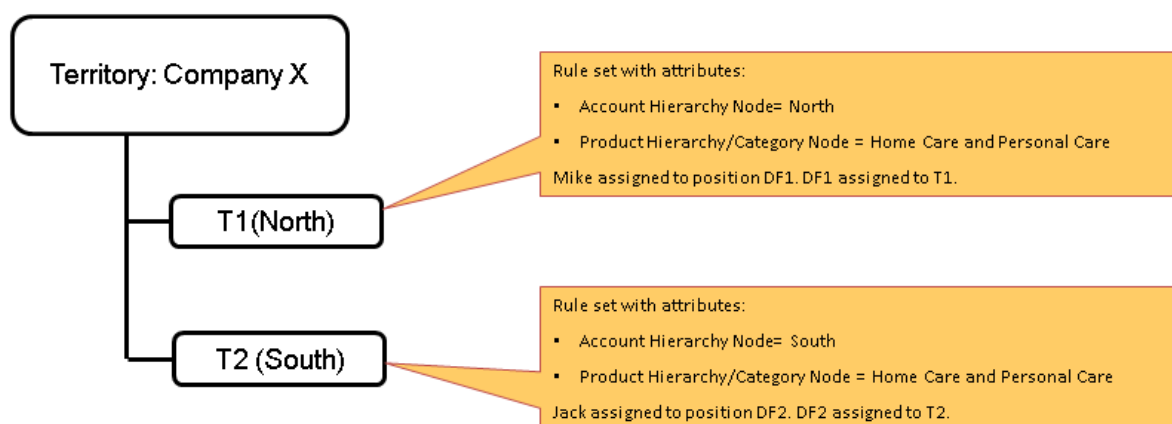
Example Territory for Dynamic Funding

Setting up the Territory

To assign responsibility of the Jack and Mike to their respective territories, you first set up the territories to use for dynamic funding, as follows:

1. Create a root territory node at the territory level *Company* named `Company X` with validity dates.
2. Create two territories at the territory level *Territory*, named `T1` and `T2`.
3. For each territory, assign a rule set that contains the attributes *Product Hier./Cat.* and *Account Hierarchy*.

> **i Note**
>
> If you are working with the sales product category, you must additionally assign the attribute *Sales Area* to your rule set.

    Company X now has two territory nodes: T1 and T2. Each territory must have a rule set with the attributes assigned. You assign the following values to the rule attributes:

    - For the `T1` territory node, the attributes `Account Hierarchy Node = North`, `Product Hierarchy/Category Node = Home Care AND Personal Care`
    - For the `T2` territory node, the attributes `Account Hierarchy Node = South`, `Product Hierarchy/Category Node = Home Care AND Personal Care`

4. Release your rules to activate them.
5. Once you have defined your territories and their rules, you then assign Mike and Jack to the territories. You assign employees to territories through their position in the *Change Organizational Model* (PPOMA_CRM) transaction.

For more information about territory management, see SAP Help Portal at http://help.sap.com/crm🔗 under ▶ *Master Data* ❯ *Territory Management* ❯.

Overlapping Responsibilities

Depending on configuration, you can have responsibilities that overlap. For example, Mike is responsible for the territory that has the account hierarchy node = *North* (which includes *North-East* and *North-West*) in its rule set, and Jack is responsible for the territory that has the account hierarchy node *North-West* in its rule set. Both territories have the product category *Personal Care* assigned to their rule set. In this case, both of the finance professionals can maintain dynamic funding rates for the accounts in the north-west for personal care products.

The system accepts this setup and ensures that Mike and Jack cannot both maintain rates for the same combination of account and product at the same time, for example, for the account *ACC-4* and for the product *Shampoo*.

The following diagram illustrates the overlapping responsibilities of Jack and Mike.
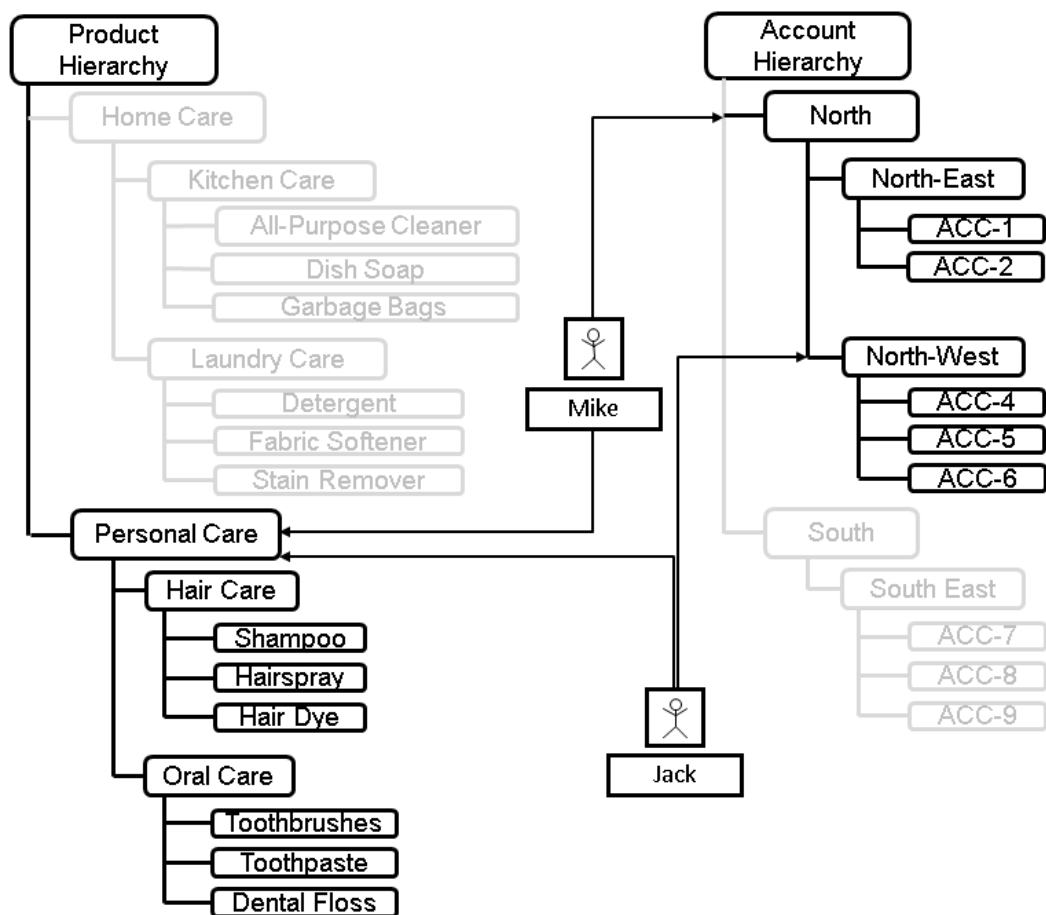
Overlapping Responsibilities

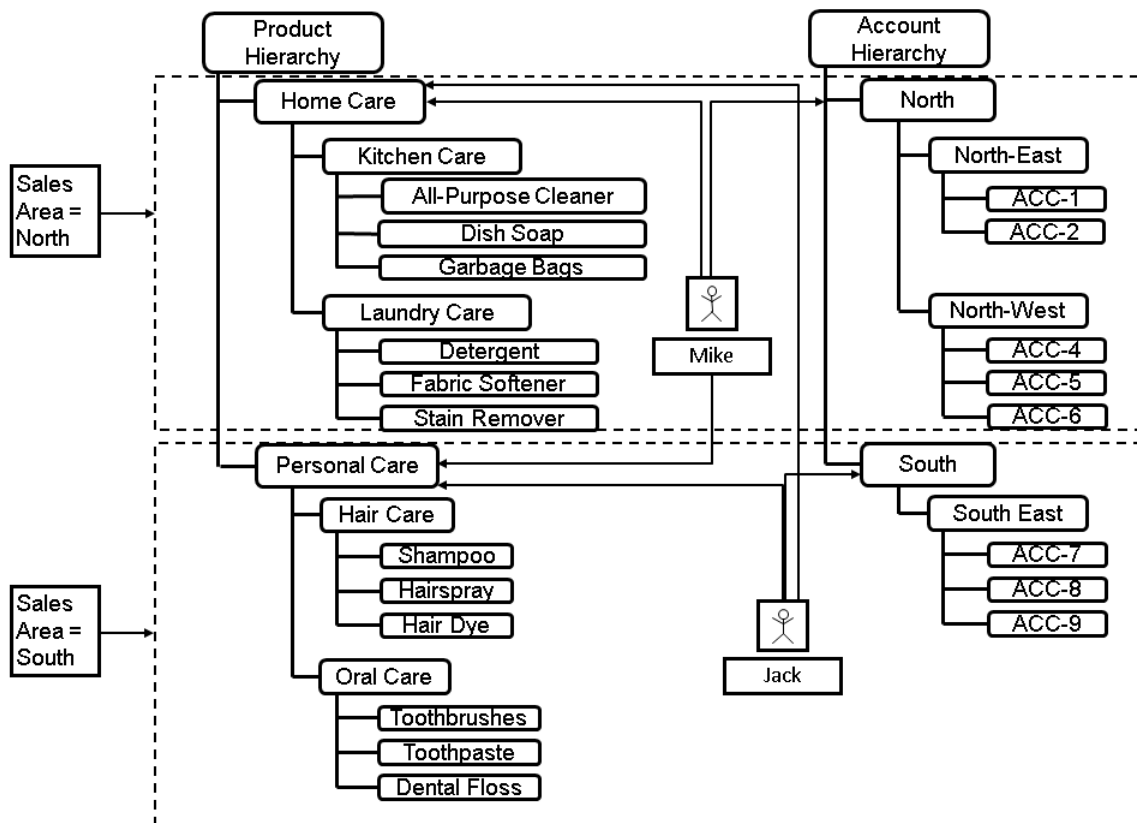The following table illustrates the employees overlapping responsibilities:

Employee	Position in Organization	Account Hierarchy Node	Product Hierarchy Node
Mike	Finance Professional N	North	Personal Care
Jack	Finance Professional S	North-West	Personal Care

10.2.2 Example: Responsibility Management Using Sales Area or No Responsibility

Use

The following examples illustrate responsibility management using *Sales Area* and *No Responsibility* as the responsibility engines. They only apply to the WebClient UI and not SAP UI5.

Features

Product and Account Hierarchies for Sales Areas

The following identifies the funds plans that are relevant for each sales area.

Funds Plan	Sales Area
Funds Plan A	North
Funds Plan B	South

The following table illustrates the dynamic funding plans that Mike and Jack are responsible for.

Employee	Dynamic Funding Plan	Funds Plan
Mike	Dynamic Funding Plan A	Funds Plan A
Jack	Dynamic Funding Plan B	Funds Plan B

Responsibility Management Using Sales Area

If the responsibility engine is *Sales Area*, then based on the above example, Jack and Mike can maintain rates for the following:

- Mike can only maintain dynamic funding rates for products or product categories in the home care product hierarchy, and for accounts or account hierarchies in the north account hierarchy.
- Jack can only maintain dynamic funding rates for products or product categories in the personal care product hierarchy, and for accounts or account hierarchies in the south account hierarchy.

Responsibility Management Using No Responsibility

If the responsibility engine is *No Responsibility*, then based on the above example, Jack and Mike can maintain rates for all accounts, account hierarchy nodes, products, and product categories in the dynamic funding plans they are working with, since there is are restrictions.

More Information

10.3 Dynamic Funding Plans

Definition

An object that contains, for a certain sales area and time period, the dynamic funding rates for a set of account and product hierarchy combinations.

Use

This functionality works with the WebClient UI but not with SAP UI5.

You use dynamic funding plans to maintain dynamic funding rates for combinations of account and product hierarchies for a particular sales area, time period, and funds plan. These rates are used to calculate the performance budget that is posted to funds in the assigned funds plan. This budget can then be used to fund trade promotion activities.

You can assign multiple dynamic funding plans to the same funds plan, although only one dynamic funding plan can be used with a funds plan for a particular sales area and time period. Multiple finance professionals can work within the same dynamic funding plan.

You cannot delete a dynamic funding plan once there are fund postings created from that dynamic funding plan.

Structure

Dynamic funding plans have the following structure:

- A dynamic funding plan has a *Details* assignment block where you provide the periods that the plan is valid for. You can create dynamic funding plans based on calendar week or fiscal period. Additionally, you provide the funds plan that contains the funds that the system posts performance budget to. The currency and the sales area of the dynamic funding plan are defaulted from the funds plan and cannot be modified.

  > **i Note**
  >
  > You cannot change the funds plan that is assigned to the dynamic funding plan after the system has posted performance budget to funds in the funds plan.

- The *Rates* assignment block is used by finance professionals to maintain dynamic funding rates for their area of responsibility.

  > **i Note**
  >
  > You cannot change the validity dates of a dynamic funding plan once there are rates defined in the *Rates* assignment block.

- A filter is available to allow you to work with a specific set of dynamic funding rates. You can use the *Hierarchical* filter criteria to include the children of the hierarchy nodes in your results.
- The *Fund Postings* assignment block is available to view the fund postings that have been made for the dynamic funding plan as a result of the budget calculation process.
- The standard assignment blocks *Change History*, *Notes*, and *Attachments* are available.

  > **i Note**
  >
  > The change history only records a change after the dynamic funding plan or rate is saved for the first time. If you want to keep track of when initial changes were made to the *Details* or *Rates* assignment block, and who made them, you can configure the assignment blocks to show the *Created On* and *Created By* fields.

Integration

- Funds Management
  Performance budget amounts calculated from the dynamic funding process are posted to the designated funds in funds management and can be viewed in the *Performance Budget* value category in the funds checkbook.
  You can navigate from the dynamic funding plan to the budget postings application to post fixed budget directly to a fund.
- SAP Business Warehouse (SAP BW)
  Dynamic funding rates are stored in SAP BW in addition to SAP CRM.

More Information

10.3.1 Status Management for Dynamic Funding Plans

Use

This functionality works with the WebClient UI but not with SAP UI5.

You use status management to set the current processing status of a dynamic funding plan. The current status determines the actions that can be performed for dynamic funding plans. Statuses can be set by the system or by the user. System status profiles are provided and cannot be modified. You can configure user statuses profiles.
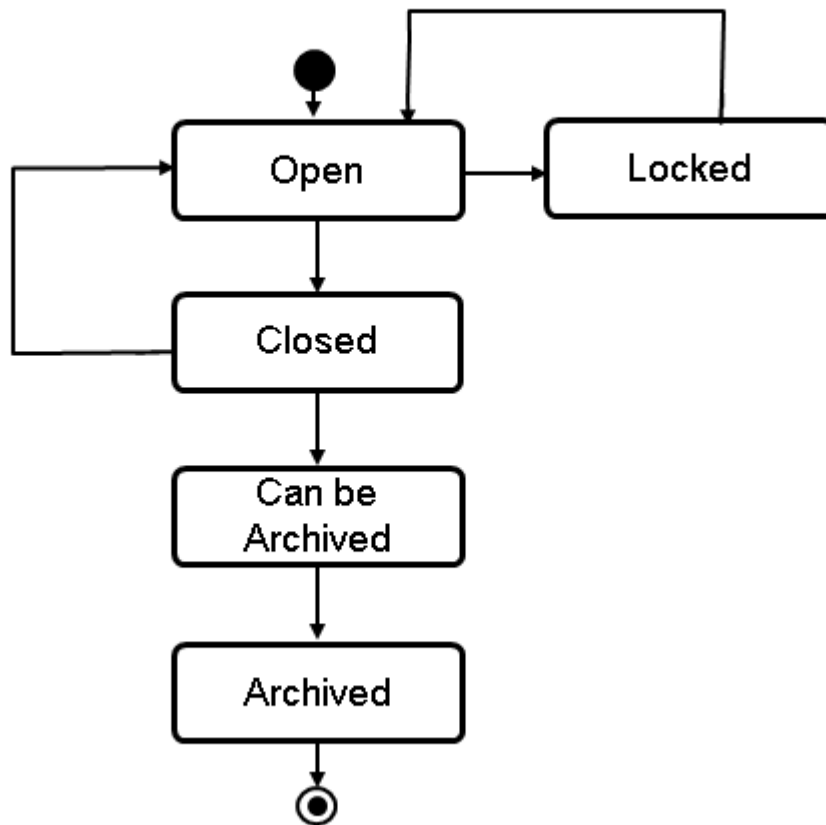
Prerequisites

You have made the following optional settings in Customizing:

- Defined user status profiles for dynamic funding plans in Customizing for *Customer Relationship Management* under ▶ *Marketing* 〉 *Marketing Planning and Campaign Management* 〉 *General Settings* 〉 *Define Status Profile for User Status* 〉.
  User status profiles are made up of individual statuses. Each status is linked to a business transaction. Business transactions are defined in the *Maintain Processes* BS32 transaction.
- Assigned user status profiles to sales areas in Customizing for *Customer Relationship Management* under ▶ *Trade Management* 〉 *Trade Promotion Planning and Management* 〉 *Dynamic Funding* 〉 *Basic Settings* 〉 *Assign User Status Profiles* 〉.

Features

System Status

The following system statuses are available for dynamic funding plans.

Status flow for system statuses

Status	Description
Open	The status is set to *Open* when you create a dynamic funding plan. In this status you can maintain rates and post performance budget. You can also maintain details of the dynamic funding plan, notes, and attachments. You can close or delete a dynamic funding plan in this status.
Locked	The status is set to *Locked* when the budget calculation batch job is triggered for the dynamic funding plan. You cannot perform any actions to the dynamic funding plan apart from changing the user status. The status is reset to *Open* once the budget calculation process is complete.

Status	Description
Closed	The status is set to *Closed* after the period end, when the last performance budget posting is complete. The dynamic funding plan is read-only when it is in the *Closed* status. You can re-open and archive a dynamic funding plan in this status.
Can be archived	The status is set to *Can be archived* once the archiving pre-processing batch job is run. You cannot perform any actions to a dynamic funding plan in this status.
Archived	The status is set to *Archived* once the standard archiving process is run and all related data is archived. You cannot perform any actions to a dynamic funding plan that has been archived.

The following table identifies which business transactions are allowed or forbidden when the dynamic funding plan has a particular system status:

Business Transactions	Open	Locked	Closed	Can be archived	Archived
Maintain dynamic funding rates	Allowed	Forbidden	Forbidden	Forbidden	Forbidden
Post performance budgets	Allowed	Forbidden	Forbidden	Forbidden	Forbidden
Delete dynamic funding plan	Allowed	Forbidden	Forbidden	Forbidden	Forbidden
Close dynamic funding plan	Allowed	Forbidden	Forbidden	Forbidden	Forbidden
Archive dynamic funding plan	Forbidden	Forbidden	Allowed	N/A	Forbidden
Unlock dynamic funding plan	Forbidden	Allowed	Forbidden	Forbidden	Forbidden

More Information

10.3.2 Archiving Dynamic Funding Plans (CRM_FM_DFP)

Use

This functionality works with the WebClient UI but not with SAP UI5.

You use the archiving object `CRM_FM_DFP` to archive dynamic funding plans and the related dynamic funding rates.

Application-Specific Customizing

You define the residence time for archiving dynamic funding plans and rates in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Dynamic Funding* ❯ *Dynamic Funding Plans* ❯ *Define Residence Time for Dynamic Funding Plans* ❯ .

Optionally, you can use the Business Add-In (BAdI) *BAdI: Archiving Check* to perform additional checks on your dynamic funding plans before you archive them. For more information, see the BAdI documentation in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Dynamic Funding* ❯ *Business Add-Ins* ❯ .

Archiving Object Contents

The dynamic funding plan archiving object contains the following database tables:

Database Table Technical Name	Description	Comment
CGPL_HIERARCHY	Project Planning: Activities and Projects Hierarchy Table	To be archived
CGPL_PROJECT	Project Planning: Attribute Table for Project Headers	To be archived
CGPL_TEXT	Project Planning of Language Dependent Short Texts for Projects and Tasks	To be archived
CRMD_FM_DFP_HDR	Dynamic Funding Plan: Header Attributes Database	To be archived
CRMD_FM_DF_RATE	Dynamic Funding Rates	To be archived
CRM_JCDS	Change Documents for System/User Statuses (Table JEST)	To be archived
CRM_JEST	Individual Object Status	To be archived
CRM_JSTO	Status Object Information	To be archived
THEAD	SAPscript: Text Header	To be archived
TLINE	SAPscript: Text Lines	To be archived

You use the *Archive Administration* (`SARA`) transaction to schedule archiving reports to be run as background jobs. The dynamic funding plan archiving object contains the following reports:

- Preprocessing (`CRM_FM_DFP_PRE`)
  The preprocessing report selects dynamic funding plans that can be archived. Dynamic funding plans can be archived if they meet the following criteria:
  - The dynamic funding plans have the status *Closed*.
  - The dynamic funding plans exceed the residence time defined in Customizing.

> **i Note**
>
> A dynamic funding plan is archived with the related rates and cannot be archived separately.

  The preprocessing report changes the status of the relevant dynamic funding plans from *Closed* to *Can be archived*.
- Write (`CRM_FM_DFP_WRI`)
  The write report selects the dynamic funding plans that have the status *Can be archived*. The report copies data from these dynamic funding plans and changes their status from *Can be archived* to *Archived*.
- Delete (`CRM_FM_DFP_DEL`)
  The delete report reads the data stored in the archiving files and deletes the corresponding data from the database.

More Information

Dynamic Funding [page 97]

For more information about archiving, see the *Data Archiving* documentation in the SAP NetWeaver Library on SAP Help Portal under http://help.sap.com/nw ➤ *SAP NetWeaver Platform* ❯ *Function-Oriented View* ❯ *Solution Life Cycle Management* ❯ *Data Archiving* ➤.

10.4 Dynamic Funding Rates

Use

This functionality works with the WebClient UI but not with SAP UI5.

You maintain dynamic funding rates in your dynamic funding plan. Rates can be a fixed amount or a percentage. You maintain rates for combinations of accounts or account hierarchy nodes and products or product categories for specific time periods. These rates are used to calculate the performance budget which can be used, for example, to fund your trade promotion activities.

Prerequisites

- You have completed all of the settings for dynamic funding. For more information, see the Configuration Guide for SAP Trade Promotion Planning and Management..
- You have created a dynamic funding plan.

Features

- You can manually enter dynamic funding rates for different time periods.
  Validity dates for rates must be within the start and end periods of the dynamic funding plan.
- A responsibility engine is used to control which combination of accounts and products an employee can maintain rates for.
  Employees can only maintain rates for accounts and products that they are responsible for.
- You can filter the rates table to view specific entries.
  Use the *Hierarchical* filter criteria to include or exclude the children of the hierarchy node in your filtering results. Choose *Hierarchical is On* to include children.
- You can overwrite rate exceptions that have been maintained at lower levels of the hierarchy with new rates that you define at a higher level. Only rates of the same rate type and that are within the same validity period are overwritten.
  Select the row containing the rates you want to copy to lower levels of the hierarchy and choose *Overwrite Rates*. You can only overwrite rates that you are responsible for. For more information, see Example: Overwrite Rates [page 118].
- You can upload rates from an external application using an application programming interface (API). For more information, see Upload API for Dynamic Funding Rates [page 119].
- You can change multiple rate values and their validity dates using the *Mass Change* feature.
- You can view any changes made to rates in the *Change History* assignment block
  The system records when rates are deleted and when rate types, rate values, products, accounts, or validity dates are changed.

More Information

Dynamic Funding Plans [page 110]

Responsibility Management for Dynamic Funding [page 101]

Performance Budget Calculation [page 121]

10.4.1 Example: Overwrite Rates

Use

The following examples illustrates how you can overwrite rates defined at lower levels of the hierarchies. They only apply to the WebClient UI and not SAP UI5.

Features

A finance professional defines the following rates in the dynamic funding plan:

1. A rate of 2% for *Kitchen Care* and *North-East*.
2. A rate of 4% for *Laundry Care* and *North-West*.

The following diagram illustrates that there are rates defined for two different combinations of account and product hierarchies:
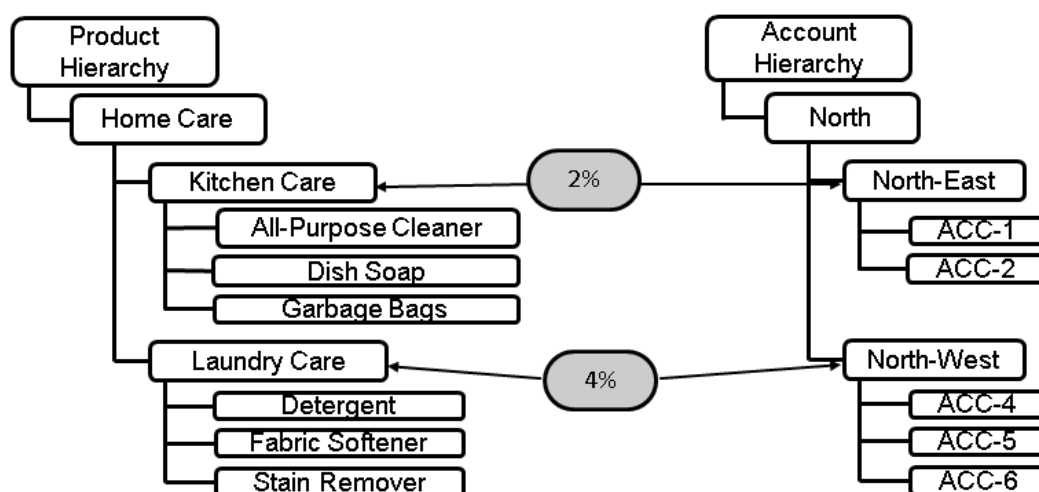

Dynamic funding rates defined for two different combinations of account and product hierarchy.

The following table illustrates the dynamic funding rates defined for two different combinations of account and product hierarchies:

Account	Product	Rate Type	Valid From	Valid To	Rate	Rate Unit
North-East	Kitchen Care	Growth	01.2014	52.2014	2	%
North-West	Laundry Care	Growth	01.2014	52.2014	4	%

A finance professional defines an additional rate of 1% at a higher level of the product and account hierarchy, for the *Home Care* and *North* nodes. The previously entered rates become rate exceptions, since they are defined at lower levels of the hierarchy. He is instructed to overwrite any rate exceptions with the new rate.
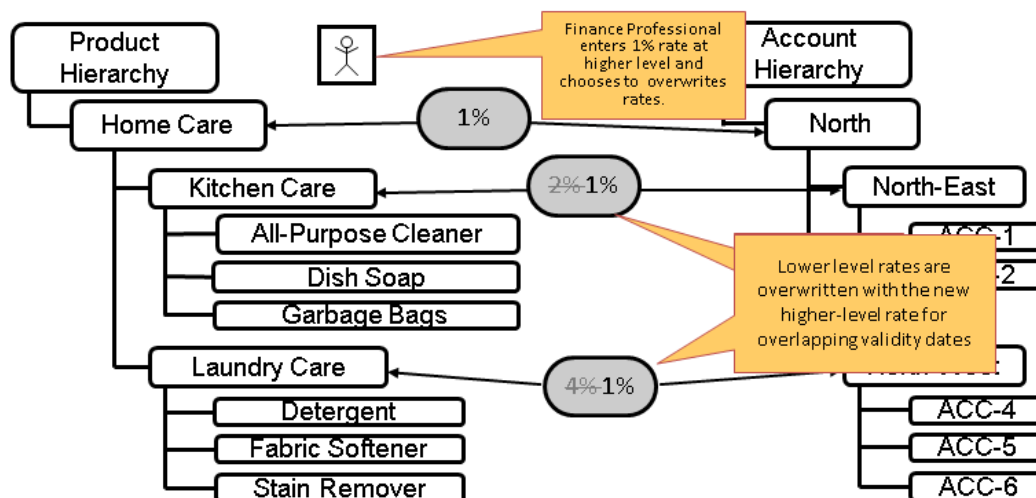
Rate changes when finance professionals choose to overwrite rates.

The following table illustrates the changes in the rates when a growth rate of 1% is defined at a higher level and the finance professional chooses to overwrite the rates:

> i Note
>
> When lower level rates are overwritten, the rate exception is deleted. The new rate is not stored for the account and product combination. The system determines the new rate for the budget calculation.

Account	Product	Rate Type	Valid From	Valid To	Rate	Rate Unit
North	Home Care	Growth	01.2014	52.2014	1	%
North-East	Kitchen Care	Growth	01.2014	52.2014	1	%
North-West	Laundry Care	Growth	01.2014	52.2014	1	%

More Information

10.4.2 Upload API for Dynamic Funding Rates

Use

This functionality works with the WebClient UI but not with SAP UI5.

The upload API allows you to mass create dynamic funding rates for a dynamic funding plan.

Features

- You use the `CL_CRM_FM_DF_RATE_UPLOAD` class that contains the `CREATE` method.
- All standard validity checks are performed on the master data and Customizing.
  For example, the uploaded rates must have valid rate types and dates.
- Valid rates are created and saved in the SAP Customer Relationship Management (SAP CRM) and SAP Business Warehouse (SAP BW) systems.
- Rates with errors are returned in an exported table, along with a log of error messages.
  Messages are added to the application log (`SLG1`) under the message class `CRM_FM_DF_RATE`.

Implementation Considerations

The following information about the parameters must be considered for rates:

- A rate can correspond either to an account ID or hierarchy ID, not both.
- A rate can correspond either to a product ID or product category ID, not both.
- Depending on the rate type selected, a rate can either be an amount or a percentage, not both.
- A rate can have a single validity date range (calendar week, calendar month, or fiscal period), not multiple.
- If a rate amount is passed, a currency must also be defined.

The API does not allow you to update existing rates with the same business key. For example, you cannot update rates with the same combination of account, product, rate type and validity. If there is an existing rate in the system that has the same business key, the rate that is being passed to the API is rejected.

Example

The following is an example of a code snippet of the API being called for the creation of two rates.

```
DATA lv_dfp_id         TYPE crm_df_dfp_external_id.
DATA ls_rate           TYPE crms_fm_df_rate_upload.
DATA lt_rate           TYPE crmt_fm_df_rate_upload.
DATA lt_rates_in_error TYPE crmt_fm_df_rate_upload.
DATA lv_success_count  TYPE i.
DATA lt_messages       TYPE bapiret2_t.

lv_dfp_id = 'DF-01234'.

ls_rate-account_id = 'BUPA_345'.
ls_rate-product_id = 'HT-1010'.
ls_rate-rate_type = 'GROW'.
ls_rate-rate_percent = '1.5'.
ls_rate-valid_from_cw = '23'.
ls_rate-valid_to_cw = '27'.

INSERT ls_rate INTO TABLE lt_rate.

ls_rate-account_hierarchy_id = 'BPHN_678'.
ls_rate-product_category_id = 'HT-2020'.
ls_rate-rate_type = 'BASE'.
ls_rate-rate_amount = '5'.
ls_rate-currency = 'USD'.
```

```
 ls_rate-valid_from_cw = '15'.
 ls_rate-valid_to_cw = '20'.

 INSERT ls_rate INTO TABLE lt_rate.

 CALL METHOD cl_crm_fm_df_rate_upload=>create
   EXPORTING
     iv_dfp_id          = lv_dfp_id
     it_rates           = lt_rate
   IMPORTING
     et_rates_in_error  = lt_rates_in_error
     ev_success_count   = lv_success_count
     et_messages        = lt_messages.
```

10.5 Performance Budget Calculation

Use

This functionality works with the WebClient UI but not with SAP UI5.

You use the *Dynamic Funding Posting* job to trigger the budget calculation process for one or more dynamic funding plans. This process results in posting performance budget amounts to funds management.

The budget calculation is performed in SAP Business Warehouse (SAP BW). The following process outlines the key steps of the budget calculation process once it is triggered by the batch job:

Step	Description	Additional Comments
1	Retrieves latest estimates	Stored in InfoProvider in SAP BW Latest estimates are either the planned or actual sales volume or revenue. You can calculate your latest estimates in SAP BW or any 3rd party system, and then load the values into SAP Business Warehouse (SAP BW). The system then uses the latest estimate values multiplied by the dynamic funding rates to calculate the performance budget. i Note • The system does not perform any conversion of unit of measure or of currencies when it calculates the performance budget. Ensure that your latest estimates are in the same unit of measure or currency of the rates in your dynamic funding plans. • Dynamic funding plans can be based on fiscal period or by calendar week. Dynamic funding rates are based on the time period of the dynamic funding plan. The latest estimates that are used to calculate the performance budget must also be in the same time period format. The system does not convert values from calendar week to fiscal period, for example.
2	Retrieves relevant rates for each combination of account hierarchy and product category node.	Stored in InfoProvider in SAP BW i Note Rates and latest estimates are determined based on the time dimension you are using for dynamic funding.

Step	Description	Additional Comments
3	Identifies which funds the performance budget is posted to	Funds are determined from the funds plan that is assigned to the dynamic funding plan.
4	Calculates the budget to post to the value categories	The budget calculation algorithm is used to calculate the performance budget that is posted to each fund.
5	Budget is posted to funds management in SAP Customer Relationship Management (SAP CRM).	The total performance budget for a fund is displayed in the fund checkbook.

Prerequisites

You have completed the settings for dynamic funding. For more information see the Configuration Guide for SAP Trade Promotion Planning and Management.

Features

- Definition of the time periods used for the budget calculation
  You can define the execution period of the budget calculation in Customizing. The budget calculation can be executed for the complete duration of the dynamic funding plan, from the current period to the end date of the dynamic funding plan, or from a defined number of periods before the current period until the end of the dynamic funding plan.
- Consideration of master data changes and validity periods
  The budget calculation process considers changes in account and product hierarchies. Additions, deletions, and changes to accounts and products are included in the budget calculation process, depending on the execution period you define for the dynamic funding posting batch job.
  The budget calculation process considers the validity dates of account hierarchies. Since product hierarchies do not have validity dates, the budget calculation batch job uses the product hierarchy that is valid at the time that the batch job is executed.
- Validation of the budget calculation process
  An audit trail is available for the budget calculation process for auditing and reporting purposes. The following information is recorded in an InfoProvider in SAP BW each time the budget calculation job is run:
  - Dynamic funding plan ID
  - Fund ID
  - Business partner ID
  - Account hierarchy
  - Product
  - Product category
  - Rate ID in SAP BW

- Dynamic funding rate type
- System date and time of the budget calculation batch job
- Currency of rates and calculated budget
- Sales unit of latest estimate volumes
- User name who ran the batch job
- Performance budget amount
- Budget calculation job ID
- Dynamic funding rate value
- Latest estimate volume
- Latest estimate amount
- Performance budget

Activities

You can run the `RCRM_FM_DF_POSTING_TO_FM` report as a background job in the CRM SAPUI5 client under ▶ *Funds Management* ❯ *Jobs* ❯ or from the *Schedule Background Job*(`SM36`) transaction.

Example

See the following examples for more information about budget calculation:

- Example: Budget Calculation with Multiple Rates and Funds [page 126]
- Example: Budget Calculation with Rate Exceptions [page 133]
- Example: Resolving Rates Using Different Hierarchy Types [page 135]

More Information

Posting Performance Budget to Funds [page 138]

Dynamic Funding Process [page 99]

10.5.1 Calculation of Earned Performance Budget

Use

This functionality works with the WebClient UI but not with SAP UI5.

You can choose to calculate earned performance budget in addition to performance budget. Earned performance budget is calculated by multiplying dynamic funding rates by actual sales amounts, as opposed

to latest estimates. The calculation for performance budget is still performed, and additionally the earned performance budget can be calculated and posted into funds management.

Prerequisites

You have made the following settings:

- You have chosen to calculate earned performance budget in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Dynamic Funding* ❯ *Budget Calculation* ❯ *Activate Calculation for Earned Performance Budget* ❯.

  > ℹ Note
  >
  > For each sales area you must identify that you want to calculate earned performance budget. Otherwise only performance budget is calculated.

- You have identified the key figure for the actual sales volumes in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Dynamic Funding* ❯ *Dynamic Funding Rates* ❯ *Map Rate Types to Key Figures* ❯.
- You have mapped the necessary application data from SAP CRM to BW InfoObjects in Customizing for *Customer Relationship Management* under ▶ *Trade Management* ❯ *Trade Promotion Planning and Management* ❯ *Dynamic Funding* ❯ *Budget Calculation* ❯ *Map CRM Application Data to BW InfoObjects* ❯. You have made an entry for the following application data: *Earned Performance Budget, Actual Volume*, and *Actual Amount*.

Features

The following features are available:

- Earned performance budget is calculated at the same time as the performance budget during the budget calculation batch job run.
- The *Dynamic Funding Posting* job displays a log of the earned performance budget that was calculated.
- Earned performance budget is posted to the fund checkbook in funds management to a new value category named *Earned Performance Budget*. For more information, see the Configuration Guide for SAP Trade Promotion Planning and Management.
- Fund postings generated from earned performance budget are visible in the fund postings section in the dynamic funding overview page and the funds overview page.
- Earned performance budget can be included in the availability control check (AVC) process.
  For example, you can set up an AVC profile that includes the *Earned Performance Budget* key figure to ensure that a claim is not allowed against the fund if the claimed amount is greater than the available budget. Available budget is equal to the following: *Budget* − *Performance Budget* + *Earned Performance Budget* − *Settled* or others.

10.5.2 Example: Budget Calculation with Multiple Rates and Funds

Use

The following example illustrates how the system calculates and posts performance budget when there are multiple rates and funds. This example shows that when there is a rate and a fund at the lowest level of the hierarchy, the system calculates the budget using the same rate for all of the combinations of accounts and products below this level. The example only applies to the WebClient UI and not SAP UI5.

> **i Note**
>
> To simplify this example, we ignore the time dimension. Normally the latest estimates and budget calculations are stored by the time dimension you have chosen in Customizing.
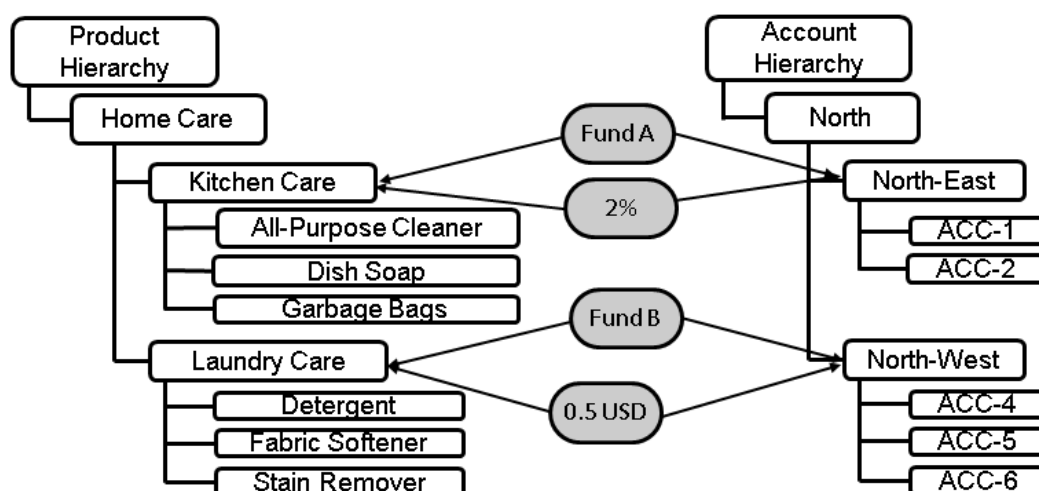
The following diagram illustrates that there are two funds with a rate defined at the same level as each fund.

The following table illustrates that for this example, there are 15 latest estimates, one for each combination of account and product at the same level of the hierarchy.

Account	Product	Latest Estimates
ACC-1	All-Purpose Cleaner	100
ACC-1	Dish Soap	50
ACC-1	Garbage Bags	200
ACC-2	All-Purpose Cleaner	400
ACC-2	Dish Soap	25
ACC-2	Garbage Bags	40

Account	Product	Latest Estimates
ACC-4	Detergent	300
ACC-4	Fabric Softener	25
ACC-4	Stain Remover	100
ACC-5	Detergent	125
ACC-5	Fabric Softener	50
ACC-5	Stain Remover	80
ACC-6	Detergent	600
ACC-6	Fabric Softener	70
ACC-6	Stain Remover	40

Result

When the budget calculation batch job is run, it uses the latest estimates, then determines the rate and the funds. The table below illustrates the results of the budget calculation process for this example:

- The system resolves the rate of 2% for the first 6 latest estimates because there is no rate defined specifically for their combination. For example, for the combination of *All-Purpose Cleaner* and *ACC-1* there is no rate defined. As the system moves up the hierarchy to each parent node, a rate of 2% is found for *Kitchen Care* and *North-East*. The system searches for a fund in the same manner. In this example, the fund to post the budget to is *Fund A*. The system calculates a total performance budget for this example of 16.3 for *Fund A*.
- The system resolves the rate of 0.5% for the last 9 latest estimates because there is no rate defined specifically for their combination. For example, for the combination of *Fabric Softener* and *ACC-6* there is no rate defined. As the system moves up the hierarchy to the parent node, it resolves the rate of 0.5% at the level of *Laundry Care* and *North-West*. The system searches for a fund in the same manner. In this example, the fund to post the budget to is *Fund B*. The system calculates a total performance budget for this example of 69.5 for *Fund B*.

Account	Product	Latest Estimates	Rates	Budget	Fund
ACC-1	All-Purpose Cleaner	100	2%	2	Fund A
ACC-1	Dish Soap	50	2%	1	Fund A
ACC-1	Garbage Bags	200	2%	4	Fund A

Account	Product	Latest Estimates	Rates	Budget	Fund
ACC-2	All-Purpose Cleaner	400	2%	8	Fund A
ACC-2	Dish Soap	25	2%	0.5	Fund A
ACC-2	Garbage Bags	40	2%	0.8	Fund A
Performance Budget Amount for Fund A				**16.3**	-
ACC-4	Detergent	300	0.05	15	Fund B
ACC-4	Fabric Softener	25	0.05	1.25	Fund B
ACC-4	Stain Remover	100	0.05	5	Fund B
ACC-5	Detergent	125	0.05	6.25	Fund B
ACC-5	Fabric Softener	50	0.05	2.5	Fund B
ACC-5	Stain Remover	80	0.05	4	Fund B
ACC-6	Detergent	600	0.05	30	Fund B
ACC-6	Fabric Softener	70	0.05	3.5	Fund B
ACC-6	Stain Remover	40	0.05	2	Fund B
Performance Budget Amount for Fund B				**69.5**	-

Example Audit Trail Records

The following table is a simplified example of the records that are stored in the InfoProvider defined for auditing purposes as a result of the above budget calculation process. There are two records added to the InfoProvider. The latest estimate and budget values are aggregated.

Account	Currency	Product Category	Rate Type	Fund ID	Budget	Rate Value	Latest Estimate
North-East	USD	Kitchen Care	Base	Fund A	16.3	2%	815
North-West	USD	Laundry Care	Match Competition	Fund B	69.5	0.5	1390

More Information

Example: Budget Calculation with Rate Exceptions [page 133]

Example: Resolving Rates Using Different Hierarchy Types [page 135]

10.5.3 Example: Budget Calculation including Territory-Based Funds

Use

The following example illustrates how the system calculates and posts performance budget when there are multiple rates and funds, and one of these funds is based on the territory attribute, instead of being based on a product and account attribute. The system decomposes the territory into its attributes, which are products and accounts. This example shows that the system can post budget to a territory-based fund that is calculated from multiple combinations of accounts and products, depending on what is assigned to the territory. You should not set up funds that have attributes that overlap. The example only applies to the WebClient UI and not SAP UI5.

> **i Note**
>
> To simplify this example, we ignore the time dimension. Normally the latest estimates and budget calculations are stored by the time dimension you have chosen in Customizing.
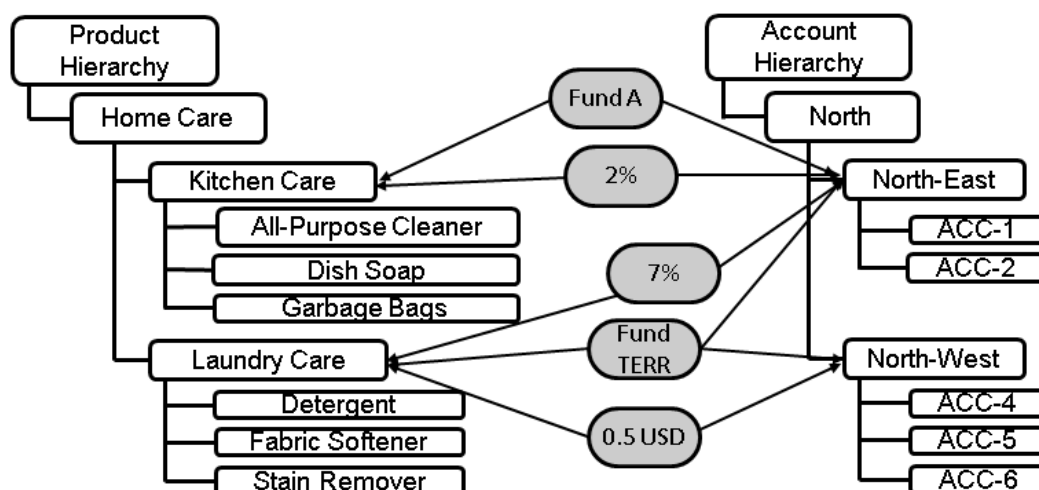
The following diagram illustrates that there are two funds with a rate defined at the same level as each fund. Fund TERR is a fund that is based on a territory that includes two accounts and one product.

The following table illustrates that for this example, there are 21 latest estimates that the system uses to calculate the performance budget. Latest estimates are defined for all possible combinations of accounts and products. The system determines how many latest estimates are considered when calculating the budget by identifying the fund and the rates and choosing only the combinations of accounts and products that are below them.

Account	Product	Latest Estimates
ACC-1	All-Purpose Cleaner	100
ACC-1	Dish Soap	50
ACC-1	Garbage Bags	200
ACC-2	All-Purpose Cleaner	400
ACC-2	Dish Soap	25
ACC-2	Garbage Bags	40
ACC-1	Detergent	175
ACC-1	Fabric Softener	50
ACC-1	Stain Remover	75
ACC-2	Detergent	60
ACC-2	Fabric Softener	25
ACC-2	Stain Remover	120
ACC-4	Detergent	300
ACC-4	Fabric Softener	25
ACC-4	Stain Remover	100
ACC-5	Detergent	125
ACC-5	Fabric Softener	50
ACC-5	Stain Remover	80
ACC-6	Detergent	600
ACC-6	Fabric Softener	70
ACC-6	Stain Remover	40

Result

When the budget calculation batch job is run, it retrieves the latest estimates, then determines the rate and the funds. The table below illustrates the results of the budget calculation process for this example:

- The system resolves the rate of 2% for the first 6 combinations because there is no rate defined specifically for their combination. For example, for the combination of *All-Purpose Cleaner* and *ACC-1* there

is no rate defined. As the system moves up the hierarchy to each parent node, a rate of 2% is found for *Kitchen Care* and *North-East*. The system searches for a fund in the same manner. The system calculates and posts a total performance budget of 16.3 for *Fund A*.

- The system resolves the rate of 7% for the next 6 combinations because there is a rate and a fund assigned to the *North-East* account hierarchy node and the *Laundry Care* product category node. The system calculates a performance budget of 35.35 for *Fund TERR*.
- The system resolves the rate of 0.5% for the last 9 combinations because there is no rate defined specifically for their combination. For example, for the combination of *Fabric Softener* and *ACC-6* there is no rate defined. As the system moves up the hierarchy to the parent node, it resolves the rate of 0.5% at the level of *Laundry Care* and *North-West*. The system searches for a fund in the same manner. The system calculates a performance budget of 69.5 for *Fund TERR*.
- The system combines the budget amounts for the same fund into a single budget posting. In this example, the budget posting amount for *Fund TERR* is 104.85.

Account	Product	Latest Estimates	Rate	Budget	Fund
ACC-1	All-Purpose Cleaner	100	2%	2	Fund A
ACC-1	Dish Soap	50	2%	1	Fund A
ACC-1	Garbage Bags	200	2%	4	Fund A
ACC-2	All-Purpose Cleaner	400	2%	8	Fund A
ACC-2	Dish Soap	25	2%	0.5	Fund A
ACC-2	Garbage Bags	40	2%	0.8	Fund A
Performance Budget Amount for Fund A				**16.3**	-
ACC-1	Detergent	175	7%	12.25	Fund TERR
ACC-1	Fabric Softener	50	7%	3.5	Fund TERR
ACC-1	Stain Remover	75	7%	5.25	Fund TERR
ACC-2	Detergent	60	7%	4.2	Fund TERR
ACC-2	Fabric Softener	25	7%	1.75	Fund TERR
ACC-2	Stain Remover	120	7%	8.4	Fund TERR
Performance Budget Amount for Fund TERR with Rate 7%				**35.35**	-
ACC-4	Detergent	300	0.05	15	Fund TERR
ACC-4	Fabric Softener	25	0.05	1.25	Fund TERR
ACC-4	Stain Remover	100	0.05	5	Fund TERR

Account	Product	Latest Estimates	Rate	Budget	Fund
ACC-5	Detergent	125	0.05	6.25	Fund TERR
ACC-5	Fabric Softener	50	0.05	2.5	Fund TERR
ACC-5	Stain Remover	80	0.05	4	Fund TERR
ACC-6	Detergent	600	0.05	30	Fund TERR
ACC-6	Fabric Softener	70	0.05	3.5	Fund TERR
ACC-6	Stain Remover	40	0.05	2	Fund TERR
Performance Budget Amount for Fund TERR with Rate 0.05				**69.5**	-

Example Audit Trail Records

The following table is a simplified example of the records that are stored in the InfoProvider defined for auditing purposes as a result of the above budget calculation process. There are three records added to the InfoProvider because three different rates were used to calculate the performance budget. The latest estimate and budget values are aggregated.

Account	Currency	Product Category	Rate Type	Fund ID	Budget	Rate Value	Latest Estimate
North-East	USD	Kitchen Care	Base	Fund A	16.3	2%	815
North-East	USD	Laundry Care	Growth	Fund TERR	35.35	7%	505
North-West	USD	Laundry Care	Match Competition	Fund TERR	69.5	0.5	1390

More Information

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10.5.4 Example: Budget Calculation with Rate Exceptions

Use

The following example illustrates how the system calculates and posts performance budget when there are rate exceptions. A rate exception is when a different rate is defined at a lower level than at the higher level. The example only applies to the WebClient UI and not SAP UI5.

> **i Note**
>
> To simplify this example, we ignore the time dimension. Normally the latest estimates and budget calculations are stored by the time dimension you have chosen in Customizing.
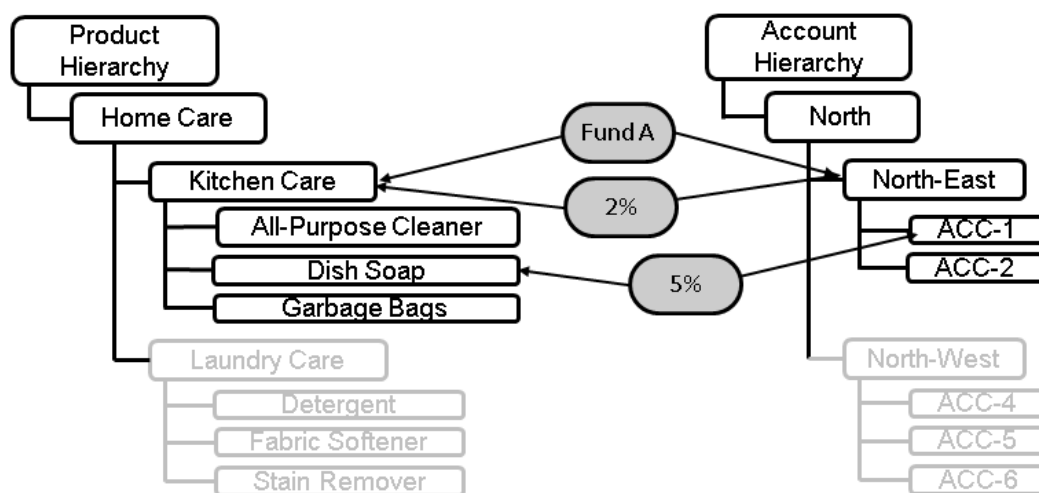
A rate exception is defined

The following table illustrates that for this example, there are 6 latest estimates, one for each combination of account and product at the *Kitchen Care* and *North-East* level of the hierarchy:

> **i Note**
>
> In this example we are not including the *Laundry Care* and *North-West* hierarchies.

Account	Product	Latest Estimate
ACC-1	All-Purpose Cleaner	100
ACC-1	Dish Soap	50
ACC-1	Garbage Bags	200
ACC-2	All-Purpose Cleaner	400
ACC-2	Dish Soap	25

Account	Product	Latest Estimate
ACC-2	Garbage Bags	40

Result

In this example, the system resolves the rate of 2% for all of the latest estimates except for the combination of *Dish Soap* and *ACC-1*, because there is a rate of 5% defined specifically for that combination of account and product category. The system determines the fund to be *Fund A*.

The rate multiplied by the latest estimate provides the budget. The budget for each combination is calculated and then aggregated to calculate the total performance budget for a fund. The system calculates a total performance budget of 17.8 for *Fund A*.

Account	Product	Latest Estimates	Rate	Budget	Fund
ACC-1	All-Purpose Cleaner	100	2%	2	Fund A
ACC-1	**Dish Soap**	**50**	**5%**	**2.5**	Fund A
ACC-1	Garbage Bags	200	2%	4	Fund A
ACC-2	All-Purpose Cleaner	400	2%	8	Fund A
ACC-2	Dish Soap	25	2%	0.5	Fund A
ACC-2	Garbage Bags	40	2%	0.8	Fund A
Performance Budget Amount for Fund A				**17.8**	-

Example Audit Trail Records

The following table is a simplified example of the records that are stored in the InfoProvider defined for auditing purposes as a result of the above budget calculation process. There are two records added to the InfoProvider because there are two different rate values. The latest estimate and budget values are aggregated.

Account	Currency	Product Category	Rate Type	Fund ID	Budget	Rate Value	Latest Estimate
North-East	USD	Kitchen Care	Base	Fund A	15.3	2%	765
North-East	USD	Kitchen Care	Base	Fund A	2.5	5%	50

More Information

# 10.5.5 Example: Resolving Rates Using Different Hierarchy Types

Use

The following example illustrates how the system resolves the rate to use for the budget calculation depending on the setting made in the Customizing activity *Assign Priority Hierarchy for Rates Resolution*. It only applies to the WebClient UI and not SAP UI5.

> **i Note**
>
> To simplify this example, we ignore the time dimension. Normally the latest estimates and budget calculations are stored by the time dimension you have chosen in Customizing.

The following diagram illustrates that the system can resolve different rates during the budget calculation process, depending on the Customizing setting:
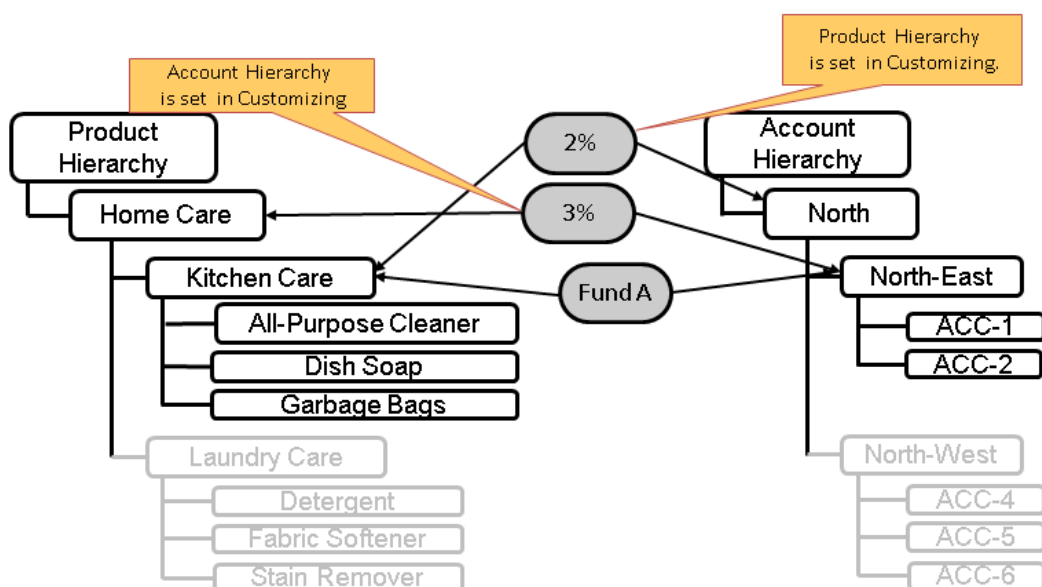
Different rates based on Customizing setting

Example Scenario

In this example, we look at how the system searches for a fund and a rate to use for the budget calculation for the combination of *All Purpose Cleaners* and *ACC-1*. Since there is no fund or rate defined for that exact combination, the system must move up the hierarchies to resolve the fund and rate to use.

> **i Note**
>
> In this example we are not including the *Laundry Care* and *North-West* hierarchies.

Finding the Fund

Since there is no fund defined for *All Purpose Cleaner* and *ACC-1*, the system moves up to the parent nodes and finds *Fund A* at *Kitchen Care* and *North-East*.

Product Hierarchy Set as Priority in Customizing

When the product hierarchy is set as the priority hierarchy in Customizing, the system moves up the account hierarchy to search for the first rate that is relevant for the parent nodes. Since there is no rate defined for *Kitchen Care* and *North-East*, the system moves up to the next parent node in the account hierarchy, and finds the rate of 2% for the combination of *North* and *Kitchen-Care*.

The following table provides the latest estimates for the combinations of products and accounts.

Account	Product	Latest Estimates
ACC-1	All-Purpose Cleaner	100
ACC-1	Dish Soap	50
ACC-1	Garbage Bags	200
ACC-2	All-Purpose Cleaner	400
ACC-2	Dish Soap	25
ACC-2	Garbage Bags	40

For the 6 latest estimates, a rate of 2% is determined. The rate multiplied by the latest estimate provides the budget. The system calculates a total performance budget of 16.3 for *Fund A* when the priority hierarchy is set to *Product* in Customizing.

Account	Product	Latest Estimates	Rate	Budget	Fund
ACC-1	All-Purpose Cleaner	100	2%	2	Fund A
ACC-1	Dish Soap	50	2%	1	Fund A
ACC-1	Garbage Bags	200	2%	4	Fund A
ACC-2	All-Purpose Cleaner	400	2%	8	Fund A
ACC-2	Dish Soap	25	2%	0.5	Fund A

Account	Product	Latest Estimates	Rate	Budget	Fund
ACC-2	Garbage Bags	40	2%	0.8	Fund A
Performance Budget Amount for Fund A				**16.3**	-

Account Hierarchy Set as Priority in Customizing

When the account hierarchy is set as the priority hierarchy in Customizing, the system moves up the product hierarchy to search for the first rate that is relevant for the parent nodes. Since there is no rate defined for *Kitchen Care* and *North-East*, the system moves up to the next parent node in the product hierarchy, and finds the rate of 3% for the combination of *North-East* and *Home Care*.

Using the same latest estimates as above, a rate of 3% is determined. The rate multiplied by the latest estimate provides the budget. The system calculates a total performance budget of 24.45 for *Fund A* when the priority hierarchy is set to *Account* in Customizing.

Account	Product	Latest Estimates	Rate	Budget	Fund
ACC-1	All-Purpose Cleaner	100	3%	3	Fund A
ACC-1	Dish Soap	50	3%	1.5	Fund A
ACC-1	Garbage Bags	200	3%	6	Fund A
ACC-2	All-Purpose Cleaner	400	3%	12	Fund A
ACC-2	Dish Soap	25	3%	0.75	Fund A
ACC-2	Garbage Bags	40	3%	1.2	Fund A
Performance Budget Amount for Fund A				**24.45**	-

Result

Example Audit Trail Records

The following table is a simplified example of the records that are stored in the InfoProvider defined for auditing purposes as a result of the above budget calculation process. The latest estimate and budget values are aggregated. There are 2 possible results, depending on the Customizing setting you choose. Only 1 record will be added to the InfoProvider for this example.

Product Hierarchy Set as Priority

Account	Currency	Product Cat- egory	Rate Type	Fund ID	Budget	Rate Value	Latest Esti- mate
North-East	USD	Kitchen Care	Base	Fund A	16.3	2%	815

Account Hierarchy Set as Priority

Account	Currency	Product Cat- egory	Rate Type	Fund ID	Budget	Rate Value	Latest Esti- mate
North-East	USD	Kitchen Care	Base	Fund A	24.45	3%	815

More Information

Example: Budget Calculation with Multiple Rates and Funds [page 126]

Example: Budget Calculation with Rate Exceptions [page 133]

Performance Budget Calculation [page 121]

10.5.6 Posting Performance Budget to Funds

Use

This functionality works with the WebClient UI but not with SAP UI5. The following diagram illustrates the fund posting process.
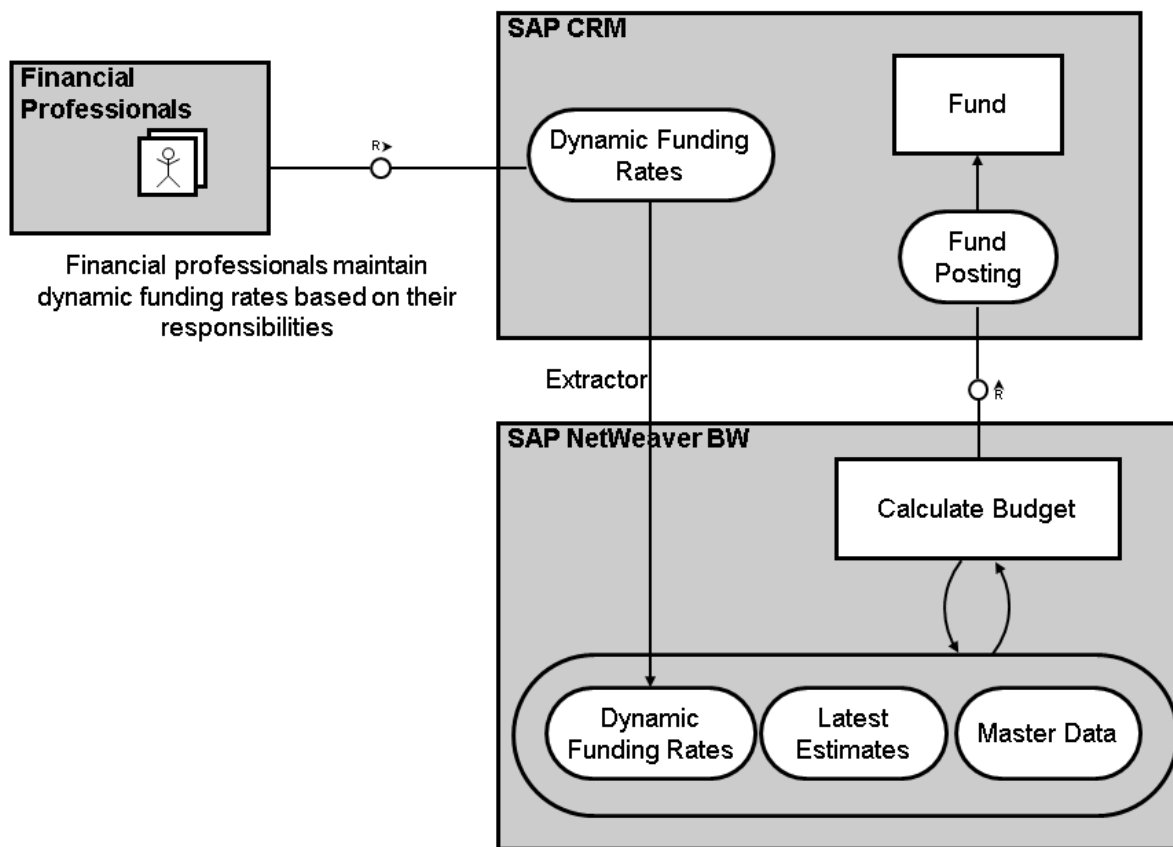
Fund Posting Process

Prerequisites

Funds must be in the *Preliminary* or *Released* status to allow fund postings.

Funds must be based on the following attributes:

- Account or account hierarchy node and product or product category
- Territory

Features

- Delta fund postings
  The system posts the budget amounts as deltas by deducting the current performance budget amount from the new performance budget amount that is calculated when the batch job is run. For example, the performance budget for a fund is USD 10000. You run the budget calculation batch job again at a later point in time which results in new performance budget of USD 15000. This results in a fund posting of USD 5000 to adjust the performance budget to USD 15000.
- Visibility of budget amounts in funds checkbook
  After the performance budget is posted to the funds, it is visible in the fund checkbook in the *Performance Budget* value category. The performance budget amount affects the *Budget* value category.

- Visibility of fund postings
  The fund postings created when performance budget amounts are posted to the fund can be viewed in the *Performance Budget* section. To create a custom configuration of the fund view to include the performance budget section, see the Configuration Guide for SAP Trade Promotion Planning and Management.
- Dynamic funding plan ID as reference ID
  The dynamic funding plan ID is stored as a reference ID for each fund posting that is generated from the dynamic funding posting batch job.
- Budget consumption controls
  You can use an availability control (AVC) profile for each sales area to ensure that budget consumption limits are not broken when budget amounts are posted to funds.
- No approval process for fund postings
  There is no approval process using status management when posting performance budget to funds. The system posts budget directly to funds.

More Information

Performance Budget Calculation [page 121]

10.5.7 Adding Fixed Budget to a Fund

Use

This functionality works with the WebClient UI but not with SAP UI5.

In addition to using the budget calculation process to post performance budget to a fund, you can also add a fixed budget amount to a fund from within a dynamic funding plan. This budget amount is added to the *Budget* value category and is displayed in the funds checkbook.

Activities

In the *Rates* section, choose the *Add Fixed Budget* pushbutton to create a budget posting and add a fixed amount of budget to a fund.

For more information about budget postings, see SAP Library on SAP Help Portal at http://help.sap.com/crm
 ⤴ ▶ *Marketing* ❭ *Trade Promotion Management* ❭ *Funds Management* ❭ *Budget Posting* ❭ *Budget Posting Creation* ❭ .

More Information

Dynamic Funding [page 97]

10.6 Analytics for Dynamic Funding

10.6.1 Dynamic Funding Plan Attributes

DataSource Attributes `0CRM_FM_DF_DFP_ATTR`

Use

This DataSource is used to extract the attributes from dynamic funding plans. The attributes are loaded into the *Dynamic Funding Plan GUID* (`0DFP_PLGUID`) characteristic in SAP Business Warehouse (SAP BW).

Technical Data

Application Component	Master Data for CRM Funds Management (0CRM_FM-IO)
Exchange Available as of Release	SAP Accelerated Trade Promotion Planning 2.0 SP08
Shipment	N/A
Content Versions	Content Version
RemoteCube-Capable	No
Delta-Capable	No
Extraction from Archives	No
Verifiable	No

Data Modeling

Fields of Origin for the Extraction Structure

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
CLIENT	Client	–	–
GUID	Dynamic Funding Plan GUID	–	–

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
EXTERNAL_ID	External ID of Dynamic Funding Plan	–	–
FUND_PLAN_ID	Funds Plan ID	–	–
SALES_ORG	Sales Organization ID	–	–
DIVISION	Division	–	–
DIS_CHANNEL	Distribution Channel	–	–
CURRENCY	Currency	–	–
FUND_PLAN_GUIDE	Funds Plan GUID	–	–
STSMA	Status Profile	–	–
VALID_FROM_CW	Calendar Week for Dynamic Funding	–	–
VALID_TO_CW	Calendar Week for Dynamic Funding	–	–
VALID_FROM_FP	Dynamic Funding Fiscal Year Period	–	–
VALID_TO_FP	Dynamic Funding Fiscal Year Period	–	–
FISCAL_VARIANT	Dynamic Funding Fiscal Year Variant	–	–
OBJECT_TYPE	Object Type in Project Planning	–	–
CREATED_BY	Name of Person Who Created Object	–	–
CREATED_ON	Date on which object was last changed	–	–
CHANGED_BY	Name of Person Who Changed Object	–	–
CHANGED_ON	Date on which object was last changed	–	–
.INCLUDE	Extension Include - Dynamic Funding Plan Header	–	–
DF_DFP_HEADER	Dummy function in length 1	–	–

10.6.2 Dynamic Funding Plan Text

DataSource Texts 0CRM_FM_DF_DFP_TEXT

Use

This DataSource is used to extract the text for the dynamic funding plan texts.

Technical Data

Application Component	Master Data for CRM Funds Management (0CRM_FM-IO)
Exchange Available as of Release	SAP Accelerated Trade Promotion Planning 2.0 SP08
Shipment	N/A
Content Versions	Content Version
RemoteCube-Capable	No
Delta-Capable	No
Extraction from Archives	No
Verifiable	No

Data Modeling

Fields of Origin for the Extraction Structure

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
CLIENT	Client	CGPL_PROJECT	CLIENT
GUID	Project Planning: 16 Character GUID for Projects	CGPL_PROJECT	GUID
LANGU	Language Key	–	–
TEXT1	Language-Dependent Short Text	–	–

10.6.3 Dynamic Funding Plan - Rate Types Texts

DataSource Texts `0CRM_FM_DF_RATETY_TEXT`

Use

This DataSource is used to extract the text for the dynamic funding rate types for dynamic funding. The attributes are loaded into the *Rate Type* (`0DFP_RATETY`) characteristic in SAP Business Warehouse (SAP BW).

Technical Data

Application Component	Master Data for CRM Funds Management (0CRM_FM-IO)
Exchange Available as of Release	SAP Accelerated Trade Promotion Planning 2.0 SP08
Shipment	N/A
Content Versions	Content Version
RemoteCube-Capable	No
Delta-Capable	No
Extraction from Archives	No
Verifiable	No

Data Modeling

Fields of Origin for the Extraction Structure

Fields in the Extraction Structure	Description of the Field in the Extraction Structure	Table of Origin	Field in the Table of Origin
CLIENT	Client	CRMC_FM_DF_RATYT	CLIENT
LANGU	Language Key	CRMC_FM_DF_RATYT	LANGU
RATE_TYPE	Rate Type	CRMC_FM_DF_RATYT	RATE_TYPE
RATE_TYPE_DESCR	Rate Type Description	CRMC_FM_DF_RATYT	RATE_TYPE_DESCR

11 Glossary

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

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

Either search for a specific term or choose *Advanced Search* to search for all terms in the following components that are relevant to SAP Trade Promotion Planning and Management:

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

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