



Siebel Consumer Goods Guide

Siebel Innovation Pack 2015

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Contents

Chapter 1: What's New in This Release

Chapter 2: Consumer Goods Overview

- About Siebel Consumer Goods 15
- Business Solutions for Siebel Business Applications 15
- Business Functions of Screens 19
- About the Home Screen 22

Chapter 3: Getting Started

- Other Guides for Administrative Setup Tasks 25
- Siebel Consumer Goods Administrative Setup Tasks 25
- Selected Setup Procedures 27
 - Creating Periods 28
 - Creating Values for the Period Type List of Values 28
 - Setting Up Siebel Workflow Processes for Consumer Goods 29

Chapter 4: Managing Accounts

- About Accounts 33
- Scenario for Setting Up and Maintaining Accounts 34
- Viewing Account Plan Status 35
- Process of Managing Accounts 37
- Creating or Modifying Accounts 38
- Changing the Prices of Individual Line Items 40
- Updating Product Price and Cost 40
- Deleting Accounts 41
- Setting Up Account Hierarchies 41
- Profiling Accounts 42
- Creating Addresses for Accounts 43
- Removing Yourself from Account Teams (End User) 43

Associating Activities with Accounts (End User) 44
Associating Contacts with Accounts (End User) 45
Adding Merchandising Locations to Accounts (End User) 45

Chapter 5: Products

About Catalog and Product Administration for Consumer Goods 47
About Catalog-Category Hierarchies 47
Scenario for Setting Up and Managing Products 48
Process of Managing Products 49
Defining Products 50
Associating Multiple Accounts with Products 52
Defining Product Lines 52
Using the Product Explorer (End User) 53

Chapter 6: Product Distribution

About Controlling Product Distribution 55
Scenario for Managing Product Distribution 57
About Creating and Modifying Distribution Lists 58
Process of Managing Product Distribution 60
Creating Distribution Codes 60
Creating Distribution Lists 61
Amending Distribution Lists 63
Copying Distribution Lists 64
Deleting Products from Distribution Lists 65
Setting Up Account Channel Values 65
Assigning Product Categories to Account Catalogs 66
Viewing and Modifying Distribution List Products (End User) 66
Viewing and Modifying Distribution List Categories (End User) 68
Reviewing Account Catalogs (End User) 69
Creating Buying Groups (End User) 70
Associating Sources of Supply with Accounts (End User) 71
Associating Sources of Supply with Products (End User) 72

Associating Account Products with Merchandising Locations (End User)	73
About Configuring Product Distribution	73
Specialized Methods Invoked in Product Distribution	74
Apply Button for an Authorized Distribution List	75

Chapter 7: Sales Volume Planning

About Sales Volume Planning	77
About the SVP Aggregate Action	80
Scenario for Using Sales Volume Planning	81
Roadmap for Sales Volume Planning	81
Process of Setting Up Category-Product Hierarchies	82
Setting Up Account Hierarchies	82
Creating Category-Product Hierarchies	82
Associating Products with Categories	84
Acquiring Categories	84
Deleting Products and Categories	85
Process of Defining SVP Hierarchies	85
Manually Associating Categories with Accounts	86
Manually Associating Subcategories with Accounts	86
Modifying Account-Category Hierarchies	87
Deleting Account-Category Hierarchies	87
Performing the Initial Aggregation	88
Running Aggregation Processing in Parallel	89
Populating Locks	91
Process of Establishing Baseline Basis Quantities	91
Generating Baseline Basis Quantities for Existing Products	92
Generating Baseline Basis Quantities for New Products	93
Precalculating Adjusted Baseline Basis Quantities	94
Copying Baseline Information to Other Fields	95
Manually Entering SVP Data	97
Process of Performing Ongoing SVP Administrative Tasks	97
Creating SVP Periods	98
Importing or Copying SVP Data	98
Resetting Account and Category Levels	98
Performing Periodic Aggregations	99
Allocating Changes Down Multiple Levels of the Account Hierarchy	99
Resetting SVP Hierarchy Levels	100

- Resetting SVP Hierarchy Locks 100
- Viewing SVP Data (End User) 100
- Skipping SVP Source Data (End User) 101
- Locking and Modifying SVP Data (End User) 102
- About SVP Algorithms 104
- About Category and Account Level Allocation 105
- About Number Handling and Percentage-Basis Calculations 106
- About Configuring Sales Volume Planning 106
- Configuring Sales Volume Planning 108
 - Modifying the SVP Business Service 109
 - Configuring SVP Category Aggregation and Mass Change 109

Chapter 8: Trade Promotions

- About Trade Promotions 113
- Scenario for Setting Up and Carrying Out Trade Promotions 114
- Viewing Account Promotion Details 115
- Roadmap for Managing Trade Promotions 115
- Process of Managing Corporate Promotions (End User) 116
 - Creating Corporate Promotions 116
 - Adding Categories to Corporate Promotions 122
 - Adding Products to Corporate Promotions 124
 - Adding Attachments to Corporate Promotions 126
 - Attaching Literature to Corporate Promotions 127
 - Creating Account Promotions from Corporate Promotions 127
 - Viewing Performance Data for Account Promotions in Corporate Promotions 128
- Creating High-Level Promotions for Account Promotions (End User) 129
- Process of Managing Plans for Account Promotions (End User) 130
 - Creating Plans for Account Promotions 131
 - Creating Default Values for Plans 134
 - Adding Attachments to Plans 135
 - Viewing Calendars for Plans 136
 - Viewing the Audit Trail for Plans 136
- Process of Managing Account Promotions (End User) 136
 - Creating Account Promotions 137
 - Adding Categories to Account Promotions 141
 - Adding Products to Account Promotions 143

Associating Baseline and Shipment Data with Promoted Products	144
Allocating Field Values in Account Promotions	149
Transferring Incremental Volumes for Account Promotions to SVP	150
Associating Objectives with Account Promotions	151
Adding Attachments to Account Promotions	151
Attaching Literature to Account Promotions	152
Viewing Calendars for Account Promotions	152
Viewing the Audit Trail for Account Promotions	153
Process of Simulating High-Level Promotions and Account Promotions (End User)	153
Importing and Copying Lift Factors	154
Simulating the Results for High-Level Promotions for Account Promotions	155
Simulating the Results for Account Promotions	156
About What-If Scenarios at the Account Plan Level	159
Process of Managing Deals for Account Promotions (End User)	160
Creating Deals for Account Promotions	160
Creating Deals for Promoted Categories	161
Creating Deals for Promoted Products	161
Process of Managing Phasing for Account Promotions (End User)	162
Enabling Phasing for Account Promotions	162
Phasing Promoted Categories	164
Recalculating Phasing Results for Categories	165
Phasing Promoted Products	166
Recalculating Phasing Results for Products	167
Finalizing Account Promotions	167
About Some Fields for Promotions	168
General Fields in Promotions	168
Fields for Details About Promotional Tactics	170
Fields for Volume and Revenue in Promotions	171
Fields for Spending in Promotions	175
Fields for Details About Deals	178
About Phasing Results	181
About Configuring Trade Promotions	183
Configuring Trade Promotions	189
Retaining Account Promotions When Deleting Corporate Promotions	190
Changing the Visibility Filter for Team Members	190
Configuring Available Plans for Account Promotions	191
Changing Dates for Baseline Data Retrieval	192
Configuring the Spread Button	192

Configuring the Forecast Button 194

Configuring the Update Button 195

Planning by Using Different Units of Measure 195

Chapter 9: Trade Funds

About Trade Funds 199

Scenario for Managing Funds for Account Promotions 200

Process of Managing Trade Funds 200

Creating Funds 201

Creating Fixed Funds 201

Creating Accrual Funds 203

Adding Child Funds to Parent Funds 208

Adjusting Funds 209

Reviewing Deals 209

Reviewing Fund Payments 211

Transferring Fund Amounts Without Constraint 211

Reconciling Deals 212

Closing Deals 212

Forecasting Accrual Funds (End User) 212

Transferring Fund Amounts with Constraint (End User) 214

Approving Fund Transfers (End User) 214

Submitting Payments for Funds (End User) 215

Reviewing Funds (End User) 216

About Configuring Trade Funds 217

About Rolling Up Paid Payments 217

About Consumer Goods Payment Business Service 218

Funds Configuration for Enterprise Integration Manager 219

Specialized Methods Invoked in Funds 220

User Properties for Funds 220

Configuring Trade Funds 221

Chapter 10: Deductions and Claims

About Deductions 224

Scenarios for Managing and Resolving Deductions 224

Scenario for Managing Deductions for Account Promotions 225

Scenario for Managing HQ Deductions	225
Process of Managing Account Promotion Deductions	226
Creating and Editing Deductions	227
Adding Literature to Deductions	228
Splitting Deductions	229
Creating Credit Memos	229
Analyzing Workloads	230
Creating Activity Templates	231
Reviewing Deductions (End User)	231
Viewing Account Deductions (End User)	232
Creating Deduction Activities (End User)	232
Creating Deduction Activity Plans (End User)	233
Associating and Modifying Invoices (End User)	233
Creating Deduction Attachments (End User)	233
Creating Deduction Notes (End User)	234
Reviewing Account Credit Memos (End User)	234
Reviewing Deduction Literature (End User)	235
Resolving Deductions (End User)	235
About Status Stage Behavior in Deduction Resolutions	239
About Claims	241
Process of Managing Claims	241
Creating and Editing Claims	241
Adding Attachments to Claims	241
Resolving Claims	242
About Configuring Deductions and Claims	242
Chapter 11: Objectives	
About Objectives	243
Scenario for Creating and Fulfilling Sales Objectives	244
Process of Working with Objectives	244
Creating Objectives	245
Creating Recommended Activities for Objectives	246

Targeting Accounts to Objectives	248
Creating Child Objectives	249
Changing the Dates for Objectives	249
Applying Objectives	249
Scheduling Store Visits	250
Reviewing Objectives (End User)	250
Changing the Status of Activities (End User)	251
Checking the Status of Objectives (End User)	251
About Configuring Objectives	252

Chapter 12: Retail Execution

About Retail Execution	255
Scenario for Retail Execution	256
Roadmap for Performing Retail Execution	256
Preparing for Retail Visits (End User)	257
Planning Retail Visits (End User)	257
Starting Retail Visits (End User)	259
Process of Performing Retail Activities (End User)	259
Performing Merchandising Audits	259
Performing Retail Assessments	260
Exchanging Products Between Sales Representatives	261
Performing Retail Audits	262
Reviewing Store Conditions	263
Creating Retail Activities (End User)	263
Reviewing Account Information (End User)	264
Ending Retail Visits (End User)	265
About Configuring Retail Execution	266

Chapter 13: Routes

About Routes	267
Scenarios for Creating and Using Routes	267
Scenario for Creating Routes	268
Scenario for Creating Routes for Sales Representatives	268
Scenario for Creating Routes That Change Frequently	269

Process of Creating and Using Routes	269
Creating Routes (End User)	269
Adding Accounts to Routes (End User)	270
Assigning Target Lists to Routes (End User)	272
Using Routes to Schedule Visits (End User)	273
About Configuring Routes	274

Chapter 14: Account Targeting

About Account Targeting	275
Scenarios for Account Targeting	276
Scenario for Creating Target Lists for Sales Representatives	276
Scenario for Creating Target Lists	277
Process of Account Targeting	278
Making Predefined Queries Public	278
Deleting Saved Predefined Queries	279
Creating Target Lists (End User)	279
Saving Target Lists (End User)	282

Chapter 15: Inventory and Order Management

About Inventory and Order Management	283
Scenario for Managing Inventory and Orders	284
Process of Managing Inventory and Orders	285
Associating Assets with Inventory Locations (End User)	285
Recording Van Information (End User)	286
Verifying Van Inventory (End User)	286
Reviewing Billings (End User)	287
Taking Retail Orders (End User)	288
Recording Deposits (End User)	289

Index

1

What's New in This Release

What's New in Siebel Consumer Goods Guide, Siebel Innovation Pack 2015

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

NOTE: Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

2

Consumer Goods Overview

This chapter provides a brief overview of the Consumer Goods application. Topics include:

- [About Siebel Consumer Goods on page 1](#)
- [Business Solutions for Siebel Business Applications on page 1](#)
- [Business Functions of Screens on page 5](#)
- [About the Home Screen on page 8](#)

About Siebel Consumer Goods

Oracle's Siebel Consumer Goods is a multichannel application designed for the consumer goods industry. These products help consumer goods manufacturers manage relationships across the entire demand chain. Marketing, sales, and customer service applications are fully integrated and are designed to manage the various complex interactions and relationships between brand owners, their partners (including brokers and distributors), their customers, and the end consumer. Siebel Consumer Goods provides customer, partner, and employee relationship management solutions for companies in the following industry segments:

- Food, beverage, and tobacco
- Over-the-counter (OTC) drugs and health-and-beauty aids (HBA)
- Household goods
- Consumer media
- Appliances and electronics

Business Solutions for Siebel Business Applications

You can purchase many Siebel Business Applications modules to use with Siebel Consumer Goods. You can also purchase modules specific to Siebel Consumer Goods to provide enhanced functionality for various business processes. For information about the modules that you can use with the Siebel Consumer Goods application, contact your Oracle sales representative or local Oracle Sales Office.

Table 2 describes how the Siebel Business Applications can provide solutions for business issues. These solutions include optional features and modules.

Table 2. Siebel Business Applications for Key Business Issues

Business Issue	Siebel Business Applications Solutions
Account management	<ul style="list-style-type: none"> ■ Management of accounts through multilevel account hierarchies based on complex account relationships ■ Management of account and customer information through profiles
Agreement management	<ul style="list-style-type: none"> ■ Automated production of agreements from accepted quotes ■ Coordination of pricing information ■ Assignment of standard terms, conditions, and features ■ Tracking to make sure that agreements and service entitlements are fulfilled
Analytics	<ul style="list-style-type: none"> ■ Encapsulation of best practices across Siebel Business Applications ■ Self-service access to intelligence across business applications ■ Proactive intelligence for trade funds, trade promotion evaluation, sales performance, and retail execution ■ Use of existing enterprise data sources
Audit trail	<ul style="list-style-type: none"> ■ Creation of a history of all the changes that were made to various kinds of information ■ Record of who accessed an item, the operation performed, when it was performed, and how the value was changed ■ Security maintenance, examination of the history for a record, and modification documentation for future analysis and record keeping
Billing management	<ul style="list-style-type: none"> ■ Integration with back-office billing systems ■ Query and display of billing information ■ Management of payment information, payment plans, bill adjustments, and bill profiles
Brand management	<ul style="list-style-type: none"> ■ Management of brands through account distribution lists and personalization attributes ■ Dynamic matching of accounts and products to make sure that accounts get the appropriate products

Table 2. Siebel Business Applications for Key Business Issues

Business Issue	Siebel Business Applications Solutions
Call center optimization	<ul style="list-style-type: none"> ■ Single desktop to manage multiple types of customer interactions ■ Computer telephony integration (CTI) to connect callers with the most qualified agent ■ Integrated Web and Interactive Voice Response (IVR) self-service functionality
Credit management	<ul style="list-style-type: none"> ■ Integration with a back-office credit system ■ Management of credit alerts ■ Notification of customers who are delinquent in payments
Customer acquisition	<ul style="list-style-type: none"> ■ Analytical tools for segmenting prospects and developing targeted campaigns ■ Campaign management tools for developing and executing multichannel campaigns ■ Prebuilt performance analysis tools ■ Call scripting, which delivers messages that use proactive selling and retention techniques during customer contacts ■ Intelligent territory assignment, lead scoring, and routing
Customer and partner applications	<ul style="list-style-type: none"> ■ eService, which allows your customers to create and track their trouble tickets and service requests and to search for answers to frequently asked questions (FAQs) through the Internet ■ eSales, which allows your customers to browse through your company's products and services, customize them, and purchase them through the Internet
Customer retention	<ul style="list-style-type: none"> ■ Comprehensive customer profile that is shared throughout the enterprise ■ Sales tools that increase sales effectiveness and maximize time spent building relationships ■ Tools for marketing analysis, campaign development, and execution
Equipment and infrastructure	<ul style="list-style-type: none"> ■ Management of physical assets available at a customer site ■ Tracking of equipment sales to accounts ■ Management of meters and assets

Table 2. Siebel Business Applications for Key Business Issues

Business Issue	Siebel Business Applications Solutions
Fraud management	<ul style="list-style-type: none"> ■ Integration with a back-office fraud management system ■ Management of fraud alerts ■ Definition of relevant thresholds for customer fraud profiles ■ Classification of customer accounts to indicate the likelihood of fraud ■ Management of customer accounts that are late in settlement or delinquent
Information analysis and marketing	<ul style="list-style-type: none"> ■ Analysis of customer information and measurement of campaign results with marketing analytics ■ Creation and execution of targeted marketing campaigns ■ Internet marketing with Siebel Marketing: integrated email campaigns, customized Web offers, personalized Web pages, Internet newsletters, and Internet surveys
Order configuration and management	<ul style="list-style-type: none"> ■ Automated generation of quotes and sales orders with Siebel Configurator ■ Tracking of relationships between sales, sales orders, and work orders ■ Definition of process rules and automatic escalation of open sales orders ■ Use of product parameters in generating sales orders ■ Provisioning of sales orders through work orders ■ Incorporation of complex attributes such as style, color, size, and multiple ship-to destinations
Pricing management	<ul style="list-style-type: none"> ■ Set of tools for defining pricing adjustments and the conditions under which they are applied ■ Engine that evaluates condition statements and determines the pricing adjustments to apply ■ Testing area that allows assessment of the pricing adjustments ■ Integration with end-user interfaces such as Quotes, Orders, Siebel eSales, and Siebel Configurator

Table 2. Siebel Business Applications for Key Business Issues

Business Issue	Siebel Business Applications Solutions
Service request management	<ul style="list-style-type: none"> ■ Single platform for logging, assigning, managing, and resolving customer problems ■ Online solutions search capability ■ Proactive customer notifications through email, pager, fax, and Internet ■ Automatic escalation of overdue service requests
Third-party and legacy integration	<ul style="list-style-type: none"> ■ Prebuilt COM interfaces to leading Operating System Software (OSS) and Enterprise Resource Planning (ERP) applications ■ Integration mapping tools for cross-application process integration ■ Bidirectional data exchange and synchronization provided by Siebel Enterprise Integration Manager (EIM) ■ Credit verification and address validation ■ Maintenance of billing accounts through an external billing system
Up-selling and cross-selling	<ul style="list-style-type: none"> ■ Scripting engine that identifies up-sell and cross-sell opportunities with every customer contact ■ Building of complex assortment plans to provide an atmosphere of suggestive selling

Business Functions of Screens

The Siebel Consumer Goods interface includes task-specific screens. Only administrators use some screens. For introductory information about using the Siebel Consumer Goods standard interface, see *Siebel Fundamentals*.

NOTE: This guide documents the preconfigured Siebel Consumer Goods application with all of the optional modules specific to Consumer Goods functionality. The sample database includes data for these optional modules. If your installation does not include some of these optional modules, your software interface will differ from the interface described in some topics of this guide.

Table 3 lists the most frequently used Siebel Consumer Goods screens and the business functions of the views in those screens. The exact configuration of Siebel Consumer Goods screens, views, and fields depends on your company's configuration of the application. This table also lists screens for Siebel Business Applications that you can use with Siebel Consumer Goods and the business functions of the views in those screens.

Table 3. Business Functions of Screens

Screen	Functions of the Screen Views	Information About the Screen
Accounts	Create, view, and update accounts. Set up and maintain account hierarchies. Define and maintain account profile information.	Chapter 4, "Managing Accounts" Chapter 6, "Product Distribution"
Activities	Manage activities with accounts, contacts, opportunities, and service requests, and create contact and account calls (with or without Smart Calls).	<i>Siebel Applications Administration Guide</i>
Agreements	Manage information about agreements, administrative contracts, and entitlements.	<i>Siebel Field Service Guide</i>
Assets	Manage information about products sold to accounts.	<i>Siebel Field Service Guide</i>
Audit Trail	Create automatically a history of the changes in the application.	<i>Siebel Applications Administration Guide</i>
Calendar	Create and display activities (including to-do activities) and share calendar information with co-workers.	<i>Siebel Fundamentals</i>
Campaigns	Manage outbound communications with prospects targeted for a marketing effort.	<i>Siebel Applications Administration Guide</i>
Contacts	Record and track business and personal contact information associated with an account, an opportunity, a trouble ticket, or a service request.	<i>Siebel Applications Administration Guide</i>
Cycle Counting	Manage inventory by grouping assets into classes and counting each class's assets over a period and at designated intervals.	<i>Siebel Field Service Guide</i>
Expense Reports	Manage expense-report information for your own expenses or your team's expenses.	<i>Siebel Applications Administration Guide</i>
Forecasts	Create business forecasts based on opportunities or products.	<i>Siebel Applications Administration Guide</i>
Groups	Create buying groups and planning groups, which allow account managers to plan for aggregate demand from multiple accounts.	For information about buying groups, see Chapter 6, "Product Distribution"

Table 3. Business Functions of Screens

Screen	Functions of the Screen Views	Information About the Screen
Home	Configure the Home screen to display data and reports.	"About the Home Screen"
Inventory Location Management	Associate assets with inventory locations.	Chapter 15, "Inventory and Order Management"
Literature	Display company- and industry-related literature that the administrator catalogs.	<i>Siebel Applications Administration Guide</i>
Objectives	Help drive corporate goals by defining objectives for contacts and accounts. Monitor progress toward meeting sales goals.	Chapter 11, "Objectives"
Opportunities	Manage sales opportunities for business and residential customers.	<i>Siebel Applications Administration Guide</i>
Part Browser	Check on-hand inventory.	<i>Siebel Field Service Guide</i>
Plans	Organize account promotions.	Chapter 8, "Trade Promotions"
Products	Enter and maintain products, product images, product lines, product features, and price list definitions.	Chapter 5, "Products"
Promotions	Plan and manage corporate promotions and account promotions.	Chapter 8, "Trade Promotions"
Quality	Manage information about adverse events or reactions related to products.	<i>Siebel Applications Administration Guide</i>
Receiving	Record and review information relating to a physical receipt of material.	<i>Siebel Field Service Guide</i>
Repairs	Track defective products returned to a service center for repair.	<i>Siebel Field Service Guide</i>
Routes	Manage retail outlets by creating sales routes. Add individual accounts to a specific Route. Incorporate the route into a mobile field professional's routine visit schedule. Use these routes to schedule store visits at regular, predefined intervals.	Chapter 13, "Routes"
Sales Orders	Create sales orders and track order status. Generate order summaries.	<i>Siebel Order Management Guide</i>
Sales Volume Planning	View data related to sales volume planning.	Chapter 7, "Sales Volume Planning"
Service Inventory	Manage the service parts inventory process.	<i>Siebel Field Service Guide</i>

Table 3. Business Functions of Screens

Screen	Functions of the Screen Views	Information About the Screen
Service Requests	Create, display, and update customer requests for information about or assistance with products or services.	<i>Siebel Field Service Guide</i>
Settlements	Manage deductions and claims.	Chapter 10, "Deductions and Claims"
Shipping	Record and review information relating to a physical shipment of material.	<i>Siebel Field Service Guide</i>
SmartScript	Define the application workflow for an interactive situation in a script. These interactive situations can include inbound communications (such as customer service calls) and outbound contacts (such as telemarketing calls).	<i>Siebel SmartScript Administration Guide</i>
Solutions	Search, organize, and add to a knowledge base of answers to service requests and trouble tickets.	<i>Siebel Field Service Guide</i>
Target Accounts	Identify accounts by querying profile information (such as sales volumes or location) to generate a list of accounts. Use the list to schedule visits and plan routes.	Chapter 14, "Account Targeting"
Visit Execution	Perform activities for sales visits to retail outlets.	Chapter 12, "Retail Execution"

About the Home Screen

The Home screen is the first screen that users see when they start Siebel Consumer Goods. The Home screen is customized to a user's needs. Additionally, users can personalize the layout of the Home screen by removing unwanted forms, changing field widths, and changing sort orders. For more information on customizing the Home screen, see *Siebel Applications Administration Guide*.

Administrators can configure the Home screen to display My Inbox, My Deductions, and so on. The forms that appear on the Home screen are based on the role of the user who is logged in, such as account manager, sales manager, claims manager, or brand manager.

The data that appears in the forms is specific to the position of the user, such as an account manager for specific customer accounts. The data that appears in the Home screen is also specific to user, time, and priority, for instance:

- Only the Account Manager's Planning level accounts appear in the My Accounts form.
- A predefined query for the Home Page plan is available in the preconfigured application. The query sorts the plan start date by descending order. Records are displayed in the order of start date.

- Claims that are listed in My Claims are not sorted by priority.

Reports

The Home screen can also contain different types of reports that users can use to check the progress of their business. The reports can be in the form of Microsoft Excel spreadsheets, bar charts, line graphs, speedometers, pie charts, and bubble charts.

The reports have the following interactive functionality:

- Reports are dynamically generated, and colored up and down arrows show when business is increasing or decreasing.
- Hyperlinks allow users to drill down on more detail, such as from a monthly view of the data to a weekly view.
- Action links lead users to the area of the application where an issue can be resolved. For instance, if forecasted sales are low for a particular month, an action link can take the user to the Promotions view with lists of promotions occurring that month. The user can then adjust the promotions.
- Pop-up boxes appear when the cursor pauses on graphical objects, giving the user details about data without needing to navigate to another view.
- Reports can be refined with drop-down boxes to filter returned records.
- Reports can be exported to Microsoft Excel, Microsoft Word, and Microsoft PowerPoint. The export process can be automated and the data refresh can be called from the third-party application.
- Report data can be sourced from multiple databases, such as Siebel OLAP, Siebel OLTP, Demantra, SAP, or EDW.
- Reports can be contextual, so the data that appears in the report can be in the context of the record which the user currently has highlighted.

3

Getting Started

This chapter covers the administration tasks that are specific to the Siebel Consumer Goods application. Topics include:

- [Other Guides for Administrative Setup Tasks on page 1](#)
- [Siebel Consumer Goods Administrative Setup Tasks on page 1](#)
- [Selected Setup Procedures on page 3](#)

Other Guides for Administrative Setup Tasks

Use this chapter in combination with *Siebel Applications Administration Guide*, which covers the setup tasks that are common to all Siebel Business Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information that you need to implement, configure, and monitor the Siebel sales, service, and marketing products and to perform data administration and document administration tasks.

Some tasks in this chapter might replace the corresponding tasks in the administration guide, whereas others might be additional tasks. Make sure you review [Table 4 on page 2](#) before following the procedures in *Siebel Applications Administration Guide*.

This guide assumes that you installed, or if you are an existing customer, installed and completed the upgrade of, a Siebel Consumer Goods application. If you have not, consult the installation and upgrade guides on the *Siebel Bookshelf* that apply to your company's implementation.

The Siebel Database Server installation script creates an administrator account that you can use to perform the tasks described in this guide. For information about this process, see the *Siebel Installation Guide* for the operating system you are using and *Siebel Deployment Planning Guide*. Also see *Siebel System Monitoring and Diagnostics Guide* and *Siebel System Administration Guide*.

Siebel Consumer Goods Administrative Setup Tasks

[Table 4 on page 2](#) lists and describes the administrative setup tasks that are specific to the Siebel Consumer Goods application and tasks that might differ from those of the other Siebel Business Applications. The table also directs you to documentation that provides information about each task.

When setting up your application, use [Table 4](#) and *Siebel Applications Administration Guide*. You can complete these tasks in any order.

CAUTION: Do not perform system administration functions on your local database because you can create unwanted results, such as data conflicts, a local database that is too large, or a large number of additional transactions to route.

Table 4. Siebel Consumer Goods Administrative Tasks

Administrative Task	Description	For More Information
Data loading and integration	Load data from other databases in your company into the Siebel database. You might also want to integrate with other database applications or perform periodic batch imports and exports of data between these applications.	<p><i>Siebel Enterprise Integration Manager Administration Guide</i></p> <p><i>Overview: Siebel Enterprise Application Integration</i></p> <p><i>Integration Platform Technologies: Siebel Enterprise Application Integration</i></p> <p><i>Transports and Interfaces: Siebel Enterprise Application Integration</i></p> <p><i>Business Processes and Rules: Siebel Enterprise Application Integration</i></p>
Sales territory definition	Associate account managers with accounts. You can create this association using Enterprise Integration Manager (EIM), Siebel Territory Manager, or Siebel Assignment Manager. You can also manually enter this association.	<p><i>Siebel Installation Guide</i> for the operating system you are using.</p> <p><i>Siebel Deployment Planning Guide</i></p> <p><i>Siebel System Administration Guide</i></p>
Period creation	Customize the LOVs for periods, season periods (if applicable), and period types (if necessary).	"Creating Periods" on page 4
Siebel Workflow Policies setup	For customers using the Trade Promotions, Trade Funds, or Sales Volume Planning modules, set up Workflow Policies.	"Setting Up Siebel Workflow Processes for Consumer Goods" on page 5

Table 4. Siebel Consumer Goods Administrative Tasks

Administrative Task	Description	For More Information
Product administration	If data is not imported with established catalog and category hierarchies, create and manage product definitions and attributes if necessary.	Chapter 5, "Products"
	Create catalog and category hierarchies for use with Sales Volume Planning module.	Chapter 7, "Sales Volume Planning"
Product distribution	Create an account distribution from historical shipments by using Enterprise Integration Manager (EIM) or by using Authorized Distribution List functionality. You can also manually enter an account distribution.	Chapter 6, "Product Distribution"
Sales volume planning administration	Create sales volume planning account-product hierarchy.	Chapter 7, "Sales Volume Planning"
Corporate promotions administration	Create corporate promotions that you can use to create account promotions.	Chapter 8, "Trade Promotions"
Funds administration	Create fund groups to expedite creating account funds, and then allocate funds throughout a parent-child fund hierarchy.	Chapter 9, "Trade Funds"

Selected Setup Procedures

This topic provides setup procedures that are required for implementation of more than one module or option in the Consumer Goods application. Setup procedures that are specific to only one module are documented in the chapter describing the use of that module or option.

This topic provides instructions for the following procedures:

- ["Creating Periods" on page 4](#)
- ["Creating Values for the Period Type List of Values" on page 4](#)
- ["Setting Up Siebel Workflow Processes for Consumer Goods" on page 5](#)

Creating Periods

Periods appear in drop-down lists when end users populate the Period field in various screens. Periods are used for sales volume planning and trade promotions.

For trade promotions, you must define the planning period, which is usually a fiscal year, but can be as short as a fiscal quarter. Because another part of the application might use calendar years, you can differentiate fiscal years from calendar years in the period name. For example, use the name FY 2007 for the 2007 fiscal year and the name Calendar 2007 for the 2007 calendar year.

The baseline periods for promoted product baselines and for sales volume planning must be the same. Thus, if you estimate promotional volumes in weeks, you must also manage the sales volume planning periods for product baselines in weeks. Managing sales volume planning periods by week rather than by month can result in significant additional administrative work and possible performance issues.

To expedite period selection, it is recommended that you include a zero in single digit periods. Some possible examples for period names follow:

- Week 01, 2007
- W01, 2007
- Month 01, 2007
- M01, 2007
- M01-Jan, 2007

CAUTION: Periods are sorted chronologically by start date. Therefore, you must not create periods that have the same period type and start date.

To create a period

- 1 Navigate to the Administration - Data screen, then the Periods view.
- 2 Create a new period definition record.
- 3 Select the value in the Type field that corresponds to the unit for time the delivery period spans (such as Week or Month).

NOTE: If an appropriate value is not available in the Period Type list of values, you can create it, as described in [“Creating Values for the Period Type List of Values”](#) on page 4.

- 4 Select the first and last days of the delivery period in the Start and End date fields.
- 5 Complete the necessary fields.

Creating Values for the Period Type List of Values

The data delivered with the Siebel Consumer Goods application includes the Period Type values of Day, Week, Bi-Weekly, Month, Quarter, Half-year, Year, and Season. If you want to create periods for intervals that are not represented by these values, create a new value. For example, if you want to create half-month periods, create a Period Type value named Bi-Monthly.

The Season Period Type value is required to create seasonal period records. If the Season value is inadvertently deleted from the Period Type list of values in your database, you must restore it.

For more information about administration tasks for lists of values, see *Siebel Applications Administration Guide*.

To add a value to the Period Type list of values

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 Query for PERIOD_TYPE in the Type field.
- 3 Select any of the Period Type records that the query shows.
- 4 Click Menu and select Copy Record.
A copy of the record is created in the List of Values list.
- 5 Select the new record and enter a name in the Display Value field.
- 6 In the Order field, enter a number to specify the order in which the value appears in the Period Type list of values.
NOTE: Each Period Type record must have a unique Order value.
- 7 Complete the necessary fields.

Setting Up Siebel Workflow Processes for Consumer Goods

Perform the following steps in the order given to set up Workflow Policies for the Sales Volume Planning module:

- 1 **Enable Workflow Policies.** Depending on your current implementation, you might need to import workflow processes into Siebel Workflow Manager using Siebel Tools. For information about importing workflows, see *Siebel Business Process Framework: Workflow Guide*.
- 2 **Enable Siebel Workflow Manager.** You must enable Siebel Workflow Manager before you can begin the SVP process.
- 3 **Generate triggers.** The Generate Trigger (GenTrig) component on the Siebel Server allows you to create database triggers. Policy Manager uses these database triggers to identify records that can match policy conditions. Regenerate Generate Triggers when you create or delete new policies. For information about generating triggers, see the running generate triggers topic in *Siebel Business Process Framework: Workflow Guide*.
- 4 **Start Workflow Policies Agent for each applicable module.** Start Workflow Monitor Agent to execute your policies. Workflow Monitor Agent checks to see when the conditions of policies are met. For more information about starting Workflow Monitor Agent, see *Siebel Business Process Framework: Workflow Guide*.
- 5 **Test Workflow Policies Agent.**

You do not need to perform all these steps for the other modules. For more information about workflows, see *Siebel Business Process Framework: Workflow Guide*.

Table 5 lists the Consumer Goods modules that use Siebel Workflow processes.

Table 5. Consumer Goods Modules That Use Siebel Workflow Processes

Module	Name of Process	Action
Products	SIA CS Update Product Status	Spreads an end date change for a product to the associated accounts.
Sales Volume Planning	CG SVP Process	Automates the Sales Volume Planning Action field.
	Pricing Procedure - Default	Makes pricing effective in sales volume planning.
Trade Promotions and Trade Funds	CG Apply Corporate Promotion Process	Creates and updates an account promotion from a corporate promotion.
	CG Payment Process	Aggregates all payments with a status of Paid to the Payments Paid field for deals that are associated with account promotions, promoted categories, and promoted products. Aggregates all payments with a status of Paid to the Actual Total Spend field for account promotions, promoted categories, and promoted products.
	CS CG Account Plan Update Process	Updates a plan with product baseline data that is retrieved from sales volume plans based on the account for the plan, the time period designated by the start and end dates for the plan, and, if a category is selected for the plan, the products that are associated with that category and its subcategories.

To set up the CG SVP Process

- 1 Activate the CG SVP Process workflow process by performing the following steps:
 - a Navigate to the Administration - Business Process screen, then the Workflow Deployment view.
 - b In the Repository Workflow Processes list, select the CG SVP Process record.
 - c In the Active Workflow Processes list, select the CG SVP Process record and note that the Deployment Status is Active.
 - d If the Deployment Status is not Active, make the process active by clicking Activate in the Repository Workflow Processes list.
- 2 Enable the Workflow manager by performing the following steps:

- a Navigate to the Administration - Server Configuration screen, then the Enterprises view.
 - b In the Component Groups list, select the record containing Workflow Management, click Menu, and select Enable Component Group.
 - c Click the Synchronize view tab.
 - d In the Synchronize list, click Synchronize.
- 3 Generate triggers by starting server manager and entering the following commands:
- ```
> srvmgr /g <gateway name server> /e <enterprise name> /s <siebel server name> /u sadmin /p <password >
```
- ```
> start task for comp GenTrig with PrivUser=sadmin, PrivUserPass=<password>, EXEC=True
```
- ```
> list task for comp GenTrig
```

Repeat the last command until the task shows as completed.

- 4 Start the Workflow Monitor Agent by entering the following commands in server manager:
- ```
> start task for comp WorkMon with TableOwner=table-owner, TableOwnPass=password, ActionAgent=False, GroupName='CG SVP'
```
- ```
> list task for comp WorkMon
```

Repeat the last command until the task shows as sleeping.



# 4

## Managing Accounts

You use accounts primarily to represent the wholesale and retail companies to which you sell products and the organizations and physical locations in those companies. You can also use accounts to represent your company and competitor companies.

This chapter describes how to set up and maintain accounts and account hierarchies. Topics include:

- [About Accounts on page 1](#)
- [Scenario for Setting Up and Maintaining Accounts on page 2](#)
- [Viewing Account Plan Status on page 3](#)
- [Process of Managing Accounts on page 5](#)
- [Creating or Modifying Accounts on page 6](#)
- [Changing the Prices of Individual Line Items on page 8](#)
- [Updating Product Price and Cost on page 8](#)
- [Deleting Accounts on page 9](#)
- [Setting Up Account Hierarchies on page 9](#)
- [Profiling Accounts on page 10](#)
- [Creating Addresses for Accounts on page 11](#)
- [Removing Yourself from Account Teams \(End User\) on page 11](#)
- [Associating Activities with Accounts \(End User\) on page 12](#)
- [Associating Contacts with Accounts \(End User\) on page 13](#)
- [Adding Merchandising Locations to Accounts \(End User\) on page 13](#)

### About Accounts

Because accounts are critical to your business efforts, maintaining complete, accurate data in your accounts is a primary task. Administrators can perform bulk loading of data on accounts, but administrators and end users can also create and modify accounts manually as needed. For accounts with multiple departments and divisions, end users can enter independent information about those subaccounts.

For more information about bulk loading account information, such as account demographic information, hierarchy, and general account attributes, see *Siebel Enterprise Integration Manager Administration Guide*.

## About Account Hierarchies

You can manage and administer different hierarchies for different customers. For example, for a large chain of drugstores, you can establish a four-level hierarchy with the corporate headquarters office at the top level, its regional offices at the second level, its distribution centers at the third level, and its retail stores at the fourth level. For a distributor, you might establish a two-level hierarchy with the distributor at the top level and the retail outlets it serves at the second level. If a company uses a third-party distributor for its products, you can associate this indirect account as well. For more information about structuring organizations, see *Siebel Applications Administration Guide*.

## About Account Classification

You can classify Accounts in many ways. The following standard classifications can drive specific application functionality:

- **Account type.** Classifying an account by type, such as Retailer or Distributor, can drive a dynamic profile attribute form. This form determines the profile information that is stored and available for the account.
- **Distribution code.** You can apply Distribution codes to accounts and products to automatically create authorized distribution lists.
- **Market segment.** Classifying an account's market segment determines the types of products that appear in that account's product catalog when creating assortment plans. You classify the market segment for your customer accounts by assigning the personalization attribute Account Channel to accounts.

For more information about methods that are available for controlling authorized product distribution based on distribution codes or account market segment, see [Chapter 6, "Product Distribution."](#)

# Scenario for Setting Up and Maintaining Accounts

Marketing administrators, account managers, and retail sales representatives perform the process in this example scenario for accounts. Your company might follow a different process according to its business requirements.

The marketing administrator for a food manufacturing company maintains the account-related data in the Siebel Business Application. Generally, all of the account data is bulk loaded into the Siebel Business Application from the food manufacturer's legacy database. However, the company just acquired a new account, ABC Mart, and the administrator decides to manually input the information about this account directly into the Siebel Business Application.

The administrator begins by creating account records for all of ABC Mart's headquarters offices and retail outlets. He then organizes these accounts into a hierarchy. He positions the corporate headquarters for ABC Mart at the top of the hierarchy, with regional headquarters in the middle, and retail outlets at the bottom. For each account, he then adds account profile and account contact information, and creates addresses and account assessment templates. He arranges with the database administrator to import into the Siebel database consumer demographic information, including household size, income level, and location. Also, he can manually assign account team members or use Siebel Assignment Manager to automatically assign them, based on factors such as State, Area Code, and Type of account. He informs the new account manager when the account information is ready.

The account manager for ABC Mart instructs the retail sales representatives who report to her to enter activities and opportunities for each of the ABC Mart accounts for which they are responsible.

While the sales representatives interact with their contacts at the retail outlets, they enter unique information about each account, such as new contacts, addresses, assessments, best call times, store sizes, visit frequencies, or any additional demographic information. When sales territories change, representatives can remove themselves from account teams. When new representatives are hired, detailed information about accounts is available to them, based on their roles and responsibilities.

## Viewing Account Plan Status

To see the status of any particular plan, use the Plan Details view. This view contains data about plan details, account details, estimated volumes, and actual volumes. Account managers can see the status of a plan by viewing the following typical types of reports:

- Sales Trending: YTD actual sales compared with planned sales compared with YAGO Sales
- Sales Profitability: Gross sales compared with net sales compared with margin contribution
- Fund Forecasting: Fixed funds plus accrual rate plus planned volume
- Fund Accounting: Forecasted funds compared with committed (planned) spend minus accounting for committed funds reconciliation
- Spend Forecasting: YTD actual paid plus forecasted spent plus YTG planned to spend
- Promotion Performance: Planned volume compared with actual volume compared with claim volume
- Promotion Profitability: Total profitability compared with incremental profitability compared with ROI compared with sales/trade spend
- An account manager can see this data at the Total Account Plan level or drill down by:
  - Time: Year, Month, Week
  - Product: Category/Brand, Promoted Product Group, SKU
  - Account: Territory, HQ Account, Planning Account, Ship To Account

Account managers can also select a particular dimension to review, such as a specific PPG.

**To view the status of a plan**

- 1 Navigate to the Plans screen, Plan List, and then the Details View.
- 2 In the Plans list, select the relevant plan.
- 3 Review the fields for the plan.

The following table describes some fields.

| Field                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Category                         | Allows the account plans for an account to be segmented by the category of products for which the account managers are responsible. This segmentation is especially important for large companies that use multiple account managers or brokers to service a single account.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Period                           | Designates the fiscal year of the plan. This field is can be used to group promotions and perform analyses by fiscal halves, quarters, or months.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Status                           | Indicates when the plans are complete and ready for review.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Volume Planning Type             | Use Sell-In or Sell-Out data for volume planning. The default value is Sell-In.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Main Volume Planning Methodology | Select the most appropriate methodology: <ul style="list-style-type: none"> <li>■ <b>Baseline &amp; Incremental:</b> The ideal volume planning methodology for true promotion ROI analysis. It is the most labor intensive and might not be appropriate for account managers with very many accounts, for accounts or products that are over-promoted, or for accounts for which good sales data is not available.</li> <li>■ <b>Total Volume Planning (promoted/non-promoted volume planning):</b> For accounts and products that are not responsible for a significant percentage of sales, such as the smaller wholesalers, accounts and products that are over-promoted or almost never promoted, or for accounts and products for which good sales data is not available.</li> <li>■ <b>Promotional Volume Only:</b> For indirect accounts.</li> </ul> |
| Account Team                     | Limits visibility at the account plan level data to only the people actively involved with the account or category of products being sold into that account.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Baseline                         | The volume that would have been sold if no promotions were planned.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Incremental                      | The additional volume (over and above baseline volume) that is being sold due to the planned promotions.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

| Field | Description                                                                                          |
|-------|------------------------------------------------------------------------------------------------------|
| Total | Baseline plus Incremental.                                                                           |
| ROI   | Return on Investment. The incremental profit from the planned promotions divided by the total spend. |

## Process of Managing Accounts

This topic lists the tasks that administrators and end users typically perform to manage accounts. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks that administrators typically perform to manage accounts:

- 1 ["Creating or Modifying Accounts" on page 6](#)
- 2 ["Deleting Accounts" on page 9](#)
- 3 ["Setting Up Account Hierarchies" on page 9](#)
- 4 ["Profiling Accounts" on page 10](#)
- 5 Creating Account Contacts, as described in *Siebel Applications Administration Guide*
- 6 ["Creating Addresses for Accounts" on page 11](#)
- 7 Creating Account Assessment Templates, as described in *Siebel Applications Administration Guide*
- 8 Assigning Account Team Members
 

Use Siebel Assignment Manager or Siebel Territory Manager to manually or automatically designate Account team members:

  - For information about manually assigning account team members, see *Siebel Applications Administration Guide*.
  - For more information about using Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

### End-User Procedures

The following list shows tasks that end users typically perform to access and use account information:

- ["Removing Yourself from Account Teams \(End User\)" on page 11](#)
- ["Associating Activities with Accounts \(End User\)" on page 12](#)
- ["Associating Contacts with Accounts \(End User\)" on page 13](#)
- ["Adding Merchandising Locations to Accounts \(End User\)" on page 13](#)

## Creating or Modifying Accounts

When implementing the Consumer Goods application, you might decide to import account-related information from another database in your company and avoid entering this information manually. However, when you add new customers and when your existing customers add new retail outlets, you might need to create new accounts manually.

Before you create an account, find out if you already have the account information in your database so that you do not enter information more than once. To determine if the account already exists in your database, query for values such as the company name, contact information, customer number, telephone number, or any other unique identifier.

As an administrator, you can create addresses for accounts. Later, you or end users can associate these addresses with the appropriate accounts. You can also edit existing addresses. Be careful when editing an existing address because the address for all accounts and contacts that are associated with that address also changes. For more information about querying your database for accounts, see *Siebel Fundamentals*.

Verifying if an account exists can be done automatically if deduplication is active. For more information about deduplication, see *Siebel Data Quality Administration Guide*.

This task is a step in [“Process of Managing Accounts” on page 5](#).

### To create an account

- 1 Navigate to the Administration - Data screen, then the Account List view.
- 2 Create a new record.
- 3 Drill down on the Account field hyperlink and click the More Info view tab.
- 4 Complete the necessary fields.

The following table describes some fields.

| Field        | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Address      | <p>An account can have multiple addresses. Click the select button to access the Account Addresses dialog box, where you can select an existing address or create a new one. Select the Primary field in the dialog box to specify the primary address.</p> <p>You can edit an existing address in the Account Addresses dialog box. However, changing this address also changes every instance of the address for all the other accounts and contacts that are associated with it.</p> |
| Account Team | A list of employees who work with this account. This list determines who can access information about the account. The system administrator can determine the primary team member, or the person who creates the account record can be the primary team member.                                                                                                                                                                                                                         |
| Account Name | The name of the Account.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



| Field                   | Comments                                                                                                                                                                                                                                                 |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Site                    | A description of the physical location or function of the account, such as headquarters, corporate, or San Francisco.                                                                                                                                    |
| Parent                  | The parent account of the account. For more information, see <a href="#">“Setting Up Account Hierarchies” on page 9.</a>                                                                                                                                 |
| Industries              | The type of industry in which the account is involved, for example, manufacturing or service. You can enter multiple industries in this field.                                                                                                           |
| Price List              | The account specific price list, for example, Consumer Price List or North American Price List.                                                                                                                                                          |
| Buying Group            | Select this check box if the account serves as a buying group for other accounts. For more information, see <a href="#">“About Buying Groups” on page 3.</a>                                                                                             |
| Account Type            | The type of account, for example, HQ, Distributor, or Retailer.<br><br>This field determines the account Profile form layout. Use Siebel Tools to configure the Profile form. For more information, see <a href="#">“Profiling Accounts” on page 10.</a> |
| Synonyms                | A preferred way to refer to accounts and associated sites. For example, an account named A and B Products, Inc. might have the following synonyms: AB, A and B, and AB Products.                                                                         |
| Partner                 | Select this check box if the account is a partner.                                                                                                                                                                                                       |
| Competitor              | Select this check box if the account is a competitor.                                                                                                                                                                                                    |
| Status                  | The status of the account, for example, Active or Prospect.                                                                                                                                                                                              |
| Disable Cleansing       | Select this check box to disable cleansing for the account.<br><br>For more information, see <i>Siebel Data Quality Administration Guide</i> .                                                                                                           |
| Fund Eligible           | Select this check box to indicate that users can associate the account with a fund.                                                                                                                                                                      |
| Lock Assignment         | Provides information for the Territory Assignment program.<br><br>If you select Lock Assignment, the Territory Assignment program does not automatically change the account team for the account.                                                        |
| Assignment Area Code    | If you use area codes in your account assignment process, enter an area code.<br><br>The Assignment Area Code value determines the area code that the Territory Assignment program uses to assign this account or subaccount.                            |
| Assignment Country Code | If you use country codes in your account assignment process, enter a country code.<br><br>The Assignment Country Code value determines the country code that the Territory Assignment program uses to assign this account or subaccount.                 |

## Changing the Prices of Individual Line Items

When a customer buys enough product from the manufacturer to warrant a better pricing bracket, a new price list is associated with the customer. When there is a universal change to the prices of only a few items, you can change the prices only by using the Price List Line Items view.

Price and Cost are refreshed when Price List, Price List Item, Cost List, or Cost List Items are changed.

### *To change the price of a line item*

- 1 Navigate to the Pricing screen, Price Lists, and then the Price List Line Items view.
- 2 In the Price List Line Items list, drill down on the Name hyperlink of the price list.
- 3 To change the price of an item, create a new record to duplicate the item.

The price is updated and the Start Date field of the new price is populated.

## Updating Product Price and Cost

To perform accurate margin and ROI analysis, cost and prices are available at the account product level. As prices change over time, this information is stored at the Product Baseline level. When price lists or costs lists change, you can identify which product baseline records have been affected, and, in turn, which periods, products, and accounts need to be restated.

When the product baseline record is created in Administration - Data, Account Product, the Baseline applet, the Product Price and Cost fields are populated automatically. You can associate the price list with the account and populate price and cost for the product baseline.

### *To update produce price and cost*

- 1 Navigate to the Administration - Data screen, Account Product, and then the Baseline view.
- 2 Click Update Price/Cost to populate the price and cost for future account product baseline records.

In Administration – Data, Account Product, Baseline, when a new record is created, it automatically populates the price and cost if the price and cost lists are associated with the account.

When baseline records are created, but the price list is later associated with the account or any update in pricing or account price is associated in Administration, Pricing, the user can click the Update Price/Cost button in Account Product, Price Lists view or in Account Product, Baseline view to populate or update the price and cost value for product baseline records.

If any pricing is updated in account product baseline records, and those records are used in an account promotion, then the Refresh Pricing button in the promotion applet is enabled.

- 3 Click Refresh Pricing to refresh the data related to the pricing change of product baseline in the promotion hierarchy.

## Deleting Accounts

Deleting an account completely removes the account and all data related to the account, such as activities, contacts, and addresses, from the application.

If you do not know if the account is still active, contact the primary account team member and inquire before modifying or deleting the account. Do not delete active accounts.

You can remove yourself or others from the account team instead of deleting the record. End users can remove themselves from the account team, but they cannot delete records in the preconfigured Consumer Goods application. Removing a team member from the account team removes the account from the records that the removed team member can view.

As an administrator, you can delete individual accounts manually or delete accounts in batch using Enterprise Integration Manager (EIM). For information about EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

This task is a step in ["Process of Managing Accounts" on page 5](#).

### *To delete an account*

- 1 Navigate to the Administration - Data screen, then the Account List view.
- 2 Select an account record.
- 3 In the Accounts/Orgs list, click Delete.

## Setting Up Account Hierarchies

For overview information about account hierarchies, see ["About Account Hierarchies" on page 2](#).

To set up account hierarchies, you create parent-child relationships between accounts. A list of guidelines for creating account hierarchies follows:

- Accounts can have any number of child accounts.
- Accounts can have only one parent account.
- An account hierarchy can have any number of levels.
- You can define Accounts as Buying Groups (an attribute flag of account).
- Accounts can have any number of associated product categories and products.
- Each account can have only one profile (based on Account Type).
- An account can have any number of associated assessments, and assessments can have many assessment values.

If your company uses the Sales Volume Planning module, you must create one contiguous account hierarchy with all the accounts for the sales volume planning process. For example, you might create a five-level hierarchy with your corporate headquarters at the top level and your company's divisions at the second level. You can place the accounts representing all of the headquarters offices for your customers in the third level, distribution centers in the fourth level, and retail outlets in the fifth level. For more information about sales volume planning, see [Chapter 7, "Sales Volume Planning."](#)

This task is a step in ["Process of Managing Accounts"](#) on page 5.

### *To create an account-subaccount (parent-child) relationship*

1 Navigate to the Administration - Data screen, then the Account List view.

2 Verify that the parent account record exists; if it does not, create it.

For more information about creating accounts, see ["Creating or Modifying Accounts"](#) on page 6.

3 Verify that the child account record exists; if it does not, create it.

4 In the Accounts/Orgs list, select the child account record.

5 In the Account form, click the select button in the Parent Account field.

6 In the Pick Account dialog box, select the Parent account record, and click OK.

**NOTE:** You cannot create a new account from the Parent Account field; the account must already exist. For more information about creating accounts, see ["Creating or Modifying Accounts"](#) on page 6.

## Profiling Accounts

Account profiles maintain and display information specific to the type of an account. For example, an account of the type Retailer has a different profile than an account of the type Distributor.

This task is a step in ["Process of Managing Accounts"](#) on page 5.

### *To profile an account*

1 Navigate to the Accounts screen, then the Accounts List view.

2 Drill down on the Name field hyperlink for an account, and click the Profiles view tab.

The Profile form that appears on the Account Profile view depends on the type of account that you select:

- If the Account Type value is HQ, an HQ Profile form appears.

- If the Account Type value is Retailer, a Retail Profile form appears.

3 In the Profile form, complete the necessary fields.

## Creating Addresses for Accounts

You can create addresses for accounts. Later, end users can associate these addresses with the appropriate accounts. You can also edit existing addresses. Be careful when editing an existing address because the addresses for all accounts and contacts that are associated with that address also change.

This task is a step in ["Process of Managing Accounts" on page 5](#).

### *To create an address for an account*

- 1 Navigate to the Administration - Data screen, then the Addresses view.
- 2 In the Address form, create a new record, and complete the necessary fields.

Use the following procedure to associate an address with an account.

### *To associate an address with an account*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Select an account record.
- 3 In the Account form, click the select button in the Address field.
- 4 In the Account Addresses dialog box, move the address record from the Available column to the Selected column, and click OK.

In this dialog box, you can also create new addresses from which to choose.

## Removing Yourself from Account Teams (End User)

Unlike administrators, end users cannot delete accounts. If end users need to remove an account from their My Accounts view, they must remove themselves from the account team.

This task is a step in ["Process of Managing Accounts" on page 5](#).

### *To remove yourself from an account team*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Select an account record.
- 3 Click the select button in the Account Team field, move the row containing your name from the Selected column to the Available column, and click OK.

The change is reflected the next time you log in to the application.

## Associating Activities with Accounts (End User)

Siebel Business Applications allow end users to record many types of activities for a variety of reasons. You can record an activity to remind you to do something regarding an account. For example, an end user might want to make note of a meeting with a contact at an account.

In the Account Activities view, end users can:

- Create new activities.
- View all activities for an account.
- Modify existing activities.
- Drill down on the Type field hyperlink for an individual activity to view additional information.
- Chart completed activities for an account.

For more information about activities and managing your calendar, see *Siebel Fundamentals*.

This task is a step in [“Process of Managing Accounts”](#) on page 5.

### *To create an activity for your account*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account.
- 3 In the Activities list, create a new activity record, and complete the necessary fields.

The following table describes some fields.

| Field       | Comments                                                                                                                                                                                                                                                                                                                                                          |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type        | From the drop-down list, select the specific type of activity to perform. This field provides a hyperlink to the Visit Execution view and to other views.                                                                                                                                                                                                         |
| Description | A description of the activity.                                                                                                                                                                                                                                                                                                                                    |
| Status      | From the drop-down list, select the current status of the activity.                                                                                                                                                                                                                                                                                               |
| Activity    | A high-level description of activity that an administrator provides. This field provides a hyperlink to the Activity Attachment view.<br><br>In the preconfigured Siebel Consumer Goods application, this field is General, by default, and you cannot update it. However, you can use Siebel Tools to modify the behavior of this field or to remove this field. |
| Employees   | Click the select button to assign employees from the Employees list to the activity.<br><br>Depending on the type of activity you create, this record now appears on this person's My Activities calendar or to-do list.                                                                                                                                          |

# Associating Contacts with Accounts (End User)

End users can associate contacts with accounts.

This task is a step in [“Process of Managing Accounts” on page 5](#).

## *To associate contacts with accounts*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Contacts view tab. In this view, you can:
  - Create new contacts.
  - View all contacts for an account.
  - Modify existing contacts.
  - Drill down on the Last Name field hyperlink for a contact to create activities for that contact and account.

**NOTE:** Before creating a new contact, make sure that the contact does not already exist by querying the All Contacts view. If the contact does not exist, you can enter a new contact from the All Accounts View or the All Contacts view and associate the contact with the appropriate account. For more information about querying, see *Siebel Fundamentals*.

For the procedure about creating and modifying contact information, see *Siebel Applications Administration Guide*.

# Adding Merchandising Locations to Accounts (End User)

You can add merchandising locations to accounts. Merchandising locations are physical locations where products can exist, such as one or more display locations in a retail outlet or in a bin in a warehouse. Adding merchandising locations to accounts allows you to associate products with physical locations and to perform merchandising audits.

For more information about merchandising locations, see [“Associating Account Products with Merchandising Locations \(End User\)” on page 19](#) and [“Performing Merchandising Audits” on page 5](#).

This task is a step in [“Process of Managing Accounts” on page 5](#).

## *To add a merchandising location to an account*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Merchandising Location view tab.

- 3 In the Merchandising Locations list, create a new record, and complete the necessary fields. The following table describes some fields.

| Field          | Comments                                                                                                                                                                                                                                         |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type           | The type of merchandising location. Values include Bin, Aisle, Shelf, Trunk, Virtual, and Warehouse.                                                                                                                                             |
| Location Order | The order in which the products or merchandising locations appear. This field facilitates retail audits. A field value example is side-by-side. The person performing the retail audit then knows the exact location of each individual product. |
| Asset Name     | A product the customer owns, typically acquired through contract or purchase. For consumer goods companies, this field is typically a type of merchandising or display unit.                                                                     |
| Asset Number   | This field is automatically populated when you select an asset in the Asset field.                                                                                                                                                               |



# 5

## Products

This chapter covers the procedures necessary to manage and use product and pricing information structures (catalogs, categories, and products) and describes how to access information about a product. Topics include:

- [About Catalog and Product Administration for Consumer Goods on page 1](#)
- [About Catalog-Category Hierarchies on page 1](#)
- [Scenario for Setting Up and Managing Products on page 2](#)
- [Process of Managing Products on page 3](#)
- [Defining Products on page 4](#)
- [Associating Multiple Accounts with Products on page 6](#)
- [Defining Product Lines on page 6](#)
- [Using the Product Explorer \(End User\) on page 7](#)

### About Catalog and Product Administration for Consumer Goods

The Catalog administration and Product administration screens and associated views that appear in Siebel Consumer Goods share much of the functionality in Siebel Business Applications. This chapter focuses on the catalog and product administration functionality that is unique to the Siebel Consumer Goods application.

For more information about controlling product distribution, see [Chapter 6, “Product Distribution.”](#)

For information about setting up and maintaining customizable products (products that you can interactively configure), see *Siebel Product Administration Guide*.

### About Catalog-Category Hierarchies

A product catalog is a collection of products arranged in a logical hierarchy of categories, according to your company’s business needs.

Figure 1 shows a schematic of a catalog-category hierarchy with the catalog at the root level. The catalog is parent of three categories that are parents of more subcategories or products.

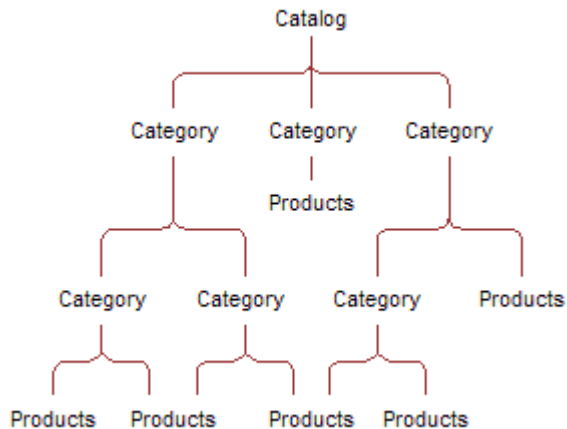


Figure 1. Product Catalog Hierarchy

You organize product catalogs by creating categories and structuring the categories and subcategories into parent-child relationships to form a catalog-category hierarchy. You then add products to categories. For example, the parent category, Beverages, can contain the Ace Splash Refrigerated Juice subcategory, which can contain all the Ace Splash brand refrigerated juice drink products. The Beverages category can also contain a subcategory for a different brand of beverages, Big Wave. When conducting a promotional campaign for a company’s line of beverages, you can use the category or subcategory definition, such as Big Wave, to make sure that only those associated products are available for users to include in the trade promotion.

For sales volume planning (SVP) however, a category-subcategory hierarchy must be contiguous with only one designated SVP parent (root) category. For information about setting up category-product hierarchies for SVP, see [“Process of Setting Up Category-Product Hierarchies”](#) on page 6.

## Scenario for Setting Up and Managing Products

Marketing administrators and customer service representatives perform the process in this example scenario for managing products. Your company might follow a different process according to its business requirements.

The marketing administrator for a beverage and vending machines manufacturing company sets up and manages the company’s products. The administrator sets up two catalogs for the company, Beverages and Vending Machines. He adds product categories and subcategories to each catalog, structured according to the business needs of his company. He then adds products and product details such as features, comparison features, and marketing literature. He creates product lines, and then associates products to product lines. Finally, the administrator creates different price lists for various geographic locations, currencies, and customers.

A customer service representative from the company receives a call from a customer in California who is interested in one of the company's vending machines. By navigating through the Siebel Business Application, the representative can describe the product's key features and component products. During the conversation, the customer expresses an interest in features that are available in a higher-end model. Immediately, the representative can give the customer a feature-by-feature comparison of the two models and quote prices from the California price list. The representative can then follow up by sending the customer more detailed information, such as product brochures, using email or fax.

The service representative can also navigate through the Beverages catalog to help the customer decide the items to stock in the vending machine.

## Process of Managing Products

This topic lists the tasks that marketing administrators and customer service representatives typically perform to manage products. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows procedures that administrators typically perform to manage products:

**1** Setting Up Catalogs, as described in *Siebel Order Management Guide*

In the Siebel Consumer Goods application, you can apply the Account Channel personalization attribute to product categories and to products and accounts. For information about using the Account Channel field, see [Chapter 6, "Product Distribution."](#)

In the preconfigured Siebel Consumer Goods application, the Account Channel field is not visible for catalogs. To enable this personalization attribute for catalogs, see *Using Siebel Tools*.

For information about setting up category-product hierarchies specifically for the Sales Volume Planning (SVP) module, see ["Modifying the SVP Business Service" on page 33](#).

**2** ["Defining Products" on page 4](#)

**3** Providing Greater Detail to Product Records, as described in *Siebel Product Administration Guide*

You can create product features, assign key features to a product, define product attributes and associate them with product classes, define related products, designate equivalent products, create comparison features for equivalent products, create product entitlements, associate literature with products, and associate images with products.

**4** ["Associating Multiple Accounts with Products" on page 6](#)

**5** ["Defining Product Lines" on page 6](#)

6 Creating and Managing Price Lists, as described in *Siebel Pricing Administration Guide*

**NOTE:** When the ENTERPRISE\_FLG is set to N, the default setting, Database Extract extracts only organization Price Lists and Items specific to each organization. You can use Siebel Enterprise Integration Manager (EIM) to import Price Lists and Price List Items by organization. If EIM sets the ENTERPRISE\_FLG to Y, all Price Lists and associated Price List Items are routed to all users regardless of organization. For more information, see *Siebel Enterprise Integration Manager Administration Guide*.

## End-User Procedures

Most of the end-user tasks associated with products and price lists involve viewing information. An administrator sets up product lines, products, and price lists.

The following list shows tasks that end users typically perform when working with products:

- [“Using the Product Explorer \(End User\)” on page 7](#)
- Viewing product information and associating attachments with products, as described in *Siebel Fundamentals*
- Viewing and comparing product key features and viewing the product image, as described in *Siebel Applications Administration Guide*

# Defining Products

Use the Administration - Product screen to enter products into the Siebel database by creating product records. The only required field in the product record is the product name. However, it is recommended that you also associate the record with a product line, category, and price list.

In the preconfigured Siebel Consumer Goods application, after you create a product record you cannot delete it. To prevent display of a product record in drop-down lists and dialog boxes, edit the product record by deselecting the Orderable, Sales Product, and Service Product check boxes. You can also control display of the product by setting the Effective Start Date and the Effective End Date fields.

Your company might also choose to configure the application to allow administrators to delete products, to delete products as part of the batch Enterprise Integration Management (EIM) process, or both. For more information about EIM processes, see *Siebel Enterprise Integration Manager Administration Guide*.

This task is a step in [“Process of Managing Products” on page 3](#).

### *To create a product record*

- 1 Navigate to the Administration - Product screen.

- 2 Create a new product record, and complete the necessary fields.

The following table describes some fields in the Products list.

| Field         | Comments                                                                                                                                                                                                                                                                                |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name          | The name of the product. This field is a hyperlink to the Product Detail Key Features Administration View by default.                                                                                                                                                                   |
| Type          | The type classification of the product.<br>To configure your Types, see <i>Configuring Siebel Business Applications</i> . This field drives the dynamic Detail Product Form.                                                                                                            |
| Product Line  | The product line with which the product is associated.<br>For information about creating product lines and associating products with product lines, see <a href="#">"Defining Product Lines" on page 6</a> .                                                                            |
| Revision      | The version or revision of a product. You can use this field in association with an internal employee position for routing requests related to the product. For example, for Product X, Version 7, you can initially assign service requests to the product line manager for Product X. |
| Billable Flag | Select this check box if the product is billable.                                                                                                                                                                                                                                       |
| Report Header | Enter the name you want to use as the report header for this product.                                                                                                                                                                                                                   |
| Category      | Select the category to which the product belongs. A category is a logical group of subcategories or products.                                                                                                                                                                           |
| Customizable  | Select this check box if the product can be customized.                                                                                                                                                                                                                                 |
| UoM           | The unit of measure in which you sell the product.                                                                                                                                                                                                                                      |
| Product Level | An optional indicator of products in relation to each other.                                                                                                                                                                                                                            |
| Case Pack     | The number of individual selling units in a case.                                                                                                                                                                                                                                       |
| Lead Time     | The standard lead time for ordering the product.                                                                                                                                                                                                                                        |
| Organization  | You can associate a product with an organization and limit who can see the product.                                                                                                                                                                                                     |
| Target        | The market to which the product is targeted.                                                                                                                                                                                                                                            |
| Bundle        | Select this check box to define a product bundle.                                                                                                                                                                                                                                       |

**NOTE:** To view competitor products, for example in conducting retail audits, the competitor products must exist in the distribution list of the account. Only administrators can add competitor products to an end user's distribution list. End users who are responsible for account audits can then associate competitor products with the account they plan to audit. For information about conducting retail audits, see [Chapter 12, "Retail Execution."](#)

- 3 To view all the fields for a product, drill down on the Name field hyperlink in the Product Administration view, and click the first More Info link in the More Info link bar.

For descriptions of additional fields that you can make visible using Siebel Tools, see *Siebel Product Administration Guide*.

## Associating Multiple Accounts with Products

You can associate multiple accounts with a product by using the product as the parent and each account as a child.

### *To associate multiple accounts with a product*

- 1 Navigate to the Administration - Product screen, then the Products view.
- 2 Select the product, and click the Product Account view tab.
- 3 Create a new record, and complete the necessary fields.

The following table describes some fields.

| Field      | Comments                                            |
|------------|-----------------------------------------------------|
| Account    | The account for the product.                        |
| Delist     | The data and time to remove the account.            |
| Orderable  | Select this check box if the account is orderable.  |
| Promotable | Select this check box if the account is promotable. |
| Auditable  | Select this check box if the account is auditable.  |

- 4 To add more accounts, repeat [Step 3](#).

## Defining Product Lines

Product lines are logical groupings of products. When you define a product line, you name it and then specify all the products in that line. If you have products that are already defined, you can associate them with the product line. You can assign product line managers.

**NOTE:** When you create a new product on the Products screen, you can add the product to an existing product line by specifying a value in the Product Line field of the Product record.

This task is a step in [“Process of Managing Products”](#) on page 3.

### *To create a product line*

- 1 Navigate to the Administration - Product screen, then the Product Lines view.

- In the Product Lines list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field                | Comments                                                                                                                                                                                                                                 |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Product Line         | The name of the product line for the products.                                                                                                                                                                                           |
| Product Line Manager | The name of the product line managers.                                                                                                                                                                                                   |
| Products             | The products associated with the product line. You can add or delete a product from a product line, and a product can belong to more than one product line.<br><br>A product must exist before you can associate it with a product line. |

## Using the Product Explorer (End User)

Explorer views in Siebel Business Applications display information in a hierarchical, multipane format. The Product Explorer view has an explorer tree on the left, with folders arranged hierarchically, and a list on the right, representing the contents of the selected folder. For more information about using Explorer views in Siebel Business Applications, see *Siebel Fundamentals*.

This task is a step in ["Process of Managing Products"](#) on page 3.

### To use the Product Explorer

- Navigate to the Products screen.
- Drill down on the Name field hyperlink for a product record, and click the Explorer view tab.
- In the Explorer tree, find the page icon of the product for which you want information.
 

**NOTE:** If the tree contains more products than are visible when you scroll to the end, click the arrow at the bottom of the tree to display more products.
- Click the plus sign (+) next to the page icon of the product to expand the item and reveal its contents.
- Click the folder icons to view related Products, Attachments, Components, Price List, and Literature.

Available records appear as hyperlinks in the list to the right of the Explorer tree.





# 6

## Product Distribution

This chapter describes how to use Siebel Consumer Goods to manage all aspects of product distribution. Topics include:

- [About Controlling Product Distribution on page 1](#)
- [Scenario for Managing Product Distribution on page 3](#)
- [About Creating and Modifying Distribution Lists on page 4](#)
- [Process of Managing Product Distribution on page 6](#)
- [Creating Distribution Codes on page 6](#)
- [Creating Distribution Lists on page 7](#)
- [Amending Distribution Lists on page 9](#)
- [Copying Distribution Lists on page 10](#)
- [Deleting Products from Distribution Lists on page 11](#)
- [Setting Up Account Channel Values on page 11](#)
- [Assigning Product Categories to Account Catalogs on page 12](#)
- [Viewing and Modifying Distribution List Products \(End User\) on page 12](#)
- [Viewing and Modifying Distribution List Categories \(End User\) on page 14](#)
- [Reviewing Account Catalogs \(End User\) on page 15](#)
- [Creating Buying Groups \(End User\) on page 16](#)
- [Associating Sources of Supply with Accounts \(End User\) on page 17](#)
- [Associating Sources of Supply with Products \(End User\) on page 18](#)
- [Associating Account Products with Merchandising Locations \(End User\) on page 19](#)
- [About Configuring Product Distribution on page 19](#)

### About Controlling Product Distribution

You can structure and track the distribution of a wide range of products to large numbers of accounts. In addition, you can control where the product is held in the premises of an account.

Your company can control product distribution in the following ways:

- **Managing distribution lists to automate product distribution.** By assigning distribution codes to categories, products, and accounts in a customer's product distribution account hierarchy, you build a distribution system that determines the products that are distributed to each account. For more overview information about distribution lists, see ["About Distribution Lists" on page 2](#).
- **Classifying accounts by market segment.** Classifying an account's market segment automates the product distribution process by controlling the products (or product categories) that appear in that account's product catalog. You classify the market segments for your customer accounts by applying the personalization attribute Account Channel for each account. For more overview information about account market segments, see ["About Account Market Segments" on page 3](#).
- **Assigning product categories to an account.** Administrators or end users can manually assign specific product categories to specific accounts so that only products in those categories are available for distribution.
- **Creating buying groups.** Buying groups are accounts that act as product distributors, or suppliers, to multiple member accounts. For more overview information about buying groups, see ["About Buying Groups" on page 3](#).
- **Designating merchandising locations.** You can assign multiple merchandising locations to an account.

**NOTE:** For information that is specific to product distribution and its relationship to sales volume planning, see [Chapter 7, "Sales Volume Planning."](#)

### About Distribution Lists

Most consumer goods companies are organized in a hierarchical structure, often based on the company's channels of distribution. Typically, marketing administrators create product distribution lists that control the company products that are available for distribution to their customer distributor accounts and the retail outlets that they serve.

The Siebel Consumer Goods application can use distribution codes to automatically create an account-product record, which is a *distribution list* of the products that each account (in the product distribution account hierarchy) is authorized to receive. You can apply distribution codes to the appropriate level of the product distribution account hierarchy for each of your customers, usually to the customer's distribution centers and to the outlets that they serve, and to any or all of the products that your company manufactures. Each subaccount receives the full set or a subset of products that are authorized for the key distributor accounts directly above that subaccount in the hierarchy.

Most consumer goods companies use one or both of the following distribution methods to supply their retail outlets:

- **Direct distribution.** With this distribution method, the key account, usually the customer's own distribution center, is the sole intermediary between your company and the retail outlets.
- **Indirect distribution.** With this distribution method, another intermediary such as a third-party distributor, called an indirect account, exists between the key account and the retail outlets.

Retail product authorization is when your company's products are authorized for retail distribution at the key account, indirect account, and retail outlet levels. With indirect distribution, distribution lists are built from the products available to the indirect account. These products are a subset of the products from the key account distribution list.

For more information about creating distribution lists to control product distribution to accounts, see ["Creating Distribution Lists" on page 7](#).

## About Account Market Segments

If you have multiple channel partners operating in the same locale, such as a shopping mall, you might want them to carry different sets of products to avoid unnecessary price reductions that erode the brand equity of your products. Companies in this situation determine the product mix that an account carries based on the market segment of the account.

In the Siebel Consumer Goods application, you can use the Account Channel attribute to selectively display an account catalog with only the product categories and products that fit the account's market segment.

Administrators or account managers can tag your company's accounts with the Account Channel attribute, which determines to which type of distribution channel the account belongs, such as Mass Merchandiser or Electronics Specialists.

## About Buying Groups

A buying group is an account (consisting of multiple member accounts) that buys products at high volume, typically for the purpose of receiving discounted prices. All stores in a buying group can benefit by receiving products at prices lower than they receive if they purchase independently.

You can associate specific products with a buying group to determine the products available for distribution to the group members. Buying groups can purchase products on behalf of their member accounts. End users can check to see if their buying group plans to purchase some of the products they require and, if it does, they can remove those products from the plan and eliminate double ordering.

# Scenario for Managing Product Distribution

Marketing administrators and account managers perform the process in this example scenario when using distribution hierarchies and the Account Channel personalization attribute to determine how their products are distributed among their accounts. Your company might follow a different process according to its business requirements.

The administrator at a large beverage manufacturing company is responsible for making sure that the right products are available for each customer account. He does so by controlling product distribution lists at the corporate level. These lists determine the set of products available at the key distribution account level of each account's hierarchy and the subsets of products available to the accounts down the hierarchy. In addition, the administrator determines where various products are available in retail outlets.

The Ace Corporation account consists of two warehouse distribution centers, Ace Corporation East and Ace Corporation West. Each warehouse supplies retail outlets throughout North America. Ace Corporation headquarters determines the beverage items that are stocked at each warehouse. In addition, Ace Corporation employs a third-party wholesaler, AnyCompany Distribution, to supply products to outlets in the state of Louisiana in the United States.

The administrator enters the Ace Corporation account hierarchy for product distribution into the Siebel database. He indicates that the Ace Corporation East and West accounts are Distributors and that AnyCompany Distribution is a wholesaler or supplier account for one or more of the Ace Corporation accounts in its product distribution account hierarchy.

He then establishes an authorized product distribution list for the Ace Corporation account product distribution hierarchy that is based on the inclusive distribution option. He gives both of Ace Corporation's distribution warehouses (Ace Corporation East and West) a distribution code of Premium for the category Fizz and a distribution code of Standard for the category Splash. This designation authorizes both warehouses to receive all of his company's beverage products that are part of the Fizz category, independent of product category, and all products in the Splash category that have a distribution code of Standard or Limited. However, because Louisiana bans the sale of alcoholic fruit drinks, the third-party wholesaler in Louisiana is not licensed to distribute them. The administrator gives the wholesaler a distribution code of Limited for the category Fizz so that only the subset of his company's products that do not contain alcoholic fruit drinks is shipped to this warehouse.

The account manager manages and updates the authorized product distribution lists, supplier references, and source of supply for each of her key accounts. She notes that Ace Corporation East cannot meet the demand for beverage products for all the retail outlets that it supplies, so she fulfills the needs of those outlets by designating Ace Corporation West as the alternative supplier for those outlets in the account hierarchy for product distribution.

Finally, the account manager specifies the percentage of the authorized product distribution list each warehouse supplies and designates merchandising locations for several of the products that are available to Ace Corporation's outlets.

## About Creating and Modifying Distribution Lists

Typically, marketing administrators create distribution lists that control the company products that are distributed to a customer's distributor accounts and the retail outlets that they serve.

Before creating a distribution list for a customer, you must create the appropriate distribution codes. Distribution codes impose a logic on the distribution of products across the account-category hierarchy that is inclusive or exclusive. In both systems, the distribution codes govern how products move from key accounts to subaccounts. For information about creating accounts and account hierarchies, see [Chapter 4, "Managing Accounts."](#)

For each product you add to the key account's distribution list, an account-product record is automatically created. The distribution code you enter for each product on the key account's distribution list is matched with the distribution codes given to each subsidiary account.

With inclusive distribution, the sequence or order that you assign to a group of distribution codes in the list of values (LOV) is used to assign rank to accounts. For example, outlets might have different distribution codes in the Beverages category. [Table 6](#) shows the distribution codes and the order that is assigned to those codes in an inclusive system.

Table 6. Distribution Codes, Order, and Products in an Inclusive System

| Distribution Code | Order | Subaccount Receives        |
|-------------------|-------|----------------------------|
| Premium           | 1     | Premium, Standard, Limited |
| Standard          | 2     | Standard, Limited          |
| Limited           | 3     | Limited                    |

In an inclusive distribution system, subaccounts with the Premium distribution code receive the entire key account’s list of beverages, that is, products with Premium, Standard, or Limited distribution codes. Outlets with the Standard distribution code receive a subset of the entire list, which includes products with Standard and Limited distribution codes. Outlets with the Limited distribution code receive only those products with the distribution code of Limited.

With exclusive distribution, each distribution code defines a specific subset of products that do not depend on the order that you assign to the distribution codes. [Table 7](#) shows an example of distribution codes and products in an exclusive distribution system.

Table 7. Distribution Codes and Products in an Exclusive System

| Distribution Code | Order | Subaccount Receives |
|-------------------|-------|---------------------|
| Premium           | 1     | Premium             |
| Standard          | 2     | Standard            |
| Limited           | 3     | Limited             |

In an exclusive distribution system, outlets with the Premium distribution code in the Beverages category receive a subset of the key account’s distribution list of products, which includes products that are part of the Premium category with Premium distribution codes. Outlets with the Standard distribution code for the Beverages category receive a subset of the entire list, which includes only those products with the distribution code of Standard in the Beverages category. Outlets with the Limited distribution code in the Beverages category receive only the products with the distribution code of Limited in the Beverages category.

You can also add unauthorized products to subaccount distribution lists. An *unauthorized product* is a product that you add to a subaccount’s distribution list outside the inclusive or exclusive distribution system.

# Process of Managing Product Distribution

This topic lists the tasks that administrators and end users typically perform to manage product distribution. Your company might follow a different process according to its business requirements.

## Administrator Procedures

The following list shows the tasks that administrators typically perform to manage product distribution:

- 1 [“Creating Distribution Codes” on page 6](#)
- 2 [“Creating Distribution Lists” on page 7](#) or [“Amending Distribution Lists” on page 9](#)
- 3 [“Copying Distribution Lists” on page 10](#)
- 4 [“Deleting Products from Distribution Lists” on page 11](#)
- 5 [“Setting Up Account Channel Values” on page 11](#)
- 6 [“Assigning Product Categories to Account Catalogs” on page 12](#)

## End-User Procedures

The following list shows the tasks that end users typically perform to manage product distribution:

- 1 [“Viewing and Modifying Distribution List Products \(End User\)” on page 12](#)
- 2 [“Viewing and Modifying Distribution List Categories \(End User\)” on page 14](#)
- 3 [“Reviewing Account Catalogs \(End User\)” on page 15](#)
- 4 [“Creating Buying Groups \(End User\)” on page 16](#)
- 5 [“Associating Sources of Supply with Accounts \(End User\)” on page 17](#)
- 6 [“Associating Sources of Supply with Products \(End User\)” on page 18](#)
- 7 [“Associating Account Products with Merchandising Locations \(End User\)” on page 19](#)

After administrators create distribution lists, end users can perform the other tasks involved in product distribution in any order. However, you can specify suppliers for products only after you create buying groups because you select the suppliers from the existing buying groups.

## Creating Distribution Codes

Before you can create a distribution list, you must first define the distribution codes that you want to use.

This task is a step in [“Process of Managing Product Distribution” on page 6](#).

**To set up distribution codes**

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 In the List of Values view, query for the Type field RTL\_PRFL\_DIST\_CODE.  
The query results show all the account distribution codes that are available.
- 3 In the Order column, assign a different number to each distribution code to create a sequence.

**NOTE:** The sequence that is applied to this LOV determines the order in which the distribution codes appear on the Dist. Code list. The sequence does not impose organization, but applies a rank in an inclusive distribution system.

## Creating Distribution Lists

After you define distribution codes, you can create a distribution list for a key account and specify the subaccounts of the key account. You can then define the products you want to include in the key account's distribution list.

This task is a step in ["Process of Managing Product Distribution"](#) on page 6.

**To create an account distribution list and define subaccounts**

- 1 Navigate to the Administration - Authorized Distribution List screen, then the Detail List view.
- 2 Select the account record for which you want to create an account distribution list by performing a query in the list.  
**NOTE:** For direct distribution, this key account is a key distribution point for the customer, such as a distribution warehouse. For indirect distribution, this key account is responsible for indirect distribution, such as a third-party distributor.
- 3 (Optional) Click the More Info view tab, and select the Inclusive check box to assign inclusive distribution properties.
- 4 Click the Authorized Accounts view tab, and create a new record in the Authorized Accounts list.
- 5 Click the select button in the Account field, and in the Pick Account dialog box, select an account record to add as a subaccount to this key account, and click OK.
- 6 Complete the necessary fields.

The following table describes some fields.

| Field           | Comments                                                                  |
|-----------------|---------------------------------------------------------------------------|
| Account Channel | Determines the type of distribution channel to which the account belongs. |
| Dist. Code      | Distribution Code. Determines the products that this account receives.    |
| Category        | Determines the category of products this account receives.                |

**NOTE:** You can create multiple records for one subaccount. Each record for a subaccount must have a different category, but each category can have a different distribution code.

After you specify the subaccounts to include in the authorized distribution list, you can define the products available to those accounts.

**To define products for an account distribution list**

- 1 Navigate to the Administration - Authorized Distribution List screen, then the Detail List view.
- 2 Select an account record for which you want to define products.
- 3 To add the products in a category to the Authorized Category Product list, complete the following steps:
  - a Click the Authorized Category Products view tab.
  - b Click Category.
  - c In the Select Category dialog box, query for the category with products to add to this account's distribution list and click OK.

All products in the selected category appear in the Authorized Category Products list, and the Categories list displays the category of a selected product.
- 4 (Optional) In the Authorized Category Products list, add a new product without a category.
- 5 To set up selection availability for each product in the Authorized Category Products list, use the fields in the following table.

| Field       | Comments                                                                                                                                                                                                                              |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Orderable   | Select this check box to make the product available for selection when a user adds products to a sales order.                                                                                                                         |
| Promotable  | Select this check box to make the product available for selection when a user adds products to an account or corporate promotion if the Authorized Product field for the account or corporate promotion is selected.                  |
| Auditable   | Select this check box to make the product available for selection when a user designates products for a retail audit.                                                                                                                 |
| Delist Date | The product is available for selection if the value in this field is on or before the date that the user adds products to sales orders, adds products to an account or corporate promotion, designates products for a retail audit.   |
| List Date   | The product is available for selection if the value in this field is blank or after the date that the user adds products to sales orders, adds products to an account or corporate promotion, designates products for a retail audit. |

- 6 Include products in or exclude products from the distribution list for the account.



- To include a product in the distribution list for the account, select the product in the Authorized Category Products list, then specify the distribution code for that product in the Categories list.

If the Inclusive check box is selected for the key account, do not create more than one product-category record for the same product and category. With inclusive distribution, product-category records for the same product and category but with different distribution codes have contradictory meaning. Also, these records can result in error messages when you apply distribution code updates to the subaccounts for the key account.

- To exclude a product from the distribution list for the account, select the product in the Authorized Category Products list, and then select the Skip check box in the Categories list.
- 7 In the Authorized Category Products list, click Apply to propagate the key account's distribution list to the subaccounts that are associated with the account.
  - 8 Click the Authorized Distribution List view tab.

All the subaccounts are listed with assigned categories and products.

**NOTE:** To view competitor products, for example when conducting retail audits, the competitor products must exist in the distribution list of the account. Only administrators can add competitor products to an end user's products list. End users who are responsible for account audits can then associate competitor products with the account that they plan to audit.

## Amending Distribution Lists

You can amend the distribution list for a key account. For example, you can:

- Add an additional product category to a distribution list.
- Change the details of a product on a distribution list, for example, the distribution code, account code, sequence code, and if the product is included in the distribution list.

This task is a step in ["Process of Managing Product Distribution"](#) on page 6.

### *To add a product category to an account distribution list*

- 1 Navigate to the Administration - Authorized Distribution List screen, then the Detail List view.
- 2 Select the key account record that you want to amend.
- 3 Click the Authorized Category Products view tab, and click Category.
- 4 In the Select Category dialog box, query for a product category to add to this account's distribution list, and click OK.

All products in the selected category appear in the Authorized Category Products list.

- 5 For each product, specify a distribution code on the Categories list.
- 6 (Optional) For each product, specify an account code and sequence code on the Authorized Category Products list.

**7** Click Apply.

The products in the product category are added to the distribution list of the key account and its subaccounts.

Use the following procedure to amend product details on an account distribution list.

***To amend product details on an account distribution list***

- 1** Navigate to the Administration - Authorized Distribution List screen, then the Detail List view.
- 2** Select the account record that you want to amend.
- 3** Click the Authorized Category Products view tab.
- 4** Select the product that you want to amend.
- 5** Amend the appropriate fields in the Authorized Category Products list (Seq. code, Account Code) or the Categories list (Dist. code, Skip check box) as necessary.
- 6** Click Apply.

The changes that you made are applied to the key account and its subaccounts.

## Copying Distribution Lists

Instead of defining individual subaccounts and products for a distribution list, you can create a new distribution list for an account by copying to that account an existing distribution list from another account. After you perform this copying task, the new distribution list contains all of the authorized accounts and authorized category products from the existing distribution list.

***To copy a distribution list***

- 1** Navigate to the Administration - Authorized Distribution List screen, then the Detail List view.
- 2** Select an account record with a distribution list that you want to copy to another account.
- 3** Click the Target Accounts view tab.
- 4** Select the target account to which you want to copy the distribution list.
- 5** Click Copy ADL.
- 6** To see the subaccounts and products for the target account, complete the following steps:
  - a** Navigate to the Administration - Authorized Distribution List screen, then the Account List view.
  - b** Select the target account.
  - c** Navigate to the Administration - Authorized Distribution List screen, then the Detail List view.

The subaccounts appear in the Authorized Accounts view, and the products appear in the Authorized Category Products view.

## Deleting Products from Distribution Lists

After you create a distribution list for an account, you can delete products from the distribution list of the key account and its subaccounts.

**NOTE:** Deleting a product from a distribution list deletes associated merchandising location records, but does not delete associated store condition records.

This task is a step in [“Process of Managing Product Distribution”](#) on page 6.

### *To delete a product from an account distribution list*

- 1 Navigate to the Administration - Authorized Distribution List screen, then the Detail List view.
- 2 In the Accounts list, select the account record for which you want to delete a product.
- 3 Click the Authorized Category Products view tab, and query for the product you want to delete.
- 4 Click Delete.

The product is deleted from the distribution list for the key account.

- 5 Click Apply.

The product is also deleted from the distribution list for the subaccounts if the key account is the only supplier of the deleted product.

## Setting Up Account Channel Values

To make effective use of the Account channel personalization attribute, administrators or end users must select values for the Account Channel field for each of your company's accounts that is included on an authorized distribution list. The Account Channel field determines the type of distribution channel to which the account belongs.

To assign Account Channel personalization attributes to accounts, see [“Creating Distribution Lists”](#) on page 7.

**NOTE:** If you select no value for the account channel field, its value is recognized as null. Accounts with null Account Channel values are matched with product categories and products that have null values in those fields.

The data for the preconfigured Siebel Consumer Goods application includes predefined values for the Account Channel attribute under the list of values (LOV) type ACCOUNT\_CHANNEL. You can create new values or change any of the following existing values:

- |                      |                          |                  |
|----------------------|--------------------------|------------------|
| ■ Apparel Specialty  | ■ Drug                   | ■ Military       |
| ■ Athletic Specialty | ■ Electronics Speciality | ■ Pet            |
| ■ Convenience Store  | ■ Grocery                | ■ Sporting Goods |
| ■ Department Store   | ■ Mass Merchandiser      | ■ Warehouse Club |
| ■ Dollar             |                          |                  |

For the procedure to create or change a value in the LOV, see *Siebel Applications Administration Guide*.

This task is a step in [“Process of Managing Product Distribution” on page 6](#).

## Assigning Product Categories to Account Catalogs

You can use the Account Channel personalization attribute and rules to control the product categories and products available for inclusion in an account’s catalog, as described in [“About Account Market Segments” on page 3](#).

At times, however, an administrator might want to override the personalization rule to further refine the products or product categories that are available to an account. In this case, the administrator assigns exactly the categories of products available for inclusion in an account’s catalog in the Account Categories view.

**NOTE:** If you assign one or more categories to an account through the Account Category view, only those categories are available for inclusion in the account’s catalog. No categories are available based on personalization rules; your category assignments instead override the rules.

This task is a step in [“Process of Managing Product Distribution” on page 6](#).

### *To assign categories to an account*

- 1 Navigate to the Administration - Catalog screen, then the Account Categories view.
- 2 In the Accounts list, select an account record.
- 3 In the Categories list, create a new record.
- 4 In the Pick Category dialog box, select one or more categories to add, and click OK.

## Viewing and Modifying Distribution List Products (End User)

End users can view the products on an account’s distribution list, add unauthorized products to a subaccount’s distribution list, and modify an account’s distribution list.

Account managers can use the Product Distribution list to enter a list of their customers products and to determine which products are added automatically to promotions when the Products button is clicked in the Account Promotions list of the Promotions screen. Account managers can also capture the regular retail shelf price (bench price), which is the non-promoted price at which the customer sells the product.

This task is a step in [“Process of Managing Product Distribution” on page 6](#).

**To view an account's distribution list products**

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Product Distribution view tab.  
The product distribution list for that account appears.

**NOTE:** In the preconfigured Siebel Consumer Goods application, you can add additional products to this account's distribution list from the Product Distribution view.

Use the following procedure to add an unauthorized product to an account's distribution list.

**NOTE:** A product that you manually add to a subaccount's distribution list is not affected by key account changes.

**To add an unauthorized product to an account's distribution list**

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Source of Supply view tab.  
The products on the account's distribution list are listed on the Products list.
- 3 In the Products list, create a new record.
- 4 Click the select button in the Product field.
- 5 In the Pick Product dialog box, select a product record to add to the account's distribution list, and click OK.
- 6 Complete the necessary fields.

The following table describes some fields.

| Field        | Comments                                                                                               |
|--------------|--------------------------------------------------------------------------------------------------------|
| Dist. Code   | Distribution Code. Determines the products that this account receives.                                 |
| Account Code | Retailers use this code to identify the product.                                                       |
| Seq. Code    | Sequence Code. Specifies the aisle on which the product appears in the display sequence at the outlet. |

Use the following procedure to modify a key account's distribution list.

**To modify a key account's distribution list**

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Select the key account record for the customer's distribution list.
- 3 Drill down on the Name field hyperlink, and click the Source of Supply view tab.  
The Products and Source of Supply lists appear.
- 4 Modify the Products list as necessary. You can:

- Add new products to the Products list.
- Change the sequence code.
- Assign the product a status of active or inactive.
- Change the distribution code.

## Viewing and Modifying Distribution List Categories (End User)

End users can view the products on an account's distribution list, add unauthorized products to a subaccount's distribution list, and modify an account's distribution list.

This task is a step in ["Process of Managing Product Distribution"](#) on page 6.

### *To view or modify category distribution list products*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Category Distribution view tab.
- 3 In the Category Distribution list, create a new record.
- 4 Click the select button in the Category Name field.
- 5 In the Category Products dialog box, select a product record and click OK.
- 6 Complete the necessary fields.

The following table describes some fields.

| Field                      | Description                                                                                           |
|----------------------------|-------------------------------------------------------------------------------------------------------|
| Category Name              | Name of the category.                                                                                 |
| Description                | Description of the category.                                                                          |
| Effective Start Date       | Date on which the distribution becomes effective.                                                     |
| Effective End Date         | Date on which the distribution ends.                                                                  |
| Bench Price                | The usual price the retailer charges consumers. The regular retail price.                             |
| Bench Price Effective Date | Date on which the bench price becomes effective.                                                      |
| Bench Price Updated        | A check mark in this field indicates that the Bench Price field was changed and used by the workflow. |

| Field                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer Cost Price          | <p>The cost of the product to the customer. For wholesalers and direct retailers, this is the same price as the list price, but for indirect retailers, who buy from wholesalers rather than direct from the manufacturer, this is the wholesaler to retailer price.</p> <p>This price is not stored anywhere in the system. To set this price, a sales representative must enter it manually or import it from a source, such as a Demand Signal Repository (DSR), which might have spin data or sell-through data.</p> |
| Customer Cost Effective Date | Date on which the customer cost price becomes effective.                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Customer Cost Updated        | A check mark in this field indicates that the Customer Cost field was changed and used by the workflow.                                                                                                                                                                                                                                                                                                                                                                                                                  |

- 7 To add all the products associated with the category to the category product, click Products.
- 8 To update the Bench Price, Bench Price Effective Date, Customer Cost Price, and Customer Cost Price Effective Date fields from category to all the associated products, click Update Products.
- 9 To update the respective baseline products records that match the effective dates and account, click Update Price/Cost.

## Reviewing Account Catalogs (End User)

*Account catalogs* contain detailed information about the categories and products that your company makes available for a specific account to order.

If you are an account manager with responsibility for creating quotes and orders, account catalogs are a valuable resource in providing information about the products that are available. You can review catalogs in preparation for a visit or telephone call with an account's buyer. If you use the Siebel Consumer Goods application on a laptop computer, you can display the catalogs when you meet with buyers, allowing them to view prices and other critical information about your company's products for upcoming seasons.

This task is a step in ["Process of Managing Product Distribution"](#) on page 6.

### *To review an account catalog*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Account Catalogs view tab.  
A list of catalogs for the account that you select appears in the Account Catalogs list.
- 3 In the Account Catalogs list, drill down on the Name field hyperlink.  
The More Info view for the catalog appears.

- 4 In the Catalogs list, drill down on the Name field hyperlink a second time.  
The Categories view for the catalog appears. The Categories list displays the categories of the catalog, and the Category Details form displays the highest-level category.
- 5 In the Categories link bar, click the Products link. You can review:
  - The category hierarchy in the Categories list.
  - Product details, by drilling down on the Product field hyperlink in the products list.

## Creating Buying Groups (End User)

A buying group account acts as a product distributor, or supplier, for its multiple member accounts.

To create buying groups, complete the following tasks:

- 1 Create a buying group account, or designate an existing account as a buying group.
- 2 Associate member accounts with the buying group account.
- 3 Associate products with the buying group.
- 4 (Optional) Associate specific buying group member accounts with specific buying group products.

This task is a step in [“Process of Managing Product Distribution” on page 6](#).

### *To create a buying group*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Create a new buying group account record, or select an existing account record.  
For information about creating accounts, see [Chapter 4, “Managing Accounts.”](#)
- 3 Drill down on the Name field hyperlink and click the More Info view tab.
- 4 In the More Info form, select the Buying Group check box.  
The Account Attribute Flag is now Buying Group, and you can add member accounts to this buying group.

Use the following procedure to associate member accounts with a buying group.

### *To associate member accounts with a buying group*

- 1 Navigate to the Groups screen, then the Buying Group List view.
- 2 From the visibility filter, select Buying Group Accounts.  
The Buying Groups Accounts form and the Accounts list appear.
- 3 From the Buying Groups Accounts form, query to select the appropriate buying group record.  
The accounts that are already members of that buying group appear in the Accounts list.
- 4 In the Accounts list, create a new record.



- 5 In the Add Accounts dialog box, select one or more account records that you want to designate as members of the buying group, and click OK.

Use the following procedure to associate products with a buying group.

#### *To associate products with a buying group*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for a buying group record, and click the Source of Supply view tab.  
The Products and Source of Supply lists for the account appear.
- 3 In the Products list, create a new record.
- 4 Click the select button in the Product field.
- 5 In the Pick Product dialog box, select the product that you want to add, and click OK.
- 6 Repeat [Step 3](#) through [Step 5](#) for each product that you want to add.

## Associating Sources of Supply with Accounts (End User)

You can capture wholesaler to retailer relationships by product category and extend the source of supplier relationships to specify the percent at the category level. You can also extend the percentage to the product level and override the percentages for a particular promotion. You can enter a value in the Percentage field for a source of category supply, and then click the Update button to allocate this value to the corresponding account category product.

This task is a step in [“Process of Managing Product Distribution”](#) on page 6.

#### *To associate a source of supply with an account*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink, and click the Source of Category Supply view tab.  
The Account Category and Source of Category Supply lists for the account appear.
- 3 In the Account Category list, query on the Category Name field and complete the other necessary fields.
- 4 In the Source of Category Supply list, create a new buying group.
- 5 Click the select button in the Buying Group field.
- 6 In the Pick Account Suppliers dialog box, select the suppliers that you want to associate with the category, and click OK.

- 7 Complete the necessary fields.

The following table describes some fields.

| Field      | Comments                                                           |
|------------|--------------------------------------------------------------------|
| Site       | The location of the buying group.                                  |
| Percentage | The percentage of the total category associated with the supplier. |

- 8 Click Products to create the product records and associate the supplier accounts associated with the category to the products.

This information can be viewed from the Source of Product Supply view. To determine which products are added automatically when you click Products, see [“Viewing and Modifying Distribution List Products \(End User\)”](#) on page 12.

- 9 Click Update to copy or update the Percentage values from Category to Products.

## Associating Sources of Supply with Products (End User)

You can specify sources of supply for the products on a distribution list. You can associate multiple sources of supply with a single authorized product. This association helps account managers understand the distribution patterns of supply for the various accounts and buying groups.

This task is a step in [“Process of Managing Product Distribution”](#) on page 6.

### *To associate a source of supply with a product*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Source of Supply view tab.
- 3 In the Products list, select the product for which you want to designate a source of supply.
- 4 In the Source of Supply list, create a new record, and complete the necessary fields.
- 5 Click the select button in the Buying Group field.
- 6 In the Pick Account Suppliers dialog box, select the supplier that you want to associate with the product, and click OK.
- 7 Complete the necessary fields.

The following table describes some fields.

| Field        | Comments                                                                 |
|--------------|--------------------------------------------------------------------------|
| Primary Flag | Select this check box if you want the supplier to be the primary source. |

| Field      | Comments                                                                |
|------------|-------------------------------------------------------------------------|
| Site       | The location of the buying group.                                       |
| Percentage | The percentage of the total product order that comes from the supplier. |

## Associating Account Products with Merchandising Locations (End User)

By associating an account's authorized product with merchandising locations, you can assign a specific physical location for that product, such as one or more display locations in a retail outlet or in a warehouse bin. A product can have multiple merchandising locations. If you delete a product record, its associated merchandising location records are also deleted. Deleting a merchandising location record does not delete associated store condition records. For more information about merchandising locations, see ["Adding Merchandising Locations to Accounts \(End User\)" on page 13](#) and ["Performing Merchandising Audits" on page 5](#).

This task is a step in ["Process of Managing Product Distribution" on page 6](#).

### *To associate products with an account merchandising location*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Merchandising Location view tab.
- 3 From the Merchandising Locations list, select the appropriate merchandising location record.
- 4 In the Product list, add products to the merchandising location:
  - a To add products individually, create a new record, click the select button in the Product field, select a product in the Account Product dialog box, and click OK.
  - b To add products by category, click Select Categories, select a category of products in the Add Products dialog box, and click OK.

All products in the selected category are added to the merchandising location.

## About Configuring Product Distribution

This topic contains information that might be useful when configuring the product distribution features. Topics include:

- ["Specialized Methods Invoked in Product Distribution" on page 20](#)
- ["Apply Button for an Authorized Distribution List" on page 21](#)

## Specialized Methods Invoked in Product Distribution

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 8](#).

Table 8. Buttons and Methods for Product Distribution Configurations

| Button            | Name of Method              | Description                                                                                                                                                                                                                                                                                                                                       | Supported On   |
|-------------------|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Apply             | OnAssignProductToSubaccount | Changes the ADL status of a selected account to Pending and then triggers a run time event to carry out the Apply task. On the Authorized Category Products view, the Apply task applies all authorized products and categories of the selected key distributor account down to its subaccounts in accordance with inclusive or exclusive logic.  | Bus Comp Layer |
| Category          | ShowPopup                   | Opens a dialog box of categories.                                                                                                                                                                                                                                                                                                                 | Applet Layer   |
| Copy ADL          | CopyADL                     | Creates a new ADL that is similar to an existing ADL.                                                                                                                                                                                                                                                                                             | Bus Comp Layer |
| Delete            | DeleteSelected              | Marks the selected S_ORG_PROD and S_ORG_DIST_LST records in the Authorized Products view for deletion from the parent account and its subaccounts. Triggers the business service SIA CS ADL Delete Business Service, which in turn calls the DeleteExtra method. The DeleteExtra method deletes the marked S_ORG_PROD and S_ORG_DIST_LST records. | Applet Layer   |
| OK                | AddCategoryProducts         | Adds the category and the products associated with it to the parent account.                                                                                                                                                                                                                                                                      | Applet Layer   |
| Select Categories | ShowPopup                   | Adds all products in the selected category to the merchandising location.                                                                                                                                                                                                                                                                         | Applet Layer   |

## Apply Button for an Authorized Distribution List

The Apply button, which is used to propagate product distribution lists to accounts based on distribution codes that are defined in an authorized distribution list, ceases to function if you change the following preconfigured parameter settings:

- For version 7.5, the TRUE value for the Force Active property in the ADL Status field in the Account business component.
- For version 7.7 or later, the Y value for the ForceActive control user property in the SIS Account Entry applet.



# 7

## Sales Volume Planning

This chapter describes how to set up and perform sales volume planning (SVP). Topics include:

- [About Sales Volume Planning on page 1](#)
- [About the SVP Aggregate Action on page 4](#)
- [Scenario for Using Sales Volume Planning on page 5](#)
- [Roadmap for Sales Volume Planning on page 5](#)
- [Process of Setting Up Category-Product Hierarchies on page 6](#)
- [Process of Defining SVP Hierarchies on page 9](#)
- [Performing the Initial Aggregation on page 12](#)
- [Running Aggregation Processing in Parallel on page 13](#)
- [Populating Locks on page 15](#)
- [Process of Establishing Baseline Basis Quantities on page 15](#)
- [Copying Baseline Information to Other Fields on page 19](#)
- [Manually Entering SVP Data on page 21](#)
- [Process of Performing Ongoing SVP Administrative Tasks on page 21](#)
- [Viewing SVP Data \(End User\) on page 24](#)
- [Skipping SVP Source Data \(End User\) on page 25](#)
- [Locking and Modifying SVP Data \(End User\) on page 26](#)
- [About SVP Algorithms on page 28](#)
- [About Category and Account Level Allocation on page 29](#)
- [About Number Handling and Percentage-Basis Calculations on page 30](#)
- [About Configuring Sales Volume Planning on page 30](#)
- [Configuring Sales Volume Planning on page 32](#)

### About Sales Volume Planning

Sales volume planning (SVP) is an iterative process in which consumer goods manufacturers model the projected sales for an upcoming period. Companies capture and update salesperson-influenced data pertaining to the quantity or value of product that their customers will purchase during a period of time. Uses of SVP include the following tasks:

- Top-down volume planning of target sales, usually starting with a high level number from a financial planning system.

- Bottom-up total sales forecast planning, usually with sales of the previous year as the starting point.
- Baseline volume estimating, usually starting with a derived baseline from Demantra or a Demand Planning system such as APO, I2, or Manugistics.

**NOTE:** This chapter uses the term quantity to represent any amount in SVP. You can also use a monetary amount, such as currency. However, you cannot use quantity and monetary amounts at the same time in SVP.

As part of their annual forecasting process, companies use SVP based on the data sets. These data sets make the SVP process possible and provide feedback, in the form of baseline and target quantities, for current and future sales volume plans. You can develop this data internally, or a third party can supply this data.

**NOTE:** It is recommended that companies perform complex trending and data modification on the initial load of historical records, such as shipment history, before importing this data into Siebel base tables.

See [Table 9](#) for definitions of the data sets.

Table 9. SVP Data Set Definitions

| Data Set                                           | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Baseline                                           | <p>This data set is the quantity of product that would have been shipped, sold, or consumed without an account promotion for a period of time.</p> <p>The Baseline view also shows incremental quantity, the quantity of product that is shipped, sold, or consumed as a direct result of an account promotion for a period of time. For example, because a product is on sale, a customer purchases two incremental pallets of the product in addition to the one the customer regularly purchases. Incremental quantity is generated during account promotion planning. For more information about account promotions, see <a href="#">Chapter 8, "Trade Promotions."</a></p> |
| Incremental                                        | <p>This data set is the quantity of product that is sold over and above the baseline quantity and that is attributed to an account promotion.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Target<br>(Also referred to as quota or objective) | <p>This data set is the quantity of product that a manufacturer expects to sell in a period of time. Targets can incorporate growth or decline rates for the SVP period.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Shipment                                           | <p>This data set is the quantity of product that is shipped to customers during a period of time. Because shipments are always historical data, end users can view, but not modify, the shipment data.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Consumption                                        | <p>Also called Consumption Volume. This data set is the quantity of product that customers purchase and use during a period of time. Because consumption is always historical data, end users can view, but not modify, the consumption data.</p>                                                                                                                                                                                                                                                                                                                                                                                                                               |



See [Table 10](#) for possible sources of these data sets.

Table 10. SVP Data Set Possible Sources

| Data Set                                           | Possible Sources                                                                                                                                                                                                                                                                           |
|----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Baseline                                           | <ul style="list-style-type: none"> <li>■ Obtain from shipments to accounts information.</li> <li>■ Obtain from customer warehouse withdrawals that a customer provides to the manufacturer or that a third-party data source provides.</li> <li>■ Derive from consumption data.</li> </ul> |
| Incremental                                        | <ul style="list-style-type: none"> <li>■ Derive by calculating the difference between customer warehouse withdrawals, or shipments, and baseline.</li> <li>■ Obtain from a third-party data source.</li> <li>■ Incorporate lift matrices or use an educated estimate.</li> </ul>           |
| Target<br>(Also referred to as quota or objective) | <ul style="list-style-type: none"> <li>■ Derive from shipment, baseline, or consumption data from a prior period.</li> <li>■ Modify data based on a factor such as a growth or decline rate expected for the upcoming period.</li> </ul>                                                   |
| Shipment                                           | <ul style="list-style-type: none"> <li>■ Import from an order processing system or a customer data warehouse.</li> </ul>                                                                                                                                                                   |
| Consumption                                        | <ul style="list-style-type: none"> <li>■ Obtain from a third-party data source.</li> <li>■ Use customer warehouse withdrawals as a proxy to derive.</li> </ul>                                                                                                                             |

## About Basis, Planning, and Baseline Data Elements

The SVP module supports the following three-step baseline and target planning process:

- 1 The Baseline Basis (or Target Basis) fields are populated with data that you previously import or copy into the sales volume plan. These read-only fields serve as the basis data for the planning process.
- 2 The SVP process promotes this data into Baseline Planning (or Target Planning) values, which are then released to sales planners or account managers for adjustment. Sales planners and account managers make their adjustments based on known elements that impact trends for the planning periods.
- 3 After users make these adjustments, the values are promoted into the Baseline (or Target) fields where the values are also used as the account promotion baseline.

Your company can choose to use some or all of these elements in its planning process.

## About the SVP Aggregate Action

SVP is the process of modeling projected sales of a product at one or more accounts in a future time period. Companies establish sales volume plans to forecast or plan the quantity of products they expect to sell to these accounts during the SVP period. The SVP Aggregate action models this complex account-category-product-period hierarchy and allows for the allocation and aggregation of data through this hierarchy.

The SVP Aggregate action uses the account-category links that an administrator creates to construct the account-category-product hierarchy, and associates the imported source data with the appropriate SVP nodes. SVP nodes create records that represent the combination of accounts and category-products.

The SVP Aggregate action is an ongoing SVP task. Each time you run the action after the initial Aggregate action, a search is performed down the established account-category-product-period hierarchy structure and any new or missing nodes are created. The data is then reaggregated up through the account-category-product-period hierarchy.

Executing the SVP Aggregate action is a resource-intensive task because the action depends on the complexities of your account-category-product-period hierarchy and your source data set. The appropriate planning of this process is important when using the SVP module.

**NOTE:** The SVP Aggregate action does not aggregate across period types. Changes to data stored in weeks do not aggregate up into the monthly periods, and changes to data stored in years do not allocate down throughout the periods in the year. You can aggregate data, however, using Oracle Business Intelligence for reporting purposes. It is recommended that you store data in the standard periods of weeks or months.

### About Maximizing Aggregation Performance

The Aggregate action is the most resource-intensive action in the SVP module. To maximize performance, run Aggregate for only select period ranges. Also, use short intervals and run Aggregate only as frequently as your business requirements dictate. For example, if you store sales volume data by week, it is recommended that you run the aggregation at the end of each week and only for the that week.

**NOTE:** Running Aggregate for the first time creates a large number of transaction records. It is recommended that you perform this function in an environment that allows optimum performance.

Follow these guidelines to maximize aggregation performance:

- Make sure that the Siebel database is configured according to the *Siebel Installation Guide* for the operating system you are using.
- Turn off transaction logging during Aggregate.
- Reextract all mobile clients. For more information, see *Siebel Remote and Replication Manager Administration Guide*.

For more information about aggregation, see [“Performing the Initial Aggregation” on page 12](#).

# Scenario for Using Sales Volume Planning

SVP administrators, senior managers, and account managers perform the process in this example scenario for using SVP. Your company might follow a different process according to its business requirements.

An SVP administrator for a large beverage manufacturer knows that her company is beginning its annual planning effort. To generate the SVP, she performs several tasks. First, she identifies the source of the sales volume planning data. This source might be shipment or consumption data from previous periods. After she identifies the data, she reviews it to determine its relevancy for future SVP periods. As a result of the review, the SVP administrator chooses to skip certain account-product periods because of discontinued products or inactive accounts in those periods.

Next, she uses the data to establish a baseline for all products and accounts in the specified planning periods. She can modify the data directly or use it as a basis for populating the baseline planning field. In this case, the SVP administrator chooses to copy the values into the baseline planning fields for comparable periods and, while doing so, she uses the percentage change algorithm to increase the values by 5%. After the baseline planning column is populated, the SVP administrator informs the senior managers and region managers that they can manually adjust the values.

The senior managers modify the data and allocate these changes down the account-category-product hierarchy. The SVP administrator then informs the subordinate managers and account managers that the data is available.

The account managers then modify the baseline data based on their knowledge of their local accounts and markets. They use this information to plan account promotions for these accounts, and they enter the incremental quantity that they anticipate as a result of these account promotions. Finally, at the end of the planning cycle, the SVP administrator reaggregates the baseline and incremental data and exports the data to a demand planning tool that she can use in the consensus forecasting.

## Roadmap for Sales Volume Planning

This topic lists the tasks and processes that administrators and end users typically perform to successfully execute the SVP process. Your company might follow a different roadmap according to its business requirements.

### Administrator Procedures

The following list shows tasks and processes that administrators typically perform to execute sales volume planning:

- 1 [“Process of Setting Up Category-Product Hierarchies” on page 6](#)
- 2 [“Process of Defining SVP Hierarchies” on page 9](#)
- 3 [“Performing the Initial Aggregation” on page 12](#)
- 4 (Optional) [“Running Aggregation Processing in Parallel” on page 13](#)

- 5 ["Populating Locks" on page 15](#)
- 6 ["Process of Establishing Baseline Basis Quantities" on page 15](#)
- 7 ["Copying Baseline Information to Other Fields" on page 19](#)
- 8 ["Manually Entering SVP Data" on page 21](#)
- 9 ["Process of Performing Ongoing SVP Administrative Tasks" on page 21](#)

## End-User Procedures

The following list shows tasks that end users typically perform to execute sales volume planning:

- 1 ["Viewing SVP Data \(End User\)" on page 24](#)
- 2 ["Skipping SVP Source Data \(End User\)" on page 25](#)
- 3 ["Locking and Modifying SVP Data \(End User\)" on page 26](#)

# Process of Setting Up Category-Product Hierarchies

The following list shows the tasks that administrators perform to set up a category-product hierarchy:

- ["Setting Up Account Hierarchies" on page 6](#)
- ["Creating Category-Product Hierarchies" on page 6](#)
- ["Associating Products with Categories" on page 8](#)
- ["Acquiring Categories" on page 8](#)
- ["Deleting Products and Categories" on page 9](#)

This process is a step in ["Roadmap for Sales Volume Planning" on page 5](#).

## Setting Up Account Hierarchies

You must establish an account hierarchy in which every account in the hierarchy has a parent account except the root account (the highest-level account in an account hierarchy). Organizational entities that are part of sales volume plans must exist in this SVP account hierarchy. For instructions about setting up account hierarchies, see ["Setting Up Account Hierarchies" on page 9](#).

This task is a step in ["Process of Setting Up Category-Product Hierarchies" on page 6](#).

## Creating Category-Product Hierarchies

You must establish an explicit category-product hierarchy before beginning the SVP process. Categories and products in SVP must have a single designated SVP parent category.

This task is a step in [“Process of Setting Up Category-Product Hierarchies”](#) on page 6.

### *To create a category-product hierarchy*

- 1 Navigate to the Administration - Catalog screen, then the SVP Categories view.
- 2 In the All Categories list, create a new record, and complete the necessary fields. Repeat this step for all categories.

The following table describes some fields.

| Field                    | Comments                                                                                                                                                            |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Category Name            | The name of the category in the category-product hierarchy.                                                                                                         |
| Parent SVP Category Name | The parent SVP name of the category (for example, All Products). This field is automatically populated when you later establish category-subcategory relationships. |
| SVP Level                | The SVP level of the category. This field is automatically populated when you make an association to a subcategory.                                                 |
| Description              | A description of the category-product hierarchy.                                                                                                                    |
| Effective Start Date     | The starting date and time of the category.                                                                                                                         |
| Effective End Date       | The ending date and time of the category.                                                                                                                           |
| Catalog Name             | The name of the catalog that is associated with this category-product hierarchy.                                                                                    |

- 3 In the All Categories list, select the root category, and drill down on the Category Name field hyperlink.

The SVP Category Details view appears.

- 4 In the Subcategories list, add the subcategory or subcategories for which you want to designate the parent category as the subcategory's SVP parent.

**NOTE:** You can designate many subcategories as SVP adoptees for the SVP parent. However, if a subcategory has another category as its SVP parent, your designation ends the previous SVP parent relationship and creates a new one.

## Associating Products with Categories

After establishing your multiple-category hierarchy, you associate products with each of the appropriate categories. Associate only products at the lowest level of the category hierarchy.

**CAUTION:** Even though you can add products to the upper levels of the category hierarchy, it is not recommended because the products are not recognized during SVP actions.

**NOTE:** If you create product to category links through other methods that are external to the application, you need to perform an Acquire Categories action to create the associations. For more information about this action, see [“Acquiring Categories” on page 8](#).

This task is a step in [“Process of Setting Up Category-Product Hierarchies” on page 6](#).

### *To associate products with a category*

- 1 Navigate to the Administration - Catalog screen, then the SVP Categories view.
- 2 Drill down on the Category Name field hyperlink for a category.  
The SVP Category Details view appears.
- 3 In the Subcategories list, drill down on the Name field hyperlink until you reach the lowest level subcategory.
- 4 In the Products list, create a new record.
- 5 In the Add Internal Products dialog box, select one or more products, and click Add.
- 6 In the Products list, select one or more products for which you want to designate an SVP parent category.
- 7 Click SVP Adopt.

The SVP Adoptee field of the selected product is automatically populated with a check. This product now has the selected parent category as its SVP parent. The other products in the Products list, for which the SVP Adoptee field is cleared, are not active products for the parent category. They do not appear in sales volume plans for the parent category.

## Acquiring Categories

Associating products with categories creates the links that the application needs to enable the allocation process. If you make these associations through another method that is external to the application, you need to perform an Acquire Categories action to establish these links. You must perform this action when the category-product hierarchy changes.

This task is a step in [“Process of Setting Up Category-Product Hierarchies” on page 6](#).

### *To perform the Acquire Categories action*

- 1 Navigate to the Administration - Sales Volume Planning screen, then the Other Actions view.
- 2 In the Other Actions form, create a new record.

- 3 From the Action field drop-down list, select Acquire Categories.
- 4 Enter text in the Description field (for example, Fall Forecast - Acquire Categories).
- 5 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the categories are acquired, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## Deleting Products and Categories

When deleting products, you must first unadopt the product. Similarly, when deleting a category, first unadopt all products associated with that category.

**CAUTION:** If you do not delete products and categories using the method described in this topic, you must run the Acquire Categories action to make sure that the allocation functions correctly in the new hierarchy. You can also run the Acquire Categories action to synchronize the category-product hierarchy when inconsistencies are introduced through error. Failing to keep this hierarchy synchronized adversely affects the allocation functionality.

This task is a step in [“Process of Setting Up Category-Product Hierarchies”](#) on page 6.

### *To unadopt a product*

- 1 Navigate to the Administration - Catalog screen, then the SVP Categories view.
- 2 Drill down on the Category Name field hyperlink for a category.
- 3 In the Subcategories list, drill down on the Name field hyperlink until you reach the lowest level subcategory.
- 4 In the Products list, select one or more products that you want to delete.
- 5 Click SVP Adopt.

The check in the SVP Adoptee field of the selected product is cleared. This product is no longer active for the parent category in SVP functions.

## Process of Defining SVP Hierarchies

Connecting the account hierarchy with the category-product hierarchy establishes the SVP hierarchy, also known as the account-product tree. You can connect these hierarchies by associating accounts in the account hierarchy with the categories in the category-product hierarchy.

**CAUTION:** Make sure the account hierarchy is explicit and contiguous, with every account in the hierarchy having a parent account except the root account. All organizational entities that are part of sales volume plans must exist in this SVP account hierarchy.

The following list shows the tasks that administrators can perform to define the SVP hierarchy:

- [“Manually Associating Categories with Accounts”](#) on page 10

- [“Manually Associating Subcategories with Accounts” on page 10](#)
- [“Modifying Account-Category Hierarchies” on page 11](#)
- [“Deleting Account-Category Hierarchies” on page 11](#)
- Importing the associations with the data from a back-office system

**CAUTION:** Running Aggregate can take you less time than manually establishing associations between every account and category-product hierarchy. However, the Aggregate action aggregates sales volume data and can take a long time to complete. Therefore, if you run Aggregate to create these associations, import the SVP data before running Aggregate.

This process is a step in [“Roadmap for Sales Volume Planning” on page 5](#).

## Manually Associating Categories with Accounts

You can manually associate categories with accounts.

This task is a step in [“Process of Defining SVP Hierarchies” on page 9](#).

### *To manually associate a category with accounts*

- 1 Navigate to the Administration - Catalog screen, then the SVP Categories view.
- 2 Drill down on the Category Name field hyperlink for a category.  
The SVP Category Details form appears.
- 3 From the visibility filter, select SVP Category Accounts.
- 4 Scroll down to the Accounts list and create a new account record.
- 5 In the Pick Account dialog box, select the accounts that you want to add to the category, and click Add.

## Manually Associating Subcategories with Accounts

You can manually associate subcategories with accounts.

This task is a step in [“Process of Defining SVP Hierarchies” on page 9](#).

### *To manually associate a subcategory with accounts*

- 1 Navigate to the Administration - Catalog screen, then the SVP Categories view.
- 2 In the All Categories list, select the subcategory that you want to associate with accounts.
- 3 Drill down on the Category Name field hyperlink for the subcategory.  
The SVP Category Details view appears.
- 4 From the visibility filter, select SVP Category Accounts.



- 5 Scroll down to the Accounts list and create a new account record.
- 6 In the Pick Account dialog box, select the accounts that you want to associate with the subcategory, and click Add.

## Modifying Account-Category Hierarchies

You can modify account-category hierarchies to reflect changes to accounts and categories in your organization. An account-category hierarchy changes when you change a parent-child account relationship. Perform changes to a parent-child account relationship by designating a new or different parent account for an account record. You can make these changes from one of the Sales Volume Planning views or from the general Data Administration views for accounts.

After making these changes, you must perform the Aggregate action. Take special consideration if the hierarchy change removes all associated subaccounts from a parent account. For information about the Aggregate action, see [“Performing the Initial Aggregation” on page 12](#).

This task is a step in [“Process of Defining SVP Hierarchies” on page 9](#).

### *To modify an account-category hierarchy*

- 1 Navigate to the Administration - Catalog screen, then the SVP Categories view.
- 2 In the All Categories list, select a category record.
- 3 From the visibility filter, select SVP Category Accounts.
- 4 Scroll down to the Accounts list, select an account record, and modify the Parent Account field.

## Deleting Account-Category Hierarchies

You can delete an account-category association by removing the account from the SVP Category Accounts view. After making this change, you must perform the Aggregate action. For information about the Aggregate action, see [“Performing the Initial Aggregation” on page 12](#).

This task is a step in [“Process of Defining SVP Hierarchies” on page 9](#).

### *To delete an account-category hierarchy*

- 1 Navigate to the Administration - Catalog screen, then the SVP Categories view.
- 2 In the All Categories list, select a category record.
- 3 From the visibility filter, select SVP Category Accounts.
- 4 Scroll down to the Accounts list, select an account record, and delete it.

## Performing the Initial Aggregation

The SVP Aggregate action executes and builds the account-category relationships that are defined earlier in the physical database. After this process is complete, SVP users can navigate the associated account-category hierarchy to understand or change periodic product movement data.

You can specify that the Aggregate action aggregates baseline data and rolls up incremental quantity from any level across the entire account-category-product hierarchy. You can also aggregate specific source fields (such as incremental quantity) rather than the entire source table.

You must run the SVP Aggregate action independently for each product movement table: baseline, target, consumption, and shipment. For example, a planning administrator who wants to establish targets and a baseline basis must run the Aggregate action twice—the first time to establish the targets and a second time to establish a baseline basis. You use the same SVP hierarchy when performing the Aggregate action for targets and a baseline basis. The Aggregate action fails if the product movement tables do not contain data.

**NOTE:** Before performing aggregation, make sure that products are associated with the authorized product distribution list for their respective account. For more information about distribution lists, see [“Creating Distribution Lists” on page 7](#).

This task is a step in [“Roadmap for Sales Volume Planning” on page 5](#).

### To perform an aggregation

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 In the Aggregate view, create a new record.
- 3 From the Action field drop-down list, select Aggregate.
- 4 Complete the necessary fields.

The following table describes some fields.

| Field                  | Comments                                                                                                                                                                                            |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description            | The name of the sales volume plan.                                                                                                                                                                  |
| Source Table           | The complete data set (baseline, shipment, consumption, or target) that you want to aggregate. Select a source table if you want to aggregate the entire data set.                                  |
| Source Field           | The subset of data that you want to aggregate (for example, incremental quantity or shipped quantity). Select a source field if you want to limit the aggregation to a specific column of SVP data. |
| Start Period           | The starting period of the source field or table.                                                                                                                                                   |
| End Period             | The ending period of the source field or table.                                                                                                                                                     |
| Starting Account Level | The level of the hierarchy from which you want to begin the aggregation. If this field is blank, aggregation starts at the lowest level of the account hierarchy.                                   |

5 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field.

**NOTE:** If you prepare sales volume data for multiple periods and want to track the progress of the action, click the Sub Actions view tab to see the status of the periods as they are processed.

After the aggregation is built, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## Running Aggregation Processing in Parallel

You can expedite aggregation processing by running parallel SVP Aggregate actions.

**NOTE:** You must enable the Workflow Process Manager component for each Siebel Server. For information about enabling components on a Siebel Server, see *Siebel System Administration Guide*.

To facilitate parallel processing, you partition your aggregation into multiple aggregation actions. For example, if you want to aggregate consumption data for the first 12 weeks of the year, instead of creating a single 12-week SVP Aggregate action record, create four Aggregate action records of three weeks each.

After you create the aggregation actions, you can run the actions in parallel, as multiple tasks on one server or as tasks on multiple servers.

To set up parallel aggregation processing, perform the following tasks:

- 1 Make sure Siebel Workflow Manager is started. For more information, see [“Setting Up Siebel Workflow Processes for Consumer Goods”](#) on page 5.
- 2 Enable the Workflow Process Manager component on each Siebel Server. For information about enabling components on a Siebel Server, see *Siebel System Administration Guide*.
- 3 Start the Workflow Monitor Agent on each Siebel Server. For more information, see *Siebel Business Process Framework: Workflow Guide*.

**NOTE:** To run multiple aggregation processes in parallel, each process needs a Workflow Monitor Agent. For example, if you want to run five processes in parallel, you must start five Workflow Monitor Agents. Similarly, if you want to run six parallel processes on a single server, you must start six Workflow Monitor Agents on that server.

- 4 Modify the CG SVP Action business component to enable the Mass Invoke button. For more information, see [“Modifying the CG SVP Action Business Component”](#) on page 14.
- 5 Set up and run parallel SVP Aggregate actions from a single-server or multiple-server environment. For more information, see [“Performing Parallel Aggregation Processing”](#) on page 14.

This task is a step in [“Roadmap for Sales Volume Planning”](#) on page 5.

## Modifying the CG SVP Action Business Component

To enable the Mass Invoke button, which you need for parallel processing, you must modify the CG SVP Action business component. If you do not modify the CG SVP Action business component as described in the following procedure, you cannot use the Mass Invoke button.

### *To modify the CG SVP Action business component*

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Component object, and in the Object List Editor, query for the following business component: CG SVP Action.
- 3 In the Object Explorer, select the Business Component User Prop child object.
- 4 For the Generate Account Category user property, change the value to FALSE.

## Performing Parallel Aggregation Processing

Before beginning this procedure, confirm that the AOM parameters for the eConsumer Object Manager (ENU) are as follows:

Minimum MT Servers =  $n$  plus 1

Maximum MT Servers =  $n$  plus 1

Where  $n$  is the number of servers that you use.

**CAUTION:** If you are configuring parallel SVP processing for the first time, you can use Workflow Simulator to test the following procedure before using Workflow Monitor Agent. For more information about Workflow Simulator, see *Siebel Business Process Framework: Workflow Guide*.

### *To perform parallel aggregation processing*

- 1 Log in to the Siebel Consumer Goods application, and navigate to the Administration - Sales Volume Planning screen, then the Other Actions view.
- 2 Create an SVP Populate Locks action and click Execute Action.  
All records are unlocked and available for aggregation.
- 3 Create an SVP Acquire Categories action and click Execute Action.  
Account category records are created for each combination of accounts and categories.
- 4 After you determine how to divide the aggregation into subperiods, create and execute an SVP Aggregate action record for each subperiod aggregation using the instructions in ["Performing the Initial Aggregation"](#) on page 12.
- 5 For each Siebel Server running Consumer Goods that you want to use to process this aggregation, log in and launch a new instance of the Consumer Goods application Web client.
- 6 On each client, navigate to the Administration - Sales Volume Planning screen.
- 7 From the Aggregate view, click Mass Invoke.  
Repeat this step for each client.

- 8 Close each client.
- 9 To monitor the progress of your parallel aggregations, launch a new instance of the Consumer Goods application Web client and navigate to the Administration - Sales Volume Planning screen.  
The SVP Action list displays the status of each Aggregate action. Make sure that at least two Aggregate actions have a status of Executing at the same time. This condition confirms that the processing is running in parallel.

## Populating Locks

After building an SVP hierarchy, you populate the hierarchy's locks. When you populate locks, multiple users cannot simultaneously edit data, and you can remotely edit forecast data.

**NOTE:** Until you populate the locks, end users cannot view SVP data.

Locks are populated at the account level, preventing users at lower account levels from overwriting modifications that users make at higher account levels.

For more information about locking SVP data, see [“Locking and Modifying SVP Data \(End User\)” on page 26](#).

This task is a step in [“Roadmap for Sales Volume Planning” on page 5](#).

### *To populate SVP hierarchy locks*

- 1 Navigate to the Administration - Sales Volume Planning screen, then the Other Actions view.
- 2 In the Other Actions form, create a new record.
- 3 From the Action field drop-down list, select Populate Locks, and enter text in the Description field.
- 4 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the locks in the hierarchy are populated, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## Process of Establishing Baseline Basis Quantities

After importing the SVP data, you copy the data to the Baseline Basis Qty field. Typically, your first step in creating a baseline is generating a baseline basis quantity. A *baseline basis quantity* is generated from imported SVP source data and represents the preadjusted quantity that would have been sold without an account promotion.

The following list shows that tasks that administrators perform to establish a baseline basis quantity:

- [“Generating Baseline Basis Quantities for Existing Products” on page 16](#)
- [“Generating Baseline Basis Quantities for New Products” on page 17](#)

- [“Precalculating Adjusted Baseline Basis Quantities” on page 18](#)

This process is a step in [“Roadmap for Sales Volume Planning” on page 5](#).

## Generating Baseline Basis Quantities for Existing Products

For existing products, you can use shipment or consumption data from an earlier period or baseline data from a demand planning tool as the source data for generating a baseline basis. After determining the source of the baseline basis, for example, historical shipments, you copy these records to the baseline basis quantity.

This task is a step in [“Process of Establishing Baseline Basis Quantities” on page 15](#).

### *To generate a baseline basis quantity for an existing product*

- 1 Navigate to the Administration - Sales Volume Planning screen, then the Copy Actions view.
- 2 In the Copy Actions form, create a new record.
- 3 From the Action field drop-down list, select Copy Field.
- 4 In the Account field, select the highest level account structure, for example, All Accounts or Company HQ.
- 5 Select a value in the Category field or the Source Product field.  
**NOTE:** You must select the Account field before you select the Category field or the Source Product field.
- 6 Complete the rest of the fields in the form.

The following table describes some fields.

| Field            | Comments                                                                                                             |
|------------------|----------------------------------------------------------------------------------------------------------------------|
| Description      | A description of the action that creates the sales volume plan, for example, copy Shipped Qty to Baseline Basis Qty. |
| Category         | The category in the category-product hierarchy.                                                                      |
| <b>Source</b>    |                                                                                                                      |
| Source Product   | The product in the category-product hierarchy.                                                                       |
| Source Field     | The source field of the baseline basis, for example, Shipped Qty or Consumed Qty.                                    |
| Start Period     | The starting period of the source field.                                                                             |
| End Period       | The ending period of the source field.                                                                               |
| Include Skipped  | Select this field to include skipped account-product periods.                                                        |
| <b>Algorithm</b> |                                                                                                                      |

| Field         | Comments                                                                                                                                                               |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Algorithm     | The algorithm, for example, Percentage Change or Trended Volume-Period. For more information about algorithms, see <a href="#">“About SVP Algorithms” on page 28</a> . |
| %Change       | The percentage change from the source field to the target field. You must select Percentage Change in the Algorithm field to enter data in this field.                 |
| <b>Target</b> |                                                                                                                                                                        |
| Target Field  | The target field of the baseline basis, for example, Baseline Basis Qty.                                                                                               |
| Start Period  | The starting period of the target field.                                                                                                                               |
| End Period    | The ending period of the target field.                                                                                                                                 |

#### 7 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field.

**NOTE:** If you prepare sales volume data for multiple periods and want to track the progress of the action, click the Sub Actions view tab to see the status of the periods as they are processed.

After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful. On the Sales Volume Planning screen, the Basis Qty field in the Category Baseline list is now populated for this product.

## Generating Baseline Basis Quantities for New Products

For new products, you can copy baseline shipment or consumption data from a similar existing product to generate a baseline basis. After determining the source of the baseline basis, for example, historical shipments of a similar product, you copy these records to the new product's baseline basis quantity.

This task is a step in [“Process of Establishing Baseline Basis Quantities” on page 15](#).

### *To generate a baseline basis quantity for a new product*

- 1 Navigate to the Administration - Sales Volume Planning screen, then the Copy Actions view.
- 2 In the Copy Actions form, create a new record.
- 3 From the Action field drop-down list, select Copy Product.

**NOTE:** If you want to copy information between products, the products must be part of the same account. If products are part of the same account hierarchy but at different account levels, you cannot copy product information from an existing product to a new product.

- 4 Select the Apply ADL check box if you want to create records for only the accounts that are already added to the ADL (Authorized Distribution List) for the new product:

- If no ADL is established for the new product, or if you want to sell the new product to the same accounts to which you sell the source product, leave this check box blank.
  - If you select the Apply ADL check box, the Default Value field is available, and you can enter an estimated value for those ADL accounts that do not buy or receive the source product.
- 5 Complete the rest of the fields in the form.

Step 6 of [“Generating Baseline Basis Quantities for Existing Products” on page 16](#) describes the available fields.

- 6 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field.

After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful. On the Sales Volume Planning screen, the Basis Qty field in the Category Baseline list is now populated for this new product.

## Precalculating Adjusted Baseline Basis Quantities

After you establish a baseline basis quantity, you can adjust this quantity to reflect growth or decline rates by using a percentage change algorithm or a trended volume by period algorithm.

You can precalculate changes to the baseline basis quantity. This predetermination of the quantity shows values for this data and provides you with a quick reference to the total quantity. If you think that quantity values were skipped and want to understand the source value (predetermination) for all periods (including skipped periods), select the same periods before performing the predetermination.

After making all of the needed adjustments to the baseline basis quantity, you copy the values to the baseline basis planning quantity.

This task is a step in [“Process of Establishing Baseline Basis Quantities” on page 15](#).

### *To precalculate an adjusted baseline basis quantity*

- 1 Navigate to the Administration - Sales Volume Planning screen, then the Copy Actions view.
- 2 In the Copy Actions form, create a new record.
- 3 In the Account field, select the account in the account-product hierarchy to use to calculate the adjusted baseline basis.
- 4 Select a value in the Category field or the Source Product field for the category or product in the category-product hierarchy to use to calculate the adjusted baseline basis.

**NOTE:** You must select the Account field before you select the Category field or the Source Product field.

- 5 Complete the rest of the fields in the form.

Step 6 of [“Generating Baseline Basis Quantities for Existing Products” on page 16](#) describes the available fields.



6 Click Calculate Source.

The Source Value field displays the unadjusted Source field quantity, and the Target Value field displays the adjusted Source field quantity.

7 (Optional) Enter a quantity value in the Override field.

The value in the Override field appears in the Target Value field, and the %Change field is adjusted to reflect the value in the Override field.

**NOTE:** The Override field does not depend on the values in the Algorithm field or %Change field.

## Copying Baseline Information to Other Fields

The baseline quantity is the quantity of product that would have been sold without an account promotion. After establishing a baseline quantity, account managers can use this value in conjunction with the Trade Promotions module to better plan incremental quantity for account promotions. You can also use the baseline quantity to establish and generate target quantities.

When you copy baseline information to other fields in the Siebel Consumer Goods application, you can copy baseline information:

- From the Baseline Basis Qty field to the Baseline Planning Qty field.

After copying, SVP administrators release the imported SVP data to their senior managers. These managers modify the data to reflect their markets and allocate the modified quantities down the account-product hierarchy. For more information about modifying the data, see [“Skipping SVP Source Data \(End User\)” on page 25](#).

- From the Baseline Planning Qty field to the Baseline Qty field.

After senior managers modify and allocate the baseline planning quantities, you can copy the Baseline Planning Qty field to the Baseline Qty field.

- From the Baseline Qty field to the Baseline PY Qty field.

To establish baseline quantities for the prior year, you can copy the Baseline Qty field to the Baseline PY Qty field.

- From the Baseline Qty field to the Baseline Target Qty field.

To establish baseline quantities for expected targets, you can copy the Baseline Qty field to the Baseline Target Qty field.

This task is a step in [“Roadmap for Sales Volume Planning” on page 5](#).

### *To copy baseline information into other fields*

- 1 Navigate to the Administration - Sales Volume Planning screen, then the Copy Actions view.
- 2 In the Copy Actions form, create a new record.
- 3 From the Action field drop-down list, select Copy Field.

## 4 Complete the necessary fields.

The following table describes some fields.

| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description      | A description of the action that creates the sales volume plan, for example, copy Baseline Basis Qty to Baseline Planning Qty.                                                                                                                                                                                                                                                                                                                                        |
| Account          | The account in the account-product hierarchy to copy.                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Category         | The category in the category-product hierarchy to copy. Select a value in the Category field or the Source Product field. You must select the Account field before you select the Category field or the Source Product field.                                                                                                                                                                                                                                         |
| <b>Source</b>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Source Product   | The product in the category-product hierarchy to copy. Select a value in the Category field or the Source Product field.                                                                                                                                                                                                                                                                                                                                              |
| Source Field     | The source field to copy from.                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Start Period     | The starting period of the source field.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| End Period       | The ending period of the source field.                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Source Value     | The source value to copy.                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Apply ADL        | Select the Apply ADL check box if you want to create records for only the accounts that are already added to the ADL (Authorized Distribution List) for the new product. If no ADL is established for the new product, or if you want to sell the new product to the same accounts to which you sell the source product, leave this check box blank. For more information about Authorized Distribution Lists, see <a href="#">Chapter 6, "Product Distribution."</a> |
| Default Value    | If you select the Apply ADL check box, the Default Value field is available. Enter a default value for those ADL accounts that do not buy or receive the source product.                                                                                                                                                                                                                                                                                              |
| Include Skipped  | Select this field to include skipped account-product periods.                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Algorithm</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Algorithm        | The algorithm, for example, Percentage Change or Trended Volume-Period. For more information about algorithms, see <a href="#">"About SVP Algorithms" on page 28.</a>                                                                                                                                                                                                                                                                                                 |
| %Change          | The percentage change from the source field to the target field. You must select Percentage Change in the Algorithm field to enter data in this field.                                                                                                                                                                                                                                                                                                                |
| Override         | If the target field value already exists in the database, you can use this field to specify a value that overrides that value.                                                                                                                                                                                                                                                                                                                                        |
| <b>Target</b>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

| Field          | Comments                                                                                                                                    |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Target Product | The product in the category-product hierarchy to which a value is copied. Select a value in the Category field or the Source Product field. |
| Target Field   | The target field to which a value is copied.                                                                                                |
| Start Period   | The starting period of the target field.                                                                                                    |
| End Period     | The ending period of the target field.                                                                                                      |
| Duration       | The length of the target field from the start period to the end period.                                                                     |
| Target Value   | The value of target. This constant target value overwrites all other values.                                                                |

5 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field.

**NOTE:** If you prepare sales volume data for multiple periods and want to track the progress of the action, click the Sub Actions view tab to see the status of the periods as they are processed.

After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## Manually Entering SVP Data

Marketing administrators who want to prepare sample databases for training or testing purposes can manually enter account-product data for use in the SVP process. Manually entering this data eliminates the need to import these records.

**NOTE:** Use caution when entering this data manually. It is recommended that you establish and use a separate SVP hierarchy for training purposes.

This task is a step in [“Roadmap for Sales Volume Planning”](#) on page 5.

### *To manually enter account-product data*

- 1 Navigate to the Administration - Data screen, then the Account Product view.
- 2 Enter the account-product data that you want.

## Process of Performing Ongoing SVP Administrative Tasks

The following list shows the tasks that administrators typically perform for ongoing SVP administration:

- [“Creating SVP Periods”](#) on page 22
- [“Importing or Copying SVP Data”](#) on page 22

- [“Resetting Account and Category Levels” on page 22](#)
- [“Performing Periodic Aggregations” on page 23](#)
- [“Allocating Changes Down Multiple Levels of the Account Hierarchy” on page 23](#)
- [“Resetting SVP Hierarchy Levels” on page 24](#)
- [“Resetting SVP Hierarchy Locks” on page 24](#)

This process is a step in [“Roadmap for Sales Volume Planning” on page 5](#).

## Creating SVP Periods

You must create periods to represent the units of time that you work with in the SVP process. SVP supports period types of weeks or months. For information about creating periods, see [“Creating Periods” on page 4](#).

This task is a step in [“Process of Performing Ongoing SVP Administrative Tasks” on page 21](#).

## Importing or Copying SVP Data

You must import the data to use in the SVP process. You can import SVP source data into any of the standard product movement tables (baseline, target, consumption, and shipment) using Siebel Enterprise Integration Manager (EIM). Data that is imported into these tables is copied or staged to the appropriate catalog-category tables for the same product movement types. The SVP module uses predefined interface tables for importing source data. For more information, see *Siebel Enterprise Integration Manager Administration Guide*.

**NOTE:** SVP source data is recorded at the lowest level of your account and product hierarchies. Therefore, when importing SVP source data, you must import this data at the lowest level of your hierarchies—for example, at the Ship To-SKU level.

You can also copy SVP data from existing products to records for similar new products. You can then use this data as the source records for your upcoming SVP actions. For more information about copying SVP data from existing products to records for similar new products, see [“Generating Baseline Basis Quantities for New Products” on page 17](#).

This task is a step in [“Process of Performing Ongoing SVP Administrative Tasks” on page 21](#).

## Resetting Account and Category Levels

Resetting levels displays the current levels associated with each account that is represented in your SVP hierarchy. If you want the Account Level field to auto-populate in SVP views and forms, you must reset account and category levels. Resetting account levels allows you to view an account's level.

This task is a step in [“Process of Performing Ongoing SVP Administrative Tasks” on page 21](#).

### *To reset Account and Category levels*

- 1 Navigate to the Administration - Sales Volume Planning screen, then the Other Actions view.
- 2 In the Other Actions form, create a new record.
- 3 From the Action field drop-down list, select Reset Levels, and enter text in the Description field.
- 4 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the levels in the account-product hierarchy are reset, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## Performing Periodic Aggregations

You need to run Aggregate to incorporate account, category, or product changes into the SVP hierarchy. You also need to run the process to aggregate baseline data changes or to create SVP data for future periods. For information about running Aggregate, see [“Performing the Initial Aggregation” on page 12](#).

This task is a step in [“Process of Performing Ongoing SVP Administrative Tasks” on page 21](#).

## Allocating Changes Down Multiple Levels of the Account Hierarchy

If you need to allocate changes down multiple levels of the account hierarchy, use the Administration - Sales Volume Planning screen and run an Allocate action. For example, if the Vice President of Sales mandates a change in the forecast at the root account level that applies to all accounts in the hierarchy, run the Allocate action. This action pushes changes down the account hierarchy from the selected account to any of the 10 hierarchical levels. For more information about allocating changes, see [“Locking and Modifying SVP Data \(End User\)” on page 26](#) and [“About Category and Account Level Allocation” on page 29](#).

When changes are made to a volume, they are automatically rolled up and pushed down the category-product hierarchy with the account node being worked on. To push the changes down to the next level of account nodes, click the Allocate button. Because the allocation process can involve updating thousands of records, the system is designed to allow end users to only allocate down one level of the account hierarchy at a time. To allocate down more than one level or to aggregate up the account hierarchy, an administrator must initiate this action from the SVP Administration view. When a value is changed at the Category Baseline level, that change must be pushed down to the Product Baseline level and converted to the other units of measure before being rolled-up back to the original category baseline level.

Sales volumes (in currency, units, cases, and so on) can be entered at any level of the account or product hierarchy and pushed down or rolled-up the hierarchy, to keep all numbers in the hierarchy in synchronization.

This task is a step in [“Process of Performing Ongoing SVP Administrative Tasks” on page 21](#).

## Resetting SVP Hierarchy Levels

During the SVP period, you can reset the levels of an account-product tree. Perform this task if new accounts are added or if the category-product hierarchy is changed. Resetting account-product tree levels resets the account level and category level designations to reflect the updated hierarchical change. For more information, see [“Resetting Account and Category Levels” on page 22](#).

This task is a step in [“Process of Performing Ongoing SVP Administrative Tasks” on page 21](#).

## Resetting SVP Hierarchy Locks

You can reset the locks of an SVP hierarchy to allow users at lower account levels to modify SVP data. You can also reset SVP hierarchy locks if an account team lock prevents a user from modifying that user’s data, and the members of the account team cannot resolve the lock. For example, the members of the account team might be out of the office or on vacation, or a lock error might occur. Resetting SVP hierarchy locks overrides the established lock and allows other users to modify the previously locked records.

This task is a step in [“Process of Performing Ongoing SVP Administrative Tasks” on page 21](#).

### *To reset SVP hierarchy locks*

- 1 Navigate to the Administration - Sales Volume Planning screen, then the Other Actions view.
- 2 In the Other Actions form, create a new record.
- 3 From the Action field drop-down list, select Reset Locks, and enter text in the Description field.
- 4 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the locks in the hierarchy are reset, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## Viewing SVP Data (End User)

Throughout the SVP period, sales managers view SVP data to monitor shipment or consumption quantities, gather feedback about the effectiveness of account promotions, and track their progress in meeting their targets. For more information about SVP data, see [“About Sales Volume Planning” on page 1](#).

When you create a query to find data in the Category Baseline and Product Baseline lists, the query definition is applied to your subsequent selections in the Accounts and Category lists. For example, to view category baseline records for a quarter, you define the query to return results for the three months in that quarter. When you drill down to the next level, the previously defined query automatically returns records for only that quarter. Similarly, queries that you create in the Product Baseline list are applied when you select subsequent records in the Products list. For more information about creating, executing, and canceling queries, see *Siebel Fundamentals*.

This task is a step in [“Roadmap for Sales Volume Planning” on page 5](#).

**To view SVP data**

- 1 Navigate to the Sales Volume Planning screen.
- 2 In the Sales Volume Planning link bar, for the data that you want to view click one of the following links:
  - **Baseline.** If you click this link, the Category Baseline list and Product Baseline list appear with the Accounts list, Category list, and Products list.
  - **Shipment.** If you click this link, the Category Shipment list and Product Shipment list appear with the Accounts list, Category list, and Products list.
  - **Consumption.** If you click this link, the Category Consumption list and Product Consumption list appear with the Accounts list, Category list, and Products list.
  - **Target.** If you click this link, the Category Target list and Product Target list appear with the Accounts list, Category list, and Products list.
  - **Baseline - Flat.** If you click this link, the Product Baseline - Flat list appears with the Accounts list and Category list. You can click Prior Year, Current Year, or Next Year, to see baseline data for the time period.
- 3 In the Accounts list, select an account.
- 4 In the Category list, select the root category, or drill down on the Name field hyperlink to navigate through the subcategories until you reach the level that you want to view:
  - To return to a higher level, click Go Up.
  - To return to the root, or highest-level category, click the browser Back button.
- 5 In the Category Baseline list, Category Shipment list, Category Consumption list, or Category Target list, select a value from the drop-down list that is next to the list buttons.  
The Period Analysis value shows data in a graphical chart by period.
- 6 Scroll down to the Products list, and drill down on the Name field hyperlink for a product to view the data.
- 7 In the Product Baseline list, Product Shipment list, Product Consumption list, or Product Target list, select a value from the drop-down list that is next to the list buttons.  
The Period Analysis value shows data in a graphical chart by period.

## Skipping SVP Source Data (End User)

After importing the SVP source data, managers can make adjustments to reflect changes in the account-product hierarchy. For example, an account might no longer be part of your organization, a product might be discontinued, or a period might not apply to SVP. You make these adjustments by excluding or *skipping* some of the source data. You can skip data at any level of the hierarchy. For any parent records that you skip, all associated child records are also skipped. You can skip data for baseline or shipment data.

The following procedure uses shipment data as the source for the SVP process. Your company might use a different source depending upon its business requirements.

This task is a step in [“Roadmap for Sales Volume Planning”](#) on page 5.

### *To skip source data*

- 1 Navigate to the Sales Volume Planning screen and click either of the following links, as appropriate to your needs:
  - **Baseline.** To view the Baseline view.
  - **Shipment.** To view the Shipment view.
- 2 In the Accounts list, select an account record.
- 3 In the Category list, select the product record for which you want to view shipments.  
In the Category Shipment list, the quantity of shipped product for the selected account-product pair appears.
- 4 In the Category Shipment list, select the Skip check box for each period that you want to skip.  
You can skip data at any level.

**NOTE:** If you skip a category, all products in that category are skipped. If you do not want to skip all products in a category, you can skip at the product level.

When the administrator aggregates this data, the periods for which you select the Skip check box are not included in the final numbers.

## Locking and Modifying SVP Data (End User)

Locking allows users to modify data throughout the account-product-category hierarchy without interfering with the modifications of other users.

The SVP module offers two options for locking account-product nodes:

- Automatic locking based on the account-product node’s position in the SVP hierarchy. Any user in the account hierarchy can automatically lock a node to prevent users at lower positions in the account hierarchy from modifying their account-product nodes.
- Manual locking.

This task is a step in [“Roadmap for Sales Volume Planning”](#) on page 5.



## Automatically Locking Account-Product Nodes

To prevent overwriting numbers, account nodes must be locked before their numbers can be edited. Locking a node prevents other people from making any modifications to any ascendant account node or any descendant account node. The SVP module uses an allocation lock process during the allocation and aggregation process. An *allocation lock* is a Boolean variable that is kept at the highest account level. When an allocation lock is set, the lock prevents all subordinate account levels from updating SVP data. Before an allocation lock is granted, the application checks the current account node to confirm that its upper lock is active and searches to ascertain that no allocation lock is currently held in the superior account node.

Allocation locks are maintained for the account hierarchy. In a single instance of the category-product hierarchy, all updates are allocated and aggregated immediately.

After a user completes SVP allocation-related updates, the actual allocation is invoked, and the application modifies the locks as follows:

- By updating the upper lock in the originating allocation node
- By disallowing further changes there until the user performs the Aggregate action

**NOTE:** You can see the nodes that are locked by viewing the Allocate Lock column in the Accounts list in the Sales Volume Planning screen. You might need to manually refresh this view to see the results of a recently attempted lock request.

## Locking, Modifying, and Allocating Account-Product Nodes

You can lock and unlock an account-product node manually. However, you can unlock the account-product node only if no changes are made. If changes are made, the node remains locked until one of the following actions occurs:

- The changes are allocated.
- A user performs an aggregate action, and the specific updates are aggregated up the organizational hierarchy.

The following procedure uses baseline planning quantity as an example to describe how to lock and modify account-product nodes. It also includes information about how locking and unlocking can occur automatically.

### *To lock, modify, and allocate the baseline planning quantity*

- 1 Navigate to the Sales Volume Planning screen, then the Baseline view.
- 2 In the Accounts list, select an account record.
- 3 Lock the category for which you want to modify the baseline planning quantity as follows:
  - To lock the category manually, click Lock.
  - To lock the category automatically:
    - In the Category list, select the category for which you want to modify the baseline planning quantity.

- Optionally, navigate down to the product list, and select the product for which you want to modify the baseline planning quantity.
- 4 Scroll down to the Category Baseline or Product Baseline list, select the record that you want to modify, and edit the fields.

Modifying a baseline planning value automatically locks the selected account nodes when connected to the server (even if you did not click Lock in [Step 3](#)).

- 5 To apply the same change to multiple periods, click Mass Change, complete the fields in the Baseline Mass Change dialog box, and click Execute.

Adjustments that you make to the baseline planning quantity affect only the products and categories in the account.

- 6 Perform one of the following steps to view the navigation mechanism for the Product Baseline:
  - a Navigate to a category sublevel. In the Category Baseline list, from the Category Baseline drop-down list, select one of the following values:
    - Period Analysis
    - Sub-Account Baseline
    - Sub-Category Baseline
    - Sub-Product Baseline
  - b Navigate to a product sublevel, and perform the following steps:
    - In the Category List, select a product.
    - Scroll down to the Product Baseline list, and from the Product Baseline drop-down list, select Sub-Account Baseline.
  - c In the Category Baseline or Product Baseline lists, click Refresh.

This step is for informational purposes only to see how [Step 4](#) and [Step 5](#) (if executed) impact the allocation of values for an account down through the category hierarchy. The Basis% field is recalculated to reflect the new proportions of the account-product hierarchy.

- 7 Repeat [Step 4](#) until you finish modifying the basis planning quantity.
- 8 Scroll up to the Accounts list, and click Allocate.

The baseline planning quantity is allocated to the next lower level of the account hierarchy. When the allocate action is complete, the account-product node is unlocked. Managers at the next lower level of the account hierarchy repeat this process until the baseline planning quantity is allocated to the lowest level of the account hierarchy.

**NOTE:** If the allocation does not complete (due to pending subaction records that are not processed), then the action does not complete, and the account remains in locked mode.

## About SVP Algorithms

The following two algorithms are available in the SVP module:

- **Percentage Change.** Modifies the source value by a percentage and populates the target proportionately. A period definition is not required.
- **Trended Volume Period.** Compares the value in the Trended Volume Period to the value in the Source Period to obtain a variance, and uses this variance to extrapolate the value in the target period. A period definition is required. [Table 11](#) shows an example of trended volume period calculations.

Table 11. Trended Volume Period Calculations

| Source Period                          | Trended Volume Period                  | Variance                                                      | Target Period                                                                                                                                |
|----------------------------------------|----------------------------------------|---------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Start: Week 1, 1998<br>(Quantity: 100) | Start: Week 1, 1999<br>(Quantity: 110) | 10% increase<br>(from source period to trended volume period) | Start: Week 1, 2000<br>(Quantity: 121)<br>Apply Variance to the value in the trended volume period to obtain the value in the target period. |
| End: Week 2, 1998<br>(Quantity: 100)   | End: Week 2, 1999<br>(Quantity: 90)    | 10% decrease<br>(from source period to trended volume period) | End: Week 2, 2000<br>(Quantity: 81)<br>Apply Variance to the value in the trended volume period to obtain the value in the target period.    |

## About Category and Account Level Allocation

Category and account level allocation functionality allows users to push changes down the account and category-product hierarchies in segments to allow groups of users to make subsequent changes.

Also known as intra-account allocation, category allocation occurs automatically after a user changes baseline records. It occurs in the category-product structure associated with the specific account that a user modifies. When a user makes a change and commits that change by stepping off the record, the change is pushed out through the category-product hierarchy in that account.

Trigger account level allocation using one of the following methods:

- **Down one level.** You can allocate changes down one level using the Allocate button in the Sales Volume Planning screen.
- **Down multiple levels.** Only an administrator can allocate changes down multiple levels, using the Administration - Sales Volume Planning screen.

## About Allocating Changes Down One Level of Account Hierarchy

By allocating changes while in the Sales Volume Planning screen, the end user can allocate changes down one level of the account hierarchy.

**NOTE:** Category-product changes are allocated in the account immediately when the user steps off of the record.

For more information about allocating changes, see [“Locking and Modifying SVP Data \(End User\)”](#) on page 26.

## About the Account Allocation Level Parameter

The Account Allocation Level parameter defines the scope of an allocation. It specifies the account level in the SVP hierarchy that is used when performing an SVP allocation action. For example, to allocate two levels, navigate to the Administration - Sales Volume Planning screen, and in the Action form, click the Allocation Level drop-down arrow, and select Allocation Level 2.

**NOTE:** The parent account is always Level 1, and each subaccount level is the next sequential number. These allocation levels are specific to the SVP account hierarchy.

# About Number Handling and Percentage-Basis Calculations

Various actions handle negative and decimal numbers as follows:

### ■ Copy Field and Copy Product actions:

- Negative source records are converted to target records with a value of zero by default. To change this behavior, set the Allow Negatives field user property to TRUE, which transfers the unaltered number.
- Floating point decimal numbers are truncated to integer values. To change this behavior, set the Decimal Number field user property to TRUE, which transfers the unaltered number.

■ **Aggregation actions.** Both negative and floating point decimal numbers are supported and calculated as such. All negative cases are field zeroed-out when the user enters a value.

■ **Allocation actions.** Negative and floating point decimal numbers are zeroed-out and not supported. Floating point decimals in the SVP quantity fields are truncated such that only the integer portion of the value is taken into consideration. For currency fields, two digits after the decimal point are calculated.

The percentage basis is calculated in each SVP-specific Category list (for example, Category Baseline or Category Target) as the proportion of the record to the total value of records in the referenced list.

# About Configuring Sales Volume Planning

This topic contains information that might be useful when configuring SVP features.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 12](#).

Table 12. Buttons And Methods For SVP Configurations

| Button           | Method                | Description                                                                                                                                                                                                                                                                                                                                    | Supported On   |
|------------------|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Allocate         | MthdAlloc             | Changes the status of the allocate action to Pending (ready for Workflow Monitor to pick up).                                                                                                                                                                                                                                                  | Bus Comp Layer |
| Calculate Source | OnCalculate           | Sums up the total value of the Source field that is specified between the Start and End fields.                                                                                                                                                                                                                                                | Bus Comp Layer |
| Current Year     | CurrentSVPYear        | Displays baseline data for the current year in the Baseline - Flat view.                                                                                                                                                                                                                                                                       | Bus Comp Layer |
| Execute          | MassChange            | Finds all Baseline or Target records with a period between the start period and end period, then updates the field specified with <i>Value</i> according to the Algorithm Type. For Percentage Change, the new value is (1 plus <i>Value</i> divided by 100) multiplied by <i>old value</i> ; for Flat Change, the new value is <i>Value</i> . | Applet Layer   |
| Execute Action   | OnExecute             | Changes the status of actions from Initialized to Pending (ready for the Workflow Monitor to pick up).                                                                                                                                                                                                                                         | Bus Comp Layer |
| Save to File     | CreatePopup           | Exports selected columns from the SVP screen to an Excel spreadsheet.                                                                                                                                                                                                                                                                          | Applet Layer   |
| Load from File   | LoadFromFileInBusComp | Imports selected columns in an Excel spreadsheet to the SVP screen.                                                                                                                                                                                                                                                                            | Applet Layer   |
| Lock             | mthdlock              | Locks a node and makes the node modifiable.                                                                                                                                                                                                                                                                                                    | Bus Comp Layer |

Table 12. Buttons And Methods For SVP Configurations

| Button      | Method             | Description                                                                                                                                                                                                                                                               | Supported On   |
|-------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Mass Change | ShowPopup          | <p>Opens a dialog box that displays the following options:</p> <ul style="list-style-type: none"> <li>■ Algorithm type</li> <li>■ Field</li> <li>■ Value</li> <li>■ Period Start</li> <li>■ Period End</li> </ul> <p>The dialog box also contains the Execute button.</p> | Applet Layer   |
| Next Year   | NextSVPYear        | Displays baseline data for the next year in the Baseline - Flat view.                                                                                                                                                                                                     | Bus Comp Layer |
| Prior Year  | PriorSVPYear       | Displays baseline data for the prior year in the Baseline - Flat view.                                                                                                                                                                                                    | Bus Comp Layer |
| Refresh     | OnRefresh          | Refreshes the form and recalculates the planning percentages.                                                                                                                                                                                                             | Bus Comp Layer |
| Skip All    | SetAll             | Sets the Skip flag to True.                                                                                                                                                                                                                                               | Bus Comp Layer |
| SVP Adopt   | mthdAdoptSVPParent | Adopts categories in a hierarchy and makes them a part of the SVP category hierarchy.                                                                                                                                                                                     | Bus Comp Layer |
| Unlock      | mthdUnlock         | Unlocks a node and makes the node not modifiable.                                                                                                                                                                                                                         | Bus Comp Layer |

## Configuring Sales Volume Planning

To configure sales volume planning, perform the following tasks:

- 1 [“Setting Up Siebel Workflow Processes for Consumer Goods” on page 5](#)
- 2 (Optional) [“Modifying the SVP Business Service” on page 33](#)
- 3 (Optional) [“Configuring SVP Category Aggregation and Mass Change” on page 33](#)

## Modifying the SVP Business Service

You can modify the SVP business service. For example, you might want the business service to send an email message to alert the system administrator when the workflow process is complete. This alert eliminates the need for the system administrator to monitor the entire process.

**CAUTION:** Do not attempt to modify the SVP workflow process.

### To modify the SVP business service

- 1 Navigate to the Administration - Business Process screen, then the Workflow Processes view.
- 2 In the Workflow Processes list, click Query.
- 3 In the Process Definition form, enter CG SVP Process in the Name field.
- 4 Click Go.
- 5 Drill down on the Name field hyperlink for the CG SVP Process that is active.

The Workflow Process Designer view appears. You can use the graphical flowchart tool in this view to modify the business service. For more information about using Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide*.

## Configuring SVP Category Aggregation and Mass Change

To view the SVP data in units, Gross Revenue, and Net Invoice Revenue, use SVP Category Aggregation in the Consumer Goods application. SVP Category Aggregation enables the user to specify those fields that are linked back to SVP from the promoted products in the plans through user properties for business components. Before you can use Category Aggregation, you must enable it using Siebel Tools. For more information about promoted products, see [Chapter 8, "Trade Promotions."](#)

The Mass Change button allows you to perform an update on the Baseline Planning Currency and the Baseline Planning Qty fields for Category Baseline records. You can make other fields visible in the Field drop-down list in the Mass Change dialog box and enable Mass Change functionality on custom fields.

### Configuring Baseline Custom Fields for Category Aggregation

You can add a custom baseline field to the category aggregation process. This field must be based on an extension column.

#### To configure a custom baseline field for category aggregation

- 1 Log in to Siebel Tools.
- 2 Create the column for the custom field in the applicable tables (S\_PROD\_BASELINE and S\_CG\_CAT\_BASELN) by performing the following steps:

- a In the Object Explorer, select the Table object, and in the Object List Editor, query for the applicable table.
- b In the Object Explorer, select the Column child object, and create the column.
- c Click Apply/DDL, select the Apply action, and click OK.

For more information about extending columns in tables, see *Configuring Siebel Business Applications*.

### 3 Create the custom field in the following business components:

- CG SVP Product Baseline
- CG SVP Product Baseline - Aux
- CG SVP Product Baseline - for Adding Data
- CG SVP Category Baseline
- CG SVP Category Baseline - Aux
- CG SVP Category Baseline - for Adding Data

To create the custom field, perform the following steps:

- a In the Object Explorer, select the Business Component object, and in the Object List Editor, query for the business component.
- b In the Object Explorer, select the Field child object, and create the custom field.

### 4 Create the list column for the custom field in the following applets:

- CG SVP Product Baseline List Applet
- CG SVP Category Baseline List Applet
- CG SVP Account Product Baseline List Applet
- CG SVP Account Category Baseline List Applet

To create the list column, perform the following steps:

- a In the Object Explorer, select the Applet object, and in the Object List Editor, query for the applet.
- b In the Object Explorer, select the List child object, select the List Column child object, and create the list column for the custom field.

### 5 Create the user property for the custom field in the CG SVP Product Baseline-Aux business component by performing the following steps:

- a In the Object Explorer, select the Business Component object, and in the Object List Editor, query for the CG SVP Product Baseline-Aux business component.
- b In the Object Explorer, select the Business Component User Prop child object, and create a new user property with a name of the next available Build Tree name (for example, Build Tree 10) and a value of the custom field name.

**NOTE:** You can use the **Category Aggregation Field** user properties to configure category aggregation for custom fields.

### 6 Save all your changes, and back up the current SRF.



- 7 Recompile the SRF.
- 8 Stop the Siebel Server, and replace the old SRF with the newly compiled version.
- 9 Restart the Server.

## Using Category Aggregation

When it is enabled, you can use category aggregation to link fields back to SVP from the promoted products in the plans.

**NOTE:** A sales volume planning shipment record can be associated with many promoted products. However when an SVP shipment record is associated with a promoted product, no adjustment in shipment quantity is made for other promoted products with which the shipment record is associated. Therefore, each promoted product has the full shipment quantity associated with it.

### *To link fields back to SVP from the promoted products*

- 1 Navigate to the Sales Volume Planning screen.
- 2 In the Accounts list, query for and select an account for which you want to link SVP fields back to the promoted products.

**NOTE:** Account promotions with promoted categories, promoted products, and attributes must exist. For more information about account promotions, see [Chapter 8, "Trade Promotions."](#)

- 3 In the Category list, select the required category, and scroll down to the Category Baseline list.
- 4 Click Calculate.

## Making Extra Fields Available for Mass Change

You can update extra fields using the Mass Change button by adding new entries to the SVP Source LOV. After you add these extra fields, you can perform a mass change on these fields as described in ["Locking and Modifying SVP Data \(End User\)"](#) on page 26.

### *To make extra fields available for mass change*

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 In the List of Values list, create a new record. Repeat this step for all extra fields that you want to add.

The following table describes some fields.

| Field         | Comments                                             |
|---------------|------------------------------------------------------|
| Type          | Enter SVP Source.                                    |
| Display Value | The display value of the field that you want to add. |

| Field                     | Comments                                                           |
|---------------------------|--------------------------------------------------------------------|
| Language-Independent Code | The LIC of the field that you want to add.                         |
| Order                     | The order that you want the field to appear in the drop-down list. |

# 8

## Trade Promotions

This chapter describes how to create corporate promotions and account promotions, how to simulate the results for account promotions, and how to manage deals and phasing for account promotions. Topics include:

- [About Trade Promotions on page 1](#)
- [Scenario for Setting Up and Carrying Out Trade Promotions on page 2](#)
- [Viewing Account Promotion Details on page 3](#)
- [Roadmap for Managing Trade Promotions on page 3](#)
- [Process of Managing Corporate Promotions \(End User\) on page 4](#)
- [Creating High-Level Promotions for Account Promotions \(End User\) on page 17](#)
- [Process of Managing Plans for Account Promotions \(End User\) on page 18](#)
- [Process of Managing Account Promotions \(End User\) on page 24](#)
- [Process of Simulating High-Level Promotions and Account Promotions \(End User\) on page 41](#)
- [About What-If Scenarios at the Account Plan Level on page 47](#)
- [Process of Managing Deals for Account Promotions \(End User\) on page 48](#)
- [Process of Managing Phasing for Account Promotions \(End User\) on page 50](#)
- [About Some Fields for Promotions on page 56](#)
- [About Phasing Results on page 69](#)
- [About Configuring Trade Promotions on page 71](#)
- [Configuring Trade Promotions on page 77](#)
- [Planning by Using Different Units of Measure on page 83](#)

### About Trade Promotions

Trade promotions include account promotions and corporate promotions.

*Plans* apply to a specific account and a specific category of products, contain a group of account promotions for a specific time period, such as a fiscal year, and show the aggregate data for the account promotions that they contain.

*Account Promotions* are trade promotions that you create for a specific account. An account is sometimes referred to as a planning account. A planning account is the lowest level of your account hierarchy for which you make promotional decisions.

*Corporate promotions* are company-wide trade promotions of a product or brand. A brand manager can create a corporate promotion to launch a new product, and an account manager can create a corporate promotion that is applicable to multiple accounts. You can assign accounts to corporate promotions, or you can associate corporate promotions with account promotions that users create.

A brand manager who wants to recommend promotional strategies to account managers can create a pull corporate promotion. A *pull* corporate promotion is a corporate promotion that account managers can use as a template to create individual account promotions.

An account manager who handles multiple accounts can create a push corporate promotion. A *push* corporate promotion is a corporate promotion that account managers use to create multiple similar account promotions all at once. For example, an account manager is responsible for an account for a national retailer. Because each of the retailer's regions has autonomy to make promotional decisions, the account manager divides the national account into regional accounts. For the occasional account promotion that applies to all regions, the account manager uses a corporate promotion to automatically create an account promotion for each regional account.

## Scenario for Setting Up and Carrying Out Trade Promotions

Brand managers and account managers perform the process in this example scenario for trade promotions. Your company might follow a different process according to its business requirements.

The account manager for a large chain of grocery stores creates a plan for account promotions applicable to the chain. The plan will include all of the retailer's account promotions for following fiscal year, but only the category of products that the account manager is responsible for selling.

For the following fiscal year, the account manager can create account promotions for this plan by manually generating them from scratch, by adapting the information in a corporate promotion template that a brand manager creates, and by using a corporate promotion that a sales manager or brand manager pushes to her. In the account promotion, she includes information about the products that to be promoted, the promotional tactics to use to increase sales, the deals and spending details to provide the chain as incentive for participating in the promotion, as well as the volumes, revenues, and profits that the account promotion will likely generate.

When she simulates the results for an account promotion that she creates, the Consumer Goods application retrieves the predicted lift factors from the lift factor table based on the promoted products, account, time period, and tactics for the account promotion, and then applies these lift factors to the baseline volumes to calculate incremental volumes. The total of the baseline and incremental volumes is the planned volume for the account promotion. The Consumer Goods application applies the promoted price to this planned volume to derive the planned sales revenue for the account promotion, and applies the spending rate to this planned volume to estimate the planned variable expenditures.

The account manager can submit the account promotion to her manager for approval by changing the its status. Her manager can approve the account promotion (pending review and acceptance by the grocery store chain), reject the account promotion, or request more information. After the grocery store chain accepts the account promotion, the account manager recognizes this acceptance by changing its status.

## Viewing Account Promotion Details

Account managers can quickly review all promotions across all accounts for which they are responsible. Sales managers can see and rank all the promotions in their territory, or brand managers can see all the promotions that promote their products.

### To view account promotion details

- 1 Navigate to the Promotion screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 Click the Details view tab.
- 4 In the form, complete the necessary fields.

The following table describes some fields.

| Field               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Corporate Promotion | Use as a starting template for the promotion. This field is useful for leveraging the marketing materials and research already done to plan a company-wide promotion, such as for new product introductions and seasonal events.                                                                                                                                                                                                                                                                                                                                                                                                  |
| Promotion Reason    | Classifies the trade spend and helps with automatic association of the promotion spend to the correct fund. Options include: <ul style="list-style-type: none"> <li>■ ROI. Generates additional profit for the company.</li> <li>■ Critical Stock. Moves product that is approaching its expiration date.</li> <li>■ New Product. Helps introduce a new product to the market.</li> <li>■ Clearance Stock. Helps a customer move excess warehouse inventory.</li> <li>■ Trade Term. Provides an overall picture of total trade spend and helps analyze total promotion profitability and total customer profitability.</li> </ul> |
| Scenario Planning   | Add one or more scenarios that allow decision makers to more analytically choose how they might spend available funds or how they can best move critical inventory at the lowest cost. For more information about scenario planning, see <a href="#">“About What-If Scenarios at the Account Plan Level”</a> on page 47.                                                                                                                                                                                                                                                                                                          |

## Roadmap for Managing Trade Promotions

This topic lists the processes and tasks that end users typically perform to manage trade promotions. Your company might follow a different roadmap according to its business requirements.

The following list shows processes and tasks that end users typically perform to access and use trade promotions:

- [“Process of Managing Corporate Promotions \(End User\)” on page 4](#)
- [“Creating High-Level Promotions for Account Promotions \(End User\)” on page 17](#)
- [“Process of Managing Plans for Account Promotions \(End User\)” on page 18](#)
- [“Process of Managing Account Promotions \(End User\)” on page 24](#)
- [“Process of Simulating High-Level Promotions and Account Promotions \(End User\)” on page 41](#)
- [“Process of Managing Deals for Account Promotions \(End User\)” on page 48](#)
- [“Process of Managing Phasing for Account Promotions \(End User\)” on page 50](#)

## Process of Managing Corporate Promotions (End User)

The following list shows tasks that end users typically perform to manage corporate promotions:

- [“Creating Corporate Promotions” on page 4](#)
- [“Adding Categories to Corporate Promotions” on page 10](#)
- [“Adding Products to Corporate Promotions” on page 12](#)
- [“Adding Attachments to Corporate Promotions” on page 14](#)
- [“Attaching Literature to Corporate Promotions” on page 15](#)
- [“Creating Account Promotions from Corporate Promotions” on page 15](#)
- [“Viewing Performance Data for Account Promotions in Corporate Promotions” on page 16](#)

This process is a step in [“Roadmap for Managing Trade Promotions” on page 3](#).

## Creating Corporate Promotions

Brand managers can manage corporate promotions. A corporate promotion includes information about promotional tactics for the corporate promotion, start and end dates for the corporate promotion, the objective for the corporate promotion, and other details. Account managers can review corporate promotions when creating account promotions for their accounts. They use the information included in corporate promotions, such as suggested promotional tactics, when they create account promotions.

**NOTE:** When you delete a corporate promotion, the account promotions that are associated with it are not deleted. If you do not want to retain associated account promotions when you delete a corporate promotion, delete those account promotions before you delete the corporate promotion. For more information, see [“Retaining Account Promotions When Deleting Corporate Promotions” on page 78](#).

This task is a step in [“Process of Managing Corporate Promotions \(End User\)” on page 4](#).

**To create a corporate promotion**

- 1 Navigate to the Promotions screen, then the Corporate Promotions List view.
- 2 Create a new record, and then enter a name in the Promotion field.
- 3 Complete the other necessary fields.

Table 14 on page 58 and the following table describe some fields.

| Field                  | Comments                                                                                                                                                                                                                                                                                                                |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Period                 | The time period, such as a fiscal year, for which the corporate promotion is in effect. The start and end dates for promotion, shipment, and consumption in a corporate promotion default to the start and end dates for this time period. You can change these default values.                                         |
| Promotion Start Date   | The recommended start date for the corporate promotion. This date must be in the time period for the corporate promotion.                                                                                                                                                                                               |
| Promotion End Date     | The recommended end date for the corporate promotion.                                                                                                                                                                                                                                                                   |
| Shipment Start Date    | The recommended date when the shipments for this corporate promotion can begin. This date can be before the corporate promotion start date.                                                                                                                                                                             |
| Shipment End Date      | The recommended date when the shipments for this corporate promotion end. This date might be after the corporate promotion end date when you allow your customers to replenish their safety stock at promotion prices after the promotion is over.                                                                      |
| Consumption Start Date | The date when a promotional tactic is in effect. This date must be in the time period of the corporate promotion. Retail execution teams can use consumption dates to verify promotion execution. You can compare consumption dates to electronic Point of Sale (ePOS) dates to verify sale amounts during a promotion. |
| Consumption End Date   | The date when a promotional tactic is no longer in effect.                                                                                                                                                                                                                                                              |
| Description            | Enter general information about the corporate promotion.                                                                                                                                                                                                                                                                |
| Objective              | Enter information about the goal of the corporate promotion. You also can enter a retail objective for retail execution, such as a retail audit to verify the execution of the corporate promotion.                                                                                                                     |
| Support                | Enter information about the reason or justification for the corporate promotion.                                                                                                                                                                                                                                        |

| Field          | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tactics        | <p>Select the promotional tactic or tactics for the corporate promotion. Tactics constitute a method of promoting products to the consumer, and include the following main categories:</p> <ul style="list-style-type: none"> <li>■ Price, including percentages of TPR (Temporary Price Reduction)</li> <li>■ Display, including shelf, end-of-aisle (end cap), and check-out</li> <li>■ Feature, including flyers and newspaper advertisements</li> </ul> <p>Some of the available options combine these categories. For information about additional fields for tactics, see <a href="#">“Fields for Details About Promotional Tactics” on page 58.</a></p>                          |
| Parent Account | <p>Select the account for the corporate promotion. If a parent account with child accounts applies to the corporate promotion, select that parent account to include the child accounts in the corporate promotion. If you select a wholesaler or distributor account, the child accounts include the indirect retailers that the account services.</p> <p>If you want to use the Authorized Category field and the Authorized Product field to restrict the categories and products that you can add to the corporate promotion, you must select a value in this field. If the corporate promotion applies to all accounts or to multiple parent accounts, leave this field blank.</p> |
| Category       | <p>Click the select button, select a parent category in the Category dialog box, and click OK. The promoted categories that you can add to the corporate promotion are restricted to the child categories for this parent category.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Active         | <p>Select this field if you want to be able to associate the corporate promotion with an account promotion. For more information about this field, see <a href="#">“Creating Account Promotions” on page 25.</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |



| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SRM Request Id   | <p>When you click the Create Account Promotions button in the Target Accounts view to create account promotions for the corporate promotion, or click the Apply Updates button in the Corporate Promotions List view to revise account promotions for the corporate promotion, this field is populated with data according to the following criteria:</p> <ul style="list-style-type: none"> <li>■ If the Consumer Goods application is operating on a server, a process request is sent to the Server Request Manager, and this field is automatically populated with a row ID from the Server Request Manager. (This row ID is the value in the ROW_ID field in the S_SRM_REQUEST table.) This processing also applies to the Products button in corporate promotions.</li> <li>■ If the Consumer Goods application is not operating on a server, this field is not populated with data.</li> </ul>                                                                                                                                                                            |
| Execution Status | <p>When you click the Create Account Promotions button in the Target Accounts view to create account promotions for the corporate promotion, or click the Apply Updates button in the Corporate Promotions List view to revise account promotions for the corporate promotion, this field is populated with data according to the following criteria:</p> <ul style="list-style-type: none"> <li>■ If the Consumer Goods application is operating on a server, a process request is sent to the Server Request Manager, and this field is populated the status of the account promotion creation process or revision process in the Server Request Manager. Values include: Pending, In Progress, Error, and Finished. This processing also applies to the Products button in corporate promotions.</li> </ul> <p><b>NOTE:</b> The creation process or the revision process can take several minutes to complete.</p> <ul style="list-style-type: none"> <li>■ If the Consumer Goods application is not operating on a server, this field is not populated with data.</li> </ul> |

| Field               | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Authorized Category | <p>This flag limits the categories that are available for selection in the Add Categories dialog box when you add promoted categories to a corporate promotion and in the Categories dialog box when you click the select button in the Category field for a promoted category in a corporate promotion:</p> <ul style="list-style-type: none"><li>■ If you do not select this check box, the categories that are available for selection are not restricted further.</li><li>■ If you select this check box, the categories that are available for selection are restricted to those categories that are associated with the parent account on the corporate promotion.</li></ul> <p>This flag limits the categories that appear in the Promoted Categories list for an account promotion when you click the Create Account Promotions button in the Target Accounts view to create an account promotion from a corporate promotion:</p> <ul style="list-style-type: none"><li>■ If you do not select this check box, the promoted categories in the corporate promotion appear in the Promoted Categories list.</li><li>■ If you select this check box, the promoted categories in the corporate promotion appear in the Promoted Categories list if those promoted categories are associated with the selected target accounts.</li></ul> |

| Field              | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Authorized Product | <p>This flag limits the products that are available for selection in the Add Products dialog box when you add promoted products to a corporate promotion and in the Pick Product dialog box when you click the select button in the Product field for a promoted product in a corporate promotion:</p> <ul style="list-style-type: none"> <li>■ If you do not select this check box, the products that are associated with the selected promoted category are available for selection.</li> <li>■ If you select this check box, the products that are associated with the selected promoted category are available for selection if those products are on the authorized distribution list for the parent account in the corporate promotion and if the Promotable field is selected for those products on that authorized distribution list.</li> </ul> <p>This flag limits the products that appear in the Promoted Products list when you click the Products button to automatically add multiple products to a corporate promotion:</p> <ul style="list-style-type: none"> <li>■ If you do not select this check box, the products that are associated with all promoted categories and subcategories in the corporate promotion appear in the Promoted Products list.</li> <li>■ If you select this check box, the products that are associated with all promoted categories and subcategories in the corporate promotion appear in the Promoted Products list if those products are on the authorized distribution list for the parent account in the corporate promotion and if the Promotable field is selected for those products on that authorized distribution list.</li> </ul> <p>This flag limits the products that appear in the Promoted Products list for an account promotion when you click the Create Account Promotions button in the Target Accounts view to create an account promotion from a corporate promotion:</p> <ul style="list-style-type: none"> <li>■ If you do not select this check box, the promoted products in the corporate promotion appear in the Promoted Products list.</li> <li>■ If you select this check box, the promoted products in the corporate promotion appear in the Promoted Products list if those promoted products are on the authorized distribution lists for the selected target accounts and if the Promotable field is selected for those products on the authorized distribution lists.</li> </ul> |

## Adding Categories to Corporate Promotions

You can associate categories with a corporate promotion. A promoted category contains a group of stock keeping units (SKUs) that are usually promoted together and that have the same price. A promoted category can be a product category or a promoted product group in the product hierarchy.

Adding a category to a corporate promotion allows you to add the products in that category to the corporate promotion. For information about how to associate products with a category, see [“Adding Products to Corporate Promotions”](#) on page 12.

This task is a step in [“Process of Managing Corporate Promotions \(End User\)”](#) on page 4.

### *To add categories to a corporate promotion*

- 1 Navigate to the Promotions screen, then the Corporate Promotions List view.
- 2 Drill down on the Promotion field hyperlink for a corporate promotion record.
- 3 Click Add in the Promoted Categories list to create a new record, select the categories in the Add Categories dialog box, and click OK.
  - The categories that are public as well as the categories that are private and associated with access groups for which you are a member appear in the Add Categories dialog box.
  - If the Category field for the corporate promotion has a value, the categories that are available for selection are restricted to the child categories for that parent category.

**NOTE:** If you change the parent category for a corporate promotion after you select categories, your category selections do not change because of your change to the parent category. But you can select different categories.
  - If the Parent Account field for the corporate promotion has a value, and if the Authorized Category field for the corporate promotion is selected, the categories that are available for selection are further restricted to those categories that are associated with the parent account.

4 Complete the other necessary fields.

“Fields for Details About Promotional Tactics” on page 58 and the following table describe some fields.

| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Period           | By default, the time period, such as a fiscal year, for the corporate promotion. The start and end dates for a promoted category default to the start and end dates for this time period. You can change these default values.                                                                                                                                                                                                                                                                                                                                                                               |
| Tactics          | <p>The promotional tactic or tactics for the promoted category. Tactics constitute a method of promoting products to the consumer, and include the following main categories:</p> <ul style="list-style-type: none"> <li>■ Price, including percentages of TPR (Temporary Price Reduction)</li> <li>■ Display, including shelf, end-of-aisle (end cap), and check-out</li> <li>■ Feature, including flyers and newspaper advertisements</li> </ul> <p>Options are available that combine these categories. For information about additional fields for tactics, see <a href="#">Table 14 on page 58</a>.</p> |
| Start Date       | The start date for the promoted category.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| End Date         | The end date for the promoted category.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Off Invoice Rate | The discount rate (dollars for each unit) that you subtract from the product price on the invoice to the customer. You provide this discount to the customer as compensation for participating in a corporate promotion. If you enter data in this field, you cannot enter data in the Off Invoice Pct field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products.                                                                                                                                                                               |

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Off Invoice Pct | The discount percentage that you subtract from the product price on the invoice to the customer. You provide this discount to the customer as compensation for participating in a corporate promotion. If you enter data in this field, you cannot enter data in the Off Invoice Rate field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products.                                                                                                                        |
| Bill Back Rate  | The discount rate (dollars for each unit) that the customer applies to the appropriate units to bill you or that the customer subtracts from the product price on the invoice to the customer to short pay that invoice. You provide this discount to the customer as compensation for participating in the corporate promotion. If you enter data in this field, you cannot enter data in the Bill Back Pct field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products. |
| Bill Back Pct   | The discount percentage that the customer applies to the appropriate units to bill you or that the customer subtracts from the product price on the invoice to the customer to short pay that invoice. You provide this discount to the customer as compensation for participating in the corporate promotion. If you enter data in this field, you cannot enter data in the Bill Back Rate field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products.                  |

## Adding Products to Corporate Promotions

To add products to corporate promotions, you associate the products with the promoted categories in the corporate promotion. You can associate a product with a promoted category in a manual or automated fashion.

This task is a step in [“Process of Managing Corporate Promotions \(End User\)”](#) on page 4.

### *To add products to a corporate promotion*

- 1 Navigate to the Promotions screen, then the Corporate Promotions List view.
- 2 Drill down on the Promotion field hyperlink for a corporate promotion record.
- 3 If you want to automatically add all applicable products for all categories in the corporate promotion, click Products.
  - The products that are associated with all promoted categories and subcategories in the corporate promotion appear in the Promoted Products list.
  - If the Parent Account field for the corporate promotion has a value, and if the Authorized Product field for the corporate promotion is selected, the products that appear in the Promoted Products list are further restricted to those products that are on the authorized distribution list for the parent account and for which the Promotable field is selected on that authorized distribution list.

- 4 If you want to manually add individual products, select a category in the Promoted Categories list, click Add in the Promoted Products list to create a new record, select the products in the Add Products dialog box, and click OK.
  - The products that are associated with the selected promoted category are available for selection.
  - If the Parent Account field for the corporate promotion has a value, and if the Authorized Product field for the corporate promotion is selected, the products that are available for selection are further restricted to those products that are on the authorized distribution list for the parent account and for which the Promotable field is selected on that authorized distribution list.
- 5 Complete the other necessary fields.

Table 14 on page 58 and the following table describe some fields.

| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SKU              | The stock keeping unit number of the promoted product. By default, this field is populated when you select a promoted product.                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Description      | The description of the promoted product. By default, this field is populated when you select a promoted product.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Start Date       | The start date for the promoted product.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| End Date         | The end date for the promoted product.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Tactics          | <p>The promotional tactic or tactics for the promoted product. Tactics constitute a method of promoting products to the consumer, and include the following main categories:</p> <ul style="list-style-type: none"> <li>■ Price, including percentages of TPR (Temporary Price Reduction)</li> <li>■ Display, including shelf, end-of-aisle (end cap), and check-out</li> <li>■ Feature, including flyers and newspaper advertisements</li> </ul> <p>Options are available that combine these categories. For information about additional fields for tactics, see <a href="#">Table 14 on page 58</a>.</p> |
| Off Invoice Rate | The discount rate (dollars for each unit) that you subtract from the product price on the invoice to the customer. You provide this discount to the customer as compensation for participating in a corporate promotion. If you enter data in this field, you cannot enter data in the Off Invoice Pct field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products.                                                                                                                                                                              |

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Off Invoice Pct | The discount percentage that you subtract from the product price on the invoice to the customer. You provide this discount to the customer as compensation for participating in a corporate promotion. If you enter data in this field, you cannot enter data in the Off Invoice Rate field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products.                                                                                                                        |
| Bill Back Rate  | The discount rate (dollars for each unit) that the customer applies to the appropriate units to bill you or that the customer subtracts from the product price on the invoice to the customer to short pay that invoice. You provide this discount to the customer as compensation for participating in the corporate promotion. If you enter data in this field, you cannot enter data in the Bill Back Pct field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products. |
| Bill Back Pct   | The discount percentage that the customer applies to the appropriate units to bill you or that the customer subtracts from the product price on the invoice to the customer to short pay that invoice. You provide this discount to the customer as compensation for participating in the corporate promotion. If you enter data in this field, you cannot enter data in the Bill Back Rate field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products.                  |

## Adding Attachments to Corporate Promotions

You can view attachments and attach documents, such as images of point-of-sale materials, to corporate promotions. Each attachment record in the Attachment list identifies one attached file. If the appropriate application is installed on your computer, you can open these files by drilling down on the Name field hyperlink of the record. For example, if a Microsoft PowerPoint (.ppt) presentation file is listed and PowerPoint is installed on your computer, you can open the file by drilling down on the Name field hyperlink.

This task is a step in [“Process of Managing Corporate Promotions \(End User\)”](#) on page 4.

### *To add an attachment to a corporate promotion*

- 1 Navigate to the Promotions screen, then the Corporate Promotions List view.
- 2 Drill down on the Promotion field hyperlink for a corporate promotion record.
- 3 Click the Attachments view tab.
- 4 To add a new file attachment, click New File, navigate to the file, select it, and click Open.  
The attachment appears in the Attachments list.
- 5 To add a new URL attachment, click New URL, enter the URL in the URL file, and click Add.  
The attachment appears in the Attachments list.



## Attaching Literature to Corporate Promotions

You can associate literature with corporate promotions. Each literature record in the Literature list identifies one attached file. If the appropriate application is installed on your computer, you can open these files by drilling down on the Name field hyperlink of the record. For example, if a Microsoft PowerPoint (.ppt) presentation file is listed and PowerPoint is installed on your computer, you can open the file by drilling down on the Name field hyperlink.

A literature document is a reference to a document on the file server, while an attachment document is an actual document. Attach large documents as literature, not as attachments, so that you can access them more efficiently.

This task is a step in [“Process of Managing Corporate Promotions \(End User\)”](#) on page 4.

### *To attach literature to a corporate promotion*

- 1 Navigate to the Promotions screen, then the Corporate Promotions List view.
- 2 Drill down on the Promotion field hyperlink for a corporate promotion record.
- 3 Click the Literature view tab.
- 4 In the Literature list, create a new record, and complete the necessary fields.

For more information about working with literature in Siebel Business Applications, see *Siebel Applications Administration Guide*.

## Creating Account Promotions from Corporate Promotions

To create an account promotion from a corporate promotion, you associate the target account with the corporate promotion. The target accounts that you can associate with a corporate promotion are restricted to the organizations to which you are associated.

Each of the account promotions that you create from a corporate promotion includes data from the corporate promotion, such as field values, attachments, literature, applicable categories, and applicable products. For more information about the applicable categories and products, see [“Authorized Category”](#) on page 8 and [“Authorized Product”](#) on page 9.

This task is a step in [“Process of Managing Corporate Promotions \(End User\)”](#) on page 4.

### *To create account promotions from a corporate promotion*

- 1 Navigate to the Promotions screen, then the Corporate Promotions List view.
- 2 Drill down on the Promotion field hyperlink for a corporate promotion record.
- 3 Click the Target Accounts view tab, and display the accounts for which you want to create account promotions:
  - To display all available accounts, select Target Accounts from the visibility filter.

- To display the child accounts for the parent account of the corporate promotion, select Target Child Accounts in the visibility filter.  
If the Parent Account field for the corporate promotion has no value, no accounts appear when you select Target Child Account.
- 4 Select one or more accounts in the Target Accounts list, and click Create Account Promotions.
  - If the Consumer Goods application is operating on a server:
    - The SRM Request ID field and the Status field for the corporate promotion are automatically populated with data.
    - A Finished value in the Status field for the corporate promotion denotes successfully completed processing.
    - An Error value in the Status field for the corporate promotion denotes unsuccessfully completed processing.
  - If the Consumer Goods application is not operating on a server, you are able to navigate in the application again when processing is complete.
  - When processing is successfully completed, the selected target accounts appear in the Accounts list that is below the Target Accounts list, these accounts are associated with the corporate promotion, and an account promotion is created for each of these accounts.
- 5 In a corporate promotion, enter a value in the Multi Buy Qty field and target a set of accounts.  
The Multi Buy Qty field is a Tactic Field and refers to the number of units that consumers need to buy to qualify for a deal. For example, the deal might be to buy one, get one free; buy three, get the fourth free, and so on.
- 6 Click Apply Updates.  
The value in the Multi Buy Qty field is reflected in all individual accounts in the account promotion lists.

## Viewing Performance Data for Account Promotions in Corporate Promotions

You can view the performance data for the account promotions that are associated with a corporate promotion.

This task is a step in [“Process of Managing Corporate Promotions \(End User\)”](#) on page 4.

### *To view the performance data for an account promotion in a corporate promotion*

- 1 Navigate to the Promotions screen, then the Corporate Promotions List view.
- 2 Drill down on the Promotion field hyperlink for a corporate promotion record.

- 3 Click the Performance view tab.

The account promotion data for the corporate promotion appears. In this view, the availability of charts that show spending and volume data for account promotions depends on a Chart Server.

## Creating High-Level Promotions for Account Promotions (End User)

Account managers can create high-level promotions for account promotions 12 to 18 months before actually implementing those account promotions. These high-level promotions can include general data such as, accounts, promoted categories, promotional tactics, time periods, expected volumes, and expected expenditures. These high-level promotions do not include more specific data, such as promoted product information or promotion names.

You can add to account promotions the categories and their associated data in a high-level promotion. For more information, see [“Adding Categories to Account Promotions” on page 29](#).

Account managers can also simulate the results of high-level promotions for account promotions. For more information, see [“Simulating the Results for High-Level Promotions for Account Promotions” on page 43](#).

This task is a step in [“Process of Managing Account Promotions \(End User\)” on page 24](#).

### *To create a high-level promotion*

- 1 Navigate to the Plans screen, then the Plan List view.

If you want to create a new plan for account promotions, see [“Creating Plans for Account Promotions” on page 19](#).

- 2 Drill down on the Name field hyperlink for a plan record.
- 3 Click the High-Level Planning view tab.

**NOTE:** If you want to create a high-level promotion that is not associated with a plan for account promotions, navigate to the Promotions screen, then the High-Level Planning view. If you want to create a high-level promotion for an account, navigate to the Accounts screen, then the Accounts List view, drill down on the Name field for an account, and click the High-Level Planning view tab.

- 4 In the list of high-level promotions, create a new record, click the select button in the Categories field, select a category in the Add Categories dialog box, and click OK.

The Add Categories dialog box shows the categories that are public and the categories that are private and associated with access groups for which you are a member.

- 5 Complete the other necessary fields.

[“About Some Fields for Promotions” on page 56](#) and the following table describe some fields.

| Field       | Comments                                                                                                                                                                                                                                                                   |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Start Date  | The start date for the high-level promotion.                                                                                                                                                                                                                               |
| End Date    | The end date for the high-level promotion.                                                                                                                                                                                                                                 |
| Lift Factor | This field is populated when you click the Simulate button to simulate the results for the high-level promotion. For more information about lift factors, see <a href="#">“Process of Simulating High-Level Promotions and Account Promotions (End User)” on page 41</a> . |

- 6 Click Forecast to update the Est Baseline Volume field and the Est Baseline Revenue field for the high-level promotion with data from sales volume plans.

The fields are populated with category baseline data that is retrieved from sales volume plans based on the promoted category as well as the account and time period for the high-level promotion. For information about viewing baseline data in sales volume plans, see [“Viewing SVP Data \(End User\)” on page 24](#).

If you change the promoted category, account, or time period data, and then click Forecast again, the Est Baseline Volume field and the Est Baseline Revenue field are updated again.

**NOTE:** For information about configuring the Forecast button to update other fields, see [“Configuring the Forecast Button” on page 82](#).

## Process of Managing Plans for Account Promotions (End User)

The following list shows tasks that end users typically perform to manage plans for account promotions:

- [“Creating Plans for Account Promotions” on page 19](#)
- [“Creating Default Values for Plans” on page 22](#)
- [“Adding Attachments to Plans” on page 23](#)
- [“Viewing Calendars for Plans” on page 24](#)
- [“Viewing the Audit Trail for Plans” on page 24](#)

This process is a step in [“Roadmap for Managing Trade Promotions” on page 3](#).

## Creating Plans for Account Promotions

A *plan* applies to a specific account and a specific category of products, contains a group of account promotions for a time period, such as a fiscal year, and shows the aggregate data for the account promotions that it contains. Account managers can create plans and then add account promotions to those plans. Alternatively, they can create account promotions that are not associated with a plan. Account promotions include promoted categories and promoted products.

By default, the visibility filter in the Plan List view filters plans based on the team members for the accounts in plans. You can change this default so this visibility filter filters plans based on the team members in plans. Changing the default for this visibility filter is applicable to situations in which a manufacturer works with multiple brokers who share the same account. The brokers can view only the plans that include them as members. For more information, see [“Changing the Visibility Filter for Team Members” on page 78](#).

This task is a step in [“Process of Managing Plans for Account Promotions \(End User\)” on page 18](#).

### *To create a plan for account promotions*

- 1 Navigate to the Plans screen, then the Plan List view.

Alternatively, you can navigate to the Accounts screen, then the Accounts List view, drill down on the Name field hyperlink for an account, and click the Plans view tab.

- 2 Create a new record, and then enter a name in the Name field.
- 3 Complete the other necessary fields.

[“About Some Fields for Promotions” on page 56](#) and following table describe some fields.

| Field            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Product Category | <p>Allows the account plans for an account to be segmented by category of products for which the account managers are responsible. This is especially important for large companies that use multiple account managers or brokers to service a single account.</p> <p>Selecting a category at plan level acts as a parent category. When the user creates promotions under the plan, the parent category copies to the promotion and displays the sub-categories to add at the promoted category level.</p> |
| Period           | Designates the fiscal year of the plan. This is can be used to group promotions and perform analyses by fiscal halves, quarters, or months.                                                                                                                                                                                                                                                                                                                                                                 |
| Status           | Enables account managers to inform management when the plans are complete and ready for review.                                                                                                                                                                                                                                                                                                                                                                                                             |

| Field                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Volume Planning Type             | <p>Enables account managers to designate the data type:</p> <ul style="list-style-type: none"> <li>■ For a direct retailer, this can be ePOS/consumption (sell-out) data, ex-factory/shipment (sell-in) data.</li> <li>■ For a wholesaler or distributor, this can be wholesaler to retailer, also known as spin (sell-out) data or ex-factory/shipment (sell-in) data. For an indirect retailer it can be ePOS/consumption (sell-out) data or wholesaler to retailer, (spin sell-in) data. It allows account managers to plan data volumes using the best data sets available to them. Consumption-based volume planning is the most ideal, but ePOS and wholesaler sell-out data are not available for all accounts.</li> </ul> <p>Creating a new record automatically adds the account team as the plan or promotion team. The creator then becomes the primary in the plan or promotion team.</p>                                                                                                             |
| Main Volume Planning Methodology | <p>Enables account managers to plan by the most appropriate methodology:</p> <ul style="list-style-type: none"> <li>■ Baseline &amp; Incremental is the ideal volume planning methodology, as true Promotion ROI Analysis cannot be done otherwise, but it is also the most labor intensive and it might not be appropriate for regional account managers who can be responsible for dozens of different accounts. It is also not appropriate for accounts or products that are over-promoted or for accounts for which good sales data is not available.</li> <li>■ Total Volume (Promoted/Non Promoted) is the appropriate methodology for accounts and products that are not responsible for a significant percentage of sales, such as the smaller wholesalers, accounts and products that are over-promoted or almost never promoted, or for accounts products for which good sales data is not available.</li> <li>■ Promotion Volume Only is the appropriate methodology for indirect accounts.</li> </ul> |
| Account Plan Team                | <p>Allows the visibility to account plan level data to be limited to only the people actively involved with the account or category of products that are being sold into that account.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

| Field            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Category         | <p>Click the select button, select a category in the Category dialog box, and click OK.</p> <p>The Category dialog box shows the categories that are public and the categories that are private and are associated with the access groups of which you are a member.</p>                                                                                                                                                                                                                                                                                |
| Plan Team        | <p>The team members for the plan. By default, the user who creates the plan is designated as the primary team member, and you cannot change this designation. Also, by default, the other team members are users who are associated with the account for the plan. You can change these other team members.</p>                                                                                                                                                                                                                                         |
| Execution Status | <p>The status of the processing that updates the baseline fields when you click Update. Values include: Pending, In Progress, Error, and Finished. When the value is Pending or In Progress, the Update button is disabled.</p>                                                                                                                                                                                                                                                                                                                         |
| Lift             | <p>(Est Incremental Volume divided by Est Baseline Volume) multiplied by 100. This field is populated when you click the Simulate button to simulate an account promotion and thus change the Est Incremental Volume field for the plan. If you change the Lift field, the Est Incremental Volume field is recalculated as follows: (Est Baseline Volume multiplied by Lift) divided by 100. For more information about these fields, see <a href="#">“Est Incremental Volume” on page 60</a> and <a href="#">“Est Baseline Volume” on page 59</a>.</p> |

- 4 Click Update to update the baseline fields in the plan with data from the sales volume plans:
  - Est Baseline Volume
  - PY Baseline Volume
  - Target Baseline Volume
  - PY Baseline Revenue

■ Target Baseline Revenue

To configure these fields, access the user properties for the CS CG Account Plan Service business service in Siebel Tools.

These fields are populated with product baseline data that is retrieved from sales volume plans based on the account for the plan, the time period for the plan, and, if a category is selected for the plan, the products that are associated with that category and its subcategories. For information about viewing baseline data in sales volume plans, see [“Viewing SVP Data \(End User\)” on page 24](#).

**NOTE:** For information about configuring the Update button to update other fields, see [“Configuring the Update Button” on page 83](#).

## Creating Default Values for Plans

Use this feature to capture the default values for promotions. Account managers can overwrite the account plan for specific promotions. Default dates and durations are created automatically.

This task is a step in [“Process of Managing Plans for Account Promotions \(End User\)” on page 18](#).

### *To create default values for plans*

- 1 Navigate to the Plans screen, then the Plan List view.
- 2 Drill down on the Name field hyperlink for the plan record.
- 3 Click the Defaults view tab.
- 4 In the Date Defaults form, complete the necessary fields.

The following table describes the fields.

| Field              | Description                                                                                                                                                                                             |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sell-In Duration   | For sell-in promotions, this value, in weeks, determines End Date. The default is NULL.                                                                                                                 |
| Sell-Out Duration  | For sell-out promotions, this value, in weeks, determines End Date. The default is NULL.                                                                                                                |
| Start Week         | The base field for setting dates. The Sell-In and Sell-Out offset fields apply in days on top of the Start Week field and auto-adjust the Sell-In and Sell-Out field dates based on the offset.         |
| Sell-Out Offset    | The day of the week in which the customer’s promotions start. Account managers can enter an exact promotion date by entering the week in which a promotion begins.                                      |
| Promotion Duration | The default duration at the account plan level is set and defaults to promotions. Account managers can overwrite the account plan for specific promotions. A default end date is created automatically. |



| Field             | Description                                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sell-In Offset    | How soon before a promotion starts that the customer usually begins purchasing for the promotion. This information is especially important to capture when a discounted price is made available to the customer (retailer) to buy the product for the promotion.                                                                                                                                          |
| Shipment Duration | The duration of the Buy Period of the promotion, which is when the customer can buy the product at a discounted rate for the promotion. If the customer is only compensated for the promotion based on sell-out volumes, then the sell-out dates are important for demand planning. Account managers can overwrite the account plan for specific promotions. A default end date is created automatically. |

- 5 In the Preferred Payment Method Defaults form, complete the necessary fields.

The following table describes the fields.

| Field                        | Description                                                                                                                                     |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Fixed Slot Fee Pay Method    | The payment method that is associated with the slotting fee for the account promotion, for example, Bill Back, Check, or Deduction.             |
| Variable Spend Pay Method    | The payment method for the variable expenditure, for example, Bill Back, Off Invoice, or Deduction.                                             |
| Other Fixed Spend Pay Method | The payment method that is associated with the other fixed expenditures for the account promotion, for example, Bill Back, Check, or Deduction. |

## Adding Attachments to Plans

You can view attachments and attach documents to plans for account promotions. Each attachment record in the Attachment list identifies one attached file. If the appropriate application is installed on your computer, you can open these files by drilling down on the Name field hyperlink of the record. For example, if a Microsoft PowerPoint (.ppt) presentation file is listed and PowerPoint is installed on your computer, you can open the file by drilling down on the Name field hyperlink.

This task is a step in [“Process of Managing Plans for Account Promotions \(End User\)” on page 18](#).

### *To add an attachment to a plan*

- 1 Navigate to the Plans screen, then the Plan List view.
- 2 Drill down on the Name field hyperlink for a plan record.
- 3 Click the Attachments view tab.
- 4 To add a new file attachment, click New File, navigate to the file, select it, and click Open.

The attachment appears in the Attachments list.

- 5 To add a new URL attachment, click New URL, enter the URL in the URL file, and click Add. The attachment appears in the Attachments list.

## Viewing Calendars for Plans

You can view calendars in Gantt chart format for plans that are associated with account promotions. The left side of the chart lists account promotions, and the right side of the chart shows scheduled time periods in a calendar format. Use the following guidelines when viewing Gantt charts:

- To zoom in or out on a time period, click Zoom + or Zoom - on the current time bar.
- To see a Gantt chart for a specific date, select the date in the date field and click Go.
- To see a Gantt chart for the current date, click Today.

This task is a step in [“Process of Managing Plans for Account Promotions \(End User\)”](#) on page 18.

### *To view a calendar for a plan*

- 1 Navigate to the Plans screen, then the Plan List view.
- 2 Drill down on the Name field hyperlink for a plan record.
- 3 Click the Calendar view tab.

## Viewing the Audit Trail for Plans

You access the Audit Trail view for a plan for an account promotion to see the changes that users make to the fields in the plan.

Administrators can specify these audited fields using the Administration - Audit Trail screen. On this screen, they select the CPG Plan Account business component to designate these audited fields. For more information about this setup, see *Siebel Applications Administration Guide*.

This task is a step in [“Process of Managing Plans for Account Promotions \(End User\)”](#) on page 18.

### *To view the audit trail for a plan*

- 1 Navigate to the Plans screen, then the Plan List view.
- 2 Drill down on the Name field hyperlink for a plan record.
- 3 Click the Audit Trail view tab.

# Process of Managing Account Promotions (End User)

The following list shows tasks that end users typically perform to manage account promotions:

- [“Creating Account Promotions” on page 25](#)
- [“Adding Categories to Account Promotions” on page 29](#)
- [“Adding Products to Account Promotions” on page 31](#)
- [“Associating Baseline and Shipment Data with Promoted Products” on page 32](#)
- [“Allocating Field Values in Account Promotions” on page 37](#)
- [“Transferring Incremental Volumes for Account Promotions to SVP” on page 38](#)
- [“Associating Objectives with Account Promotions” on page 39](#)
- [“Associating Objectives with Account Promotions” on page 39](#)
- [“Adding Attachments to Account Promotions” on page 39](#)
- [“Attaching Literature to Account Promotions” on page 40](#)
- [“Viewing Calendars for Account Promotions” on page 40](#)
- [“Viewing the Audit Trail for Account Promotions” on page 41](#)

This process is a step in [“Roadmap for Managing Trade Promotions” on page 3](#).

## Creating Account Promotions

After account managers create a plan, they can add account promotions to that plan. Alternatively, they can create account promotions that are not associated with a plan.

To expedite account promotion creation, you can select a corporate promotion for the account promotion. Some data in the corporate promotion, such as such as field values, attachments, literature, promoted categories, and promoted products is copied to the account promotion. You can select a corporate promotion for an account promotion if the Active field for the corporate promotion is selected, and if any of the following conditions apply:

- The account for the account promotion is the same as the parent account for the corporate promotion.
- The parent account of the account for the account promotion is the same as the parent account for the corporate promotion.
- The corporate promotion has no parent account.

By default, the visibility filter in the Account Promotions List view filters account promotions based on the team members for the accounts in account promotions. You can change this default so that this visibility filter filters account promotions based on the team members in account promotions. For more information see, [“Changing the Visibility Filter for Team Members” on page 78](#).

Account managers can also simulate the results of an account promotion. For more information, see [“Simulating the Results for Account Promotions” on page 44](#).

This task is a step in [“Process of Managing Account Promotions \(End User\)” on page 24](#).

**To create an account promotion**

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 If you want to expedite account promotion creation, select an account for the account promotion, and then select a corporate promotion in the Corporate Promotion field.

Some data in the corporate promotion, such as such as field values, attachments, literature, promoted categories, and promoted products is copied to the account promotion.

- 3 Revise the account promotion record that you create in the previous step, or create a new account promotion record, and then enter a name in the Promotion field.
- 4 Complete the other necessary fields.

[“About Some Fields for Promotions” on page 56](#) and the following table describe some fields.

| Field                | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Plan                 | <p>If you want to associate the account promotion with a plan, click the select button, select the plan, and click OK. The plans that are available for selection satisfy all of the following criteria:</p> <ul style="list-style-type: none"> <li>■ The plans have the same account as the account promotion.</li> <li>■ The plans have the same category as the account promotion or a category in the category hierarchy that is one level higher than the category for the account promotion.</li> <li>■ The plans have time periods that include the time period for the account promotion. Promotion start and end dates define the time period for the account promotion.</li> </ul> <p>For more information about configuring the selection criteria that determines the plans that are available for selection, see <a href="#">Configuring Available Plans for Account Promotions on page 79</a>.</p> <p>Alternatively, to associate an account promotion with a plan, you can navigate to the Plans screen, then the Plan List view, drill down on the Name field hyperlink for the plan, and create the account promotion in the Promotions view.</p> |
| Category             | <p>Click the select button, select a parent category in the Category dialog box, and click OK. The promoted categories that you can add to the account promotion are restricted to the child categories for this parent category.</p> <p>If the Plan field for the account promotion has a value, only the category for the plan is available for selection in this field. If the category for the plan has no value, or if the Plan field has no value, plans do not further restrict the categories that are available for selection.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Promotion Start Date | The recommended start date for the account promotion. This date must be in the time period for the account promotion.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| Field                    | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Promotion End Date       | The recommended end date for the account promotion.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Promotion Team           | The team members for the account promotion. By default, the user who creates the account promotion is designated as the primary team member, and you cannot change this designation. Also, by default, the other team members are users who are associated with the account for the account promotion. You can change these other team members.                                                                                                                                                                                                                                                                                                                            |
| Sell-In Override Lift %  | Calculated based on Sell-In Est Incremental Volume and Sell-In Est Baseline Volume.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Sell-Out Override Lift % | Calculated based on Sell-Out Incremental Volume and Sell-Out Est Baseline Volume. This field is visible in the Promotion, Category, and Product, and Baseline levels.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Predict Lift %           | Populated by clicking the Predict Lift % button. This field cannot be updated manually. This field is visible in the Promotion, Category, and Product, and Baseline levels.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Consumption Start Date   | The date when a promotional tactic is in effect. This date must be in the time period of the corporate promotion. Retail execution teams can use consumption dates to verify promotion execution. You can compare consumption dates to electronic Point of Sale (ePOS) dates to verify sale amounts during a promotion.                                                                                                                                                                                                                                                                                                                                                    |
| Consumption End Date     | The date when a promotional tactic is no longer in effect.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Shipment Start Date      | The recommended date when the shipments for this account promotion can begin. This date can be before the account promotion start date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Shipment End Date        | The recommended date when the shipments for this account promotion end. This date might be after the account promotion end date when you allow your customers to replenish their safety stock at promotion prices after the promotion is over.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Authorized Category      | <p>This flag limits the categories that are available for selection in the Add Categories dialog box when you add promoted categories to an account promotion and in the Categories dialog box when you click the select button in the Category field for a promoted category in an account promotion:</p> <ul style="list-style-type: none"> <li>■ If you do not select this check box, the categories that are available for selection are not restricted further.</li> <li>■ If you select this check box, the categories that are available for selection are restricted to those categories that are associated with the account on the account promotion.</li> </ul> |

| Field                    | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Authorized Product       | <p>This flag limits the products that are available for selection in the Add Products dialog box when you add promoted products to an account promotion and in the Pick Product dialog box when you click the select button in the Product field for a promoted product in an account promotion:</p> <ul style="list-style-type: none"> <li>■ If you do not select this check box, the list price products that are associated with the selected promoted category are available for selection.</li> <li>■ If you select this check box, the list price products that are associated with the selected promoted category are available for selection if those products are on the authorized distribution list for the account in the account promotion and if the Promotable field is selected for those products on that authorized distribution list.</li> </ul> <p>This flag limits the products that appear in the Promoted Products list when you click the Products button to automatically add multiple products to an account promotion:</p> <ul style="list-style-type: none"> <li>■ If you do not select this check box, the products that are associated with all promoted categories and subcategories in the account promotion appear in the Promoted Products list.</li> <li>■ If you select this check box, the products that are associated with all promoted categories and subcategories in the account promotion appear in the Promoted Products list if those products are on the authorized distribution list for the account in the account promotion and if the Promotable field is selected for those products on that authorized distribution list.</li> </ul> |
| Predict Lift %           | <p>Populates the lift factor for the Promoted Product Baseline records based on account, category, product, tactics, and period criteria.</p> <p>If Sell-In Override or Sell-Out Override is Null, then Predict Lift % is populated by clicking the Predict Lift button.</p> <p>If Sell-In Override or Sell-Out Override is Not Null, then Predict Lift % is not populated by clicking the Predict Lift button.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Sell-Out Override Lift % | <p>The percentage increase in product sold to consumers (over baseline volume) due to a promotional activity.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Sell-In Override Lift %  | <p>The amount of additional product (as compared to baseline) that is expected due to a promotional activity.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

| Field                | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Volume Planning Type | <p>Enables account managers to designate the data type:</p> <ul style="list-style-type: none"> <li>■ For a direct retailer, this can be ePOS/consumption (sell-out) data, ex-factory/shipment (sell-in) data.</li> <li>■ For a wholesaler or distributor, this can be wholesaler to retailer, also known as spin (sell-out) data or ex-factory/shipment (sell-in) data. For an indirect retailer it can be ePOS/consumption (sell-out) data or wholesaler to retailer, (spin sell-in) data. It allows account managers to plan data volumes using the best data sets available to them. Consumption-based volume planning is the most ideal, but ePOS and wholesaler sell-out data are not available for all accounts.</li> </ul> <p>Creating a new record automatically adds the account team as the plan or promotion team. The creator then becomes the primary in the plan or promotion team.</p> |

## Adding Categories to Account Promotions

You can associate categories with an account promotion. A promoted category contains a group of stock keeping units (SKUs) that are usually promoted together and that have the same price. A promoted category can be a product category or a promoted product group in the product hierarchy.

Adding a category to an account promotion allows you to add the products in that category to the account promotion. For information about how to associate products with a category, see [“Adding Products to Account Promotions” on page 31](#).

When you add a category from a high-level promotion, the values in the following fields in the high-level promotion are copied to the corresponding fields for the promoted category:

|                                |                             |                          |
|--------------------------------|-----------------------------|--------------------------|
| ■ Off Invoice Rate             | ■ Variable Spend Pay Method | ■ TPR Type               |
| ■ Off Invoice Pct              | ■ Tactics                   | ■ TPR Size               |
| ■ Bill Back Rate               | ■ Display Type              | ■ TPR Amount             |
| ■ Bill Back Pct                | ■ Display Tactics           | ■ TPR %                  |
| ■ Fixed Slot Fee Pay Method    | ■ Display Size              | ■ Lift Factor            |
| ■ Fixed Slot Fee               | ■ Ad Type                   | ■ % ACV Promoted         |
| ■ Other Fixed Spend Pay Method | ■ Ad Location               | ■ Est Baseline Volume    |
| ■ Other Fixed Spend            | ■ Ad Size                   | ■ Est Incremental Volume |

The value in the Est Incremental Volume field in the high-level promotion is copied to the Simulated Incremental Volume field in the promoted category. For more information about the Est Incremental Volume field, see [“Est Incremental Volume” on page 60](#).

This task is a step in [“Process of Managing Account Promotions \(End User\)” on page 24](#).

**To add categories to an account promotion**

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 If you want to add categories and associated data from a high-level promotion, click Add High-Level Categories, select the categories in the Add Categories dialog box, and click OK.

The Add Categories dialog box shows the categories that are associated with the account and time period for the account promotion.

- 4 If you want to add individual categories, click Add in the Promoted Categories list to create a new record, select the categories in the Add Categories dialog box, and click OK.

- The categories that are public as well as the categories that are private and associated with access groups for which you are a member appear in the Add Categories dialog box.

- If the Category field for the account promotion has a value, the categories that are available for selection are restricted to the child categories for that parent category.

**NOTE:** If you change the parent category for an account promotion after you select categories, your category selections do not change because of your change to the parent category. But you can select different categories.

- If the Authorized Category field for the account promotion is selected, the categories that are available for selection are further restricted to those categories that are associated with the account on the account promotion.

- 5 Complete the other necessary fields.

[“About Some Fields for Promotions” on page 56](#) and following table describe some fields.

| Field                        | Comments                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Phasing Pattern              | The phasing pattern for the promoted category. The phasing pattern determines how category data is allocated throughout the weeks that you designate in the pattern. For information about setting up a phasing pattern, see <a href="#">“Enabling Phasing for Account Promotions” on page 50</a> .                                              |
| Phasing Status               | The phasing status of the promoted category. For more information about this field, see <a href="#">“Phasing Promoted Categories” on page 52</a> .                                                                                                                                                                                               |
| Simulated Incremental Volume | The simulated incremental volume from a high-level promotion. This field is populated with the value in the Est Incremental Volume field from a high-level promotion when you click the Add High-Level Categories button. For more information about the Est Incremental Volume field, see <a href="#">“Est Incremental Volume” on page 60</a> . |
| Start Date                   | The start date for the promoted category.                                                                                                                                                                                                                                                                                                        |



| Field          | Comments                                                                                                                                                                                                                                                                                                                                              |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| End Date       | The end date for the promoted category.                                                                                                                                                                                                                                                                                                               |
| Phasing Enable | Indicates if phasing is enabled for the category. You can use phasing if you want to allocate the aggregate cost, volume, and payment information throughout the weeks of a time period for an account promotion. For more information about phasing, see <a href="#">“Process of Managing Phasing for Account Promotions (End User)”</a> on page 50. |

## Adding Products to Account Promotions

To add products to account promotions, you associate the products with the promoted categories in the account promotion. You can associate a product with a promoted category in a manual or automated fashion.

This task is a step in [“Process of Managing Account Promotions \(End User\)”](#) on page 24.

### *To add products to an account promotion*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 If you want to automatically add all applicable products for all categories in the account promotion, click Products.
  - SRM Request ID and execution status are also applicable to the Products button.
  - The products that are associated with all promoted categories and subcategories in the account promotion appear in the Promoted Products list.
  - If the Authorized Product field for the account promotion is selected, the products that appear in the Promoted Products list are further restricted to those products that are on the authorized distribution list for the account on the account promotion and for which the Promotable field is selected on that authorized distribution list.
- 4 If you want to manually add individual products, select a category in the Promoted Categories list, click Add in the Promoted Products list to create a new record, select the products in the Add Products dialog box, and click OK.
  - The list price products that are associated with the selected promoted category are available for selection.
  - If the Authorized Product field for the account promotion is selected, the products that are available for selection are further restricted to those list price products that are on the authorized distribution list for the account on the account promotion and for which the Promotable field is selected on that authorized distribution list.

## 5 Complete the other necessary fields.

“About Some Fields for Promotions” on page 56 and the following table describe some fields.

| Field                | Comments                                                                                                                                                                                                                                                                                                                                      |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Start Date           | The start date for the promoted product.                                                                                                                                                                                                                                                                                                      |
| End Date             | The end date for the promoted product.                                                                                                                                                                                                                                                                                                        |
| Shipment Start Date  | The recommended date when the shipments for this product in the account promotion can begin. This date can be before the account promotion start date.                                                                                                                                                                                        |
| Shipment End Date    | The recommended date when the shipments for this product in the account promotion end. This date might be after the account promotion end date when you allow your customers to replenish their safety stock at promotion prices after the promotion is over.                                                                                 |
| Phasing Enable       | Indicates if phasing is enabled for the promoted product. You can use phasing if you want to allocate the aggregate cost, volume, and payment information throughout the weeks of a time period for an account promotion. For more information about phasing, see “Process of Managing Phasing for Account Promotions (End User)” on page 50. |
| Est Incremental COGS | The cost of goods sold or the cost to manufacture the promoted product. This field is a rate for the promoted product and not a value applicable to the volume of the promoted product.                                                                                                                                                       |
| Promoted Price       | The value is rolled up from promoted product baseline.<br><br>List Price minus Bill Back Rate minus Off Invoice Rate minus (List Price multiplied by [Bill Back Pct divided by 100]) minus (List Price multiplied by [Off Invoice Pct divided by 100]). For more information about the fields in this calculation, see Table 16 on page 63.   |
| Average Cost         | Est Incremental COGS divided Est Incremental Cases.                                                                                                                                                                                                                                                                                           |

## Associating Baseline and Shipment Data with Promoted Products

Account managers can associate baseline and shipment data with promoted products. You can associate a baseline record or shipment record with more than one promoted product. For example, if you add the same product to two account promotions, each for the same account and each with the same shipment start and end dates, you create two promoted products that are associated with the same baseline or shipment record.

When you click the Baseline or Shipment button, if the application is running on a server, the request is sent to Server Request Manager (SRM), the SRM II is populated, and the Execution status is set to Pending. You can navigate away after clicking the button. You can refresh the UI to see the execution status as follows:

- In Progress means the process has started.

- Finished means the process is done.
- Error means the process failed with error.

If the application is not running on a server, SRM is not involved. You can navigate away from the screen only if the process (by way of object manager) is complete. This processing for the Baseline and Shipment buttons is applicable to other background process-supported buttons.

When you associate baseline data with promoted products, the product baseline data is retrieved from sales volume plans, appears in the Promoted Products Baseline view. The volumes roll up to promoted products, promoted categories, and account promotions, but not to plans. You associate baseline data with promoted products before the account promotion is implemented. For information about viewing baseline data in sales volume plans, see [“Viewing SVP Data \(End User\)” on page 24](#).

This task is a step in [“Process of Managing Account Promotions \(End User\)” on page 24](#).

### ***To associate baseline data with promoted products***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 Click Baseline.
- 4 In the Promoted Categories list, select the category that contains the promoted product or products to which you associated baseline data.
- 5 In the Promoted Products list, select a product record.

The Promoted Product Baseline view shows the baseline data applicable to the account as well as the shipment start and end dates for the promoted product. The default dates depend on the Volume Planning Type field value at promotion. Shipment dates are used for Sell-In. Consumption dates are used for Sell-Out. If no volume planning type is specified, then the shipment dates are the default.

**NOTE:** For more information about configuring the dates for baseline data retrieval to the promotion start and end date or the consumption start and end date, see [“Changing Dates for Baseline Data Retrieval” on page 80](#).

The following table describes some fields.

| Field                  | Comments                                                                                |
|------------------------|-----------------------------------------------------------------------------------------|
| Period                 | The time period of the record for the promoted product baseline.                        |
| Baseline               | The estimated volume of product that would have been sold without an account promotion. |
| PY Baseline Volume     | For the prior year, the estimated volume of product that was sold.                      |
| PY Baseline Revenue    | For the prior year, the revenue for estimated volume of product that was sold.          |
| Target Baseline Volume | The expected volume of product to be sold.                                              |

| Field                     | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Target Baseline Revenue   | The expected revenue for the volume of product to be sold.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| %                         | <p>This percentage accommodates situations in which the first and last week of a promoted product record are not the same length as a full week for the corresponding baseline record.</p> <p>If the number of days that are designated by the start and end dates for the promoted product baseline record matches the number of days that are designated by the start and end dates for the promoted product record, this field is populated with 100%. Otherwise, this field is populated with a percentage that is calculated as follows: (the number of days that are designated by the start and end dates for the promoted product record divided by the number of days that are designated by the start and end dates for the promoted product baseline record) multiplied by 100.</p> |
| Promotion Baseline        | Baseline multiplied by (% divided by 100).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Predict Lift %            | This field is populated when you click the Predict Lift % button to simulate an account promotion. For more information about lift factors, see <a href="#">“Process of Simulating High-Level Promotions and Account Promotions (End User)” on page 41.</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Promotion PY Baseline     | PY Baseline Volume multiplied by (% divided by 100).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Promotion PY Revenue      | PY Baseline Revenue multiplied by (% divided by 100).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Promotion Target Baseline | Target Baseline Volume multiplied by (% divided by 100).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Promotion Target Revenue  | Target Baseline Revenue multiplied by (% divided by 100).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Est Off Invoice Spend     | The expenditures that are associated with a invoice reduction that you provide to the customer as compensation for participating in an account promotion. For a promoted product, you can change a field value that affects the calculation of the Est Off Invoice Spend field, and then click the Spread button to allocate the new value in the Est Off Invoice Spend field for the promoted product to the Est Off Invoice Spend field for promoted product baselines.                                                                                                                                                                                                                                                                                                                      |
| Est Bill Back Spend       | The expenditures that are associated with a payment provided to the customer as compensation for participating in an account promotion. For a promoted product, you can change a field value that affects the calculation of the Est Bill Back Spend field, and then click the Spread button to allocate the new value in the Est Bill Back Spend field for the promoted product to the Est Bill Back Spend field for promoted product baselines.                                                                                                                                                                                                                                                                                                                                              |
| Est Variable Spend        | Est Off Invoice Spend plus Est Bill Back Spend.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

| Field                          | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fixed Slot Fee                 | The fee that the retailer charges to you for placing the promoted products for the account promotion on the retailer's shelves. You can enter a value in this field for an account promotion, promoted category, or promoted product, and then click the Spread button to allocate that value to the Fixed Slot Fee field for promoted product baselines.                                                                                              |
| Other Fixed Spend              | The other fixed expenditures that you pay to the retailer to encourage the retailer's participation in the account promotion, for example, a fee that you pay to include your products in the retailer's weekly catalog. You can enter a value in this field for an account promotion a promoted category, or promoted product, and then click the Spread button to allocate that value to the Other Fixed Spend field for promoted product baselines. |
| Est Fixed Spend                | Fixed Slot Fee plus Other Fixed Spend.                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Est Total Spend                | Est Variable Spend plus Est Fixed Spend.                                                                                                                                                                                                                                                                                                                                                                                                               |
| List Price                     | The price of the product without an account promotion.                                                                                                                                                                                                                                                                                                                                                                                                 |
| Promoted Price                 | The promoted price of each item in the deal.                                                                                                                                                                                                                                                                                                                                                                                                           |
| Bench Price                    | The standard retail price.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Warehouse Withdrawal Cases     | The number of cases withdrawn from a warehouse in using the inventory on hand.                                                                                                                                                                                                                                                                                                                                                                         |
| Warehouse Withdrawal Units     | The number of units withdrawn from a warehouse in using the inventory on hand.                                                                                                                                                                                                                                                                                                                                                                         |
| Forward Buy Cases              | The additional number of cases that a retailer might purchase over and above that cases sold to consumers, so that the retailer can buy additional volume on a sale to increase the profit margin.                                                                                                                                                                                                                                                     |
| Forward Buy Units              | The additional number of units that a retailer might purchase over and above the units sold to consumers, so that the retailer can buy additional volume on a sale to increase the profit margin.                                                                                                                                                                                                                                                      |
| Est Incremental Sell-Out Cases | The delta of cases that a retailer does not buy from a wholesaler or manufacturer even though the retailer plans on selling more to consumers, because the retailer wants to reduce warehouse inventory.                                                                                                                                                                                                                                               |
| Est Incremental Sell-Out Units | The change in number of units that a retailer does not buy from a wholesaler or manufacturer, even though the retailer plans on selling more to consumers, because the retailer wants to reduce warehouse inventory.                                                                                                                                                                                                                                   |
| Est Sell-Out Total Cases       | Baseline Cases plus Incremental Sell-Out Cases.                                                                                                                                                                                                                                                                                                                                                                                                        |

| Field                    | Comments                                                                                                                                |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| Est Sell-Out Total Units | Baseline Units plus Incremental Sell-Out Units.                                                                                         |
| Net Revenue              | Net Revenue is calculated by multiplying the volumes by list price to customer and subtracting trade spend (fixed and variable spends). |
| Gross Revenue            | Gross Revenue equals list price multiplied by total volume.                                                                             |

When you associate shipment data with promoted products, the product shipment data is retrieved from sales volume plans, appears in the Shipments view. The volumes roll up to promoted products, promoted categories, account promotions, and plans. You associate shipment data with promoted products after the account promotion is implemented to evaluate the account promotion. For information about viewing shipment data in sales volume plans, see [“Viewing SVP Data \(End User\)” on page 24](#).

***To associate shipment data with promoted products***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 Click Shipment.  
Applicable shipment records are identified and associated with the promoted products in the account promotion.
- 4 In the Promoted Categories list, select the category that contains the promoted product or products to which you associated shipment data.
- 5 In the Promoted Products list, drill down on the Product field hyperlink, and click the Shipments view tab.

The Shipments view shows the shipment data applicable to the account as well as the shipment start and end dates for the promoted product.

The following table describes some fields.

| Field    | Comments                                                                                   |
|----------|--------------------------------------------------------------------------------------------|
| Period   | The period of time recorded for the shipment.                                              |
| Shipment | The estimated volume of product that would have been shipped without an account promotion. |

| Field                      | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| %                          | <p>This percentage accommodates situations in which the first and last week of a promoted product record are not the same length as a full week for the corresponding shipment record.</p> <p>If the number of days that are designated by the start and end dates for the shipment record matches the number of days that are designated by the start and end dates for the promoted product record, this field is populated with 100%. Otherwise, this field is populated with a percentage that is calculated as follows: (the number of days that are designated by the start and end dates for the promoted product record divided by the number of days that are designated by the start and end dates for the shipment record) multiplied by 100.</p> |
| Promotion Shipment         | Shipment multiplied by (% divided by 100). This field is populated when you click the Shipment button in the Account Promotions List view to update the Promotion Shipment Revenue field in the Shipments view with product shipment data from sales volume plans. The revenues roll up from this view to promoted products, promoted categories, account promotions, and plans. This field is not available for high-level promotions.                                                                                                                                                                                                                                                                                                                      |
| Shipment Revenue           | The revenue that is associated with the volume of product that would have been shipped without a promotion.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Promotion Shipment Revenue | Shipment Revenue multiplied by (% divided by 100).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

## Allocating Field Values in Account Promotions

You can enter a value in the Est Incremental Volume field for an account promotion, and then click the Spread button to allocate this source field value to the corresponding target field in records for promoted categories, promoted products, and promoted product baselines.

You can enter a value in the Fixed Slot Fee field and the Other Fixed Spend fields for an account promotion, a promoted category, or a promoted product, and then click the Spread button to allocate this source field value to the corresponding target field in the lower levels of the account promotion hierarchy.

The target field value for each promoted category and promoted product record is calculated as follows:

Source field value multiplied by (Est Baseline Volume field value for the target field in promoted categories or promoted products divided by Est Baseline Volume for the source field)

The target field value for each promoted product baseline record is calculated as follows:

Source field value multiplied by (Promotion Baseline field value for the target field in promoted product baselines divided by Est Baseline Volume for the source field)

Edits can be made at the Promotion, Category, or Promoted Product levels. If you change the value for a source field in a lower level, that changed value automatically rolls up to the higher levels of the account promotion hierarchy. You cannot change the value in the Fixed Slot Fee and Other Fixed Spend fields for records for promoted product baselines.

This task is a step in [“Process of Managing Account Promotions \(End User\)” on page 24](#).

### ***To allocate field values in an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Select an account promotion record, and change the value in at least one of the following source fields:
  - Est Incremental Volume
  - Fixed Slot Fee
  - Other Fixed Spend

A value is spread as soon as you change the value and step off the record or save the record (by using the keyboard command Ctrl and S).

The value for the source field in the account promotion is allocated to the corresponding target field in records for promoted categories, promoted products, and promoted product baselines.

**NOTE:** For information about configuring the Spread button to allocate other source fields using different allocation methods, see [“Configuring the Spread Button” on page 80](#).

## **Transferring Incremental Volumes for Account Promotions to SVP**

You can transfer to the Sales Volume Planning module the aggregate values in the Incremental field in the Promoted Product Baseline list for all account promotions. As part of the transfer procedure, you perform additional steps in the Sales Volume Planning module to aggregate and allocate these transferred values.

This task is a step in [“Process of Managing Account Promotions \(End User\)” on page 24](#).

### ***To transfer incremental volumes for account promotions to SVP***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Click Aggregate.

For all account promotions, a separate total is created for each product and account combination that is associated with the values in the Incremental fields in the Promoted Product Baseline list. Then, the Promotion Incremental Qty field in the Product Baseline list in sales volume planning is updated with these totals.



- 3 Complete an aggregation in sales volume planning. For information about how to complete this aggregation, see [“Performing the Initial Aggregation” on page 12.](#)

The Aggregated Incremental Qty field in the Product Baseline list in sales volume planning is updated with totals of the values in the Promotion Incremental Qty fields for accounts in lower levels of the account hierarchy. Also, the Incremental Qty field in the Product Baseline list in sales volume planning is updated. This field is calculated as follows: Promotion Incremental Qty plus Aggregated Incremental Qty.

- 4 Complete an allocation in sales volume planning. For more information about how to complete this allocation, see [“Locking and Modifying SVP Data \(End User\)” on page 26.](#)

The Allocated Incremental Qty field in the Product Baseline list in sales volume planning is updated with an allocated part of the values in the Promotion Incremental Qty field for accounts in higher levels of the account promotion hierarchy. Also, the Incremental Qty field in the Product Baseline list in sales volume planning is updated. This field is calculated as follows: Promotion Incremental Qty plus Aggregated Incremental Qty plus Allocated Incremental Qty.

## Associating Objectives with Account Promotions

You can associate objectives with account promotions. An objective provides the goal for an account promotion.

This task is a step in [“Process of Managing Account Promotions \(End User\)” on page 24.](#)

### *To associate an objective with an account promotion*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 Click the Objectives view tab.
- 4 Create a new objective record, click the select button in the Objective field, select an objective in the dialog box, and click OK.
- 5 Complete the additional necessary fields.

## Adding Attachments to Account Promotions

You can view attachments and attach documents, such as proof-of-performance documents, to account promotions. Each attachment record in the Attachment list identifies one attached file. If the appropriate application is installed on your computer, you can open these files by drilling down on the Name field hyperlink of the record. For example, if a Microsoft PowerPoint (.ppt) presentation file is listed and PowerPoint is installed on your computer, you can open the file by drilling down on the Name field hyperlink.

This task is a step in [“Process of Managing Account Promotions \(End User\)” on page 24.](#)

### ***To add an attachment to an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 Click the Attachments view tab.
- 4 To add a new file attachment, click New File, navigate to the file, select it, and click Open.  
The attachment appears in the Attachments list.
- 5 To add a new URL attachment, click New URL, enter the URL in the URL file, and click Add.  
The attachment appears in the Attachments list.

## **Attaching Literature to Account Promotions**

You can associate literature with account promotions. Each literature record in the Literature list identifies one attached file. If the appropriate application is installed on your computer, you can open these files by drilling down on the Name field hyperlink of the record. For example, if a Microsoft PowerPoint (.ppt) presentation file is listed and PowerPoint is installed on your computer, you can open the file by drilling down on the Name field hyperlink.

A literature document is a reference to a document on the file server, while an attachment document is an actual document. Attach large documents as literature, not as attachments, so that you can access them more efficiently.

This task is a step in [“Process of Managing Account Promotions \(End User\)”](#) on page 24.

### ***To attach literature to an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 Click the Literature view tab.
- 4 In the Literature list, create a new record, and complete the necessary fields.  
For more information about working with literature in Siebel Business Applications, see *Siebel Applications Administration Guide*.

## **Viewing Calendars for Account Promotions**

You can view calendars in Gantt chart format for account promotions and associated accounts. The left side of the chart lists account promotions, and the right side of the chart shows scheduled time periods in a calendar format. Use the following guidelines when viewing Gantt charts:

- To zoom in or out on a time period, click Zoom + or Zoom - on the current time bar.
- To see a Gantt chart for a specific date, select the date in the date field and click Go.
- To see a Gantt chart for the current date, click Today.

This task is a step in [“Process of Managing Account Promotions \(End User\)”](#) on page 24.

#### ***To view a calendar for an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion.
- 3 Click the Calendar view tab.

Use the following procedure to view a calendar for an account.

#### ***To view a calendar for an account***

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account record.
- 3 Click the Promotions Calendar view tab.

## **Viewing the Audit Trail for Account Promotions**

You access the Audit Trail view for an account promotion to see the changes that users make to the fields in the account promotion.

Administrators can specify these audited fields using the Administration - Audit Trail screen. On this screen, they select the CPG Plan Account Promotion business component to designate these audited fields. For more information about this setup, see *Siebel Applications Administration Guide*.

This task is a step in [“Process of Managing Account Promotions \(End User\)”](#) on page 24.

#### ***To view the audit trail for an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion record.
- 3 Click the Audit Trail view tab.

# **Process of Simulating High-Level Promotions and Account Promotions (End User)**

Simulations allow account managers to see the promotion results of a high-level promotion, an account promotion, a promoted category, a promoted product, and a promoted product baseline.

The following list shows tasks that end users typically perform for simulations:

- [“Importing and Copying Lift Factors”](#) on page 42

- [“Simulating the Results for High-Level Promotions for Account Promotions” on page 43](#)
- [“Simulating the Results for Account Promotions” on page 44](#)

This process is a step in [“Roadmap for Managing Trade Promotions” on page 3](#).

## Importing and Copying Lift Factors

*Lift factors* indicate the expected sales volume increase when you promote a category or product for an account during a certain time period with a specific promotional tactic. Lift factors are product-specific and category-specific. You can obtain lift factor information from a third-party syndicated data provider.

You must import and store lift factors into the product lift factor table (S\_PROD\_LFT\_FACTOR) and category lift factor table (S\_CATG\_LFT\_FACTOR) in the Siebel Consumer Goods application to perform simulations. To import lift factors, use Siebel Enterprise Integration Manager (EIM). For more information, see *Siebel Enterprise Integration Manager Administration Guide*. You can also copy imported lift factor data, and then change this data to accommodate your business.

Simulations use lift factors to calculate incremental volumes that are attributable to high-level promotions and account promotions. A simulation for a high-level promotion obtains lift factors using the following data:

- The category and account for the high-level promotion
- The time period and promotional tactics that you designate for that high-level promotion

This task is a step in [“Process of Simulating High-Level Promotions and Account Promotions \(End User\)” on page 41](#).

### *To copy a lift factor*

- 1 Navigate to the Lift Factors screen, then the Product Lift Factor List view or the Category Lift Factor List view.
- 2 Select a lift factor.
- 3 Click Menu, and select Copy Record.

A copy of the lift factor is created in the lift factors list.

## Simulating the Results for High-Level Promotions for Account Promotions

Account managers can simulate the results for high-level promotions for account promotions to determine the viability of the high-level promotions. They perform a simulation to evaluate the incremental sales volume that a high-level promotion will generate based on promoted category data that they enter in the Consumer Goods application. Before they begin the simulation, they must import lift factors for categories. For more information, see [“Importing and Copying Lift Factors” on page 42](#). Also, the Est Baseline Volume field for the high-level promotion must contain data. For more information about this field, see [“Est Baseline Volume” on page 59](#).

After you simulate the results of a high-level promotion, the applicable lift factor for the simulation appears in the Lift Factor field in the high-level promotion. If multiple lift factors apply to a category, then the lift factor in the high-level promotion is an average of these multiple lift factors. If no lift factors apply to a category, then the lift factor in the high-level promotion is the lift factor for the next available category from a higher level in the category hierarchy.

The following calculation determines the values that the simulation populates in the Est Incremental Volume field in the High-Level Planning view:

Est Baseline Volume [for the high-level promotion] multiplied by (% ACV Promoted [for the high-level promotion] divided by 100) multiplied by (Lift Factor [for the high-level promotion] divided by 100)

This task is a step in [“Process of Simulating High-Level Promotions and Account Promotions \(End User\)” on page 41](#).

### *To simulate the results for a high-level promotion*

- 1 Navigate to the Plans screen, then the Plan List view, or the Promotions screen, then the High-Level Planning view.
- 2 Drill down on the Name field hyperlink for a plan record.
- 3 Click the High-Level Planning view tab.
- 4 Select the high-level promotion for which you want to simulate promotion results.

If the high-level promotion is not on the list, you can add it. For more information, see [“Creating High-Level Promotions for Account Promotions \(End User\)” on page 17](#).

- 5 Designate the parameters for lift factor retrieval and for the simulation calculation by entering a value in the following fields for the high-level promotion.

| Field      | Comments                                                                        |
|------------|---------------------------------------------------------------------------------|
| Category   | The type of high-level category and its associated Parent Category and Account. |
| Account    | The account for the high-level promotion.                                       |
| Start Date | The start date for the high-level promotion.                                    |
| End Date   | The end date for the high-level promotion.                                      |

| Field          | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tactics        | <p>The promotional tactic or tactics for the high-level promotion. Tactics constitute a method of promoting products to the consumer, and include the following main categories:</p> <ul style="list-style-type: none"> <li>■ Price, including percentages of TPR (Temporary Price Reduction)</li> <li>■ Display, including shelf, end-of-aisle (end cap), and check-out</li> <li>■ Feature, including flyers and newspaper advertisements</li> </ul> <p>Options are available that combine these categories.</p> |
| % ACV Promoted | Percentage All Commodity Volume promoted. The percentage of the total sales volume that applies to the high-level promotion.                                                                                                                                                                                                                                                                                                                                                                                      |

**6** Click Simulate.

The results for the high-level promotion simulation appear in the Est Incremental Volume field and the Lift Factor field in the list of high-level promotions.

**7** As many times as necessary, modify any of the fields in [Step 5](#) and repeat [Step 6](#) to generate more simulation results.

## Simulating the Results for Account Promotions

Account managers can simulate the results for account promotions to determine the viability of the account promotions. They perform a simulation to evaluate the incremental sales volume that an account promotion will generate based on promoted product and promoted category data that they enter in the Consumer Goods application. Before they begin the simulation, they must import lift factors for promoted products and promoted categories. For more information, see [“Importing and Copying Lift Factors” on page 42](#). Also, the Promotion Baseline fields for the promoted product baselines in the account promotion must contain data. For more information about this field, see [“Promotion Baseline” on page 34](#).

To obtain the Lift Factor field in the Promoted Product Baseline view, the simulation uses promoted product data to find this field value in the product lift factor table. If no applicable data is found in that table, the simulation uses promoted product data to find this field value in the category lift factor table.

After you simulate the results of an account promotion, the applicable lift factor for the simulation appears in the Predict Lift % field in the Promoted Product Baseline view. If multiple lift factors apply to a product, then the lift factor in the Promoted Products Baseline view is an average of these multiple lift factors.

The Predict Lift % button only populates the Sell-In Override Lift % field if its value is empty and Volume Planning Type equals Sell-In.

The Predict Lift % button only populates the Sell-Out Override Lift % field if its value is empty and Volume Planning Type equals Sell-Out.

In the Promoted Product Baseline view, the values that the simulation populates in the incremental fields are determined by the following calculation:

Promotion Baseline [for the promoted product baseline] multiplied by (% ACV Promoted [for the promoted product] divided by 100) multiplied by (Lift Factor [for the promoted product baseline] divided by 100).

This calculation does not apply to the Predict Lift % button. Clicking this button does not directly populate incremental values.

The results for the account promotion simulation appear in the Incremental field and the Predict Lift % field in the Promoted Product Baseline view.

If the Sell-In Override Lift % field and the Sell-Out Override Lift % field values are not updated, then Incremental fields are not updated.

This task is a step in [“Process of Simulating High-Level Promotions and Account Promotions \(End User\)”](#) on page 41.

### ***To simulate the results for an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for the account promotion record.
- 3 Select the account promotion for which you want to simulate promotion results.

If the account promotion is not on the list, you can add it. For more information, see [“Creating Account Promotions”](#) on page 25.

- 4 Click the Promoted Categories view tab.

- 5 In the Promoted Products list, designate the parameters for lift factor retrieval and for the simulation calculation by entering a value in the following fields for each promoted product.

| Field               | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Shipment Start Date | <p>The recommended date when the shipments for this product in the account promotion can begin. This date can be before the account promotion start date.</p> <p>If the promotion volume planning type is Sell-In, by default the shipment start date is used.</p> <p>If promotion volume planning type is Sell-Out, then Consumption Start Date is used.</p> <p>If volume planning type is not select, then Sell-In case is the default.</p>                                                                                                                                                                                                           |
| Shipment End Date   | <p>The recommended date when the shipments for this product in the account promotion end. This date might be after the account promotion end date when you allow your customers to replenish their safety stock at promotion prices after the promotion is over.</p> <p>If the promotion volume planning type is Sell-In, by default the shipment end date is used.</p> <p>If promotion volume planning type is Sell-Out, then Consumption End Date is used.</p> <p>If volume planning type is not select, then Sell-In case is the default.</p>                                                                                                        |
| Tactics             | <p>The promotional tactic or tactics for the promoted product. Tactics constitute a method of promoting products to the consumer, and include the following main categories:</p> <ul style="list-style-type: none"> <li>■ Price, including percentages of TPR (Temporary Price Reduction)</li> <li>■ Display, including shelf, end-of-aisle (end cap), and check-out</li> <li>■ Feature, including flyers and newspaper advertisements</li> </ul> <p>Options are available that combine these categories. The Predict Lift % button uses the tactics value at the promoted product level for searching the product or category lift factor records.</p> |



- 6 Click Predict Lift %, available at the promotion, promoted category, and promoted product levels.

The results for the account promotion simulation appear in the Incremental field and the Predict Lift % field in the Promoted Product Baseline view. The Est Incremental Volume field for the account promotion, promoted categories, and promoted products is updated, and, if the account promotion is associated with a plan, the Est Incremental Volume field for the plan is updated. Incremental fields are not updated if the Sell-In Override Lift % field and the Sell-Out Override Lift % field are not updated.

The start and end dates are chosen dynamically depending on the Volume Planning method. Lift factor matching searches first for a match at the product level, but if a match is not found it searches at the category level. The following conditions apply:

- If a lift factor is found, the update promoted product record and the set lift factor value in the Predict Lift % field update the promoted product baseline records and set the lift factor value in the Predict Lift % field.
  - If the promotion volume planning type equals sell-in and the Sell-In Override Lift % field is empty, the lift factor value is set in the Sell-In Override Lift % field.
  - If the promotion volume planning type equals sell-out and the Sell-Out Override Lift % field is empty, then the lift factor value is set in the Sell-Out Override Lift % field.
  - If the Sell-In or Sell-Out Override Lift % fields are not empty at the baseline level, the Predict Lift % button does not update these two fields. Therefore, no update occurs on incremental fields and other derived fields, and only the Predict Lift % field is updated.
  - If the Sell-In or Sell-Out Override Lift % fields are empty at the baseline level, then the Predict Lift % button does update the Override Lift % fields, which in turn updates the incremental fields.
- 7 As many times as necessary, modify any of the fields in [Step 5](#) and repeat [Step 6](#) to generate more simulation results.

## About What-If Scenarios at the Account Plan Level

Account managers can plan what-if scenarios at the Account Plan level by adding or removing a promotion from a scenario.

A promotion can belong to one or more scenarios. Multiple promotions can be added to a scenario using the change all command. Promotions scenarios can be based on planned promotions, promotions in the draft stage, or promotions already executed.

Scenario Planning allows account managers to create:

- The optimal set of scenarios to generate the maximum amount of sales volume, revenue, or profit
- An alternative set of promotions that can be presented to the customer after the customer has already accepted the first set, or that can be used to compare how the previous year's promotion plan works if applied to the present year, as opposed to a completely different set of promotions

Sales managers and trade marketing analysts have the ability to experiment with promotions without affecting the actual account plan, to show account managers how:

- Fewer and deeper promotions might be more effective than more promotions that are shallower.
- A different set of promotions might generate less sales volume, but more profit.

For example, executives can review promotions that account managers want to run, depending on available funds, or promotions that might move a lot of volume, but are not necessarily profitable. This ability allows decision makers to more intelligently choose how they might spend available funds or how they can best move critical inventory at the lowest cost.

For information about applying scenario plans to promotions, see [“Viewing Account Promotion Details” on page 3](#).

## Process of Managing Deals for Account Promotions (End User)

The following list shows tasks that end users typically perform to manage deals for account promotions:

- [“Creating Deals for Account Promotions” on page 48](#)
- [“Creating Deals for Promoted Categories” on page 49](#)
- [“Creating Deals for Promoted Products” on page 49](#)

For more information about deals, see [Chapter 9, “Trade Funds.”](#)

This process is a step in [“Roadmap for Managing Trade Promotions” on page 3](#).

## Creating Deals for Account Promotions

Account managers can create deals for account promotions. A deal establishes discount structures and pays for the cost of running an account promotion. A deal contains details about payments for an account promotion. The details include funding sources, payment amounts, and payment methods.

This task is a step in [“Process of Managing Deals for Account Promotions \(End User\)” on page 48](#).

### *To create a deal for an account promotion*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for the account promotion, and click the Deals view tab.
- 3 In the Deals list, create a new record, and complete the necessary fields.

[Table 17 on page 66](#) describes some fields.

## Creating Deals for Promoted Categories

Account managers can create and view a list of deals that fund a promoted category and view information about each deal's planned and actual spending.

**NOTE:** A deal for a promoted category rolls up to an account promotion only when you create the deal for a category that is associated with the account promotion. If you add a deal to a category that is not associated with the account promotion, the deal does not roll up to the account promotion if the category is later associated with the account promotion.

This task is a step in ["Process of Managing Deals for Account Promotions \(End User\)"](#) on page 48.

### *To create a deal for a promoted category*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for the account promotion that contains the promoted categories for which you want to create a deal.
- 3 In the Promoted Categories list, click the Category field hyperlink of the promoted category for which you want to create a deal.
- 4 In the Deals list, create a new record, and complete the necessary fields.

[Table 17 on page 66](#) describes some fields.

## Creating Deals for Promoted Products

Account managers can create and view a list of deals that fund a promoted product and view information about each deal's planned and actual spending.

**NOTE:** A deal for a promoted product rolls up to an account promotion only when you create the deal for a product that is associated with the account promotion. If you add a deal to a promoted product that is not associated with the account promotion, the deal does not roll up to the account promotion if the product is later associated with the account promotion.

This task is a step in ["Process of Managing Deals for Account Promotions \(End User\)"](#) on page 48.

### *To create a deal for a promoted product*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for the account promotion that contains the promoted products for which you want to create a deal.
- 3 In the Promoted Categories list, select the category that contains the promoted products for which you want to create a deal.
- 4 In the Promoted Products list, drill down on the Product field hyperlink for the product for which you want to create a deal.

- 5 In the Deals list, create a new record, and complete the necessary fields.

[Table 17 on page 66](#) describes some fields.

## Process of Managing Phasing for Account Promotions (End User)

The following list shows tasks that end users typically perform to manage phasing for account promotions:

- [“Enabling Phasing for Account Promotions” on page 50](#)
- [“Phasing Promoted Categories” on page 52](#)
- [“Recalculating Phasing Results for Categories” on page 53](#)
- [“Phasing Promoted Products” on page 54](#)
- [“Recalculating Phasing Results for Products” on page 55](#)
- [“Finalizing Account Promotions” on page 55](#)

This process is a step in [“Roadmap for Managing Trade Promotions” on page 3](#).

### Enabling Phasing for Account Promotions

Account managers can set up phasing for an account promotion if they want to see category and product data for the account promotion on a weekly basis. You can use phasing if you want to allocate the aggregate cost, volume, and payment data throughout the weeks in the shipment time period for the account promotion.

To enable phasing for an account promotion, you designate that the account promotion uses phasing functionality, and then you set up the phasing pattern for the account in the account promotion. This phasing pattern determines how category and product data is allocated throughout the weeks that you designate in the pattern.

When you enable phasing for an account promotion, you automatically enable phasing for all categories and products in that account promotion. You cannot disable phasing for selected categories or products in an account promotion after you enable phasing for the account promotion. Also, you cannot disable phasing for an account promotion and for all the categories in the account promotion:

- After you phase a promoted category in the account promotion.
- If the Status field changes to Paid for a payment associated with a deal for any category in the account promotion. (To find the Status field, navigate to the Promotions screen, then the Account Promotions List, drill down on the Promotion field hyperlink, drill down on the Category field hyperlink in the Promoted Categories list, click the Deals view tab, and click the Payments view tab.)

After you enable phasing for an account promotion, you cannot change the shipment start date and the shipment end date if the current date is after the shipment start date. Also, you cannot change the shipment start date and the shipment end date if the account promotion status is Finalized.

This task is a step in [“Process of Managing Phasing for Account Promotions \(End User\)”](#) on page 50.

***To enable phasing for an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Select the account promotion for which you want to enable phasing.
- 3 Select the Phasing Enable check box.

The Phasing Enable field for all categories and products in the account promotion is selected.

Use the following procedure to create a phasing pattern for an account in an account promotion.

***To create a phasing pattern for an account in an account promotion***

- 1 Navigate to the Administration - Pattern screen, then the Pattern Administration view.
- 2 In the Pattern list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field        | Comments                                                                                                                                 |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Pattern      | The name of the pattern.                                                                                                                 |
| Account Name | The account for the pattern. This pattern is available only to account promotions for this account and the subaccounts for this account. |

- 3 In the Pattern Distribution list for the pattern, create at least one new record, and complete the necessary fields.

The following table describes some fields.

| Field                | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sequence             | A number that designates a week in the shipment time period for the account promotion. This field is automatically populated with a number when you create a record, but you can overwrite this number. Use 1 for the first week, 2 for the second week, and so on. You cannot use a pattern for phasing if you do not assign at least 1 sequence. The number of weeks in a pattern must be equal to or less than the number of weeks in the shipment time period for which the time periods are created. |
| Pattern Distribution | The percentage of the aggregate data that is distributed to the associated sequence week. Make sure that the pattern distribution values for all of the sequences in a pattern add up to 100%. You cannot use the pattern for phasing if the values total less than or more than 100%.                                                                                                                                                                                                                    |

## Phasing Promoted Categories

Account managers can phase a promoted category if they want to allocate the aggregate cost, volume, and payment data for the category throughout the weeks of the shipment time period for the account promotion.

Before you can phase a promoted category, you must:

- **Enable phasing for the account promotion.** For more information about enabling phasing, see [“Enabling Phasing for Account Promotions” on page 50](#).
- **Create time periods for the weeks to which you want to allocate category data.** If you want to begin data allocation on the start date of the account promotion’s shipments, make sure a time period is created for the week that contains that start date. Also make sure the time periods are created for any subsequent weeks to which you want to allocate category data. You can allocate category data to weeks that are after the end date for the account promotion’s shipments if time periods are created for those weeks. For more information about creating time periods, see [“Creating Periods” on page 4](#).

If the current date is before the start date for the account promotion’s shipments, you can phase all the promoted categories. If the current date is during or after the shipment time period for the account promotion, you can phase the promoted categories for which the Phasing Status field is Not Phased or blank.

After you phase a promoted category, you cannot disable phasing for the category’s account promotion and for all categories in the account promotion. For more information about the phasing results, see [“About Phasing Results for Promoted Categories” on page 69](#).

This task is a step in [“Process of Managing Phasing for Account Promotions \(End User\)” on page 50](#).

### *To phase a promoted category*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion.
- 3 In the Promoted Categories list, select the category that you want to phase.
- 4 Select a pattern in the Phasing Pattern field for the category.

The phasing pattern determines how category and product information is allocated during the weeks you designate in the pattern. If the phasing pattern that you want is not available for selection, you can create that pattern. To create a phasing pattern, see [“Enabling Phasing for Account Promotions” on page 50](#).

- 5 Click Phase to phase the promoted category.  
The Phasing Status field for the category changes to Phased.
- 6 Click the Category field hyperlink for the category that you phased.
- 7 Click the Phasing Result view tab to display the result of the phasing.

## Recalculating Phasing Results for Categories

To see the current phasing result for a promoted category, account managers must recalculate the result when the Phasing Status field for the category is Refresh Required. The Phasing Status field changes to Refresh Required if:

- You change the Est Incremental Volume field for the category's account promotion.
- You change the Incremental field in the category's Promoted Product Baseline list. Changing this field changes the Est Incremental Volume field for the promoted category.
- You associate baseline data with promoted products. You click the Baseline button in the Account Promotions List view to make this association. Making this association changes the Est Baseline Volume, PY Baseline Volume, and Target Baseline Volume fields for the promoted category.
- You change the Est Distribution Update Pct fields for some weeks in the phasing result for the promoted category. Your changed values for all weeks must add up to 100%. When you change a percentage in this field, you supersede the percentage for the corresponding week in the phasing pattern.
- Any of the following category fields change:
 

|                       |                          |
|-----------------------|--------------------------|
| ■ Est Total Volume    | ■ Act Ship Volume        |
| ■ Est Deferred Cost   | ■ Act Deferred Payment   |
| ■ Est On-Invoice Cost | ■ Act On-Invoice Payment |
| ■ Est Fixed Cost      | ■ Act Fixed Payment      |

These promoted category fields are calculated fields, and you cannot enter data in them. However, these fields can change if you make changes in other records (for example, deal or deal payment records).

When you recalculate the phasing result, you do not update all of the fields in the phasing result. The following fields are not updated:

- All planned fields
- All fields for the weeks that are before the week that contains the date that you recalculate the phasing result

If the current date is before the start date for the account promotion's shipments, you cannot recalculate the phasing result for all the promoted categories. However, you can change the phasing pattern for a promoted category and again phase the category. For more information about the phasing results, see ["About Phasing Recalculation Results for Promoted Categories" on page 70](#).

This task is a step in ["Process of Managing Phasing for Account Promotions \(End User\)" on page 50](#).

### *To recalculate the phasing result for a promoted category*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion.
- 3 In the Promoted Categories list, click the Category field hyperlink for the category for which you want to recalculate the phasing result.

- 4 Click the Phasing Result view tab to display the result of the previous phasing.
- 5 Click Recalculate to display the result of the phasing recalculation.

The Phasing Status field for the promoted category changes to Phase Updated.

## Phasing Promoted Products

Account managers can phase a promoted product if they want to allocate the aggregate cost, volume, and payment data for the product throughout the weeks in the shipment time period for an account promotion. Before you can phase a promoted product, you must phase the promoted category. For more information about category phasing, see [“Phasing Promoted Categories” on page 52](#).

When you phase a promoted product, you allocate to the product a percentage of the phasing result for the product's promoted category. This percentage is calculated as follows:

$$\frac{\text{Est Baseline Volume field of Promoted Product}}{\text{Est Baseline Volume field of Promoted Category}}$$

This percentage is applied to the phasing result for the promoted category to obtain the phasing result for the promoted product.

All the phasing result fields for a promoted category, except the Est Distribution Update Pct field, are available when you phase a promoted product. The phasing result fields that are percentages display the same values for a promoted category and its promoted products.

This task is a step in [“Process of Managing Phasing for Account Promotions \(End User\)” on page 50](#).

### *To phase a promoted product*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Name field hyperlink for the account promotion that contains the promoted product.
- 3 In the Promoted Categories list, select the category that contains the promoted product that you want to phase.
- 4 In the Promoted Products list, select a product that you want to phase.
- 5 Click Phase to phase the promoted product.
- 6 Drill down on the Product field hyperlink for the product that you phased.
- 7 Click the Product Phasing view tab to display the result of the phasing.



## Recalculating Phasing Results for Products

When you recalculate the phasing result for a promoted category, any prior phasing result for the products in that category is deleted. If account managers recalculate the phasing result for a promoted category, to see the current phasing result for promoted products in that category, they must recalculate the phasing result for those products. For more information about phasing result recalculation for a category, see [“Recalculating Phasing Results for Categories” on page 53](#).

This task is a step in [“Process of Managing Phasing for Account Promotions \(End User\)” on page 50](#).

### *To recalculate the phasing result for a promoted product*

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion.
- 3 In the Promoted Categories list, select the category that contains the promoted product for which you want to recalculate the phasing result.
- 4 In the Promoted Products list, drill down on the Product field hyperlink for the product for which you want to recalculate the phasing result.
- 5 Click the Product Phasing view tab to display the result of the previous phasing.
- 6 Click Recalculate to display the result of the phasing recalculation.

## Finalizing Account Promotions

Account managers can finalize account promotions if they use phasing functionality. After the shipment time period for an account promotion and after applicable payments are associated with the account promotion, you can finalize the phasing result for the account promotion. In general, you finalize the phasing result after the shipment time period, not before or during the shipment time period.

When you finalize the phasing result for an account promotion, promoted categories and promoted products are phased if they were not previously phased. Also, promoted categories and promoted products are recalculated if data that affects the phasing result has changed since the last phasing. After you finalize the phasing result, no one can recalculate that result even if the data that affects it changes.

To finalize the phasing result for all the categories and products in an account promotion, you change the Status field for the account promotion to Finalized. If you later decide to update the phasing result with data that changes after finalization, you can change the account promotion Status field to Re-opened, and then recalculate the phasing result.

Regardless of the value in the Phasing Enable field for an account promotion, if you change the account promotion's Status field to Finalized or Re-opened, the Status field for all categories and products in the account promotion automatically changes to Finalized or Re-opened. If the Phasing Enable field is selected and you change the account promotion's Status field to Finalized, you cannot add to or delete from the account promotion any categories, products, deals, or payments. The Phase and Recalculate buttons are disabled, and the following account promotion buttons are disabled: Revise, Products, Baseline, Spread, Shipment, and Aggregate.

This task is a step in [“Process of Managing Phasing for Account Promotions \(End User\)”](#) on page 50.

***To finalize an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Select the account promotion that you want to finalize.
- 3 Change the Status field to Finalized.

## About Some Fields for Promotions

The following topics include information about some fields for high-level promotions, corporate promotions, and account promotions:

- [“General Fields in Promotions”](#) on page 56
- [“Fields for Details About Promotional Tactics”](#) on page 58
- [“Fields for Volume and Revenue in Promotions”](#) on page 59
- [“Fields for Spending in Promotions”](#) on page 63
- [“Fields for Details About Deals”](#) on page 66

## General Fields in Promotions

Table 13 shows the miscellaneous fields in high-level promotions and the levels of the account promotion hierarchy. These levels include plans, account promotions, promoted categories, and promoted products. The field comments indicate whether a particular field does not appear in high-level promotions or some levels of the account promotion hierarchy.

Table 13. General Fields in Promotions

| Field   | Comments                                                                                                                                                                                                                                                                         |
|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account | The account for the plan, high-level promotion, account promotion, promoted category, or promoted product. An account is sometimes referred to as a planning account. A planning account is the lowest level of your account hierarchy for which you make promotional decisions. |

Table 13. General Fields in Promotions

| Field        | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Period       | <p>The time period, such as a fiscal year, for which the plan, high-level promotion, account promotion, promoted category, or promoted product is in effect. The start and end dates for promotion, shipment, and consumption in an account promotion default to the start and end dates for this time period. The start and end dates for a high-level promotion default to the start and end dates for this time period. The start and end dates as well as the period for a promoted category default to the corresponding fields for an account promotion. The start and end dates as well as the period for a promoted product default to the corresponding fields for a promoted category. You can change these default values.</p>                                                                                                                                                                                                                            |
| Tactics      | <p>The promotional tactic or tactics for the high-level promotion, account promotion, promoted category, or promoted product. Tactics constitute a method of promoting products to the consumer, and include the following main categories:</p> <ul style="list-style-type: none"> <li>■ Price, including percentages of TPR (Temporary Price Reduction)</li> <li>■ Display, including shelf, end-of-aisle (end cap), and check-out</li> <li>■ Feature, including flyers and newspaper advertisements</li> </ul> <p>Options are available that combine these categories. This field is not available for plans. For information about additional fields for tactics, see <a href="#">Table 14 on page 58</a>.</p>                                                                                                                                                                                                                                                    |
| Organization | <p>The name of the organization that implements the plan, high-level promotion, account promotion, promoted category, or promoted product. An organization frequently denotes a country or market in a Consumer Goods implementation.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Status       | <p>The status of the plan, account promotion, promoted category, and promoted product. An account manager who creates a plan or account promotion can select Pending Approval in this field to submit the plan or account promotion for approval. Then, the approver can change this field to Approved - Pending Review, More Information Needed, or Rejected. The approver's selection determines the field values that are subsequently available for selection. When the approver selects Accepted in the Status field in a plan or account promotion, the Status field in the associated promoted categories and promoted products automatically changes to Accepted. Also, the Status field in deals for the account promotion and associated promoted categories and promoted products changes to Committed. This field is not available for high-level promotions.</p> <p>When the Status is Accepted, Status field options include Finalized and Reopen.</p> |

## Fields for Details About Promotional Tactics

Table 14 shows the fields for details about promotional tactics in high-level promotions, the levels of the corporate promotion hierarchy, and the levels of the account promotion hierarchy. These levels include corporate promotions, account promotions, promoted categories, and promoted products.

Table 14. Fields for Details About Promotional Tactics

| Field               | Comments                                                                                                                                                                                                                                                                                                                                      |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display Type        | The type of advertisement inside of a retail outlet.                                                                                                                                                                                                                                                                                          |
| Display Tactics     | The location of an advertisement inside of a retail outlet.                                                                                                                                                                                                                                                                                   |
| Display Size        | The general physical size of an advertisement inside of a retail outlet.                                                                                                                                                                                                                                                                      |
| Other Media Tactics | The type of advertisement outside of a retail outlet.                                                                                                                                                                                                                                                                                         |
| Ad Location         | The media prominence of an advertisement outside of a retail outlet.                                                                                                                                                                                                                                                                          |
| Ad Size             | The specific physical size of an advertisement outside of a retail outlet.                                                                                                                                                                                                                                                                    |
| TPR Type            | The type of temporary price reduction—for example, TPR (Temporary Price Reduction), BOGO (Buy One Get One), and EDLP/EDLC (Every Day Low Price/Every Day Low Cost).                                                                                                                                                                           |
| TPR Size            | The method for calculating the temporary price reduction.                                                                                                                                                                                                                                                                                     |
| TPR Amount          | The dollar amount applicable to the temporary price reduction.                                                                                                                                                                                                                                                                                |
| TPR %               | The percentage discount applicable to the temporary price reduction. This field is calculated as follows: 1 minus (Promoted Price divided by Non-Promoted Price). The non-promoted price is not the same as the suggested retail price.                                                                                                       |
| Catalog Tactics     | The location and size in the retailer's catalog in which the product is being promoted. Sample values include Front Page, Back Page, and Inside Page. It can also be concatenated with size, such as Front Page Large, Front Page Small, Back Page Large, and so on.                                                                          |
| Display Note        | A free-form text field that can be used to store a promotional display set-up or audit notes for the retail execution team.                                                                                                                                                                                                                   |
| Display Details     | The additional comments that can be included to describe the display tactics being used to support the promotion. This is generally used for promotion verification purposes during retail execution. This can include specific locations of the display or secondary supporting displays that are set up in addition to the primary display. |
| Other Tactics       | For describing any other promotional tactics that are used but do not fall into any of the other categories.                                                                                                                                                                                                                                  |
| Multi Buy Qty       | The minimum buy quantity required to receive special pricing.                                                                                                                                                                                                                                                                                 |
| Field Priority      | For sales representatives to sell-in, merchandise, or audit a promotion at the retail outlet level.                                                                                                                                                                                                                                           |

## Fields for Volume and Revenue in Promotions

Table 15 shows the fields for volume and revenue in high-level promotions and the levels of the account promotion hierarchy. These levels include plans, account promotions, promoted categories, and promoted products. The field comments indicate if a particular field does not appear in high-level promotions. Volume includes cases and units.

The Incremental Sell-In and Incremental Sell-Out volume fields are related to each other based on the values in the Warehouse Withdrawal field and Forward-Buy Volume field. The value entered and the value stored are based on whether the account plan's volume plan is sell-in or sell-out.

If the promotion (account plan) has a sell-in volume plan, manually enter values in the Incremental Sell-In Volume, Warehouse Withdrawal Volume, and Forward Buy Volume fields. The Incremental Sell-Out Volume field is a read-only field that is calculated automatically and stored using the following formula:

- Upon simulation, Incremental Sell In field equals Override Lift % field multiplied by Baseline Volume field.
- Incremental Sell-Out Volume field equals Incremental Sell-In Volume field plus Warehouse Withdrawal Volume field minus Forward Buy Volume field.

If the promotion (account plan) has a sell-out volume plan, manually enter values in the Incremental Sell-Out Volume, Warehouse Withdrawal Volume, and Forward Buy Volume fields. The Incremental Sell-In Volume field is a read-only field that is calculated automatically and stored using the following formula:

- Upon simulation, the Incremental Sell Out field equals Override Lift % field multiplied by Baseline Volume field.
- Incremental Sell-In Volume field equals Incremental Sell-Out Volume field minus Warehouse Withdrawal Volume field plus Forward Buy Volume field.

Table 15. Fields for Volume and Revenue in Promotions

| Field                | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Volume Fields</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Est Baseline Volume  | <p>The estimated volume of product that would have been sold without an account promotion. For account promotions, promoted categories, and promoted products, this field is populated when you click the Baseline button in the Account Promotions List view to update the Promotion Baseline field in the Promoted Product Baseline view with product baseline data from sales volume plans. The volumes roll up from this view to promoted products, promoted categories, and account promotions, but not to plans. This field is updated for plans when you click the Update button in the Plan List view.</p> <p>For high-level promotions, this field is populated when you click the Forecast button to update a high-level promotion with category baseline data from sales volume plans.</p> |

Table 15. Fields for Volume and Revenue in Promotions

| Field                  | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Est Incremental Volume | <p>The incremental volume over and above the estimated baseline volume that is attributable to the promotional tactics in the account promotion. This field is populated when you enter a value in the Incremental field in the Promoted Product Baseline view or when you click the Simulate button to simulate an account promotion and thus change the Incremental field in the Promoted Product Baseline view. The incremental volumes roll up to promoted products, promoted categories, account promotions, and, if the account promotions are associated with plans, to plans. If you change the plan, these values roll up to the Est Incremental Volume field for the new plan and are deleted from the prior plan.</p> <p>Est Incremental Volume can be one of two types: Sell-In or Sell-Out. A type is calculated when a user modifies the opposite type. The calculation involves the values from the Forward Buy Cases, Forward Buy Units, Warehouse Withdrawal Cases, and Warehouse Withdrawal Units fields, along with the Incremental Qty field.</p> <p>This field is populated for high-level promotions when you click the Simulate button to simulate the results for a high-level promotion. Also, you can enter a value in this field for high-level promotions.</p> <p>You can enter a value in this field for an account promotion, and then click the Spread button to allocate that value to the incremental volume field for records in the lower levels of the account promotion hierarchy.</p> |
| Est Total Volume       | Est Baseline Volume plus Est Incremental Volume.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| PY Baseline Volume     | <p>For the prior year, the estimated volume of product that was sold. This field is populated when you click the Baseline button in the Account Promotions List view to update the Promotion PY Baseline field in Promoted Product Baseline view with product baseline data from sales volume plans. The volumes roll up from this view to promoted products, promoted categories, and account promotions, but not to plans. This field is updated for plans when you click the Update button in the Plan List view. This field is not available for high-level promotions.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Target Baseline Volume | <p>The expected volume of product to be sold. This field is populated when you click the Baseline button in the Account Promotions List view to update the Promotion Target Baseline field in the Promoted Product Baseline view with product baseline data from sales volume plans. The volumes roll up from this view to promoted products, promoted categories, and account promotions, but not to plans. This field is updated for plans when you click the Update button in the Plan List view. This field is not available for high-level promotions.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

Table 15. Fields for Volume and Revenue in Promotions

| Field                                  | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Actual Baseline Volume                 | Equal to the Est Baseline Volume field. This field is not available for high-level promotions.                                                                                                                                                                                                                                                                                                                                           |
| Actual Incremental Volume              | Actual Total Volume minus Actual Baseline Volume. This field is not available for high-level promotions.                                                                                                                                                                                                                                                                                                                                 |
| Actual Total Volume                    | The shipment volume for the account promotion. This field is populated when you click the Shipment button in the Account Promotions List view to update the Promotion Shipment field in the Shipments view with product shipment data from sales volume plans. The volumes roll up from this view to promoted products, promoted categories, account promotions, and plans. This field is not available for high-level promotions.       |
| Warehouse Withdrawal Cases             | The number of cases withdrawn from a warehouse in using the inventory on hand.                                                                                                                                                                                                                                                                                                                                                           |
| Warehouse Withdrawal Units             | The number of units withdrawn from a warehouse in using the inventory on hand.                                                                                                                                                                                                                                                                                                                                                           |
| Forward Buy Cases                      | The additional number of cases that a retailer might purchase over and above the cases sold to consumers, so that the retailer can buy additional volume on a sale to increase the profit margin.                                                                                                                                                                                                                                        |
| Forward Buy Units                      | The additional number of units that a retailer might purchase over and above the units sold to consumers, so that the retailer can buy additional volume on a sale to increase the profit margin.                                                                                                                                                                                                                                        |
| <b>Revenue Fields</b>                  |                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Est Baseline Revenue                   | For promoted products, this field is calculated as follows: Est Baseline Volume multiplied by List Price. The estimated baseline revenue values roll up to promoted categories, account promotions, and, if the account promotions are associated with plans, to plans.<br><br>For high-level promotions, this field is populated when you click the Forecast button to update a high-level promotion with data from sales volume plans. |
| Est Incremental Revenue                | For plans, account promotions, promoted categories, and promoted products, this field is calculated as follows: Est Total Revenue minus Est Baseline Revenue. This field is not available for high-level promotions.                                                                                                                                                                                                                     |
| Est Baseline Net Revenue               | Est Baseline Revenue minus Trade Spend.                                                                                                                                                                                                                                                                                                                                                                                                  |
| Est Sell-Out Incremental Gross Revenue | Case Price multiplied by Est Sell-Out Incremental Cases.                                                                                                                                                                                                                                                                                                                                                                                 |
| Est Sell-Out Incremental Net Revenue   | Est Sell-Out Incremental Gross Revenue minus Trade Spend.                                                                                                                                                                                                                                                                                                                                                                                |

Table 15. Fields for Volume and Revenue in Promotions

| Field                      | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Est Total Revenue          | For plans, account promotions, promoted categories, and promoted products, this field is calculated as follows: (Est Baseline Volume plus Est Incremental Volume) multiplied by Promoted Price. This field is not available for high-level promotions. For more information about Promoted Price, see <a href="#">"Promoted Price" on page 32</a> .                                                                                                                                                                                                    |
| PY Baseline Revenue        | For the prior year, the revenue for estimated volume of product that was sold. This field is populated when you click the Baseline button in the Account Promotions List view to update the PY Baseline Revenue field in for promoted products with product baseline data from sales volume plans. The revenues roll up from this view to promoted categories and account promotions, but not to plans. This field is updated for plans when you click the Update button in the Plan List view. This field is not available for high-level promotions. |
| Target Baseline Revenue    | The expected revenue for the volume of product to be sold. This field is populated when you click the Baseline button in the Account Promotions List view to update the Target Baseline Revenue field for promoted products with product baseline data from sales volume plans. The revenues roll up from this view to promoted categories and account promotions, but not to plans. This field is updated for plans when you click the Update button in the Plan List view. This field is not available for high-level promotions.                    |
| Actual Baseline Revenue    | Equal to the Est Baseline Revenue field. This field is not available for high-level promotions.                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Actual Incremental Revenue | Actual Total Revenue minus Actual Baseline Revenue. This field is not available for high-level promotions.                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Actual Total Revenue       | The revenue that is associated with the shipment volume for the account promotion. This field is populated when you click the Shipment button in the Account Promotions List view to update the Promotion Shipment Revenue field in the Shipments view with product shipment data from sales volume plans. The revenues roll up from this view to promoted products, promoted categories, account promotions, and plans. This field is not available for high-level promotions.                                                                        |



## Fields for Spending in Promotions

Table 16 shows the fields for spending in high-level promotions and the levels of the account promotion hierarchy. These levels include plans, account promotions, promoted categories, and promoted products. The field comments indicate if a particular field does not appear in high-level promotions or some levels of the account promotion hierarchy.

Table 16. Fields for Spending in Promotions

| Field                           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| % ACV Promoted                  | Percentage All Commodity Volume promoted. The percentage of the total sales volume that applies to the high-level promotion, account promotion, promoted category, or promoted product. The default value for this field is 100%. You enter a value in this field to simulate results for a high-level promotion or an account promotion. This field is not available for plans.                                                                                                            |
| <b>Variable Spending Fields</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Off Invoice Rate                | The discount rate (dollars for each unit) that you subtract from the product price on the invoice to the customer. You provide this discount to the customer as compensation for participating in an account promotion. If you enter data in this field, you cannot enter data in the Off Invoice Pct field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products. This field is not available for plans and account promotions. |
| Off Invoice Pct                 | The discount percentage that you subtract from the product price on the invoice to the customer. You provide this discount to the customer as compensation for participating in an account promotion. If you enter data in this field, you cannot enter data in the Off Invoice Rate field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products. This field is not available for plans and account promotions.                  |
| Est Off Invoice Spend           | For promoted products, this field is calculated as follows: (Off Invoice Rate multiplied by Est Total Volume multiplied by [% ACV Promoted divided by 100]) plus (Off Invoice Pct multiplied by [Est Total Revenue divided by 100] multiplied by [% ACV Promoted divided by 100]). The values for estimated off-invoice expenditures roll up to promoted categories, account promotions, and, if the account promotions are associated with plans, to plans.                                |

Table 16. Fields for Spending in Promotions

| Field                        | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bill Back Rate               | The discount rate (dollars for each unit) that the customer applies to the appropriate units to bill you or that the customer subtracts from the product price on the invoice to the customer to short pay that invoice. You provide this discount to the customer as compensation for participating in the account promotion. If you enter data in this field, you cannot enter data in the Bill Back Pct field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products. This field is not available for plans and account promotions. |
| Bill Back Pct                | The discount percentage that the customer applies to the appropriate units to bill you or that the customer subtracts from the product price on the invoice to the customer to short pay that invoice. You provide this discount to the customer as compensation for participating in the account promotion. If you enter data in this field, you cannot enter data in the Bill Back Rate field. You can click the Spread button to copy a value in this field from a promoted category to its promoted products. This field is not available for plans and account promotions.                  |
| Est Bill Back Spend          | For promoted products, this field is calculated as follows: (Bill Back Rate multiplied by Est Total Volume multiplied by [% ACV Promoted divided by 100]) plus (Bill Back Pct multiplied by [Est Total Revenue divided by 100] multiplied by [% ACV Promoted divided by 100]). The values for estimated bill back expenditures roll up to promoted categories, account promotions, and, if the account promotions are associated with plans, to plans.                                                                                                                                           |
| Variable Spend Pay Method    | The payment method for the variable expenditure, for example, Bill Back, Off Invoice, or Deduction. This field is not available for plans.                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Est Variable Spend           | Est Off Invoice Spend plus Est Bill Back Spend.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Fixed Spending Fields</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Fixed Slot Fee               | The fee that the retailer charges to you for placing the promoted products for the account promotion on the retailer's shelves. You can enter a value in this field for an account promotion, promoted category, or promoted product, and then click the Spread button to allocate that value to the Fixed Slot Fee field for records in the lower levels of the account promotion hierarchy.                                                                                                                                                                                                    |
| Fixed Slot Fee Pay Method    | The payment method that is associated with the slotting fee for the account promotion, for example, Bill Back, Check, or Deduction. This field is not available for plans.                                                                                                                                                                                                                                                                                                                                                                                                                       |

Table 16. Fields for Spending in Promotions

| Field                        | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Other Fixed Spend            | The other fixed expenditures that you pay to the retailer to encourage the retailer's participation in the account promotion, for example, a fee that you pay to include your products in the retailer's weekly catalog. You can enter a value in this field for an account promotion, a promoted category, or a promoted product, and then click the Spread button to allocate that value to the Other Fixed Spend field for records in the lower levels of the account promotion hierarchy. |
| Other Fixed Spend Pay Method | The payment method that is associated with the other fixed expenditures for the account promotion, for example, Bill Back, Check, or Deduction. This field is not available for plans.                                                                                                                                                                                                                                                                                                        |
| Est Fixed Spend              | Fixed Slot Fee plus Other Fixed Spend.                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Other Fields</b>          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Est Total Spend              | Est Variable Spend plus Est Fixed Spend.                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Est Fund Allocations         | The sum of the deal amounts. This field is populated from the Amount field in deals that are associated with account promotions, promoted categories, and promoted products. This field is not available for high-level promotions. For more information about deals, see <a href="#">"Process of Managing Deals for Account Promotions (End User)"</a> on page 48.                                                                                                                           |
| Actual Total Spend           | The payments relating to the deal amounts. This field is populated from the Amount field for payments with a status of Paid in deals that are associated with account promotions, promoted categories, and promoted products. This field is not available for high-level promotions. For more information about deals, see <a href="#">"Process of Managing Deals for Account Promotions (End User)"</a> on page 48.                                                                          |
| Est Incremental COGS         | Est Incremental Volume multiplied by COGS for promoted products. COGS is a rate applicable to the cost of goods sold. The values roll up from promoted products to promoted categories and account promotions. This field is not available for high-level promotions.                                                                                                                                                                                                                         |
| Actual Incremental COGS      | Actual Incremental Volume multiplied by COGS for promoted products. COGS is a rate applicable to the cost of goods sold. The values roll up from promoted products to promoted categories and account promotions. This field is not available for high-level promotions.                                                                                                                                                                                                                      |

Table 16. Fields for Spending in Promotions

| Field      | Comments                                                                                                                                                                                                                                                                                                                                                             |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Est ROI    | The estimated return on investment. If the Est Total Spend field is 0, then this field is 0. Otherwise, this field is calculated as follows: $([\text{Est Incremental Revenue} \text{ minus } \text{Est Incremental COGS}] \text{ divided by } \text{Est Total Spend}) \text{ multiplied by } 100$ . This field is not available for high-level promotions.          |
| Actual ROI | The actual return on investment. If the Actual Total Spend field is 0, then this field is 0. Otherwise, this field is calculated as follows: $[(\text{Actual Incremental Revenue} \text{ minus } \text{Actual Incremental COGS}) \text{ divided by } \text{Actual Total Spend}] \text{ multiplied by } 100$ . This field is not available for high-level promotions. |

## Fields for Details About Deals

Table 17 shows the fields for deals in the levels of the account promotion hierarchy. These levels include account promotions, promoted categories, and promoted products. The field comments indicate if a particular field does not appear in some levels of the account promotion hierarchy.

Table 17. Fields for Details About Deals

| Field   | Comments                                                                                                 |
|---------|----------------------------------------------------------------------------------------------------------|
| Deal ID | The automatically generated identification number of the deal.                                           |
| Status  | The status of the deal.                                                                                  |
| Type    | The type of deal, such as Bill Back, Fixed Cost, or Off Invoice. Select a value from the drop-down list. |

Table 17. Fields for Details About Deals

| Field          | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deal Category  | <p>The type of deal category. This field is automatically populated when you select a type of deal in the Type field:</p> <ul style="list-style-type: none"> <li>■ If the type of deal is Bill Back, the deal category is Deferred.</li> <li>■ If the type of deal is Off Invoice, the deal category is On-Invoice.</li> </ul> <p>For a Deferred or On-Invoice deal category, you can enter data in the Volume and Cost Per Case fields in the Deals list and in the Volume and Rate fields in the Payments view for this deal. You cannot enter data in the Amount field in the Deals list and in the Payments view for this deal.</p> <ul style="list-style-type: none"> <li>■ If the type of deal is Fixed Cost, the deal category is Fixed.</li> </ul> <p>For a Fixed deal category, you can enter data in the Amount field in the Deals list and in the Payments view for this deal. You cannot enter data in the Volume and Cost Per Case fields in the Deals list and in the Volume and Rate fields in the Payments view for this deal.</p> <p>This field is not available for account promotions and promoted products.</p> |
| Fund           | The name of the fund from which the deal is made. Funds provide the money to pay for the cost of an account promotion.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Deal Volume    | The estimated volume that is applicable to the deal. For information about when you can enter data in this field, see the Deal Category field description. This field is not available for account promotions and promoted products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Cost Per Case  | The cost of each case in the deal. For information about when you can enter data in this field, see the Deal Category field description. This field is not available for account promotions and promoted products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Amount         | The amount of the deal. For information about when you can enter data in this field, see the Deal Category field description.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Est. Pay Date  | The estimated date of the payments paid for the deal. If you want this field to drive behavior in the application, you must customize the preconfigured application.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Promoted Price | The promoted price of each item in the deal. This field is not available for account promotions and promoted products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Retail Price   | The retail price of each item in the deal. This field is not available for account promotions and promoted products.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

Table 17. Fields for Details About Deals

| Field                          | Comments                                                                                                                                                                              |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| On-Invoice Deal Amount         | The amount of the deal for the on-invoice deal category. This field is not available for account promotions and promoted products.                                                    |
| Deferred Deal Amount           | The amount of the deal for the deferred deal category. This field is not available for account promotions and promoted products.                                                      |
| Fixed Deal Amount              | The amount of the deal for the fixed deal category. This field is not available for account promotions and promoted products.                                                         |
| Deal Payment Volume            | The volume that is applicable to the deal payments. This field is not available for account promotions and promoted products.                                                         |
| On-Invoice Deal Payment Volume | For the on-invoice deal category, the volume that is applicable to the deal payments. This field is not available for account promotions and promoted products.                       |
| On-Invoice Deal Payment        | For the on-invoice deal category, the deal payments. This field is not available for account promotions and promoted products.                                                        |
| Deferred Deal Payment          | For the deferred deal category, the deal payments. This field is not available for account promotions and promoted products.                                                          |
| Fixed Deal Payment             | For the fixed deal category, the deal payments. This field is not available for account promotions and promoted products.                                                             |
| Payment Pending                | The sum of the deal payments for which the payment status is Pending.                                                                                                                 |
| Payment Submitted              | The sum of the deal payments for which the payment status is Submitted.                                                                                                               |
| Payments Paid                  | The sum of the deal payments for which the payment status is Paid.                                                                                                                    |
| Min. Quantity                  | If the customer purchases less than this minimum volume of product, the deal is not applicable.                                                                                       |
| Max. Quantity                  | If the customer purchases more than this maximum volume of product, the deal is not applicable to the extra purchased volume. This field generally applies to variable rate deals.    |
| Price Adj. Type                | The type of price adjustment—for example, % Markup or Discount Amount. If you want this field to drive behavior in the application, you must customize the preconfigured application. |

Table 17. Fields for Details About Deals

| Field             | Comments                                                                                                                                                                                                                                                                                                                  |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Price Adj. Amount | The amount of price adjustment. This field adds dimensions to the deal. If you want this field to drive behavior in the application, you must customize the preconfigured application.                                                                                                                                    |
| Stackable         | Indicates that the deal is not exclusive and that you can stack the deal with other existing deals. If you want this field to drive behavior in the application, you must customize the preconfigured application.                                                                                                        |
| Bundle            | A check in this box indicates that the deal can contain bundled products. If you want this field to drive behavior in the application, you must customize the preconfigured application.                                                                                                                                  |
| Phasing Enable    | Indicates if phasing is enabled for the account promotion. You can use phasing if you want to allocate throughout the weeks of a time period for an account promotion the aggregate cost, volume, and payment information for that time period. This field is not available for account promotions and promoted products. |

## About Phasing Results

This topic provides information about phasing results and phasing recalculation results for promoted categories.

### About Phasing Results for Promoted Categories

Regardless of when you phase a promoted category, the available data for the planned fields is allocated using the percentages for all of the weeks in the phasing pattern. The data allocated to nonplanned fields depends on when you phase the promoted category:

- If you phase a promoted category before the shipment start date for the account promotion, the available data for nonplanned fields is allocated using the percentages for all of the weeks in the phasing pattern.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase before the first week in the shipment time period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$30, \$20, \$10.

- If you phase a promoted category during the shipment time period for the account promotion, the available data for nonplanned fields is allocated as follows:
  - For any weeks in the phasing pattern prior to the week that contains the current date, the nonplanned fields are not allocated any data.

- For the week in the phasing pattern that contains the current date, the nonplanned fields are allocated data using the percentages for that week and for any prior weeks in the phasing pattern.
- For any weeks in the phasing pattern subsequent to the week that contains the current date, the nonplanned fields are allocated data using the percentages for the corresponding weeks in the phasing pattern.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase during the second week in the shipment time period, then the phasing result for nonplanned field is allocated as follows: \$0, \$70, \$20, \$10.

- If you phase a promoted category after the shipment end date for the account promotion, the available data for nonplanned fields is allocated as follows:
  - For all weeks in the phasing pattern, the nonplanned fields are not allocated any data.
  - For the week that contains the current date, the nonplanned fields are allocated all data.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase in the week after the shipment time period, then the phasing result for nonplanned field is allocated as follows: \$0, \$0, \$0, \$100.

**NOTE:** The logic described in this topic provides a general framework for phasing result calculations. In some scenarios and for some fields, this logic does not apply.

### About Phasing Recalculation Results for Promoted Categories

Regardless of when you recalculate the phasing result for a promoted category, the planned fields for all of the weeks in the phasing pattern do not change. The change in nonplanned fields depends on when you recalculate the phasing result:

- If you recalculate the phasing result for a promoted category during the shipment time period for the account promotion, the available data for nonplanned fields is recalculated as follows:
  - For any weeks in the phasing pattern prior to the week that contains the current date, the nonplanned fields are not recalculated.
  - For the week in the phasing pattern that contains the current date, the nonplanned fields are allocated data using the percentages for that week and for any prior weeks in the phasing pattern. Then, the data in the nonplanned fields that is not recalculated for the prior weeks is subtracted from this allocation.



- For any weeks in the phasing pattern subsequent to the week that contains the current date, the nonplanned fields are recalculated using the percentages for the corresponding weeks in the phasing pattern.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase before the first week in the shipment time period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$30, \$20, \$10. If the nonplanned field value later changes to \$200, and if you recalculate the phasing result during the second week of the shipment time period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$100, \$40, \$20. The phased data for the first week is not recalculated. The phased data for the second week is calculated as follows: [(\$200 multiplied by .70) minus \$40]. The phased data for the third week is calculated as follows: (\$200 multiplied by .20). The phased data for the fourth week is calculated as follows: (\$200 multiplied by .10).

- If you recalculate the phasing result for a promoted category after the shipment end date for the account promotion, the available data for nonplanned fields is recalculated as follows:
  - For the all weeks in the phasing pattern, the nonplanned fields are not recalculated.
  - For the week that contains the current date, the nonplanned fields are allocated all data. Then, the data in the nonplanned fields that is not recalculated for the prior weeks is subtracted from this allocation.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase before the first week in the shipment time period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$30, \$20, \$10. If the nonplanned field value later changes to \$200, and if you recalculate the phasing result in the week after the shipment time period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$30, \$20, \$10, \$100. The phased data for the first four weeks is not recalculated. The phased data for the fifth week is calculated as follows: [(\$200 multiplied by .100) minus \$40 minus \$30 minus \$20 minus \$10].

**NOTE:** The logic described in this topic provides a general framework for phasing result calculations. In some scenarios and for some fields, this logic does not apply.

## About Configuring Trade Promotions

This topic contains information that might be useful when configuring the trade promotion features.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 18](#).

Table 18. Buttons And Methods For Trade Promotion Configurations

| Button                           | Name of Method                                                               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Supported On                         |
|----------------------------------|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| <b>Only Corporate Promotions</b> |                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                      |
| Apply Updates                    | ApplyCorpUpdates                                                             | Copies revised data in a corporate promotion to account promotions. This copying is supported by way of Service Request Manager if the application is running on a server, and by Object Manager if the application is not running on a server.                                                                                                                                                                                                                                                                                        | Bus Comp and Bus Service Layer       |
| Create Account Promotions        | CommitAcct (on BC layer)<br>ApplyCorp Promotion<br>ApplyCorp PromotionSvrReq | Creates account promotions for the target accounts from a corporate promotion and copies the data in the corporate promotion to the account promotions.<br><br>ApplyCorp Promotion is on the BS layer through Object Manager if the application is not running on a server, and through Server Request Manager if it is running on a server.<br><br>ApplyCorpPromotionSvrReq is on the BS layer through Object Manager if the application is not running on a server, and through Server Request Manager if it is running on a server. | Bus Comp Layer and Bus Service Layer |
| <b>Only Account Promotions</b>   |                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                      |
| Calculate Lift %                 | CalculateLiftPct                                                             | Automatically estimates promotional lift percentage from the Lift Factor table.                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Bus Comp and Bus Service layer       |

Table 18. Buttons And Methods For Trade Promotion Configurations

| Button                    | Name of Method                                                                                              | Description                                                                                                                                                                                                                                                                                                                  | Supported On   |
|---------------------------|-------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Refresh Pricing           | UpdatePromoPrice Cost (BC and BS layer)<br>UpdatePromoPrice CostSvrReq (BS layer by Server Request Manager) | Refreshes the Promotion Revenue, COGS, and ROI calculations. Use the button on the Promotion applet to invoke this business service.                                                                                                                                                                                         |                |
| Add High-Level Categories | ShowPopup                                                                                                   | Opens a dialog box from which the user can select a high-level category to add to an account promotion. When the user adds a category from a high-level promotion, the values in various fields in the high-level promotion are copied to the corresponding fields for the promoted category.                                | Applet Layer   |
| Aggregate                 | CatAggregate<br>DoCatAggregate                                                                              | For all account promotions, creates a separate total for each product and account combination that is associated with the values in the Incremental fields in the Promoted Product Baseline list. Then, updates the Promotion Incremental Qty field in the Product Baseline list in sales volume planning with these totals. | Bus Comp Layer |

Table 18. Buttons And Methods For Trade Promotion Configurations

| Button                            | Name of Method                                                                                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Supported On                         |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| Baseline                          | OnBaselineData<br>OnMovementData (BS layer)<br>OnMovementData SvrReq (BS Layer by Server Request Manager) | <p>Updates the Promoted Product Baseline view with product baseline data from sales volume plans based on the account as well as the shipment start and end dates for the promoted products. This hard-coded method functions only if these required fields contain data.</p> <p>The volumes roll up from this view to promoted products, promoted categories, and account promotions, but not to plans. Then, a user can add incremental volume to each baseline record.</p> <p>This method is supported by Service Request Manager if the application is running on a server, and by Object Manager if the application is not running on a server.</p> | Bus Comp Layer and Bus Service Layer |
| Phase (Promoted Categories)       | CreatePhaseData ForCategory                                                                               | Calculates and displays the phasing results for a promoted category.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Bus Comp Layer                       |
| Phase (Promoted Products)         | CreatePhaseData ForProduct                                                                                | Calculates and displays the phasing results for a promoted product.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Bus Comp Layer                       |
| Recalculate (Promoted Categories) | RecalcPhaseData ForCategory                                                                               | Recalculates and displays phasing results for a promoted category.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Bus Comp Layer                       |
| Recalculate (Promoted Products)   | RecalcPhaseData ForProduct                                                                                | Recalculates and displays phasing results for a promoted product.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Bus Comp Layer                       |

Table 18. Buttons And Methods For Trade Promotion Configurations

| Button                                       | Name of Method                                                                                                         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Supported On                         |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| Shipment                                     | OnShipmentData<br>OnMovementData (on BS layer)<br>OnMovementData SvrReq (on BS Layer by way of Server Request Manager) | Updates the Shipments view with product shipment data from sales volume plans based on the account as well as the shipment start and end dates for the promoted products.<br><br>The estimated shipment volumes roll up from this view to promoted products, promoted categories, account promotions, and plans.<br><br>This method is supported by Service Request Manager if the application is running on a server, and by Object Manager if the application is not running on a server. | Bus Comp Layer and Bus Service Layer |
| <b>Both Corporate and Account Promotions</b> |                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                      |
| Products                                     | OnCatalogProduct (on BC layer)<br>AddCategory Products (on BS layer)<br>AddCategory ProductSvrReq (on BS layer)        | Finds the products that are associated with all promoted categories in a corporate promotion or an account promotion and adds them as promoted products in the promoted categories of the corporate promotion or account promotion.<br><br>The Products button invokes the CPG Plan Account Promotion Product business component.                                                                                                                                                           | Bus Comp Layer and Bus Service Layer |

Table 18. Buttons And Methods For Trade Promotion Configurations

| Button            | Name of Method | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Supported On   |
|-------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Spread            | OnSpread       | <p>Allocates (to the nearest whole dollar) the values in source fields for incremental volume, fixed slotting fees, and other fixed expenditures, from higher levels to corresponding target fields in lower levels of the account promotion hierarchy. Any remaining value that is not allocated is randomly distributed to the lower-level records.</p> <p>Allocates the values in the Est Off Invoice Spend and Est Bill Back Spend fields in an account promotion from promoted products to promoted product baselines.</p> <p>Copies the values in the Off Invoice Rate, Off Invoice Pct, Bill Back Rate, and Bill Back Pct fields in a corporate promotion or account promotion from promoted categories to promoted products.</p> <p>For information about configuring the Spread button to allocate other source fields using different allocation methods, see <a href="#">“Configuring the Spread Button” on page 80.</a></p> | Bus Comp Layer |
| <b>Only Plans</b> |                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                |

Table 18. Buttons And Methods For Trade Promotion Configurations

| Button                            | Name of Method                         | Description                                                                                                                                                                                                                                                                                                                          | Supported On                         |
|-----------------------------------|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| Update                            | UpdateAcctPlan<br>(on BC and BS layer) | Updates the Est Baseline Volume, PY Baseline Volume, Target Baseline Volume, PY Baseline Revenue, and Target Baseline Revenue fields in a plan with data from sales volume plans.<br><br>For information about configuring the Update button to update other fields, see <a href="#">“Configuring the Update Button” on page 83.</a> | Bus Comp Layer and Bus Service Layer |
| <b>Only High-Level Promotions</b> |                                        |                                                                                                                                                                                                                                                                                                                                      |                                      |
| Forecast                          | GetCatBaseline Data                    | Updates the Est Baseline Volume field and the Est Baseline Revenue field in a high-level promotion with data from sales volume plans.<br><br>For information about configuring the Forecast button to update other fields, see <a href="#">“Configuring the Forecast Button” on page 82.</a>                                         | Bus Comp Layer                       |
| Simulate (High-Level Promotions)  | SimulateCategory                       | Obtains the category lift factor for a high-level promotion and then uses the lift factor and other parameters that the user designates to calculate and display the estimated incremental volume for the high-level promotion.                                                                                                      | Bus Comp Layer                       |

## Configuring Trade Promotions

To configure trade promotions, perform the following tasks:

- [“Retaining Account Promotions When Deleting Corporate Promotions” on page 78](#)
- [“Changing the Visibility Filter for Team Members” on page 78](#)
- [“Configuring Available Plans for Account Promotions” on page 79](#)
- [“Changing Dates for Baseline Data Retrieval” on page 80](#)

- [“Configuring the Spread Button” on page 80](#)
- [“Configuring the Forecast Button” on page 82](#)
- [“Configuring the Update Button” on page 83](#)

## Retaining Account Promotions When Deleting Corporate Promotions

To retain account promotions when you delete a corporate promotion, you must modify a link and a business component using Siebel Tools.

For instructions about modifying links and business components, see *Configuring Siebel Business Applications*.

### *To retain account promotions when deleting an associated corporate promotion*

- 1 Log in to Siebel Tools.
- 2 In the Object Explorer, select the Link object, and select CPG Promotion/CPG Plan Account Promotion in the links list.
- 3 In the Cascade Delete column, select Clear.
- 4 In the Object Explorer, select the Business Component object, and select CPG Promotion in the business components list.
- 5 In Object Explorer, select the Multi Value Link child object, and select CPG Plan Account Promotion in the list.
- 6 Enter a check in the No Delete column.

## Changing the Visibility Filter for Team Members

By default, the visibility filter in the Plan List view filters plans based on the team members for the accounts in plans. You can change this default so this visibility filter filters plans based on the team members in plans. Changing the default for this visibility filter is applicable to situations in which a manufacturer works with multiple brokers who share the same account. The brokers can view only the plans that include them as members.

### *To change the visibility filter for team members in the Plan List view*

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Component object, and in the Object List Editor, query for the following business component: CPG Plan Account.
- 3 In the Object Explorer, select the Buscomp View Mode child object.
- 4 For each view mode record:



- Change the Visibility MVField column value from Account Sales Rep to Sales Rep.
- Change the Visibility MVLink column value from Account Position to Position.

By default, the visibility filter in the Account Promotions List view filters account promotions based on the team members for the accounts in account promotions. You can change this default so that this visibility filter filters account promotions based on the team members in account promotions.

### *To change the visibility filter for team members in the Account Promotions List view*

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Component object, and in the Object List Editor, query for the following business component: CPG Plan Account Promotion.
- 3 In the Object Explorer, select the Buscomp View Mode child object.
- 4 For each view mode record:
  - Change the Visibility MVField column value from Account Sales Rep to Sales Rep.
  - Change the Visibility MVLink column value from Account Position to Position.

## Configuring Available Plans for Account Promotions

You can associate a plan with an account promotion by selecting the plan in the Plan field in the Account Promotions List view. The plans that are available for selection in the Plan field satisfy all of the following criteria:

- The plans have the same account as the account promotion.
- The plans have the same category as the account promotion or a category in the category hierarchy that is one level higher than the category for the account promotion.
- The plans have time periods that include the time period for the account promotion. Promotion start and end dates define the time period for the account promotion.

You can configure the selection criteria that determines the plans that are available for selection.

### *To configure the available plans for an account promotion*

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Component object, and in the Object List Editor, query for the following business component: CPG Plan Account Promotion.
- 3 If you want to eliminate the selection criteria that relates to matching accounts:
  - a In the Object Explorer, select the Field child object, and then select the Plan Name field.
  - b In the Object Explorer, select the Pick Map child object, and remove the check from the Constrain column for the Account Id field.
- 4 If you want to eliminate the selection criteria that relates to time periods:
  - a In the Object Explorer, select the Field child object, and then select the Plan Name field.

- b In the Object Explorer, select the Field User Prop child object, and enter a value of N in the Value column for the Period Constrain user property.
- 5 If you want to eliminate the selection criteria that relates to categories:
  - a In the Object Explorer, select the Field child object, and then select the Category Name field.
  - b In the Object Explorer, select the Field User Prop child object, and enter a value of N in the Value column for the Plan Category Constrain user property.

## Changing Dates for Baseline Data Retrieval

When you associate baseline data with an account promotion, the product baseline data is retrieved from sales volume planning based on the shipment start and end date for the promoted products in an account promotion. You can configure the default shipment start and end date for this data retrieval to the promotion start and end date or the consumption start and end date.

### *To configure the dates for baseline data retrieval*

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Component object, and in the Object List Editor, query for the following business component: CPG Plan Account Promotion.
- 3 In the Object Explorer, select the Business Component User Prop child object.
- 4 For the Baseline Dates user property, change the Value column to one of the following values:
  - Promotion
  - Shipment

## Configuring the Spread Button

The Spread button allocates the values in source fields for incremental volume, fixed slotting fees, and other fixed expenditures from higher levels to corresponding target fields in lower levels of the account promotion hierarchy. Also, this button allocates the values in the Est Off Invoice Spend and Est Bill Back Spend fields in an account promotion from promoted products to promoted product baselines. Additionally, this button copies the values in the Off Invoice Rate, Off Invoice Pct, Bill Back Rate, and Bill Back Pct fields in a corporate promotion or account promotion from promoted categories to promoted products.

You can configure the Spread button to allocate other source fields using different allocation methods. The following guidelines are applicable to configuring the Spread button:

- The target business component must be a child business component of the business object that is linked to the current business component through a one-to-many link.
- Only the RollUp user properties that you modify in [Step 5](#) and [Step 6](#) participate in a rollup that the Spread button triggers.
- The target field must be column-based.

- If you use the Allocate method, the source and target fields must be numeric.
- If you use the Copy method, the source and target fields do not need to be numeric.

For instructions about modifying links and business components, see *Configuring Siebel Business Applications*. In the preconfigured application, the Spread button is configured for business components that relate to corporate promotions, account promotions, promoted categories, promoted products, and promoted product baselines. However, you can configure the Spread button for any business component that is based on the CSSBCCSBase class and its subclasses.

### **To configure the Spread button for a business component in the trade promotion hierarchy**

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Component object, and in the Object List Editor, query for the source business component.
- 3 In the Object Explorer, select the Business Component User Prop child object.
- 4 Create new user properties:
  - a Create a new user property with the following name: CS Spread Target: *BO Name*  
where: *BO Name* is the name of the business object. For example, CS Spread Target: CPG Plan
  - b Enter the following value in this new user property: *Target Business Component*.  
where: *Target Business Component* is the name of the target business component. For example, CS CG Plan Account Promotion Category.
  - c Create another new user property with the following name: CS Spread Fields: *BO Name N*  
where:
    - *BO Name* is the name of the business object.
    - *N* is a number.
 For example, CS Spread Fields:CPG Plan 1
  - d Enter the following value in this new user property: "*Source Field*", "*Target Field*", "*Method*", "*Field Name*".  
where:
    - *Source Field* is the name of the source field from which to spread.
    - *Target Field* is the name of the target field to which to spread.
    - *Method* is the method applicable to the spread. Values include Allocate and Copy.
    - *Field Name* is the field that is used to calculate the allocation percentage. Field Name is required only if you select an Allocate method.
 For example, "Est Incremental Volume", "Est Incremental Volume", "Allocate", "Est Baseline Volume"

- 5 Change the user property with the following name: CS RollUp Fields: *BO Name N*  
where:
  - *BO Name* is the name of the business object.
  - *N* is a number.For example, CS RollUp Fields:CPG Plan 3
- 6 Enter the following value in this user property: "*Source Field*", "*Target Field*", Spread.  
where:
  - *Source Field* is the name of the source field from which to roll up.
  - *Target Field* is the name of the target field to which to roll up.
  - Spread is required only if you want to spread the data after rollup.For example, "Est Incremental Revenue", "Est Incremental Revenue", Spread.

You can also configure the Spread button for a nonroot business component. In this case, the Spread button is invoked from the root business component.

### ***To configure the Spread button for a nonroot business component***

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Component object, and in the Object List Editor, query for the nonroot business component.
- 3 In the Object Explorer, select the Business Component User Prop child object.
- 4 Create a new user property with the following name: CS Spd Rt: *BO Name/Root BC*  
where:
  - *BO Name* is the name of the business object.
  - *Root BC* is the name of the root business component.For example, CS Spd Rt:CPG Plan/CPG Plan Account Promotion
- 5 Enter the following value in this new user property: *Link Field*.  
where: *Link Field* is the name of the field that links this business component to the root business component. For example, Plan Account Promotion Id.

## **Configuring the Forecast Button**

The Forecast button updates the Est Baseline Volume field and the Est Baseline Revenue field in a high-level promotion with data from sales volume plans. You can configure additional fields for this update.

The following guidelines are applicable to configuring the Forecast button:

- The source and target fields must be numeric.

- The source and target fields must not be multi-valued.
- The target field must not be read-only or calculated.

### ***To configure the Forecast button***

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Service object, and in the Object List Editor, query for the following business service: CS CG Account Promotion Business Service.
- 3 In the Object Explorer, select the Business Service User Prop child object.
- 4 Create a new user property with the following name: Category Baseline Field Map: *Source Field* where: *Source Field* is the name of the source field from the CG SVP Category Baseline business component.
- 5 Enter the following value in this new user property: *Target Field* where: *Target Field* is the name of the target field from the CS CG Plan Account High Level Category business component.

## **Configuring the Update Button**

The Update button updates the Est Baseline Volume, PY Baseline Volume, Target Baseline Volume, PY Baseline Revenue, and Target Baseline Revenue fields in a plan with data from sales volume plans. You can configure additional fields for this update.

### ***To configure the Update button***

- 1 Log in to Siebel Tools.
- 2 In Object Explorer, select the Business Service object, and in the Object List Editor, query for the following business service: CS CG Account Plan Service.
- 3 In the Object Explorer, select the Business Service User Prop child object.
- 4 Create a new user property with the following name: CG Baseline To Plan Field Map: *Source Field* where: *Source Field* is the name of the source field from the CG SVP Product Baseline - for Adding Data business component.
- 5 Enter the following value in this new user property: *Target Field* where: *Target Field* is the name of the target field from the CPG Plan Account business component.

## **Planning by Using Different Units of Measure**

Account managers can plan their sales volume in the following different units of measure:

- Cases to Units
- Units to Cases
- Gross Sales Value (GSV) to Units
- Units to GSV

The base unit for promotions is cases. The base unit for SVP is GSV.

The Planned Volumes view can read any field and multiply it by a conversion factor stored in another field, then save the results to another field. Modifying Incremental Qty in units or cases at any level in the promotion module automatically calculates and updates the other field (unit or case) based on the Unit Conversion Factor at the promoted product level.

The data in the Planned Volume view is the promoted category volume data. A new record in the Planned Volume view is a new promoted category record.

***To make a plan by using different units of measure***

- 1 Navigate to the Plans screen, Promotions, Promoted Categories, and then the Planned Volumes view.
- 2 Create a new planned volume.
- 3 Use the calculator pick list to enter values in the fields.

The following table describes some fields.

| Field                       | Description                                                                                                                                                                                                     |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Baseline Volume             | Used to capture either the Sell-In or Sell-Out Baseline volume. With a single baseline volume number, the method (sell-in or sell-out) determines which dates are used to pull the baseline number.             |
| Sell-In Incremental Volume  | The amount of product that is bought from retailers or manufacturers over and above the baseline quantity.                                                                                                      |
| Total Sell-In Volume        | Total amount of product a retailer buys from a wholesaler or manufacturer. Equals Baseline Volume plus Incremental Sell-In Volume fields.                                                                       |
| Warehouse Withdrawal Volume | The amount of product withdrawn from warehouse inventory. The default value is zero.                                                                                                                            |
| Forward Buy Volume          | The additional amount of volume that a retailer might purchase over and above the volume sold to consumers, because the retailer wants to buy additional volume on a sale to get a higher profit margin.        |
| Sell-Out Incremental Volume | The delta volume that a retailer does not buy from a wholesaler or the manufacturer, even though the retailer plans on selling more to consumers, because the retailer is trying to reduce warehouse inventory. |

| Field                    | Description                                                                                                                                       |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Total Sell-Out Volume    | The total amount sold to consumers. Equals Baseline Volume plus Incremental Sell-Out Volume fields.                                               |
| % Promoted ACV           | Percent of Promoted All Commodity Volume. The percent of the total sales volume that applies to a high-level promotion.                           |
| Sell-Out Override Lift % | The percent of increase in product sold to consumers (over baseline volume) due to a promotional activity.                                        |
| Sell-In Override Lift %  | The amount of additional product (as compared to baseline) that is expected due to a promotional activity.                                        |
| Net Revenue              | Net Revenue is calculated by multiplying the volumes by list price to the customer and subtracting trade spend (fixed and variable spends).       |
| Gross Revenue            | Gross revenue is calculated by multiplying the volumes by list price to the customer. Gross revenue equals list price multiplied by total volume. |
| Predict Lift %           | The forecasted or predicted percent increase in volume (over baseline volume) that is expected from a promotion.                                  |





# 9

## Trade Funds

This chapter covers the procedures necessary to set up and assign funds to account promotions, promoted categories, and promoted products. Topics include:

- [About Trade Funds on page 1](#)
- [Scenario for Managing Funds for Account Promotions on page 2](#)
- [Process of Managing Trade Funds on page 2](#)
- [Creating Funds on page 3](#)
- [Adding Child Funds to Parent Funds on page 10](#)
- [Adjusting Funds on page 11](#)
- [Reviewing Deals on page 11](#)
- [Reviewing Fund Payments on page 13](#)
- [Transferring Fund Amounts Without Constraint on page 13](#)
- [Reconciling Deals on page 14](#)
- [Closing Deals on page 14](#)
- [Forecasting Accrual Funds \(End User\) on page 14](#)
- [Transferring Fund Amounts with Constraint \(End User\) on page 16](#)
- [Approving Fund Transfers \(End User\) on page 16](#)
- [Submitting Payments for Funds \(End User\) on page 17](#)
- [Reviewing Funds \(End User\) on page 18](#)
- [About Configuring Trade Funds on page 19](#)
- [Configuring Trade Funds on page 23](#)

### About Trade Funds

A *fund* is a named appropriation of money to spend on account promotions over a specific period of time for specific accounts and specific categories and products. *Fixed* funds are fixed amounts of money allocated in a lump sum. *Accrual* funds are funds in which the amount of money is calculated based on product movement.

Marketing administrators set up funds and allocate larger funds to child funds that account managers use. Account managers can manage funds. They create deals for account promotions, submit payments against deals, and track fund activities.

# Scenario for Managing Funds for Account Promotions

Marketing administrators and account managers perform the process in this example scenario for managing funds for account promotions. Your company might follow a different process according to its business requirements.

A large beverage manufacturing company develops a new category of fruit-flavored beverages. The account manager plans to run an account promotion with a feature and display of the new category. To pay for the account promotion, he uses funds that the marketing administrator establishes. He sets aside funds to pay for the account promotion by creating a deal for the feature and display.

After the account promotion runs, the account manager submits payments against the deal to pay for the account promotion.

## Process of Managing Trade Funds

This topic lists the tasks that administrators and end users typically perform to manage funds. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks that administrators typically perform to manage trade funds:

- 1 ["Creating Funds" on page 3](#)
- 2 ["Adding Child Funds to Parent Funds" on page 10](#)
- 3 ["Adjusting Funds" on page 11](#)
- 4 ["Reviewing Deals" on page 11](#)
- 5 ["Reviewing Fund Payments" on page 13](#)
- 6 ["Transferring Fund Amounts Without Constraint" on page 13](#)
- 7 ["Reconciling Deals" on page 14](#)
- 8 ["Closing Deals" on page 14](#)

### End-User Procedures

The following list shows tasks that end users typically perform to access and use trade fund information:

- ["Forecasting Accrual Funds \(End User\)" on page 14](#)
- ["Transferring Fund Amounts with Constraint \(End User\)" on page 16](#)
- ["Approving Fund Transfers \(End User\)" on page 16](#)
- ["Submitting Payments for Funds \(End User\)" on page 17](#)
- ["Reviewing Funds \(End User\)" on page 18](#)

## Creating Funds

Marketing administrators create funds that account managers use. Marketing administrators can manually create funds or use fund groups to automatically generate funds. Fund groups hold created funds and contain generic information that administrators can apply when generating a fund. Marketing administrators can create fixed funds and accrual funds.

This task is a step in [“Process of Managing Trade Funds” on page 2](#).

## Creating Fixed Funds

Fixed funds have a predetermined amount of money allocated in a lump sum that you use over a specified period of time. Administrators can manually create or automatically generate fixed funds. They usually automatically generate fixed funds for accounts from the same organization, and they manually create fixed funds for single accounts.

### *To manually create a fixed fund*

- 1 Navigate to the Administration - Data screen, then the Funds view.
- 2 In the Funds list, create a new fund record, and complete the necessary fields.

The following table describes some fields.

| Field           | Comments                                                                                                                                                                                                                 |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account         | The account that is eligible for the fund.                                                                                                                                                                               |
| Fund            | The name of the fund.                                                                                                                                                                                                    |
| Type            | Select Fixed in this field.                                                                                                                                                                                              |
| Amount          | The amount of money in this fund.                                                                                                                                                                                        |
| Target Category | The category that contains the target products for this fund. The target products are the products that your company wants to promote in this account promotion.                                                         |
| Period          | The period of time in which you can use this fund.                                                                                                                                                                       |
| Organization    | The umbrella organization for the account for this fund. For more information about organizations and accounts, see <a href="#">Chapter 4, “Managing Accounts”</a> and <i>Siebel Applications Administration Guide</i> . |

Use the following procedure to automatically generate a fixed fund.

### *To automatically generate a fixed fund*

- 1 Navigate to the Administration - Data screen, then the Fund Groups view.

- 2 In the Fund Groups list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field           | Comments                                                                                                                                                                                                                                                                                                                              |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name            | The name of the fund group.                                                                                                                                                                                                                                                                                                           |
| Type            | Select Fixed in this field.                                                                                                                                                                                                                                                                                                           |
| Period          | The period of time in which you can use this fund group.                                                                                                                                                                                                                                                                              |
| Basis           | The value (for example, Cases or Revenue) used to accrue funds. You do not need to complete this field for fixed funds.                                                                                                                                                                                                               |
| Basis Period    | The period of time for which the basis is valid. You do not need to complete this field for fixed funds.                                                                                                                                                                                                                              |
| Source Category | The category with products that are used to calculate accruals. You do not need to complete this field for fixed funds. It acts as the parent source category. If it exists, only sub-categories of the selected category appear in the categories pick applet at the source category level.                                          |
| Target Category | The category that contains the target products for this fund. The target products are the products that your company wants to promote in this account promotion. It acts as the parent target category. If it exists, only sub-categories of the selected category appear in the categories pick applet at the target category level. |
| Amount          | The amount of money in this fund group. This amount is divided between different accounts based on the percentage for each account.                                                                                                                                                                                                   |
| Organization    | The umbrella organization for the accounts for this fund group. The accounts that you can select for this fund group depend on this organization. For more information about organizations and accounts, see <a href="#">Chapter 4, "Managing Accounts"</a> and <i>Siebel Applications Administration Guide</i> .                     |

- 3 In the Accounts list, and click Apply to add eligible accounts to the fund.
- 4 In the Pick Account dialog box, select the account records to add, or click Select All to add all eligible account records.

To be eligible, an account must have:

- The same organization as the fund group.
- A check in the Fund Eligible field.

**NOTE:** To verify that the Fund Eligible field is checked, navigate to the Accounts screen, then the Accounts List view.

- 5 Enter a value in the Percentage field for each account record.

The value in the Percentage field determines how much of the Amount field for the fund group is allocated to the account.

- 6 Click the Target Products view tab, and in the Target Products list, click Products.

All products of the target category and any subcategories are listed. The target products are the products that your company wants to promote in this account promotion.

- 7 Click the Accounts view tab, and in the Funds list, click Generate.

Fixed funds are created based on the fund group and the accounts.

## Creating Accrual Funds

Administrators can manually create or automatically generate accrual funds. They usually automatically generate accrual funds for accounts from the same organization, and they manually create accrual funds for single accounts.

Accrual funds are calculated using source product records that are based on product sales data. For example, if you sell 5,000 cases at a price of \$1.50 for each case, the accrual is \$7,500. You use established accruals over a specified period of time.

Trade managers or trade administrators can enter fund rates or fund group rates at the category level and cascade the rates to child products.

You can obtain product sales data from your customers, back-office applications for order processing, data warehouses, and Siebel orders in a specific state. Administrators can import this sales data into the S\_MDF\_ACCRUAL table using the following methods:

- Siebel Enterprise Integration Manager (EIM)

This method uses the EIM\_MDF table. You import only shipment and accrual rate data. To calculate the total fund amount, the user must instigate the business logic that starts the calculation process. To instigate this business logic, administrators can create a button for a custom business service.

- Siebel Enterprise Application Integration (EAI)

The WriteRecord method in the CS Fund Source Product business component calculates the total fund amount and updates the fund record.

- Business services and workflow processes

The WriteRecord method in the CS Fund Source Product business component calculates the total fund amount and updates the fund record.

You can also use the Source Products view in Siebel Consumer Goods to add product sales data to an accrual fund as described in [Step 3](#) and [Step 4](#) of the following procedure.

### *To manually create an accrual fund*

- 1 Navigate to the Administration - Data screen, then the Funds view.

- 2 In the Funds list, create a new fund record, and complete the necessary fields.

The following table describes some fields.

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account         | The account that is eligible for the fund.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Fund            | The name of the fund.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Type            | Select Accrual in this field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Source Category | The category with products that are used to calculate accruals. It acts as the parent target category. If it exists, only sub-categories of the selected category appear in the categories pick applet at the target category level.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Target Category | The category that contains the target products for this fund. The target products are the products that your company wants to promote in this account promotion. It acts as the parent target category. If it exists, only sub-categories of the selected category appear in the categories pick applet at the target category level.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Period          | The period of time in which you can use this fund.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Basis           | <p>The value (for example, Cases or Revenue) used to accrue funds.</p> <p>For a Cases basis, accrual fund fields are calculated as follows:</p> <ul style="list-style-type: none"> <li>■ The Amount field is populated with the result of the Accrual Rate field for each source product multiplied by the Shipments field for each source product.</li> <li>■ The Forecast field is populated with the result of the Accrual Rate field for each source product multiplied by the Est Total Volume field for each source product.</li> </ul> <p>For a Revenue basis, accrual fund fields are calculated as follows:</p> <ul style="list-style-type: none"> <li>■ The Amount field is populated with the result of the Accrual % field for each source product multiplied by the Revenue field for each source product.</li> <li>■ The Forecast field is populated with the result of the Accrual % field for each source product multiplied by the Est Total Revenue field for each source product.</li> </ul> |
| Basis Period    | The period of time for which the basis is valid.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Organization    | The umbrella organization for the account for this fund. For more information about organizations and accounts, see <a href="#">Chapter 4, "Managing Accounts"</a> and <i>Siebel Applications Administration Guide</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

- 3 Click the Source Products view tab, and in the Source Products list, click Products.

All products of the source category and any subcategories are listed. You can also manually add other products that are not in the source category.

#### 4 Complete the applicable fields in the Source Products list.

The source product fields are used to calculate the Amount field and the Forecast field for the accrual.

Use the following procedure to automatically generate an accrual fund.

**NOTE:** The Accrual field is not exposed on the Administration - Products view. To set the accrual rate for a product, you must use Siebel Tools to expose this field on the Product business component.

#### *To automatically generate an accrual fund*

- 1 Navigate to the Administration - Data screen, then the Fund Groups view.
- 2 In the Fund Groups list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field           | Comments                                                                                                                                                                                                                                                                                                                              |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name            | The name of the fund group.                                                                                                                                                                                                                                                                                                           |
| Type            | Select Accrual in this field.                                                                                                                                                                                                                                                                                                         |
| Period          | The period of time in which you can use this fund group.                                                                                                                                                                                                                                                                              |
| Basis           | The value (for example, Cases or Revenue) used to accrue funds.                                                                                                                                                                                                                                                                       |
| Basis Period    | The period of time for which the basis is valid.                                                                                                                                                                                                                                                                                      |
| Source Category | The category with products that are used to calculate accruals. If it exists, only sub-categories of the selected category appear in the categories pick applet at the target category level.                                                                                                                                         |
| Target Category | The category that contains the target products for this fund. The target products are the products that your company wants to promote in this account promotion. It acts as the parent target category. If it exists, only sub-categories of the selected category appear in the categories pick applet at the target category level. |
| Organization    | The umbrella organization for the accounts for this fund group. The accounts that you can select for this fund group depend on this organization. For more information about organizations and accounts, see <a href="#">Chapter 4, "Managing Accounts"</a> and <i>Siebel Applications Administration Guide</i> .                     |

- 3 In the Accounts list, click Apply to add eligible accounts to the fund.
- 4 In the Pick Account dialog box, select the account records to add, or click Select All to add all eligible account records.

To be eligible, an account must have:

- The same organization as the fund group.

- A check in the Fund Eligible field.

**NOTE:** To verify that the Fund Eligible field is checked, navigate to the Accounts screen, then the Accounts List view.

- 5 Click the Target Products view tab, and in the Target Products list, click Products.  
All products of the target category and any subcategories are listed.
- 6 Click the Source Products view tab, and in the Source Products list, click Products.  
All products of the source category and any subcategories are listed. You can also manually add other products that are not in the source category.
- 7 Click the Accounts view tab, and in the Funds list, click Generate.  
Accrual funds are created based on the fund group and the accounts.

Administrators can also use the Source Products view in Siebel Consumer Goods to assign accrual details at the fund group and publish these details to the account fund.

#### ***To assign a rate at the fund group level and publish to account fund***

- 1 Navigate to the Administration - Data screen, then the Fund Groups view.
- 2 In the Fund Groups list, create a new record, and complete the necessary fields.
- 3 Click the Accrual Details view tab.
- 4 Associate one or more categories for accrual.
  - a In the Category Name field, select a category.
  - b Click OK.
- 5 Associate one or more products for accrual.  
The products can be specific products or an assortment of associated categories.
- 6 Enter accrual rates for categories.
- 7 Click Apply Rates to apply category rates to accrual products.
- 8 If necessary, manually override accrual rates at the product level.
- 9 In the Fund Groups list, click Publish Accruals to publish accrual rates to child account funds.
- 10 Navigate to the child account fund.
- 11 Add account-specific accrual rates at the category or product level as necessary.

Administrators can also assign rates at the fund group and publish to the account fund.

#### ***To assign accrual details at fund group and publish to account fund***

- 1 Navigate to the Administration - Data screen, then the Fund Groups view.
- 2 In the Fund Groups list, create a new record, and complete the necessary fields.
- 3 Click the Accrual Details view tab.



- 4 Associate one or more categories for accrual.
    - a In the Category Name field, select from the accrual Type, Period, and Organization fields.
    - b Click OK.
  - 5 Associate products for accrual.
 

The products can be specific products or an assortment of associated categories.
  - 6 Enter accrual rates for categories.
  - 7 Click Apply Rates to apply category rates to accrual products.
  - 8 If necessary, manually override accrual rates at the product level.
  - 9 In the Fund Groups list, click Publish Accruals to create new, or edit and delete existing accruals in the source and target category or products.
  - 10 Navigate to a child account fund.
  - 11 Add account specific accrual rates at the category or product level as necessary.
- Administrators can also assign rates at the fund group source categories and products.

#### ***To assign accrual details at a fund group source category and product***

- 1 Navigate to the Administration - Data screen, then the Fund Groups view.
  - 2 In the Fund Groups list, create a new record, and complete the necessary fields.
  - 3 Click the Accrual Details view tab.
  - 4 Associate categories for accrual.
  - 5 Associate products for accrual.
 

The products can be specific products or an assortment of associated categories.
  - 6 Enter accrual rates, accrual percent, and start and end dates for categories.
  - 7 Click Apply Rates to apply category rates to accrual products.
  - 8 If necessary, manually override accrual rates at the product level.
- Administrators can also assign rates at the account fund group source categories and products.

#### ***To enter a fund rate at the category level and cascade the rate to child products***

- 1 Navigate to the Administration - Data screen, then the Funds view.
- 2 Create a new fund group or account fund.
 

Include values in the Period and Organization fields.
- 3 Click the Accrual Details view tab.
- 4 Associate one or more categories for accrual.

- 5 Associate one or more products for accrual.  
The products can be specific products or associated categories.
- 6 Enter accrual rates for categories.
- 7 Click Apply Rates to apply category rates to accrual products.
- 8 If necessary, manually override accrual rates at the product level.

***To enter a fund group rate at the category level and cascade the rate to child products***

- 1 Navigate to the Administration - Data screen, then the Fund Groups view.
- 2 Create a new fund group or account fund.  
Include values in the Period and Organization fields.
- 3 Click the Accrual Details view tab.
- 4 Associate one or more categories for accrual.
- 5 Associate one or more products for accrual.  
The products can be specific products or associated categories.
- 6 Enter accrual rates for categories.
- 7 Click Apply Rates to apply category rates to accrual products.
- 8 If necessary, manually override accrual rates at the product level.

## Adding Child Funds to Parent Funds

The Funds module supports a multi-level fund hierarchy. For example, a parent fund can have child funds, which in turn can have child funds. This hierarchy allows marketing administrators to divide into smaller funds the fund records that you transfer from an external database using Siebel Enterprise Integration Manager (EIM).

This task is a step in ["Process of Managing Trade Funds" on page 2](#).

***To add a child fund to a parent fund***

- 1 Navigate to the Administration - Data screen, then the Funds view.
- 2 In the Funds list, select a parent fund record.
- 3 Click the Child Funds view tab.
- 4 In the Child Funds list, create a new record, and complete the necessary fields.

Use the following procedure to add a grandchild fund to a fund.

***To add a grandchild fund to a fund***

- 1 Navigate to the Administration - Data screen, then the Funds view.
- 2 In the Funds list, select a parent fund record.
- 3 Click the Child Funds view tab.
- 4 In the Child Funds list, drill down on the Fund field hyperlink for a child record.  
In the Funds list, the child fund record appears.
- 5 In the Child Funds list, create a new record (the grandchild fund), and complete the necessary fields.

## Adjusting Funds

After you create a fund, you can increase or decrease the amount of a fund. Typically, you adjust a fund to reflect changes in market conditions.

This task is a step in [“Process of Managing Trade Funds” on page 2](#).

***To create an adjustment for a fund***

- 1 Navigate to the Administration - Data screen, then the Funds view.
- 2 In the Funds list, select a fund record.
- 3 Click the Adjustments view tab.
- 4 In the Adjustments list, create a new record.
- 5 In the Amount field, enter a negative or positive amount, for example, 5,000 or -5,000, for the fund adjustment.
- 6 Enter a description of the adjustment, for example, the reason for the adjustment.  
The new amount of money available in the fund appears in the Sub-total field in the More Info view for the fund.

## Reviewing Deals

You can review a deal for an account promotion, a promoted category, and a promoted product, or you can review the deals for a fund.

This task is a step in [“Process of Managing Trade Funds” on page 2](#).

***To review a deal for an account promotion***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for the account promotion, and click the Deals view tab. For details about the fields in the Deals view, see [“Creating Deals for Account Promotions” on page 48](#).

- 3 Select a deal and scroll down to the Payments view to examine payments for this deal.  
The records in this view are created when you submit payments against funds. For more information, see [“Submitting Payments for Funds \(End User\)” on page 17.](#)
- 4 Click the Bundled Products view tab to examine details of the bundled products for this deal.  
Use the following procedure to review a deal for a promoted category.

#### ***To review a deal for a promoted category***

- 1 Navigate to the Promotions screen, then the Account Promotions List view.
- 2 Drill down on the Promotion field hyperlink for an account promotion.
- 3 Scroll down to the Promoted Categories list, and drill down on the Category field hyperlink.  
Details about deals for the promoted category appear in the Deals view. For details about the fields in this view, see [“Creating Deals for Promoted Categories” on page 49.](#)
- 4 Select a deal and scroll down to the Payments view to examine payments for this deal.  
The records in this view are created when you submit payments against funds. For more information, see [“Submitting Payments for Funds \(End User\)” on page 17.](#)
- 5 Click the Bundled Products view tab to examine details of the bundled products for this deal.  
Use the following procedure to review a deal for a promoted product.

#### ***To review a deal for a promoted product***

- 1 Navigate to the Promotions screen, then the Account Promotions List.
- 2 Drill down on the Promotion field hyperlink for an account promotion.
- 3 Scroll down to the Promoted Categories list, and select a category.
- 4 Scroll down to the Promoted Products list, and drill down on the Product field hyperlink.  
Details about deals for the promoted product appear in the Deals view. For details about the fields in this view, see [“Creating Deals for Promoted Categories” on page 49.](#)
- 5 Select a deal and scroll down to the Payments view to examine payments for this deal.  
The records in this view are created when you submit payments against funds. For more information, see [“Submitting Payments for Funds \(End User\)” on page 17.](#)
- 6 Click the Bundled Products view tab to examine details of the bundled products for this deal.  
Use the following procedure to review deals for a fund.

#### ***To review the deals for a fund***

- 1 Navigate to the Administration - Data screen, then the Funds view.
- 2 In the Funds list, select a fund record.

- 3 Click the Deals view tab.

The deals for the fund and the payments from the fund appear.

## Reviewing Fund Payments

You can review all payments against a fund.

This task is a step in ["Process of Managing Trade Funds"](#) on page 2.

### *To review fund payments*

- 1 Navigate to the Administration - Data screen, then the Funds view.
- 2 In the Funds list, select the fund record.
- 3 Click the Payments view tab.

The Payments list displays all payments against the fund.

## Transferring Fund Amounts Without Constraint

Administrators can transfer amounts between funds, with no constraints as to time, type, or account ID. End users have a more constrained ability to transfer funds. For information about how end users can transfer funds, see ["Transferring Fund Amounts with Constraint \(End User\)"](#) on page 16. For information about how end users can approve fund transfers, see ["Approving Fund Transfers \(End User\)"](#) on page 16.

**NOTE:** Transfers that administrators create in the Funds view automatically advance to the status of Paid after entry is complete.

This task is a step in ["Process of Managing Trade Funds"](#) on page 2.

### *To transfer a fund amount without constraint*

- 1 Navigate to the Administration- Data screen, then the Funds view.
- 2 Select a fund record, and click the Fund Transfer view tab.
- 3 Create a new record:
  - If you want to transfer an amount into this fund, complete the necessary fields in the Transfer In subview.
  - If you want to transfer an amount out of this fund, complete the necessary fields in the Transfer Out subview.

**NOTE:** You can transfer money between funds of different currencies.

## Reconciling Deals

You can reconcile a deal's amounts to all payments for that deal.

This task is a step in ["Process of Managing Trade Funds" on page 2](#).

### *To reconcile a deal to the associated payments*

- 1 Navigate to the Administration - Data screen, then the Fund Deals view.
- 2 In the Fund Deals list, select the deal record.
- 3 Click Release Commitments.

The deal amount is updated to the sum of all payments.

## Closing Deals

You can close a deal when you want to prevent users from making any further payments against the deal.

**NOTE:** If you want to reconcile and close the same deal, reconcile the deal before you close it. For more information, see ["Reconciling Deals" on page 14](#).

This task is a step in ["Process of Managing Trade Funds" on page 2](#).

### *To close a deal*

- 1 Navigate to the Administration - Data screen, then the Fund Deals view.
- 2 In the Fund Deals list, select the deal record.
- 3 From the Status field drop-down list, select Closed.

The deal is closed, and users can make no further payments against the deal.

## Forecasting Accrual Funds (End User)

Account managers or administrators might want to forecast the amount of revenue that an accrual fund will generate. They can forecast using any of the Administration Fund views or using the Funds view for an account. The forecast calculation is based on SVP baseline records that are associated with the fund. When the user clicks the Forecast button, the appropriate SVP baseline records are used to forecast the accrual fund. The following rules determine the baseline records that are used:

- The start and end dates of the baseline record must be within the effective start and end dates of the source product.
- The account of the baseline record must be the same account for the source product.
- The product of the baseline record must be the same as the source product.

These SVP baseline records are associated with an accrual fund in much the same way that SVP baseline records are associated with account promotions.

After the SVP baseline records are associated with the accrual fund, adjustments are made for partial weeks. Then the SVP baseline records are rolled up to the source product, where the Accrual Rate or Accrual % is applied to calculate the forecast for source products. Then, the forecast for each source product is rolled up to the account accrual fund.

This task is a step in [“Process of Managing Trade Funds” on page 2](#).

### ***To create a forecast for an accrual fund***

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Funds view tab.
- 3 In the Funds list, select an accrual fund record, and click Forecast.

The appropriate baseline records are associated with the fund, and the Forecast field for the fund is populated.

After you create the forecast for the accrual fund, you can examine the forecasted revenue for the fund and for each source product that is associated with the fund.

### ***To review the forecasted revenue for accrual funds and associated source products***

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Funds view tab.
- 3 In the Funds list, select an accrual fund record for which you created a forecast.
- 4 Examine the Forecast field for this record.

This field is the forecasted value of the fund and is calculated from the rollup of the Forecast field from all source products.

- 5 Scroll down, and click the Source Products view tab.
- 6 For each source product examine the following fields:
  - **Est Total Volume.** This field is the rolled-up value of the Estimated Total Volume of all the SVP baseline records associated with this source product. This field is also adjusted for partial periods.
  - **Forecast.** This field is calculated as follows:
    - If the basis is cases, the Est Total Volume multiplied by the Accrual Rate of the source product.
    - If the basis is revenue, the Est Total Volume multiplied by the Accrual %.

## Transferring Fund Amounts with Constraint (End User)

Account managers can transfer amounts between funds. Typically, transferring funds requires approval from a regional sales manager or a marketing administrator. For information about approving fund transfers, see [“Approving Fund Transfers \(End User\)” on page 16](#).

**NOTE:** When transferring funds, end users can access funds only if they are on the account team of the fund account. Administrators, however, can access all account funds with no time, type, or account constraints. For information about how administrators can transfer funds, see [“Transferring Fund Amounts Without Constraint” on page 13](#).

This task is a step in [“Process of Managing Trade Funds” on page 2](#).

### *To transfer a fund amount with constraint*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Funds view tab.
- 3 In the Funds list, select a fund record.
- 4 Click the appropriate view tab, and create a new record:
  - If you want to transfer an amount into this fund, click the Transfers In view tab.
  - If you want to transfer an amount out of this fund, click the Transfers Out view tab.

**NOTE:** You can transfer money between funds of different currencies.

- 5 Complete the necessary fields.

**NOTE:** The From and To fields in the Transfers In and Transfers Out view tabs display only funds that are allocated to the current account.

- 6 In the Submitted To field, select the employee who is responsible for approving the transfer. The transfer appears in the Transfer Approvals view of the employee that you select.
- 7 Change the Status field to Submitted.

## Approving Fund Transfers (End User)

Regional sales managers and marketing administrators can view and approve fund transfers.

This task is a step in [“Process of Managing Trade Funds” on page 2](#).

### *To approve a fund transfer*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Funds view tab.
- 3 In the Funds list, select a fund record.



- 4 Click the Transfer Approvals view tab.
- 5 In the Status field drop-down list, select Approved.

## Submitting Payments for Funds (End User)

Before running an account promotion, account managers can create deals for the account promotion, its promoted categories, and its promoted products. After they run the account promotion, the account managers submit payments for those deals.

Table 19 summarizes a payment at different status stages and the results that the end user sees.

Table 19. End User Views for Payment Status Stages

| Pending Amount                                                                                                                                                             | Submitted Amount                                                                                                                                                                                                                                                                                                                        | Paid Amount                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| For the deal that is associated with the record that has a status of Pending, Requested, or Rejected, the Payments Pending field is updated with the amount of the record. | <ul style="list-style-type: none"> <li>■ After the payment is approved, the end user manually changes the status of the record to Submitted.</li> <li>■ For the deal that is associated with the record, the Payments Pending field is decreased, and the Payments Submitted field is increased by the amount of the record.</li> </ul> | <ul style="list-style-type: none"> <li>■ The back office updates the status of the record to Paid. (You can also manually change the status of the record to Paid.)</li> <li>■ For the deal that is associated with the record, the Payments Submitted field is decreased, and the Payments Paid field is increased by the amount of the record.</li> <li>■ For the fund that is associated with the deal, the Payments field is updated.</li> <li>■ In the plan, account promotion, promoted categories, and promoted products containing the deal, the Actual Total Spend field is updated with the amount of the record.</li> </ul> |

**NOTE:** You must request approval for a new payment record before you can submit it. After the payment receives approval, you can change the status to Submitted. For information about approving payments, see [“Approving or Rejecting Payments”](#) on page 15.

After submission, payments are sent to the back office for processing. When processing is complete, the status of the payment changes to Paid. The application identifies and processes payments with a status of Paid. For more information about this processing and the results, see [“About Configuring Trade Funds”](#) on page 19.

This task is a step in [“Process of Managing Trade Funds”](#) on page 2.

### *To submit a payment against a fund*

- 1 Navigate to the Accounts screen, then the Accounts List view.

- 2 Drill down on the Name field hyperlink for an account, and click the Checkbook view tab.
- 3 In the Checkbook list, perform either of the following actions, as appropriate for your needs:
  - Query for a check.
  - Create a new check.
- 4 In the Payments list, create a new payment, click the select button in the Deal ID field, select a deal in the Pick Allocation dialog box, and click OK.
- 5 In the Amount field for the payment, enter the payment amount.
- 6 (Optional) In the Pay To field, enter the name of the check recipient.
- 7 (Optional) In the Document # field, enter the payment number as issued by the financial application (for example, a check number or credit memo number).
- 8 (Optional) In the Issue Date field, enter the date on which the financial document was issued for payment.

## Reviewing Funds (End User)

Account managers can review funds to track estimated, committed, and actual spending.

This task is a step in ["Process of Managing Trade Funds" on page 2.](#)

### *To review funds*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Funds view tab.  
The Funds list displays all funds that are associated with the account record.
- 3 Click the More Info view tab to review the fields.

The following table describes some fields.

| Field   | Comments                                                                                                                                                                                                                      |
|---------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fund    | The name of the fund.                                                                                                                                                                                                         |
| Fund Id | The automatically generated identification number of the fund.                                                                                                                                                                |
| Account | The account that is associated with the fund.                                                                                                                                                                                 |
| Type    | The fund type (Accrual or Fixed). Accrual funds are funds in which the amount is calculated from the products and accruals that are associated with the fund. Fixed funds are fixed amounts of money allocated in a lump sum. |
| Period  | The period of time for which the fund is valid.                                                                                                                                                                               |
| Start   | The starting date of the fund.                                                                                                                                                                                                |
| End     | The ending date of the fund.                                                                                                                                                                                                  |

| Field       | Comments                                                                                                                                   |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Basis       | The value (for example, Cases or Revenue) used to accrue funds.                                                                            |
| Unallocated | Calculated by subtracting allocations to child funds from the fund subtotal.                                                               |
| Estimated   | The amount in deals with a status other than Committed or Closed.                                                                          |
| Committed   | The amount in deals with a status of Committed or Closed.                                                                                  |
| Uncommitted | The amount from a fixed fund that is not allocated to a child fund. Calculated by subtracting the committed amount from the fund subtotal. |
| Amount      | The beginning amount of the fund.                                                                                                          |
| Adjustments | The adjustments to the fund amount. Includes decreases or increases to the fund amount. Excludes transfers, accruals, and payments.        |
| Transfers   | The sum of the approved transfers into or out of the fund.                                                                                 |
| Sub-total   | Amount plus Adjustments plus Transfers.                                                                                                    |

## About Configuring Trade Funds

This topic contains information that might be useful when configuring the trade fund features. Topics include:

- [“About Rolling Up Paid Payments” on page 19](#)
- [“About Consumer Goods Payment Business Service” on page 20](#)
- [“Funds Configuration for Enterprise Integration Manager” on page 21](#)
- [“Specialized Methods Invoked in Funds” on page 22](#)
- [“User Properties for Funds” on page 22](#)

## About Rolling Up Paid Payments

After the end user submits payments, the payments are sent to the back office for processing. After the payments are processed, the status of the payment is changed to Paid. When the payment status is changed to Paid in a back-office system, the following events occur, resulting in the aggregation, or rolling up, of payment data in Siebel Consumer Goods:

- 1 CG Payment workflow policy (part of the CG Payment workflow group) is invoked.
- 2 Workflow Monitor Agent task is started for the CG Payment workflow group, which monitors the CG Payment policy.
- 3 When the payment status is updated to Paid, the workflow process is executed.
- 4 The workflow policy invokes the CG Payment Process workflow.
- 5 The workflow process invokes the CG Payment Business Service.

- 6 The business service rolls up (aggregates) Paid payments in the plan, account promotion, promoted category, and promoted product (if the payment is associated with the promoted product):
  - If a paid payment is associated with an account promotion, the payment is rolled up to the account promotion and the plan that contains the account promotion (if a plan is available).
  - If a paid payment is associated with a promoted product, the payment is rolled up to the promoted product, promoted category that contains the promoted product, account promotion that contains the promoted category, and plan that contains the account promotion (if a plan is available).

When the CG Payment Business Service completes the rollup, you can verify if the workflow succeeded by looking at the Actual Total Spend field of the plan, account promotion, promoted category, and promoted product. The Actual Total Spend field is the sum of all the payments at that level and lower.

## About Consumer Goods Payment Business Service

The CG Payment Business Service uses the CPG Plan business object and the following business components:

- CG MDF Promotion Allocation
- CG Promo Product Fund Payment
- CPG Check Payment via MDF
- CPG MDF Allocation
- CPG Plan Account
- CPG Plan Account Promotion
- CPG Plan Account Promotion Product

The business service performs the following primary steps:

- Copies the Amount field into the Paid bucket.
- Rolls up the amount in the Paid bucket to the Payments Paid field.
- Rolls up Paid payments in the allocation to the Actual Total Spend field in the parent promotion.

More specifically, the business service completes the following steps:

- 1 Gets the ROW\_ID of the payment record with a status of Paid.
- 2 Gets the Parent Allocation Id of the payment record.
- 3 Gets the CPG Plan business object and the CG MDF Promotion Allocation business component.
- 4 Runs through the records in the CG MDF Promotion Allocation business component and positions to the record with the ROW\_ID of the Parent Allocation Id.
- 5 Finds the values of the Fund Promotion Id, Promo Plan Id, and Plan Account Promo Prod Id fields from the positioned record.
- 6 Instantiates the following business components:
  - CG MDF Promotion Allocation
  - CG Promo Product Fund Payment
  - CPG MDF Allocation
  - CPG Plan Account Promotion

- CPG Check Payment via MDF
- CPG Plan Account Promotion Product

**7** Determines if the Promo Plan Id field is Null:

- If the field is Null (indicating the account promotion has no plan), instantiates the CPG Plan Account business component.
- If the field is Not Null, instantiates the CPG Plan Account Promotion and CPG Plan Account business components.

**8** Determines if the Plan Account Promo Prod Id field is Null:

- If the field is Null (indicating an allocation under the account promotion and not a promoted product), positions the CPG Check Payment via MDF and CG MDF Promotion Allocation business components, sets the following values in the CG MDF Promotion Allocation business component, and forces the roll up:

- Paid Amount = Trade Fund Amount
- Submitted Amount = 0
- Pending Amount = 0

- If the Id is not Null, positions the CG Promo Product Fund Payment, CPG MDF Allocation, and CPG Plan Account Promotion Product business components, sets the following values in the CG MDF Allocation business component, and forces the rollup:

- Paid Amount = Trade Fund Amount
- Submitted Amount = 0
- Pending Amount = 0

**CAUTION:** If you use Siebel Enterprise Integration Manager to update the status of the payment record, make sure you use a business component based on class `CSSBusComp` in the integration object. For example, if you want to use the CPG Check Payment via MDF business component for updating the payment status, make a copy of the business component, change the class to `CSSBusComp`, and use the copied business component in the integration object. This modification avoids the conflict between specialized class behavior and the business service.

## Funds Configuration for Enterprise Integration Manager

The `COST_TYPE_CD` column on the `S_MDF_ALLOC` table has a List of Values (LOV) bounded property and is part of the `S_MDF_ALLOC_U2` key. It is used to uniquely identify the `ALLOC` records. Currently, you cannot remove the LOV bounded flag on the `COST_TYPE_CD` column. This property definition causes EIM to search for a bounded LOV value. Because EIM cannot find the unique values for this column on the List of Values table, EIM cannot update the allocation record error.

## Specialized Methods Invoked in Funds

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 20](#).

Table 20. Buttons And Methods For Funds Configurations

| Button              | Method            | Description                                                                                        | Supported On   |
|---------------------|-------------------|----------------------------------------------------------------------------------------------------|----------------|
| Apply               | ShowPopup         | Shows a group of eligible accounts.                                                                | Bus Comp Layer |
|                     | OK                | Adds fund participants to the fund group.                                                          |                |
| Generate            | FundGenerate      | Adds account funds to the fund group.                                                              | Bus Comp Layer |
| Products            | OnCatalogProducts | Adds all products that belong to the source category or target category of the fund or fund group. | Bus Comp Layer |
| Refresh             | OnRefreshMvg      | Refreshes the form.                                                                                | Bus Comp Layer |
| Release Commitments | ReleaseCommitment | Adjusts the amount of the deal to equal the sum of the deal payments.                              | Bus Comp Layer |

## User Properties for Funds

[Table 21](#) lists the user properties administrators must set to control propagation of source products from fund groups to account funds.

Table 21. User Properties For Funds

| Parent Object Type | Business Component                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description        | <p>You can set the following user properties on the CS Fund Group business component:</p> <ul style="list-style-type: none"> <li>■ <b>Populate Products.</b> The value can be Y or N. The default value is N. When you set the value to Y, the source and target products at the fund group level are populated when users click the Generate button to generate account funds.</li> <li>■ <b>Total Records.</b> The value is a number, for example, 10. The default value uses the business service. If the total number of source and target records at the fund group level exceeds the number in this field, the business service process is used to generate the account funds. Otherwise, the client process is used to generate the account funds.</li> </ul> |
| Functional Area    | CS Fund Group                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

# Configuring Trade Funds

To use the CG Payment Process, you need to export the workflow process from the sample database of the Consumer Goods application and import the workflow process into the server database. Complete the procedures in this topic.

## *To export the workflow process*

- 1 From the Siebel Consumer Goods application, connect to the sample database.
- 2 Navigate to the Administration - Business Process screen, then the Workflow Processes view.
- 3 In the Workflow Processes list, query for a Name of CG Payment Process.
- 4 Click Menu, and select Export Workflow.
- 5 Export the CG Payment Process in XML format to a location from which you can retrieve it.

Use the following procedure to import the workflow process.

## *To import the workflow process*

- 1 From the Siebel Consumer Goods application, connect to the server database.
- 2 Navigate to the Administration - Business Process screen, then the Workflow Processes view.
- 3 Click Menu, and select Import.
- 4 Import the CG Payment Process workflow that you exported in XML format to the server database.

Before you run the Process Simulator for the first time, you must set your debug options. For more information, see *Siebel Business Process Framework: Workflow Guide*.

## *To execute the workflow process invoked by Workflow Policy*

- 1 Navigate to the Administration - Business Process screen, then the Workflow Policy Actions view.
- 2 In the Actions list, create a new action, select Run Workflow Process in the Program field for the action, and perform the following steps:
  - a In the Arguments list, create a new argument.
  - b In the Argument field of the Arguments list, select ProcessName.
  - c In the Value field of the Arguments list, enter the name of the workflow process (for example, CG Payment Process) that you want to invoke as the argument value.
- 3 Navigate to the Administration - Business Process screen, then the Workflow Policy Groups view.
- 4 In the Policy Groups list, create a new group, and enter a name for the group in the Name field.
- 5 Navigate to the Administration - Business Process screen, then the Workflow Policies view.
- 6 In the Policies List, create a new policy, and perform the following steps:
  - a In the Conditions list, create a policy condition that must be met to invoke the workflow process.

- b** In the Actions list, create a new action, and enter the name of the action that you created in [Step 2](#).
- 7** Run Generate Triggers.  
For more information about generate triggers, see *Siebel Business Process Framework: Workflow Guide*.
- 8** If you are using the Run Workflow Process program, verify that the Workflow Process Manager server component is online.
- 9** Run Workflow Monitor Agent.  
For more information about Workflow Monitor Agent, see *Siebel Business Process Framework: Workflow Guide*.

Use the following procedure to access the CG Payment Process workflow process.

***To access the CG Payment Process workflow process***

- 1** Navigate to the Administration - Business Process screen, then the Workflow Processes view.
- 2** In the Workflow Processes list, click Menu and select New Query.
- 3** In the Name field, enter CG Payment Process.
- 4** Click Menu, and select Run Query.
- 5** In the Name field, drill down on the CG Payment Process hyperlink.  
The Workflow Process Designer view appears. Use the graphical flowchart tool in this view to modify the business service. For more information about workflows, see *Siebel Business Process Framework: Workflow Guide*.



# 10 Deductions and Claims

This chapter describes the main steps involved in managing deductions and claims. Following the procedures in this chapter, you can create, split, assign, research, and resolve deductions. Topics include:

- [About Deductions on page 2](#)
- [Scenarios for Managing and Resolving Deductions on page 2](#)
- [Process of Managing Account Promotion Deductions on page 4](#)
- [Creating and Editing Deductions on page 5](#)
- [Adding Literature to Deductions on page 6](#)
- [Splitting Deductions on page 7](#)
- [Creating Credit Memos on page 7](#)
- [Analyzing Workloads on page 8](#)
- [Creating Activity Templates on page 9](#)
- [Reviewing Deductions \(End User\) on page 9](#)
- [Viewing Account Deductions \(End User\) on page 10](#)
- [Creating Deduction Activities \(End User\) on page 10](#)
- [Creating Deduction Activity Plans \(End User\) on page 11](#)
- [Associating and Modifying Invoices \(End User\) on page 11](#)
- [Creating Deduction Attachments \(End User\) on page 11](#)
- [Creating Deduction Notes \(End User\) on page 12](#)
- [Reviewing Account Credit Memos \(End User\) on page 12](#)
- [Reviewing Deduction Literature \(End User\) on page 13](#)
- [Resolving Deductions \(End User\) on page 13](#)
- [About Status Stage Behavior in Deduction Resolutions on page 17](#)
- [About Claims on page 19](#)
- [Process of Managing Claims on page 19](#)
- [Creating and Editing Claims on page 19](#)
- [Adding Attachments to Claims on page 19](#)
- [Resolving Claims on page 20](#)
- [About Configuring Deductions and Claims on page 20](#)

## About Deductions

*Deductions* occur when customers submit a partial payment of an invoice. The unpaid balance is a deduction. The consumer goods organization needs to research the reason behind the deduction and resolve the deduction appropriately.

### About Types of Deductions

Each deduction type has a different purpose as follows:

- **Account Promotion deductions.** The customer claims a deduction because of a current account promotion.
- **HQ deductions.** This type covers all other deductions, including late deliveries, goods arriving damaged or expired, and invoicing errors.

### About Generating Deductions

The process of generating a deduction begins when your accounting department receives a partial payment for a customer invoice. You can pass the deduction information to the Siebel Consumer Goods application in several ways, depending on your company's implementation of the product.

Methods can include:

- Integrating back-office software with the Siebel Consumer Goods application.
- Accounting department personnel manually creating a deduction record.

### About Resolving Deductions

The account manager or customer financial service representative resolves deductions. Options for resolving deductions include:

- Rejecting the deduction and recharging the customer (chargeback).
- Approving the deduction and applying its cost to one or more trade fund allocations.
- Writing off the deduction.
- Applying a credit memo.

## Scenarios for Managing and Resolving Deductions

Customer financial service representatives, customer financial service managers, and account managers perform the processes in these example scenarios for managing deductions. Your company might follow different processes according to its business requirements. Topics include:

- [“Scenario for Managing Deductions for Account Promotions” on page 3](#)
- [“Scenario for Managing HQ Deductions” on page 3](#)

## Scenario for Managing Deductions for Account Promotions

The account manager for a food and beverage manufacturer sets up an account promotion to feature your company's line of gourmet coffee products at a chain of grocery stores. The account promotion includes a provision to reimburse the grocery chain for the cost of purchasing newspaper advertisements and creating signs to publicize a sale on your coffee line. Rather than authorize a payment to cover the advertising and sign expenses, the account manager arranges for the grocery chain to deduct those costs from the next invoice that is received from your company.

Next, the account manager opens the Siebel Consumer Goods application to preauthorize the deduction. He selects the plan that he created for fall account promotions at the grocery chain and adds a new record for the gourmet coffee account promotion. After entering relevant information about the account promotion, he enters the names of the four gourmet coffee products and allocates funds for each product. He allocates \$2,500 to each product (one-fourth of the total cost for the account promotion). In the fund allocation record of each coffee product, he preauthorizes the deduction.

One month later, the grocery chain returns its payment for a \$45,000 invoice from your company. It sends your company a check for \$35,000 and a debit memo referencing the deduction. The accounts receivable department notes the \$10,000 discrepancy and creates a deduction record in Siebel Consumer Goods.

The next day the account manager views the list of deductions for the accounts he manages, and sees the new deduction record. Because he preauthorized the deduction when he allocated funds for the account promotion, the allocated funds are available to resolve the deduction.

The account manager then researches the deduction, including verifying the terms of the account promotion, and resolves the deduction by applying the fund allocation to cover the \$10,000.

## Scenario for Managing HQ Deductions

A customer of a food and beverage manufacturer submits a payment of \$25,000 against an invoice for \$45,000. As a result, the back-office system generates a deduction for \$20,000. (Alternatively, the deduction is generated directly in Siebel Consumer Goods and shared with the back office.)

A customer financial service representative, reviews the attached scanned debit memo and other supporting documentation. She determines that \$15,000 of the total resulted from an account promotion run last month and that the remaining \$5,000 resulted from the return of unsaleable goods. Because the original deduction resulted from different types of activities, the customer financial service representative splits the original deduction. She creates two deductions—one for \$15,000, reflecting the portion related to account promotions, and another for \$5,000, reflecting the portion related to unsaleable goods. Based on the type of deduction and account, Siebel Consumer Goods automatically routes the deduction to the appropriate team for resolution. The \$15,000 deduction resulting from an account promotion is routed to the account team. As head of the account team, the account manager resolves the deduction resulting from the account promotion. To see how the account manager resolves this deduction, see [“Scenario for Managing Deductions for Account Promotions” on page 3.](#)

The customer financial service representative also resolves the other newly created deduction because she handles HQ deductions from this customer. After more closely researching the deduction and locating the credit memo authorizing the return of unsaleable goods, she determines that the correct deduction amount is \$4,950. Because the difference of \$50 is immaterial and less than the company's write-off threshold, the customer financial service manager applies \$4,950 to the credit memo and writes off \$50.

## Process of Managing Account Promotion Deductions

This topic lists the tasks that administrators and end users typically perform to manage deductions. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks that administrators typically perform to manage deductions:

- 1 "Creating and Editing Deductions" on page 5
- 2 "Adding Literature to Deductions" on page 6
- 3 "Splitting Deductions" on page 7
- 4 "Creating Credit Memos" on page 7
- 5 "Analyzing Workloads" on page 8
- 6 "Creating Activity Templates" on page 9

### End-User Procedures

The following list shows tasks that end users typically perform to access and use deductions:

- 1 "Reviewing Deductions (End User)" on page 9
- 2 "Viewing Account Deductions (End User)" on page 10
- 3 "Creating Deduction Activities (End User)" on page 10
- 4 "Creating Deduction Activity Plans (End User)" on page 11
- 5 "Associating and Modifying Invoices (End User)" on page 11
- 6 "Creating Deduction Attachments (End User)" on page 11
- 7 "Creating Deduction Notes (End User)" on page 12
- 8 "Reviewing Account Credit Memos (End User)" on page 12
- 9 "Reviewing Deduction Literature (End User)" on page 13
- 10 "Resolving Deductions (End User)" on page 13

# Creating and Editing Deductions

The procedure for resolving deductions begins by creating a detailed deduction record.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4.](#)

## *To add or edit a deduction record*

- 1 Navigate to the Administration - Data screen, then the Deductions view.
- 2 Create a new record, or query to find and select the record that you want to edit.
- 3 Enter values for or edit the fields as required.

The following table describes some fields.

| Field          | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New            | A asterisk (*) in this field indicates that the deduction record is new and visible to the entire account team.                                                                                                                                                                                                                                                                                                                                                                                                    |
| Id             | A unique number or code that identifies a deduction.                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Account        | The account that submitted the deduction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Priority       | The level of urgency for deduction resolution. The values are Low, Medium, High, and Very High.                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Status         | The current status of a deduction. The values are: <ul style="list-style-type: none"> <li>■ <b>Open.</b> No part or the deduction is resolved.</li> <li>■ <b>In Progress.</b> A portion of the deduction is resolved.</li> <li>■ <b>Resolved.</b> The total amount resolved is equal to the deduction amount.</li> <li>■ <b>Closed.</b> The Deduction is successfully processed.</li> <li>■ <b>Inactive.</b> The original deduction record is split into two deduction records and is no longer active.</li> </ul> |
| Type           | The type of deduction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Reason         | The reason for the deduction. The Type value determines the list of available reasons.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Amount         | The amount that the customer deducted from the invoice total.                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Remaining      | The amount of the deduction that still needs to be resolved.                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Total Resolved | The sum of trade funds, credit memos, write-offs, and chargebacks.                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Credit Memo    | The sum of the amounts that are applied to credit memos.                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Charge Back    | The amount of the deduction that you reject. The amount that you enter in this field can be less than, or equal to, the Deduction Amount, but it cannot exceed the Deduction Amount.                                                                                                                                                                                                                                                                                                                               |
| Date Received  | The date your company received the deduction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Field        | Comments                                                                                                                                                                                                               |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Team | If a team exists for the account, this field is automatically populated with the members of the account team. Deductions are visible to all account team members, and all account team members can resolve deductions. |
| Debit memo   | Debit memos are documents from the customer explaining why they are not sending the total invoice payment.                                                                                                             |
| Parent ID    | The Deduction ID of the original deduction. This field is populated in child deduction records that are created as the result of a deduction split.                                                                    |
| Site         | The location of the account for the deduction.                                                                                                                                                                         |
| Status Date  | The date the status last changed.                                                                                                                                                                                      |
| Assigned To  | The individual employee who is assigned to the deduction. However, all account team members can view the deduction.                                                                                                    |

## Adding Literature to Deductions

Only administrators can add literature to deduction records. Examples of literature include:

- Bills of lading

A bill of lading is a document that the transportation carrier issues to the shipper acknowledging that the carrier received the shipment of goods and placed the goods on a particular vessel that is bound for a particular destination. A bill of lading states the transportation terms for these received goods.

- Debit memos

- Fact sheets about account promotions

- Pick tickets

- Remittances

- Customer correspondence

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4.](#)

### *To add literature to a deduction*

- 1 Navigate to the Administration - Data screen, then the Deductions view.
- 2 Select the appropriate deduction record.
- 3 Click the Literature view tab, and create a new record.
- 4 In the Add Literature dialog box, query for and select the literature item, and click OK.

The literature item is added to the deduction.

## Splitting Deductions

Customers occasionally combine different types of deductions. For example, a buyer who runs an account promotion and also receives broken merchandise in a shipment might combine the costs of the account promotion and the broken merchandise into one deduction. To properly account for the two different deduction types, you need to split the original deduction into two separate deductions.

When you split a deduction record into two separate deduction records, the original deduction record is retained, but its status changes to inactive. The automatically generated ID of the original deduction appears in the split record's Parent ID field.

**NOTE:** You can split deductions only when the status is Open.

This task is a step in ["Process of Managing Account Promotion Deductions"](#) on page 4.

### *To split a deduction*

- 1 Navigate to the Administration - Data screen, then the Deductions view.
- 2 Select a deductions record.
- 3 Click the Split view tab.
- 4 In the Deductions list, and click Split.  
Two new records appear in the Split list.
- 5 In the Split list, select one of the new deduction records, and enter values in the fields in the Split Deductions form as required.  
Make sure you adjust the Amount fields to reflect the value of the split deductions.  
Repeat this step for the second new deduction record.

## Creating Credit Memos

Administrators can add or modify credit memos.

**NOTE:** You can also create credit memos as part of the deduction resolution process. For more information, see ["Resolving HQ Deductions"](#) on page 15.

This task is a step in ["Process of Managing Account Promotion Deductions"](#) on page 4.

### *To add or modify a credit memo from the Credit Memo Administration view*

- 1 Navigate to the Administration - Data screen, then the Credit Memos view.
- 2 In the Account form, query for the appropriate account record.  
Credit memos that are associated with the account appear in the Credit Memos list.

- 3 In the Credit Memos list, select a record to edit, or create a new record, and complete the necessary fields.

The following table describes some fields.

| Field      | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Credit ID  | The automatically generated identification number of the credit memo.                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Type       | Type of credit memo. Values include: <ul style="list-style-type: none"> <li>■ <b>Invoicing.</b> The invoice includes errors.</li> <li>■ <b>Unsaleable.</b> The goods arrived expired or spoiled.</li> <li>■ <b>Returns.</b> The goods were returned for any reason other than unsaleable.</li> <li>■ <b>Transportation.</b> The goods were delivered late.</li> <li>■ <b>Unknown.</b> Credit memos that are not part of the Invoicing, Unsaleable, Returns, or Transportation categories.</li> </ul> |
| Invoice ID | A unique number that references the invoice record. You can use the drop-down list in this field to associate existing invoices to the credit memo.                                                                                                                                                                                                                                                                                                                                                  |
| Amount     | The amount of the credit memo.                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

## Analyzing Workloads

Customer financial service managers or administrators can analyze the deduction resolution workloads among employees.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4.](#)

### *To analyze deduction workloads*

- 1 Navigate to the Settlements screen, then the Deductions List view.
- 2 From the visibility filter, select one of the following values:
  - **My Deductions.** Displays all deductions for accounts for which the user is an assigned team member (primary or not).
  - **My Team’s Deductions.** Displays the deductions for a manager’s direct reports (or subordinates). Only users with direct reports, for example, a customer financial services manager, can see this view.
  - **All Deductions.** Displays all deductions in the user’s organization.
  - **All Deductions Across Organizations.** Displays all deductions across all organizations in the Siebel database.
- 3 In the Deductions list, query for the appropriate records, and select all the deductions that you want to analyze.
- 4 In the Deductions link bar, click the Charts link.



- 5 From the drop-down list, select the type of chart that you want to view.

In the preconfigured Siebel Consumer Goods application, the chart selections are Aging Analysis, Status and Priority Analysis, Account and Type Analysis, and Rep Workload Analysis.

## Creating Activity Templates

Administrators create *Activity templates*, which are blueprints for sets of activities. End users can invoke activity templates to create activity plans. For more information about creating activity templates, see *Siebel Applications Administration Guide*.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4](#).

### *To create an Activity plan template*

- 1 Navigate to the Administration - Data screen, then the Activity Templates view.
- 2 In the Activity Templates list, create a new record.
- 3 From the Type field drop down list, select the appropriate value.
- 4 Click the Activity Template Details view tab, and create new records as necessary.

## Reviewing Deductions (End User)

End users can review, query, sort and reassign all deductions assigned to them or to the account team.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4](#).

### *To review a deduction*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 From the visibility filter, select one of the following values:
  - **My Deductions.** Displays all deductions for accounts to which the user is an assigned team member (primary or not).
  - **My Team’s Deductions.** Displays the deductions for a manager’s direct reports (or subordinates). Only users with direct reports, for example, a customer financial services manager, can see this view.
  - **All Deductions.** Displays all deductions in the user’s organization.
  - **All Deductions Across Organizations.** Displays all deductions across all organizations in the Siebel database.
- 3 Select a deduction record, and click any of the available view tabs to review or add details to the deduction.

**NOTE:** Only users with administrator privileges can attach literature to a deduction using the literature view.

## Viewing Account Deductions (End User)

Account managers can review information about all deductions that an account takes. By selecting different accounts, account managers can view and compare the deductions that different accounts take.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4.](#)

### *To view deductions for an account*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Deductions view tab.

The Deductions list displays all the deductions that are associated with that account.

## Creating Deduction Activities (End User)

Account managers and customer financial services representatives and managers can view and create activities related to deductions. For example, a customer financial services representative receives a deduction for an invoice pricing error. The customer financial services representative creates an activity for the orders department to verify the invoicing error. An employee in the orders department completes the activity. After activity completion, the customer financial services representative can resolve the deduction.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4.](#)

### *To create a deduction activity*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 Drill down on the ID field hyperlink for a deduction, and click the Activities view tab.
- 3 In the Activities list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field       | Comments                                                   |
|-------------|------------------------------------------------------------|
| Created     | The date and time you create the activity.                 |
| Type        | The classification of the activity.                        |
| Due         | The date by which the activity must be completed.          |
| Assigned To | The person who is responsible for completing the activity. |
| Priority    | The priority of the activity.                              |
| Status      | The status of the activity.                                |
| Description | A description of the activity.                             |

## Creating Deduction Activity Plans (End User)

An activity plan is a group of predetermined activities that embody the policies, procedures, and best practices for managing deductions. Customer financial services managers, account managers, and customer financial services representatives can create activity plans by selecting from predefined templates.

This task is a step in [“Process of Managing Account Promotion Deductions”](#) on page 4.

### *To create a deduction activity plan*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 Drill down on the ID field hyperlink for a deduction, and click the Activity Plans view tab.
- 3 In the Activity Plans list, create a new record, and complete the necessary fields.
- 4 In the Template field, select a template that includes all the predefined activities recommended for resolving this type of deduction.

## Associating and Modifying Invoices (End User)

You can import invoices from your company’s back-office system, or an administrator can manually create invoices. End users can associate existing invoices with a deduction and edit existing invoice information.

**NOTE:** Marketing administrators and other managers or administrators can view all invoice records and create invoices by navigating to the Invoices screen if invoice fields are not automatically populated. For more information about creating invoices, see *Siebel Field Service Guide*.

This task is a step in [“Process of Managing Account Promotion Deductions”](#) on page 4.

### *To associate or modify an invoice*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 Drill down on the ID field hyperlink for a deduction, and click the Invoices view tab.
- 3 Create a new record, and complete the necessary fields.

## Creating Deduction Attachments (End User)

Employees in the customer financial services department and account managers can view and attach documents to deductions.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4.](#)

#### *To create a deduction attachment*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 Drill down on the ID field hyperlink for a deduction, and click the Attachments view tab.
- 3 Create a new record, and complete the necessary fields.

## Creating Deduction Notes (End User)

Customer financial services representatives, account managers, and customer financial services managers can read and add notes to deduction records.

**NOTE:** All users who can view the deduction can see shared notes. Only the creator of the note can see private notes.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4.](#)

#### *To create a deduction note*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 Drill down on the ID field hyperlink for a deduction, and click the Notes view tab.
- 3 Create a new record.
- 4 From the Show drop-down filter, select Shared Notes or Private Notes.

## Reviewing Account Credit Memos (End User)

Customer financial services representatives can review all credit memos that are issued to an account and payments that are issued against credit memos.

This task is a step in [“Process of Managing Account Promotion Deductions” on page 4.](#)

#### *To review an account credit memo*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account, and click the Credit Memos view tab.
- 3 In the Credit Memos list, select the credit memo record for which you want to view payments.
- 4 Scroll down, and click the Credit Memo view tab.

Details about the credit memo appear in the form. Payments against the selected credit memo appear in the Payments list.

## Reviewing Deduction Literature (End User)

Account managers and customer financial services representatives and managers can view literature attached to deductions.

This task is a step in [“Process of Managing Account Promotion Deductions”](#) on page 4.

### *To review deduction literature*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 Drill down on the ID field hyperlink for a deduction, and click the Literature view tab.  
Literature attached to the deduction appears in the Literature list.
- 3 Drill down on the Name field hyperlink in the Literature list to open a literature attachment.

## Resolving Deductions (End User)

When account managers and customer financial services representatives finish researching a deduction, they choose from different methods for resolving deductions. The methods available for resolving deductions (for example, Invoicing or Unsaleable) depend on the deduction type (Promotion or HQ).

Deduction resolutions are reflected in the Totals row at the bottom of the Resolution view for deductions and in the summary fields of the Deductions form. For each fund payment, credit memo, chargeback, or write-off submitted, the amounts that appear in the respective summary fields and the Total Resolved field are updated, and the amount in the Remaining field is reduced. To completely resolve the deduction, the amount in the Total Remaining field must be reduced to \$0.00.

This task is a step in [“Process of Managing Account Promotion Deductions”](#) on page 4.

### Resolving Account Promotion Deductions

For deductions of the Promotion type, you can use any combination of the following methods:

- Applying trade funds
- Writing off all or part of a deduction
- Issuing chargebacks

The views for payments, chargebacks, and write-offs contain Document # and Issue Date fields. The Document # field contains the payment number as issued by the financial application (for example, a check number or credit memo number). The Issue Date field contains the date on which the financial document was issued for payment.

### *To resolve an account promotion deduction*

- 1 Navigate to the Settlements screen, then the Deduction List view.

- 2 Drill down on the ID field hyperlink for a deduction, and click the Resolution view tab.
- 3 If applicable, apply trade funds by performing the following steps:
  - a In the Resolutions link bar, click the Payments link, and create a new record.
  - b Click the select button in the Deal ID field, select a deal from the Deal drop-down list, click OK, and enter the payment amount in the Amount field.

A new payment record is generated.

**NOTE:** To determine the activity against deals, refer to the Amount, Payments Paid, Payments Submitted, and Payments Pending fields in the Pick Allocation dialog box.
  - c Repeat [Step a](#) through [Step b](#) for each payment that you want to create for the deduction.
  - d In the Status field, choose Requested. After the payment has been approved, change the status to Submitted. For information about approving or rejecting payments, see [“Approving or Rejecting Payments” on page 15](#).
- 4 If applicable, write off all or part of the deduction by performing the following steps:
  - a In the Resolutions link bar, click the Write Off link, and create a new record.
  - b Click Menu, and select Submit or Submit All.
- 5 To reject part or all of the deduction, issue a chargeback by performing the following steps:
  - a In the Resolutions link bar, click the Chargeback link, and create a new record.
  - b Click Menu, and select Submit or Submit All.

The information that you enter can be exported to your company’s back-office system. A member of the accounts receivable department can use this information to write a letter to the customer requesting payment of the chargeback amount.

### Voiding and Cancelling Payments

Account managers and customer financial service representatives can void and cancel payments:

- If the account manager creates a payment, the manager can void the payment before submitting the payment to the back office.
- If the account manager creates a payment and submits the record, the manager can still void the payment providing the back office did not process it.
- If the account manager creates a payment, and the back office processes the record, the manager can cancel the payment and create a new payment record.

#### *To void or cancel a payment*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 Drill down on the ID field hyperlink for a deduction, and click the Resolution view tab.
- 3 In the Resolutions link bar, click the Payments link.
- 4 In the Status field drop down list, select Voided or Canceled.

## Approving or Rejecting Payments

The Payment Approval List view allows account managers and customer financial service representatives to approve, reject, and comment on all requested payments that require approval. All fields in this view are read-only except for Status and Rejection Comment.

A single column stores payment status and a single column stores payment type, across all payment business components. Status values map to two different LOV types: one for deduction-related business components and one for non-deduction related business components. The type values likewise map to two different LOV types: one for all deduction-related business components and one for all non-deduction related business components.

### *To approve or reject a payment*

- 1 Navigate to the Settlements screen, then the Payment Approval List view.
- 2 Select one or more payments and click Approve or Reject, or change the Status field to Approved or Rejected.
- 3 (Optional) Add a reason for the rejection in the Rejection Comment field.

## Resolving HQ Deductions

For deductions of the HQ type, you can use one or more of the following methods:

- Applying credit memos
- Writing off all or part of a deduction
- Issuing chargebacks

The views for credit memos, chargebacks, and write-offs contain Document # and Issue Date fields. The Document # field contains the payment number as issued by the financial application (for example, a check number or credit memo number). The Issue Date field contains the date on which the financial document was issued for payment.

**NOTE:** Credit memos that you create as part of the deduction resolution process are not available in the Memo ID picklist, and are not available in the Credit Memos view of the Administration - Data screen. The Credit Memo ID field is not required, but after it is populated, the field becomes read-only.

### *To resolve a HQ deduction*

- 1 Navigate to the Settlements screen, then the Deduction List view.
- 2 Drill down on the ID field hyperlink for a deduction, and click the Resolution view tab.
- 3 If applicable, apply a Credit Memo by performing the following steps:
  - a In the Resolutions link bar, click the Credit Memo link, and create a new record and complete the fields.
  - b (Optional) To apply an existing credit memo, click the select button in the Memo ID field, select a credit memo from the drop-down list, click OK, and enter the payment amount in the Amount field.

- c In the Status field, choose Requested. After the payment has been approved, change the status to Submitted. For information about approving or rejecting payments, see ["Approving or Rejecting Payments"](#) on page 15.
- 4 If applicable, write off all or part of the deduction by performing the following steps:
  - a In the Resolutions link bar, click the Write Off link, and create a new record.
  - b Click Menu, and select Submit or Submit All.
- 5 To reject part or all of the deduction, issue a chargeback by performing the following steps:
  - a In the Resolutions link bar, click the Chargeback link, and create a new record.
  - b Click Menu, and select Submit or Submit All.

The information that you enter can be exported to your company's back-office system. A member of the accounts receivable department can use this information to write a letter to the customer requesting payment of the chargeback amount.

## Analyzing Deductions

Account managers, customer financial services representatives, and their managers can use various chart views to analyze deductions for an account.

### *To analyze an account's deductions*

- 1 Navigate to the Settlements screen, then the Charts view.
- 2 In the drop-down list, select the type of chart that you want to view.

Available charts include Aging Analysis, Status and Priority Analysis, Account and Type Analysis, and Rep Workload Analysis.



## About Status Stage Behavior in Deduction Resolutions

Table 22 describes the behavior that occurs during the various status stages in the deduction resolution. The actions that are taken depend on both the resolution method and the status stage.

Table 22. Behavior For Status Stages in Deduction Resolutions

| Resolution Method        | Pending Amount                                                                                                                                                                                                                                                                                                                                                                                                                              | Submitted Amount                                                                                                                                                                                                                                                                                                                       | Paid Amount                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Payment (by trade funds) | <ul style="list-style-type: none"> <li>■ For the deduction, the Promotion field is updated with the amount of the record.</li> <li>■ For the deduction, the Remaining and Total Resolved fields are updated with the amount of the record.</li> <li>■ For the deal that is associated with the record that has a status of Pending, Requested, or Rejected, the Payments Pending field is updated with the amount of the record.</li> </ul> | <ul style="list-style-type: none"> <li>■ After the payment is approved, the end user manually changes the status of the record to Submitted.</li> <li>■ For the deal that is associated with the record, the Payments Pending field is decreased and the Payments Submitted field is increased by the amount of the record.</li> </ul> | <ul style="list-style-type: none"> <li>■ The back office updates the status of the record to Paid. (You can also manually change the status of the record to Paid.)</li> <li>■ For the deal that is associated with the record, the Payments Submitted field is decreased and the Payments Paid field is increased by the amount of the record.</li> <li>■ For the fund that is associated with the deal, the Payments field is updated.</li> <li>■ In the account promotion hierarchy containing the deal, the Actual Total Spend field is updated with the amount of the record. For more information about payments, see <a href="#">“About Rolling Up Paid Payments”</a> on page 19.</li> </ul> |

Table 22. Behavior For Status Stages in Deduction Resolutions

| Resolution Method | Pending Amount                                                                                                                                                                                                                                                                                                                                                                                                                                         | Submitted Amount                                                                                                                                                                                                                                                                                               | Paid Amount                                                                                                                                                                                                                                                                                                                                                       |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Credit Memo       | <ul style="list-style-type: none"> <li>■ For the deduction, the Credit Memo field is updated with the amount of the record.</li> <li>■ For the deduction, the Remaining and Total Resolved fields are updated with the amount of the record.</li> <li>■ For the credit memo that is associated with the deduction where the status is Pending, Requested, or Rejected, the Payments Pending field is updated with the amount of the record.</li> </ul> | <ul style="list-style-type: none"> <li>■ The end user manually changes the status of the record to Submitted.</li> <li>■ For the credit memo that is associated with the record, the Payments Pending field is decreased and the Payments Submitted field is increased by the amount of the record.</li> </ul> | <ul style="list-style-type: none"> <li>■ The back office updates the status of the record to Paid. (You can also manually change the status of the record to Paid.)</li> <li>■ For the credit memo that is associated with the record, the Payments Submitted field is decreased and the Payments Paid field is increased by the amount of the record.</li> </ul> |
| Chargeback        | <ul style="list-style-type: none"> <li>■ For the deduction, the Chargeback field is updated with the amount of the record.</li> <li>■ For the deduction, the Remaining and Total Resolved fields are updated with the amount of the record.</li> </ul>                                                                                                                                                                                                 | <ul style="list-style-type: none"> <li>■ The end user manually changes the status of the record to Submitted.</li> </ul>                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>■ The back office updates the status of the record to Paid. (You can also manually change the status of the record to Paid.)</li> </ul>                                                                                                                                                                                    |
| Write-off         | <ul style="list-style-type: none"> <li>■ For the deduction, the Write Off field is updated with the amount of the record.</li> <li>■ For the deduction, the Remaining and Total Resolved fields are updated with the amount of the record.</li> </ul>                                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>■ The end user manually changes the status of the record to Submitted.</li> </ul>                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>■ The back office updates the status of the record to Paid. (You can also manually change the status of the record to Paid.)</li> </ul>                                                                                                                                                                                    |

**NOTE:** When you void or cancel a record, the actions that were previously taken (as described in the preceding table) are reversed.

## About Claims

A *claim* occurs when a customer submits a bill to the manufacturer for spending related to an account promotion. The claim process is the reverse of the deduction process, where a customer does not pay the full amount of an invoice. With a claim, the customer requests payment, and usually offers documentation as to why the claim is valid.

Like deduction fund payments, claim payments are associated with fund allocations and deals.

## Process of Managing Claims

End users manage the claims process. The account manager receives, inputs, and pays claims. This topic lists the tasks that end users typically perform to manage claims. Your company might follow a different process according to its business requirements.

The following list shows tasks that end users typically perform to access and use claims:

- 1 ["Creating and Editing Claims" on page 19](#)
- 2 ["Adding Attachments to Claims" on page 19](#)
- 3 ["Resolving Claims" on page 20](#)

## Creating and Editing Claims

The procedure for managing claims begins by creating a detailed claim record.

This task is a step in ["Process of Managing Claims" on page 19](#).

### *To add or edit a claim record*

- 1 Navigate to the Settlements screen, then the Claim List view.
- 2 Create a new record, or query to find and select the record that you want to edit.
- 3 Enter values for or edit the fields as required.

## Adding Attachments to Claims

Account managers can view and add attachments to claims to show supporting evidence for the customer's request.

This task is a step in ["Process of Managing Claims" on page 19](#).

### *To add or edit attachments to a claim record*

- 1 Navigate to the Settlements screen, then the Claim List view.
- 2 Drill down on the Claim ID field hyperlink for a claim.

- 3 Click the Attachments view tab.
- 4 To add a new file attachment, click New File, navigate to the file, select it, and click Open. The attachment appears in the Attachments list.
- 5 To add a new URL attachment, click New URL, enter the URL in the URL file, and click Add. The attachment appears in the Attachments list.

## Resolving Claims

Account managers can resolve claim payments.

This task is a step in [“Process of Managing Claims” on page 19](#).

### *To resolve a claim*

- 1 Navigate to the Settlements screen, then the Claim List view.
- 2 Drill down on the Claim ID field hyperlink for a claim, and click the Resolution view tab.
- 3 In the Status field, choose Requested. After the payment has been approved, change the status to Submitted. For information about approving or rejecting payments, see [“Approving or Rejecting Payments” on page 15](#).

## About Configuring Deductions and Claims

This topic contains information that might be useful when configuring features for deductions and claims.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 23](#).

Table 23. Buttons and Methods for Deductions and Claims Configurations

| Button  | Name of Method | Description                                                   | Supported On   |
|---------|----------------|---------------------------------------------------------------|----------------|
| Approve | OnApprove      | Approves selected payments in the Payment Approval List view. | Bus Comp Layer |
| Reject  | OnReject       | Rejects selected payments in the Payment Approval List view.  | Bus Comp Layer |

# 11 Objectives

This chapter covers managing objectives using the Siebel Consumer Goods application. Topics include:

- [About Objectives on page 1](#)
- [Scenario for Creating and Fulfilling Sales Objectives on page 2](#)
- [Process of Working with Objectives on page 2](#)
- [Creating Objectives on page 3](#)
- [Creating Recommended Activities for Objectives on page 4](#)
- [Targeting Accounts to Objectives on page 6](#)
- [Creating Child Objectives on page 7](#)
- [Changing the Dates for Objectives on page 7](#)
- [Applying Objectives on page 7](#)
- [Scheduling Store Visits on page 8](#)
- [Reviewing Objectives \(End User\) on page 8](#)
- [Changing the Status of Activities \(End User\) on page 9](#)
- [Checking the Status of Objectives \(End User\) on page 9](#)
- [About Configuring Objectives on page 10](#)

## About Objectives

An objective is a sales goal that is established to introduce a new product, promote the sale of an existing product, or improve a product's presence in the retail environment. You apply an objective to one or more retail store accounts. An objective includes one or more recommended activities that salespersons perform when they visit the stores belonging to the target accounts for the objective.

Organizations often create objectives to support a corporate promotion or merchandising strategy. When used with recommended activities, objectives help to coordinate your sales force. Salespersons benefit by knowing about objectives for their retail stores and activities their managers consider important to perform during their store visits.

Ideally, you implement objectives at the beginning of a planning cycle.

You can create objectives for the entire corporation, for example, to support a corporate promotion. In this case, the corporate objective is the parent objective, and regional, district, or account managers can create child objectives of this parent to support the goals of the corporate objective.

Alternatively, a retail sales manager can create an objective and activities for the retail sales representatives in a region to support specific sales goals for that region.

# Scenario for Creating and Fulfilling Sales Objectives

Retail sales managers and sales representatives perform the process in this example scenario for creating and fulfilling sales objectives. Your company might follow a different process according to its business requirements.

A large food manufacturer develops a new beverage, and plans to test consumer appeal for the beverage by introducing it in southern France. One retail sales manager's territory is the southern region of France. The sales manager is responsible for making sure that the sales representatives reporting to her take the actions necessary to successfully launch of this new beverage.

The retail sales manager begins by creating an objective named Southern France New Beverage Launch. Next, she adds three recommended activities that she wants each member of her sales force to complete to meet this objective:

- Meet with a manager to make sure that the new beverage is properly priced.
- Take a retail order to make sure that enough of the new beverage is in stock.
- Perform a retail audit to verify the new beverage is correctly positioned on store shelves.

To communicate the importance of these activities to her sales force, she assigns the priority 1-ASAP to all three recommended activities. She also adds a product fact sheet to the objective as a literature item. Her sales representatives can use this fact sheet to find valuable information about the new beverage prior to visiting accounts. Finally, she adds every account in southern France to the objective so that the objective is available to the account team members for these accounts. The three activities are available to the representatives for association with the outlet visits they plan for the upcoming business cycle.

When the sales representatives for southern France check their calendars, they see that the retail sales manager scheduled a series of store visits for them. When they prepare for each of these visits, they can review the objective, the recommended activities that she created, and the product fact sheet that she added. Later, when the new beverage launch is in progress and the sales representatives perform store visits, the manager or sales representatives can review the objective and note if representatives completed the related recommended activities.

## Process of Working with Objectives

This topic lists the tasks that administrators and end users typically perform to manage objectives. Your company might follow a different process according to its business requirements.

### Administrator Setup Procedures

The following list shows tasks that administrators typically perform to manage objectives:

- 1 ["Creating Objectives" on page 3](#)
- 2 ["Creating Recommended Activities for Objectives" on page 4](#)
- 3 ["Targeting Accounts to Objectives" on page 6](#)

- 4 (Optional) Adding Literature to an Objective, as described in *Siebel Fundamentals*
- 5 (Optional) [“Associating Objectives with Account Promotions” on page 39](#)
- 6 (Optional) [“Creating Child Objectives” on page 7](#)
- 7 (Optional) [“Changing the Dates for Objectives” on page 7](#)
- 8 [“Applying Objectives” on page 7](#)
- 9 [“Scheduling Store Visits” on page 8](#)

## End-User Procedures

The following list shows tasks that end users typically perform to access and use objectives:

- 1 [“Reviewing Objectives \(End User\)” on page 8](#)
- 2 [“Process of Performing Retail Activities \(End User\)” on page 5](#)
- 3 (Optional) [“Changing the Status of Activities \(End User\)” on page 9](#)
- 4 [“Checking the Status of Objectives \(End User\)” on page 9](#)

In general, retail sales representatives do not create objectives, but instead use objectives to direct the activities that they perform during customer visits. They use the Objectives screen to review objectives, recommended activities, target accounts, and literature that applies to their retail stores and accounts. For more information about how retail sales representatives use the retail execution feature to complete recommended activities, see [“Process of Performing Retail Activities \(End User\)” on page 5](#).

## Administrator and End-User Maintenance Procedures

During the campaign, retail sales managers and sales representatives check the status of the objectives and associated activities. For more information, see [“Checking the Status of Objectives \(End User\)” on page 9](#).

# Creating Objectives

You must complete this task before performing the remaining tasks in this chapter.

If you want to create recurring objectives, you can perform the following tasks:

- Change the period of an existing objective (if no visits are scheduled).
- Copy an existing objective and apply a new period to it.
- Use a workflow to schedule monthly visits. For more information, see *Siebel Business Process Framework: Workflow Guide*.

This task is a step in [“Process of Working with Objectives” on page 2](#).

### *To create an objective*

- 1 Navigate to the Objectives screen, then the Retail Objective List view.

- 2 In the Objectives list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Objective        | The name of the objective.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Parent Objective | <p>The name of an objective's parent objective, if applicable. The parent objective defines some of the criteria for its child objectives. For example, child objectives are restricted to the products, if any, that are associated with the parent objective.</p> <p>You can create parent objectives without completing the Parent Objective field. You must complete the Parent Objective field when creating child objectives.</p> <p>You can view parent-child relationships between objectives in the Objectives Explorer view.</p> |
| Type             | The type of objective, for example, a corporate promotion or a marketing type of objective.                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Description      | The purpose of the objective.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Period           | The period of time during which the objective must be completed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Product          | The product or products that you want to associate with this objective.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Organization     | The organization restricts the target accounts you can associate with the objective.                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Start Date       | The beginning date of an objective. This date must be in the objective's time period.                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| End Date         | The ending date of an objective. This date must be in the objective's time period.                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

## Creating Recommended Activities for Objectives

You can add one or more recommended activities to an objective. Recommended activities:

- Are associated with every target account that is added to the objective.
- Are not assigned to individuals because they are used when planning visits to all of the targeted accounts.
- Can optionally be associated with individual products if certain activities apply to specific products.

This task is a step in ["Process of Working with Objectives"](#) on page 2.



**To add a recommended activity to an objective**

- 1 Navigate to the Objectives screen, then the Retail Objective List view.
- 2 In the Objectives list, drill down on the Objective field hyperlink for the record to which you want to add an activity.
- 3 Click the Activities view tab, create a new record in the Activities list, and complete the necessary fields.

The following table describes some fields.

| Field               | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity Type       | The type of activity to perform, for example, a retail assessment or presentation.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Earliest Start      | The suggested date the recommended activity begins; the default is the objective period start date. If you choose to edit this field, the date must be in the period assigned to the parent objective.                                                                                                                                                                                                                                                                                                                                |
| Latest Finish       | The suggested date the recommended activity ends; the default is the objective period end date. If you choose to edit this field, the date must come after the earliest start date for the recommended activity and must be in the period assigned to the parent objective.                                                                                                                                                                                                                                                           |
| Products            | Each activity can have one or more products associated with it. The choice of products is restricted to products that are associated with the objective.                                                                                                                                                                                                                                                                                                                                                                              |
| Assessment Template | The name of the assessment template that is assigned to the recommended activity. If the recommended activity requires an assessment completion, you can associate the relevant assessment template with the recommended activity. For information about assessment templates, see <i>Siebel Applications Administration Guide</i> .                                                                                                                                                                                                  |
| Required            | Select this field to indicate that the representative must complete or reschedule the activity before the representative completes a visit.                                                                                                                                                                                                                                                                                                                                                                                           |
| Routine             | Select this field to indicate that the activity applies to every retail visit. For example, even after a representative completes the activity on a visit, the activity appears on every subsequent visit that is planned between the activity's earliest start and latest completion dates.<br><br>Clear this field to indicate that the activity is nonroutine. When the activity is completed or when the date of the visit is greater than the activity's Latest Completion date, the activity is no longer available for visits. |
| Role                | If you are using Territory Management, use this field to assign the activity to only positions that have this role. For more information about Territory Management, see <i>Siebel Territory Management Guide</i> .                                                                                                                                                                                                                                                                                                                   |

| Field         | Comments                                                                                                                                                                                                                                                                  |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Category      | If you are using Territory Management, use this field to assign the activity to only positions that are associated with this category.                                                                                                                                    |
| Assign To All | If you select this field, the activity is created for each member of the account team. If you do not select this field, the activity is created for only the primary member of the account team.<br><br>Do not select this field if you use the Role and Category fields. |

## Targeting Accounts to Objectives

You need to associate one or more accounts to an objective. Accounts associated with objectives are referred to as target accounts. When you apply the objective, the objective's activities are used as templates to create activities for each of the target accounts.

The accounts that are available as targets are those accounts that belong to the organization for which the user is an account team member.

This task is a step in ["Process of Working with Objectives" on page 2](#).

### *To add a target account to an objective*

- 1 Navigate to the Objectives screen, then the Retail Objective List view.
- 2 In the Objectives list, drill down on the Objective field hyperlink for the record to which you want to add a target account.
- 3 Click the Target Accounts view tab.
- 4 In the Target Accounts list, query for and select the account that you want to add.
- 5 Click Commit.

The account is added to the Accounts list and becomes a target account for the objective.

After you add a target account to an objective, you can delete the account if it no longer is associated with the objective. For information about target lists, see information about global target list management in *Siebel Applications Administration Guide*.

### *To delete a target account from an objective*

- 1 Navigate to the Objectives screen, then the Retail Objective List view.
- 2 In the Objectives list, drill down on the Objective field hyperlink for the record from which you want to delete a target account.
- 3 Click the Target Accounts view tab.
- 4 In the Accounts list, select the account that you want to delete.
- 5 Click Uncommit.

The account is deleted from the Accounts list and is no longer a target account for the objective.

## Creating Child Objectives

You can associate smaller objectives with a larger objective. The parent objective restricts the associated products of the child objective.

This task is a step in [“Process of Working with Objectives” on page 2.](#)

### *To make one objective the child of another*

- 1 Navigate to the Objectives screen, then the Retail Objective List view.
- 2 In the Objectives list, select the objective record.
- 3 In the Parent Objective field, select a parent objective.

## Changing the Dates for Objectives

During the planning stages for an objective, you can change the objective start date and end date. You can apply date changes that you make to an objective to its recommended activities by manually changing the dates for each activity. You can also apply date changes that you make to an objective to its recommended activities.

This task is a step in [“Process of Working with Objectives” on page 2.](#)

### *To change the dates for an objective*

- 1 Navigate to the Administration - Data screen, then the Objectives view.
- 2 Select the Objective record for which you want to change the start date or end date.
- 3 Select a new start date or end date for the objective by using one of the following methods:
  - In the More Info form, select a new start date or end date for the objective.
  - In the Period field, select a new time period for the objective.

The start date and end date are automatically set to the first and last dates in the period.

The start and end dates must be in the date period of the parent objective.

- 4 In the More Info form, click Apply Period.

The earliest start and latest completion dates of all recommended activities for the objective are reset to the earliest start and latest completion dates of the objective.

## Applying Objectives

After you add all the necessary information to an objective, you must apply the objective. Before you apply an objective, you can modify and update it before end users see its contents.

This task is a step in [“Process of Working with Objectives” on page 2.](#)

### *To apply an objective*

- 1 Navigate to the Objectives screen, then the Retail Objective List view.
- 2 In the Objectives list, drill down on the Objective field hyperlink for the record.
- 3 Click the Target Accounts view tab.

**CAUTION:** Before you click Apply, make sure that all objective information is correct. You can apply an objective only once. This restriction prevents creating multiple iterations of activities that might miscommunicate requirements to end users.

- 4 In the Objective form, click Apply.

## Scheduling Store Visits

After completing the preceding tasks, you can schedule store visits for each account that is added to the objective. The method you use to schedule store visits depends on the feature your organization uses:

- If your organization uses the Routes feature, see [“Using Routes to Schedule Visits \(End User\)” on page 7](#).
- If your organization uses the Retail Execution feature, see [“Planning Retail Visits \(End User\)” on page 3](#).

This task is a step in [“Process of Working with Objectives” on page 2](#).

## Reviewing Objectives (End User)

When end users navigate to the Objectives screen, the default filter on the Objectives list is My Objectives. The remaining view tabs and fields available to the end users in the Objectives screen are identical to those available to the administrator.

For more information about navigating the standard Siebel interface, including using the Explorer tree, see *Siebel Fundamentals*.

This task is a step in [“Process of Working with Objectives” on page 2](#).

### *To review an objective*

- 1 Navigate to the Objectives screen, then the Retail Objective List view.  
The default filter on the Objectives view and the additional filters available depend on the end user’s responsibilities.
- 2 From the visibility filter, select one of the following values:
  - **My Objectives.** Objectives for which the user is assigned to the team.
  - **My Team’s Objectives.** All Objectives in a manager’s team, including the manager’s.
  - **All Objectives.** All Objectives for the user’s organization.

- **All Objectives Across Organizations.** All Objectives across all organizations in the implementation.
- 3 In the Objectives list, drill down on the Objective field hyperlink for a record.
- 4 Click the view tabs to review activities, target accounts, and other information about the objective.

## Changing the Status of Activities (End User)

After performing the recommended activities, you can change the status of the activities. Changing the status of activities allows you to communicate to others that the activity is in progress, completed, or rescheduled.

This task is a step in ["Process of Working with Objectives"](#) on page 2.

### *To change the status of an activity associated with an objective*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink in the account record, and click the Outlet Visits view tab.
- 3 In the Outlet Visits list, drill down on the Description field hyperlink for a visit.
- 4 In the Activities list, change the Status field of the activity.

**NOTE:** You can view the status of Activities by navigating to the Administration - Data screen, Objectives view, Account Status view, and then the Recommended Activities list. This view is read-only; you cannot change an activity's status in this view.

## Checking the Status of Objectives (End User)

You can use the Account Status view or a graphical chart to check objectives and the status of your recommended activities or the recommended activities of your employees.

This task is a step in ["Process of Working with Objectives"](#) on page 2.

### *To check the status of an objective and its activities*

- 1 Navigate to the Objectives screen, then the Retail Objective List view.
- 2 Select the objective record for which you want to review the status.
- 3 Drill down on the Objective field hyperlink for the record, and click the Account Status view tab.
- 4 Select the account record for which you want to review the status.

The recommended activities associated with the account appear in the Recommended Activities list. You can review the status of each recommended activity.

Use the following procedure to check the status of an objective on a chart.

**To check the status of an objective on a chart**

- 1 Navigate to the Objectives screen, then the Charts view.
- 2 Select the objective record for which you want to review the status.
- 3 From the Charts visibility filter, select a chart.

## About Configuring Objectives

This topic contains information that might be useful when configuring the objective features.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 24](#).

Table 24. Buttons And Methods For Objectives Configurations

| Button | Method         | Description                                                                                                                                                                                                                                                               | Supported On |
|--------|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| Apply  | ScheduleVisits | For all the recommended activities in the objective, copies the activities and associates them with each account in the objective. The assignment of the activities depends on the way the recommended activities are set up. (See <a href="#">Table 25 on page 10</a> .) | Applet Layer |
| Commit | CommitAcctnt   | Writes account names from temporary targeting tables to permanent tables where objectives are stored.                                                                                                                                                                     | Applet Layer |

If you use Territory Management, you must flag each recommended activity as Assign to All or define a role or category to which the activity is assigned. [Table 25](#) shows the ways to assign activities if you use Territory Management.

Table 25. Ways to Assign Activities If You Use Territory Management

| Assign To All | Role or Category | Routine | Result                                                                                         |
|---------------|------------------|---------|------------------------------------------------------------------------------------------------|
| Y             | N                | Y       | Creates one activity record for each team member, and marks each record as a routine activity. |
| Y             | N                | N       | Creates one activity record and assigns all team members to the same activity.                 |

Table 25. Ways to Assign Activities If You Use Territory Management

| Assign To All | Role or Category | Routine | Result                                                                                                                                                 |
|---------------|------------------|---------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| N             | Y                | Y       | Creates one activity record and assigns a specific team member based on the member's role-category match and marks the activity as a routine activity. |
| N             | Y                | N       | Creates one activity record and assigns primary and specific team members based on the member's role-category match.                                   |





# 12 Retail Execution

This chapter covers the retail execution procedures that retail sales representatives and their managers perform. Topics include:

- [About Retail Execution on page 1](#)
- [Scenario for Retail Execution on page 2](#)
- [Roadmap for Performing Retail Execution on page 2](#)
- [Preparing for Retail Visits \(End User\) on page 3](#)
- [Planning Retail Visits \(End User\) on page 3](#)
- [Starting Retail Visits \(End User\) on page 5](#)
- [Process of Performing Retail Activities \(End User\) on page 5](#)
- [Creating Retail Activities \(End User\) on page 9](#)
- [Reviewing Account Information \(End User\) on page 10](#)
- [Ending Retail Visits \(End User\) on page 11](#)
- [About Configuring Retail Execution on page 12](#)

## About Retail Execution

The Retail Execution module helps retail sales representatives plan, schedule, execute, and review sales visits to retail outlets. It provides views that allow retail sales representatives to perform a variety of retail visit activities, including:

- Planning visits and associating activities with those visits
- Performing retail assessments
- Performing retail audits
- Reviewing store conditions, historical audit data, required product distribution, and account promotions (planned and underway)

After retail managers use the Objectives module to schedule recommended activities, or plan activities directly in the Activities module, retail sales representatives can use the Retail Execution module to undertake those activities in specifically assigned visits. For more information about objectives, see [Chapter 11, "Objectives."](#)

If retail managers use the Routes module to schedule visits, retail sales representatives and their managers can use the Retail Execution module to plan and carry out those scheduled retail visits. For more information about routes, see [Chapter 13, "Routes."](#)

## Scenario for Retail Execution

Retail sales representatives perform the process in this example scenario for retail execution. Your company might follow a different process according to its business requirements.

A retail sales representative for a large food manufacturer visits a series of retail outlets in southern France each week. He meets with the retail outlet manager and performs various retail activities, such as taking retail orders, conducting retail audits, and promoting sales objectives that his manager establishes.

Each morning, he checks his calendar and starts planning his visits for the day. He begins by reviewing activities from prior visits, noting any outstanding issues that require special attention, and checking for any objectives that are assigned to his accounts.

Today, he notices that a new objective named Southern France Beverage Launch was created for one of the accounts he is scheduled to visit. The following list of activities is also included:

- Meet with the retail manager to make sure the new beverage is priced correctly.
- Conduct a retail audit of the beverage to make sure that it is correctly positioned on store shelves.
- Place point-of-sale coupons in the retail outlet.
- Undertake a retail assessment to gain competitive intelligence.

The first two activities have a priority of 1-ASAP, and he knows he can complete them in the time he has to spend at this account. Because he has only one hour to spend at this account, he defers the remaining two activities until a later visit.

Before entering the retail outlet, he records the start time of the visit. While in the store, he performs the activities and takes notes he can use when planning future visits. He also reviews audits that were previously completed, the products carried, and the account promotions currently running. After completing the retail visit, he records the ending time of the visit and changes the status of the activities that he performed to Done.

## Roadmap for Performing Retail Execution

This topic lists the tasks and processes that retail sales representatives typically perform for retail execution. Your company might follow a different roadmap according to its business requirements.

The following list shows the tasks and processes that end users perform for retail execution:

- 1 ["Preparing for Retail Visits \(End User\)" on page 3](#)
- 2 ["Planning Retail Visits \(End User\)" on page 3](#)  
**NOTE:** This procedure is optional if you use the Routes module to schedule store visits.
- 3 ["Starting Retail Visits \(End User\)" on page 5](#)
- 4 ["Process of Performing Retail Activities \(End User\)" on page 5](#)
- 5 (Optional) ["Creating Retail Activities \(End User\)" on page 9](#)

- 6 "Reviewing Account Information (End User)" on page 10
- 7 "Ending Retail Visits (End User)" on page 11

## Preparing for Retail Visits (End User)

Preparing for a retail visit involves reviewing prior visit activities for an account and reviewing an account's objectives.

This task is a step in "Roadmap for Performing Retail Execution" on page 2.

### *To review the activities from a prior visit*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account record, and click the Outlet Visits view tab.
- 3 In the Outlet Visits list, drill down on the Planned Start field hyperlink of the prior visit that you want to review.

The Visit Execution screen appears. Information about the visit appears in the Visit form. In the Activities list, the activities that you performed during that visit appear.

- 4 In the Activities list, drill down on the Activity Type field hyperlink for the activity that you want to review.

Information you recorded during this activity appears. The view that appears depends on the activity type.

- 5 Click the browser Back button to return to the Visit Execution screen.
- 6 Repeat [Step 4](#) and [Step 5](#) for each activity that you want to review.

Use the following procedure to review an account's objectives.

### *To review an account's objectives*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for an account record, and click the Objectives view tab.  
The Objectives list displays all of the objectives that are targeted to the account.
- 3 Check the Start Date and End Date fields for each objective to identify active objectives.
- 4 Drill down on the Objective Name field hyperlink of active objectives to identify targeted accounts and activities to which you are assigned.

## Planning Retail Visits (End User)

After preparing for a retail visit by reviewing prior visit activities and account objectives, you are ready to plan the visit.

You can plan retail visits in two ways. Each way uses of a different module:

- If your organization uses the Routes module, see [“Using Routes to Schedule Visits \(End User\)”](#) on page 7.
- If your organization uses the Retail Execution module, perform the procedure described in this topic.

Planning retail visits involves the following tasks:

- Selecting an account to visit.
- Selecting activities for the visit.

**NOTE:** If you want to create new recommended activities, use the Objectives module. For more information about creating activities, see [“Creating Recommended Activities for Objectives”](#) on page 4.

- Scheduling the visit.
- Checking for activities that users created since a visit was planned.

The following procedure incorporates these tasks and describes the steps to plan a retail visit.

This task is a step in [“Roadmap for Performing Retail Execution”](#) on page 2.

### ***To plan a retail visit***

- 1 Navigate to the Visit Planning screen.
- 2 In the Available Accounts list, select the account for which you want to schedule a visit.
- 3 In the Available Activities list, select the activities that you want to apply to the visit, and click Schedule.

If the activity that you want to add is associated with the account, but not on the list, you must select the Assign To All field for the activity in the account to make the activity available on the list. (Navigate to the Accounts screen, then the Accounts List view, drill down on the Name field hyperlink for the account, and select the Assign To All field in the Activities view.)

- 4 In the Schedule Visit dialog box, complete the necessary fields, and click OK.

The new visit appears in the Scheduled Visits list, and all the activities that are applied to that visit appear in the Scheduled Activities list.

- 5 (Optional) If time elapsed since the original scheduling of the visit and if users created additional activities, retrieve the new activities by performing the following steps:
  - a In the Scheduled Visits list, click Update.
  - b In the Available Activities list, select and apply the new activities to your previously scheduled visit.

**NOTE:** Alternatively, you can click Update in the Visit Execution screen to apply all outstanding activities to a single visit.

## Starting Retail Visits (End User)

After completing the preceding tasks, retail sales representatives are now ready to start the retail visit.

This task is a step in [“Roadmap for Performing Retail Execution” on page 2](#).

### *To begin a retail visit*

- 1 Navigate to the Visit Planning screen.
- 2 In the Scheduled Visits list, and drill down on the Planned Start field hyperlink for a visit record.  
The Visit Execution screen appears and the Activities list displays the retail activities for the visit.  
**NOTE:** You can also navigate directly to the Visit Execution screen, which displays the earliest planned visit with a status not equal to Done.
- 3 (Optional) Click Update in the visit form to automatically apply all activities to the visit, including those users created since the visit was planned.
- 4 In the visit form, click Start Visit.

## Process of Performing Retail Activities (End User)

During a visit, the retail sales representative performs the activities that are selected for the visit. These activities can include the following tasks:

- [“Performing Merchandising Audits” on page 5](#)
- [“Performing Retail Assessments” on page 6](#)
- [“Exchanging Products Between Sales Representatives” on page 7](#)
- [“Performing Retail Audits” on page 8](#)
- [“Reviewing Store Conditions” on page 9](#)

**NOTE:** The procedures in this topic assume that you need to create new activities. In many cases, you do not need to create a new activity because it is already created as a recommended activity for the applicable objective you are working on.

This process is a step in [“Roadmap for Performing Retail Execution” on page 2](#).

## Performing Merchandising Audits

To clearly communicate how an account displays the company’s products, retail sales representatives perform merchandising audits. Merchandising audits allow representatives to record the status of a specific merchandising location at a point of time. They compare and record company criteria against the merchandising location.

For more information about merchandising locations, see [“Associating Account Products with Merchandising Locations \(End User\)” on page 19.](#)

**NOTE:** You must add merchandising locations to the appropriate account before performing the following procedure. For more information about adding merchandising locations, see [“Adding Merchandising Locations to Accounts \(End User\)” on page 13.](#)

This task is a step in [“Process of Performing Retail Activities \(End User\)” on page 5.](#)

### ***To perform a merchandising audit***

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 In the Activities list, create a new record with an activity type of Merchandising Audit.  
**NOTE:** For information about adding an activity to an account visit, see [“Creating Retail Activities \(End User\)” on page 9.](#)
- 3 In the Activity Type field, drill down on the Merchandising Audit hyperlink.
- 4 In the Merchandising Audit list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field            | Comments                                                                                                                                                                                                                          |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name             | The name of the Inventory location that you want to audit.                                                                                                                                                                        |
| Entry Compliance | Record the entry compliance against the company criteria.                                                                                                                                                                         |
| Exit Compliance  | If you make any changes to the merchandising location that qualify for a status change, record your changes.                                                                                                                      |
| Last Relay       | (Optional) If you perform a full relay of the display, enter the current date. Recording the last relay date allows representatives to see the level of maintenance required to keep the display compliant over a period of time. |
| Shelf Space      | Record the percentage of the merchandising location allocated to the company's products.                                                                                                                                          |

- 5 When you finish conducting the audit, select Done from the Status field drop-down list in the Account Activity form.

## **Performing Retail Assessments**

Retail assessments measure an account against a set of predefined attributes. Typically, you create the predefined attributes as assessment templates. The assessment template can help to determine the possibility of introducing a new product or measure the retail presence of a competitor.

For information about creating assessment templates, see the topic about setting up assessment templates in *Siebel Applications Administration Guide*.

This task is a step in [“Process of Performing Retail Activities \(End User\)” on page 5.](#)

### *To perform a retail assessment*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 If a retail assessment activity is not in the Activities list, create a new record with an activity type of Retail Assessment.

**NOTE:** For information about adding an activity to an account visit, see [“Creating Retail Activities \(End User\)” on page 9](#).

- 3 In the Activity Type field, drill down on the Retail Assessment hyperlink.  
The Assessments view in the Accounts screen appears. The current account appears in the Account form.
- 4 In the Assessments list, select the assessment that you want to perform during this visit.
- 5 In the Assessment Attributes list, enter values in the fields for each assessment attribute.

## Exchanging Products Between Sales Representatives

If insufficient quantities are available on the van, complete a stock transfer to load additional stock on the van. To exchange products between two sales representatives, each representative must complete the following procedure.

This task is a step in [“Process of Performing Retail Activities \(End User\)” on page 5](#).

### *To exchange products with another sales representative*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 If a stock transfer activity is not in the Activities list, create a new record with an activity type of Stock Transfer.

**NOTE:** For information about adding an activity to an account visit, see [“Creating Retail Activities \(End User\)” on page 9](#).

- 3 In the Activity Type field, drill down on the Stock Transfer hyperlink.  
The Part Tracker view in the Activities screen appears.
- 4 Create a new record in the Part Tracker view.
- 5 Set the values for the Source and Destination fields as follows:
  - If you take inventory from your van, select Trunk in the Source field and Customer in the Destination field.
  - If you add inventory to your van, select Customer in the Source field and Trunk in the Destination field.
- 6 Click Commit to update the inventory.

## Performing Retail Audits

Sales representatives perform retail audits to check if products are correctly priced, positioned, and stocked at retail outlets. You can conduct retail audits on your own organization's products and a competitor's products.

You must complete the following tasks before performing a retail audit on a competitor's products:

- Create the competitor's products and add them to the category-product hierarchy. For information about performing this task, see ["Creating Category-Product Hierarchies" on page 6](#).
- Set up product distribution lists. A competitor's products must appear on an authorized product distribution list before you can include them in a retail audit. For information about performing this task, see ["Creating Distribution Lists" on page 7](#).

This task is a step in ["Process of Performing Retail Activities \(End User\)" on page 5](#).

### *To perform a retail audit*

- 1 Navigate to the Visit Execution screen and locate your visit in the visit form.
- 2 If a retail audit activity is not in the Activities list, create a new record with an activity type of Retail Audit.  
**NOTE:** For information about adding an activity to an account visit, see ["Creating Retail Activities \(End User\)" on page 9](#).
- 3 In the Activity Type field, drill down on the Retail Audit hyperlink.  
The Retail Audit view appears.
- 4 In the Retail Audit link bar, click the Retail Audit link, and then click List Products.  
A list of all the products authorized for distribution to the account and designated for a retail audit appears in the Retail Audit list. The list includes products from your organization and a competitor's products.  
**NOTE:** Each specific combination of an account and a product contains an Auditable field and Delist Date field, as shown in the Account Products view. The List Products button shows only products that are auditable (where the Auditable field is checked) and not delisted (where the Delist Date field is blank or later than today).
- 5 Select a product record for which you want to perform a retail audit.
- 6 Scroll down to the Product form, and record observations about the conditions of the selected product in the appropriate fields.
- 7 When you finish conducting the audit, scroll back to the Account Activity form, and select Done from the Status field drop-down list.



## Reviewing Store Conditions

Retail sales representatives periodically review the store conditions of an account. The review measures store conditions over time and is useful for managers who analyze an account.

**NOTE:** If you delete or deactivate an ADL (Product) or Merchandising Location, associated product and inventory location information remains in the Store Condition record.

This task is a step in [“Process of Performing Retail Activities \(End User\)”](#) on page 5.

### *To review store conditions*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field hyperlink for the account, and click the Store Conditions view tab.
- 3 In the Store Conditions Product list, select the product record for which you want to check store conditions.

A list of previous store condition reviews appears in the Store Conditions list below the Store Conditions Product list.

- 4 To view a graphical representation of changes in the Price Point or Facing Number between various store condition reviews, select Store Condition Chart from the Store Conditions drop-down list.

## Creating Retail Activities (End User)

If you want to perform additional available retail activities or new activities that you did not previously plan, you can add them during the visit.

This task is a step in [“Roadmap for Performing Retail Execution”](#) on page 2.

### *To add an available retail activity*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 From the visit form, locate the account record to which you want to add an available activity.
- 3 Click Update to add available activities to this visit.
- 4 In the Available Activities list, select the activity record that you want to add.

If the activity that you want to add is associated with the account, but not on the list, you must select the Assign To All field for the activity in the account to make the activity available on the list. (Navigate to the Accounts screen, then the Accounts List view, drill down on the Name field hyperlink for the account, and select the Assign To All field in the Activities view.)

Use the following procedure to create a new retail activity.

### *To create a new retail activity*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.

- 2 In the Activities list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field               | Comments                                                                                                                                                                                                                                                                           |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New                 | This field is automatically selected when you create an activity. Later, you can clear this field to indicate that the activity is no longer new.                                                                                                                                  |
| Started             | This field is automatically populated with the time that you create the activity. Change this setting if necessary.                                                                                                                                                                |
| Status              | The status of the activity, for example, In Progress.                                                                                                                                                                                                                              |
| Required            | Select this check box to designate that you must complete or reschedule the activity before ending a visit.                                                                                                                                                                        |
| Products            | This field displays products associated with the activity.                                                                                                                                                                                                                         |
| Alarm               | Select this check box to enable an alarm for this activity.                                                                                                                                                                                                                        |
| Last Name           | The last name of the contact person for the activity.                                                                                                                                                                                                                              |
| Suppress Calendar   | If this field is selected, the activity does not appear in the Calendar views.                                                                                                                                                                                                     |
| Assessment Template | The name of the assessment template assigned to the activity. If the activity requires an assessment, you can associate the relevant assessment template with the activity. For more information about assessment templates, see <i>Siebel Applications Administration Guide</i> . |
| Assigned To         | To delegate the activity to another employee, select the appropriate employee.                                                                                                                                                                                                     |

## Reviewing Account Information (End User)

During the visit, the retail sales representative might want to review and discuss the account's performance (indicated by retail and merchandising audits), products listed for the account, and the promotions assigned to the account.

This task is a step in ["Roadmap for Performing Retail Execution" on page 2](#).

### *To review account audit information*

- 1 Navigate to the Visit Execution screen.
- 2 Locate your visit in the visit form, and click the Account Audits view tab.
- 3 Toggle between the Retail Audit list and the Merchandising Audit list by using the Account Audits drop-down list:
  - The Retail Audit list provides a list of retail audit products for the current account from the last 65 days.

- The Merchandising Audit list provides the merchandising audit locations for the current account from the last 95 days.

Use the following procedure to review account products.

### *To review account products*

- 1 Navigate to the Visit Execution screen.
- 2 Locate your visit in the visit form, and click the Account Products view tab.

Use the following procedure to review account promotions.

### *To review account promotions*

- 1 Navigate to the Visit Execution screen.
- 2 Locate your visit in the visit form, and click the Account Promotions view tab.
- 3 (Optional) To add an attachment to an account promotion, complete the following steps:
  - a Select an account promotion, and page down to the Attachments list.
  - b To add a new file attachment, click New File, navigate to the file, select it, and click Open. The attachment appears in the Attachments list.
  - c To add a new URL attachment, click New URL, enter the URL in the URL file, and click Add. The attachment appears in the Attachments list.

Use the following procedure to review parent account promotions.

### *To review parent account promotions*

- 1 Navigate to the Visit Execution screen.
- 2 Locate your visit in the visit form, and click the Parent Account Promotions view tab.

## Ending Retail Visits (End User)

After performing the selected retail activities and reviewing account information, the retail sales representative is ready to end the retail visit.

**NOTE:** If required activities remain for the visit, you must complete or reschedule those activities before you can end the visit.

This task is a step in [“Roadmap for Performing Retail Execution”](#) on page 2.

### *To end a retail visit*

- 1 Navigate to the Visit Execution screen and locate your visit in the visit form.
- 2 Click End Visit.

## About Configuring Retail Execution

This topic contains information that might be useful when configuring the retail execution features.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 26](#).

Table 26. Buttons And Methods For Retail Execution Configurations

| Button                            | Method                          | Description                                                                                                                                                   | Supported On   |
|-----------------------------------|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| List Products (Retail Audit)      | InstantiateAccountProducts      | Adds all authorized products to parent account activity.                                                                                                      | Bus Comp Layer |
| List Products (Retail Audit List) | InstantiateAcctMerchLocProducts | Finds all products that belong to merchandising location and that have the retail audit flag set. Adds these products to account activity for parent account. | Applet Layer   |
| Update                            | OnSetUpVisits                   | Applies recommended activities to selected visit.                                                                                                             | Bus Comp Layer |

# 13 Routes

Retail sales managers can create routes and schedule visits for the sales representatives that they manage. This chapter describes how to organize retail accounts into routes, use routes to schedule visits, and maintain routes that frequently change. Topics include:

- [About Routes on page 1](#)
- [Scenarios for Creating and Using Routes on page 1](#)
- [Process of Creating and Using Routes on page 3](#)
- [Creating Routes \(End User\) on page 3](#)
- [Adding Accounts to Routes \(End User\) on page 4](#)
- [Assigning Target Lists to Routes \(End User\) on page 6](#)
- [Using Routes to Schedule Visits \(End User\) on page 7](#)
- [About Configuring Routes on page 8](#)

## About Routes

A route specifies the order in which retail sales representatives visit the accounts and the starting time for each visit. Use routes to schedule visits to groups of accounts that retail sales representatives visit regularly and on the same day or series of days. You can also schedule nonroutine visits to accounts by assigning target lists created in Account Targeting. By arranging a group of accounts into an efficient route, you can make sure that retail sales representatives minimize the amount of time spent traveling between accounts.

After you create a route, you can use the route repeatedly to schedule store visits to the accounts in the route. You can also create routes to schedule store visits for a specific period of time in support of a corporate promotion, a campaign, or an objective.

## Scenarios for Creating and Using Routes

Retail sales managers and retail sales representatives perform the processes in these example scenarios for creating routes. Your company might follow different processes according to its business requirements. Topics include:

- [“Scenario for Creating Routes” on page 2](#), which illustrates how retail sales representatives can use the Routes views to organize retail accounts into routes and use routes to schedule visits.
- [“Scenario for Creating Routes for Sales Representatives” on page 2](#), which illustrates how retail sales managers can create routes and schedule visits for the retail sales representatives who they manage.

- [“Scenario for Creating Routes That Change Frequently” on page 3](#), which illustrates how retail sales managers and retail sales representatives can create and manage routes that change frequently.

### Scenario for Creating Routes

A retail sales representative for a large beverage manufacturer has a sales territory covering a large section of central Virginia. She visits each of the large grocery stores in her territory once a month. Most of her accounts are in Richmond, a large city. However, she visits grocery stores in several small cities. Because she always visits the same accounts in the same order, she organizes her accounts into efficient routes that she can use each month to schedule her visits.

The retail sales representative begins by creating a series of routes for the accounts in the Richmond area. Each route covers a group of accounts from one geographical area, such as northeast Richmond, that she can visit in one day. Next, she creates a four-day route that includes all of her accounts in the outlying parts of her sales territory. Day one of the route takes her to accounts in Danville and Pulaski. The following three days take her to accounts in Roanoke, Lynchburg, and Charlottesville.

After she finishes creating her routes, she uses them to schedule visits to all the accounts in her territory for the upcoming month. She specifies the date on which the route begins. Additional details, such as the starting time and duration of each visit, are determined by information she enters when she sets up the route. Each month she can again use the routes that she creates to schedule account visits.

### Scenario for Creating Routes for Sales Representatives

A retail sales manager for a large beverage manufacturer manages 12 retail sales representatives working in the Baltimore-Washington area of the eastern United States. One of his representatives, a new employee, is not familiar with her territory, which includes several grocery stores and drugstores in the District of Columbia. The retail sales manager is familiar with this area, so he handles the task of organizing the new representative's accounts into a series of routes. Each route covers one section of the District. The representative needs to visit the accounts in each route every two weeks. Therefore, he decides to create 10 routes—one for each workday in a two-week period. Each route includes six or seven stores in one neighborhood, such as Georgetown, and the representative can complete each route in one day.

When he finishes creating the routes, he uses them to schedule a month's worth of store visits for the new sales representative. The retail manager schedules the first route to begin on the first and third Mondays of the month, the second route to begin on the first and third Tuesdays of the month, and so forth, so that each route is scheduled twice during the month. The starting time and duration of each store visit are determined by information he enters when he sets up the routes.

When the retail sales representative becomes familiar with the area, the retail manager gives the representative the task of maintaining her routes. The retail sales representative can now add new accounts to a route, change the order in which she visits routes, or adjust the starting times and durations of the visits.

## Scenario for Creating Routes That Change Frequently

A brand manager at the beverage manufacturer establishes a corporate promotion that will run for the next two weeks. The retail sales manager for the beverage manufacturer reviews the corporate promotion criteria to understand the target group of accounts, and concentrates on managing the retail execution with retail sales representatives. He sends an email message to his sales team detailing the criteria they must use when generating their account lists and telling them to schedule a new call cycle for the corporate promotion.

One of the retail sales representatives who reports to the retail manager is planning for the next week. She receives the email message and decides to plan her route immediately. In her local database, she generates a target list. After she generates an optimal list of target accounts, she creates a new route and applies the target list to it. Finally, she schedules visits over the next two weeks for all of the accounts in the target list.

## Process of Creating and Using Routes

End users, such as retail sales representatives, typically create routes. A retail sales manager can create routes and assign them to a retail sales representative. This topic lists the tasks that end users typically perform to plan routes. Your company might follow a different process according to its business requirements.

The following list shows the tasks that end users typically perform to create routes and use them to schedule store visits:

- 1 ["Creating Routes \(End User\)" on page 3](#)
- 2 ["Adding Accounts to Routes \(End User\)" on page 4](#)
- 3 (Optional) ["Assigning Target Lists to Routes \(End User\)" on page 6](#)
- 4 ["Using Routes to Schedule Visits \(End User\)" on page 7](#)

**NOTE:** When creating and scheduling a route with a limited duration, such as a route in support of a corporate promotion, you can perform all of the preceding steps in the Target Accounts view.

## Creating Routes (End User)

Create routes to manage the scheduling of retail visits to accounts in a geographical area. Use the following guidelines for creating routes:

- You must specify the person (generally, a retail sales manager or a retail sales representative who reports to a retail sales manager) for whom you are creating the route.
- A retail sales representative can have many assigned routes, but each route can have only one assigned retail sales representative.
- A route can have any number of accounts.
- A route name cannot exist for more than one route assigned to a retail sales representative. However, the same route name can exist for routes that are assigned to different retail sales representatives.

- If a retail sales representative will use the route repeatedly to schedule visits, do not specify a start date when creating the route.

This task is a step in [“Process of Creating and Using Routes” on page 3](#).

### To create a route

- 1 Navigate to the Routes screen, then the Routes List view.
- 2 In the Routes list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field        | Comments                                                                                                                                                                                                                                                                                                               |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Route Id     | The automatically generated unique number assigned to the route.                                                                                                                                                                                                                                                       |
| Route Name   | A name for the route (for example, Northeast Richmond). A route name must be unique to the retail sales representative to which it is assigned.                                                                                                                                                                        |
| Description  | A description of the route.                                                                                                                                                                                                                                                                                            |
| Sales Person | The salesperson to whom the route is assigned. You can assign a route to only one person.<br><br>In the My Routes view, the Sales Person field is automatically populated with the current user name. If you want to assign a route to someone other than yourself, enter that person's name in the Salesperson field. |
| Start Day    | The day of the week in which the route begins. This field is only reference information and does not prevent you from using the route to schedule visits starting on another day of the week.                                                                                                                          |
| Active       | Select this field to indicate that the route is active and available for use in scheduling visits.                                                                                                                                                                                                                     |
| Last Updated | The time and date a user last changed the route.                                                                                                                                                                                                                                                                       |

## Adding Accounts to Routes (End User)

After you establish a route, you can add accounts to it. You can assign any number of accounts to one route. Add accounts to routes in two views:

- **Route Accounts.** Displays accounts in a list.
- **Route Explorer.** Displays routes and accounts in a hierarchical format.

**NOTE:** When you add accounts to a route using the Route Explorer view, you associate the account record with the route based on a parent-child relationship. When you add accounts to a route using the Route Accounts view, you add an individual account record without needing to understand the account's relationship with other account records.



This topic provides separate procedures for using each of these views.

**NOTE:** You can pick any existing account in the database when associating an account with a route. When associating an account with a route, select only those accounts for which the owner of the route is on the sales team.

This task is a step in [“Process of Creating and Using Routes”](#) on page 3.

### *To add accounts to a route using the Route Accounts view*

- 1 Navigate to the Routes screen, then the Routes List view.
- 2 Drill down on the Route Name field hyperlink for a route.
- 3 In the Accounts list, create a new record, and complete the necessary fields. Repeat this step for each account you want to add to the route.

The following table describes some fields.

| Field         | Comments                                                                                                                                                                                                                                                                                                                    |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Call Duration | The scheduled duration of the account visit.<br><br><b>NOTE:</b> In Siebel Tools, this field has a Predefault Value of 5. Do not edit this predefault value. Changing this value leads to an error when you commit target accounts.                                                                                         |
| Call Time     | The current time. Edit this field to reflect the time when you visit the account.                                                                                                                                                                                                                                           |
| Offset Day    | This field allows you to create routes that span more than one day, and indicates the number of days after the beginning of the route that you visit an account. For example, if you visit an account on the first day of a route, this field is 0. If you visit the account on the second day of a route, this field is 1. |
| Last Call     | This field identifies the date and time of the most recent visit to this account.                                                                                                                                                                                                                                           |

Use the following procedure to add accounts to a route using the Route Explorer view.

### *To add accounts to a route using the Route Explorer view*

- 1 Navigate to the Routes screen, then the Routes List view.
- 2 Drill down on the Route Name field hyperlink for a route, and click the Explorer view tab.
- 3 In the Routes explorer tree, click the plus sign (+) next to the folder of the route to which you want to add an account.
- 4 Click the plus sign (+) next to the Accounts folder that is under the route.  
A list of all the accounts assigned to the route appears.
- 5 In the Accounts list, create a new record, and complete the necessary fields.

[Step 3 on page 5](#) describes some fields.

Repeat this step for each account that you want to add to the route.

## Assigning Target Lists to Routes (End User)

On your local database, you can use account lists that are created with the Account Targeting feature. After creating and saving a target list, you can optimize the target list by merging (intersecting or combining) it with other target lists. When you finish merging target lists, you can assign the results to a route. You can also add or delete accounts after assigning the list of accounts to a route.

**NOTE:** The Account Targeting module is designed for end users, such as retail sales representatives who have local data access and are not continuously connected to a network. For more information about Account Targeting, see [Chapter 14, "Account Targeting."](#)

This task is a step in ["Process of Creating and Using Routes"](#) on page 3.

### *To merge a target list*

- 1 Navigate to the Routes screen, then the Routes List view.
- 2 Drill down on the Route Name field hyperlink for a route, and click the Target Accounts view tab.
- 3 Select a record in the Target Accounts list to activate the list.
- 4 In the toolbar, click the Apply Target List button (located on the extreme left of the toolbar) and apply an account target list.
- 5 (Optional) Select multiple target lists and click Union (to combine the lists) or Intersection (to intersect the lists).

If you combine or intersect lists, you can save the new list as a target list.

- 6 Repeat [Step 4](#) and [Step 5](#) until you optimize your target list.

You are now ready to assign the target list to a route. For information about target lists, see information about global target list management in *Siebel Applications Administration Guide*.

### *To assign a target list to a route*

- 1 Navigate to the Routes screen, then the Routes List view.
- 2 Drill down on the Route Name field hyperlink for a route, and click the Target Accounts view tab.
- 3 In the Target Accounts list, select the accounts that you want to add to a route.
- 4 Click Commit.

The selected accounts are added to a route and appear in the Accounts list.

- 5 Enter values in the fields for each account that you add.

The following table describes some fields.

| Field         | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Call Time     | <p>Edit this field to reflect the time when you visit the account.</p> <p>For the first account you assign to a route, this field defaults to the value in the Working Hours Start At field in the Calendar view of the User Profile Preferences screen. Subsequent accounts you assign to the route accommodate existing accounts. For example, if a route has one account with a call time of 8:00 AM and a call duration of 30 minutes, the second account you assign to the route defaults to a call time of 8:30 AM.</p> |
| Call Duration | <p>Edit this field to reflect the scheduled duration of the account visit.</p> <p>For all accounts you assign to a route, this field defaults to the value in the Appointment Duration field in the Calendar view of the User Profile Preferences screen.</p>                                                                                                                                                                                                                                                                 |
| Offset Day    | <p>This field allows you to create routes that span more than one day, and indicates the number of days after the beginning of the route that you visit an account. For example, if you visit an account on the first day of a route, this field is 0. If you visit the account on the second day of a route, this field is 1.</p>                                                                                                                                                                                            |
| Last Call     | <p>This field identifies the date and time of the most recent visit to this account.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Using Routes to Schedule Visits (End User)

After you create a route, you can use it to schedule visits to all the accounts you add to the route.

**CAUTION:** You can schedule multiple appointments for the same time period when using the Routes views to schedule visits. Such scheduling conflicts do not trigger an automatic notification. Check the Daily Calendar view for possible conflicts after routes are available on schedules. If scheduling conflicts exist, adjust the starting times of appointments or delete them as necessary to resolve the conflicts.

This task is a step in [“Process of Creating and Using Routes”](#) on page 3.

### *To schedule visits from the My Routes view*

- 1 Navigate to the Routes screen, then the Routes List view.
- 2 Drill down on the Route Name field hyperlink for a route, and click the More Info view tab.
- 3 In the More Info form, click Schedule.

- 4 In the Schedule Visit dialog box, enter a date in the Start Date field, and click OK.

In-store visit appointments for each account in the route are added to the calendar of the retail sales representative to whom the route is assigned. All activities that are relevant to the visit are automatically applied. Therefore, you do not need to associate activities to visits after you create them.

## About Configuring Routes

This topic contains information that might be useful when configuring the Routes features.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 27](#).

Table 27. Buttons And Methods For Routes Configurations

| Button                           | Method     | Description                                                                                       | Supported On   |
|----------------------------------|------------|---------------------------------------------------------------------------------------------------|----------------|
| Commit                           | CommitAcct | Writes account names from temporary targeting tables to permanent tables where routes are stored. | Applet Layer   |
| Schedule - Routes More Info view | ShowPopup  | Opens a dialog box for sales representative and start date.                                       | Bus Comp Layer |
|                                  | OK         | Creates an activity for the sales person to visit all accounts specified as route accounts.       |                |
| Schedule - Target Accounts view  | ShowPopup  | Opens a dialog box for sales representative and start date.                                       | Bus Comp Layer |
|                                  | OK         | Creates an activity for the sales person to visit all accounts specified as route accounts.       |                |

# 14 Account Targeting

Account Targeting allows end users to perform advanced queries on accounts and save the results as target lists. This chapter describes how administrators and retail sales representatives use the queries in Account Targeting to create target lists and merge these lists with other target lists. Topics include:

- [About Account Targeting on page 1](#)
- [Scenarios for Account Targeting on page 2](#)
- [Process of Account Targeting on page 4](#)
- [Making Predefined Queries Public on page 4](#)
- [Deleting Saved Predefined Queries on page 5](#)
- [Creating Target Lists \(End User\) on page 5](#)
- [Saving Target Lists \(End User\) on page 8](#)

## About Account Targeting

You can use Account Targeting only on a mobile user's local database. It allows end users to perform advanced queries on accounts and save the results. The results of these queries are called *target lists*. Target lists consist of accounts that meet the query conditions. End users can apply target lists when scheduling routes or viewing objectives. Typically, target lists are for a specific purpose and period of time in support of a corporate promotion, a campaign, or an objective.

Retail sales representatives use the views in the Target Accounts screen to perform advanced queries on the accounts that they need when creating target lists. For example:

- Accounts in New Jersey with sales greater than \$60,000 over the last half year
- Accounts that are located in a specific range of postal codes and that were last audited over five weeks ago
- Accounts in California that are out of stock for a product
- Accounts that are visited weekly, that have a distribution code of B, and that last placed an order more than three weeks ago

You can apply target lists individually or in combination with other target lists when you schedule routes or design objectives and corporate promotions. For example, you can generate a target list of all California accounts that are out of stock of 20-ounce bottles of Apricot Splash. You can generate another target list of all California accounts that were not visited in the past 30 days. You can intersect the two lists and save the target list of all California accounts that were not visited in the past 30 days and that are out of stock of 20-ounce bottles of Apricot Splash. You can apply this target list to routes that retail sales representatives visit. For information about assigning target lists to routes, see [“Assigning Target Lists to Routes \(End User\)” on page 6](#).

**NOTE:** You must execute Account Targeting queries in the same view in which users create the queries, so include the name of the appropriate view in the query name.

You can apply the target list to a route, an objective, or a corporate promotion. For information about applying target lists to:

- Routes, see [Chapter 13, “Routes.”](#)
- Objectives, see [Chapter 11, “Objectives.”](#)
- Corporate promotions, see [Chapter 8, “Trade Promotions.”](#)

**NOTE:** The Account Targeting module is designed for end users, such as retail sales representatives, who have local data access and are not continuously connected to a network.

## Scenarios for Account Targeting

System administrators, account managers, retail managers, and sales representatives perform the processes in these example scenarios for creating lists of target accounts. Your company might follow different processes according to its business requirements. Topics include:

- [“Scenario for Creating Target Lists for Sales Representatives” on page 2](#), which illustrates how account managers can create target lists that retail sales representatives use.
- [“Scenario for Creating Target Lists” on page 3](#), which illustrates how retail sales representatives can create and use their own target lists.

### Scenario for Creating Target Lists for Sales Representatives

A brand manager establishes a corporate promotion to run at all grocery stores. The account manager for the corporate headquarters of a large chain of grocery stores supports this corporate promotion. As part of the support for this corporate promotion, the account manager wants sales representatives to target specific accounts.

The account manager begins by determining the key attributes that are necessary for a successful corporate promotion. She determines that the sales force must focus on an optimal set of accounts defined by the intersection of accounts with a store condition of Out of Stock and accounts with an industry type of Grocery and an Order Quantity greater than 100. She creates two predefined queries. She creates the first predefined query to generate a list of accounts with a store condition of Out of Stock and saves this list. She creates a second predefined query to generate a list of accounts with an industry type of Grocery and an Order Quantity greater than 100 and saves this list. She intersects the two lists, and a target list of 41 accounts is returned.

The account manager sends an email message to the system administrator to request that he make public her two predefined queries. The system administrator unlocks the two predefined queries. Unlocking allows all Consumer Goods users to view and execute the queries. The system administrator sends an email message to the account manager to let her know the predefined queries are public and now available to anyone using the Consumer Goods application.

The account manager sends an email message to her retail managers and retail sales representatives directing them to intersect a list of accounts with a store condition of Out of Stock and a list of accounts with an industry type of Grocery and an Order Quantity greater than 100.

A retail sales representative is at home Sunday evening planning for the next work week. He receives the email message and decides to plan his route immediately. In his local database, he executes the two public predefined queries and saves the target list of returned accounts.

The retail sales representative now has three options. He can assign the target list to a route he created, save the target list for a later date, or select a different view to delete the target list. After assigning the target list to a route, he can add and delete accounts from the list. He can also select only the accounts he wants to add to the route. The retail sales representative decides to assign the target list to a route and adds accounts from the list.

Finally, before he logs off his computer for the evening, he deletes all target lists that are more than two weeks old.

## Scenario for Creating Target Lists

A retail sales representative is planning his visits for the week. Each day, he visits between 40 and 50 different accounts, often spending only a few minutes at each account. Because he is responsible for such a large number of accounts, he needs to track his visits and the activities he performs during those visits.

He determines that the optimal set of accounts to visit is the union of accounts that did not place an order last week and that were not audited in the last two weeks. He creates two queries. He creates the first query to generate a list of accounts that did not place an order last week and saves this list. He creates a second query to generate a list of accounts that were not audited in the last two weeks and saves this list. He combines the two lists, and a target list of 48 accounts is returned. Because the retail sales representative wants to visit the accounts on the list this week, he assigns the target list to his route for the week.

## Process of Account Targeting

This topic lists the tasks that administrators and end users typically perform to manage account targeting. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks that administrators typically perform to manage account targeting:

- 1 [“Making Predefined Queries Public” on page 4](#)
- 2 [“Deleting Saved Predefined Queries” on page 5](#)

### End-User Procedures

The following list shows tasks that end users typically perform to access and use account targeting:

- 1 [“Creating Target Lists \(End User\)” on page 5](#)
- 2 [“Saving Target Lists \(End User\)” on page 8](#)
- 3 [“Assigning Target Lists to Routes \(End User\)” on page 6.](#)

After creating and saving a target list, retail sales representatives can merge (intersect or combine) it with other target lists. Then, retail sales representatives can assign the results to a route in the view that they use to plan their routes or objectives. After assigning the list of accounts to a route, they can add or delete accounts to optimize their target list.

## Making Predefined Queries Public

You must make predefined queries public before end users can view and execute the queries.

**NOTE:** Other users must first exit and reenter the application before they can see the new public query.

This task is a step in [“Process of Account Targeting” on page 4.](#)

### *To make a predefined query public*

- 1 Navigate to the Administration - Application screen, then the Predefined Queries view.
- 2 In the Predefined Queries list, click Query.
- 3 In the Object field drop-down list, select Account Targeting.
- 4 In the Predefined Queries list, click Go.

A list of all predefined queries containing Account Target is returned.



- 5 In the Predefined Queries list, select the record containing the predefined query that you want to make public.

**NOTE:** Make sure that the name of the query includes the view in which the user created the query so that other users can execute the query in the same view. The view name in which the user created the query appears in the Query field, and you can edit the name of the query in the Name field.

- 6 In the Predefined Queries list, change the letter in the Private field to N.

The predefined query is now public, and all users with access to the Account Targeting views can execute the query.

## Deleting Saved Predefined Queries

You can delete saved queries that you no longer need after a corporate promotion or sales event ends. This deletion allows users to view and execute only current predefined queries.

This task is a step in [“Process of Account Targeting” on page 4](#).

### *To delete a saved query*

- 1 Navigate to the Administration - Application screen, then the Predefined Queries view.
- 2 In the Predefined Queries list, click Query.
- 3 In the Object drop-down list, select Account Targeting.
- 4 In the Predefined Queries list, click Go.

A list of all predefined queries containing Account Targeting is returned.

- 5 In the Predefined Queries list, click Delete.

The selected predefined query is deleted, and users can no longer view or execute it.

## Creating Target Lists (End User)

The views in the Target Accounts screen allow end users to select profile information about which to query, such as visit frequency, last visit date, and order date. The results that they save consist of a set of accounts.

If end users query only an account profile attribute, they can use the Account Information view. This view returns all accounts that meet the query conditions, whether or not the accounts contain demographic or assessment information. Using a different view to query account profile information returns accounts that meet the query conditions *and* the condition for the view. For example, querying from the Orders view returns only those accounts that contain orders and meet the query conditions. For information about performing queries, see *Siebel Fundamentals*.

**NOTE:** Account Targeting uses your local database. The end user's target lists are not synchronized with the Siebel Server. Therefore, if end users receive a new database extract, they must re-create their target lists. However, if an end user is a remote user, the normal process of synchronizing a local database with the Siebel Server does not affect the end user's target lists.

End users who want to perform queries on fields across multiple forms in a single targeting view need to use the refine query feature. For example, an end user who wants to perform a query for all California accounts with a distribution code of A must enter the query criteria (all California accounts) in the Account Attribute Selection form and then refine the query in the Demographics and Assessment form to include only those accounts with a distribution code of A.

This task is a step in ["Process of Account Targeting" on page 4](#).

### *To refine a query*

- 1 Navigate to the Target Accounts screen, then the Account Targeting List view.
- 2 From the visibility filter, select one of the following values:
  - **Account Information.** Select this value to perform a query for demographics and assessments.
  - **Orders.** Select this value to perform a query for orders.
  - **Store conditions.** Select this value to perform a query for store conditions.
- 3 In the Account Attribute Selection form, click Menu, and select New Query.
- 4 Enter the criteria in the fields for which you want to perform a query.
- 5 In the next form, click Menu, and select Refine Query.
- 6 Enter the criteria in the fields for which you want to perform a query, click Menu, and select Run Query.

In the Target Accounts list, accounts that satisfy both sets of query criteria appear.

To save the target list, see ["Saving Target Lists \(End User\)" on page 8](#).

Use the following procedure to create a target list based on demographics and assessments.

**NOTE:** The more fields in which an end user enters query criteria, the longer the time to execute the query. Also, if an end user enters a query condition that is too general (such as all accounts with a Weekly ACV greater than 1), saving the query later can take a long time because of the number of records meeting the query criteria.

### *To create a target list based on demographics and assessments*

- 1 Navigate to the Target Accounts screen, then the Account Targeting List view.

- 2 From the visibility filter, select Account Information.
- 3 In the Demographics and Assessment form, click Menu, and select New Query or select a predefined query from the Queries drop-down list.
- 4 Specify the query criteria or refine a predefined query, if necessary.
- 5 In the Demographics and Assessment list, click Menu, and select Run Query.

The results of the query are returned.

To save the target list, see [“Saving Target Lists \(End User\)” on page 8](#).

Use the following procedure to create a target list based on orders.

#### ***To create a target list based on orders***

- 1 Navigate to the Target Accounts screen, then the Account Targeting List view.
- 2 From the visibility filter, select Orders.
- 3 In the Order form, click Menu, and select New Query, or select a predefined query from the Favorites drop-down list.
- 4 Specify the query criteria or refine a predefined query, if necessary.
- 5 In the Order form, click Menu, and select Run Query.

The results of the query are returned.

To save the target list, see [“Saving Target Lists \(End User\)” on page 8](#).

Use the following procedure to create a target list based on store conditions.

**NOTE:** When an end user queries a product and a store condition, only the last audit date of the product is queried for the specified condition. When an end user queries only a store condition, all products with the store condition are returned.

#### ***To create a target list based on store conditions***

- 1 Navigate to the Target Accounts screen, then the Account Targeting List view.
- 2 From the visibility filter, select Store Conditions.
- 3 In the Store Conditions form, click Menu, and select New Query or select a predefined query from the Queries drop-down list.
- 4 Specify the query criteria or refine a predefined query, if necessary.
- 5 In the Store Conditions form click Menu, and select Run Query.

The results of the query are returned.

To save the target list, see [“Saving Target Lists \(End User\)” on page 8](#).

## Saving Target Lists (End User)

When an end user finishes creating and refining a target list, the user can save and apply the list to a route. For information about applying a target list to a route, see [“Assigning Target Lists to Routes \(End User\)” on page 6](#). You can also apply a target list to an objective or a corporate promotion. For information about applying a target list to an objective, see [Chapter 11, “Objectives,”](#) and for information about applying a target list to a corporate promotion, see [Chapter 8, “Trade Promotions.”](#)

Before performing the following procedure, you must create a target list.

**NOTE:** The saved target list includes only those records that match the query criteria *when the query was created*. It is recommended that you re-create your target lists periodically because other users might modify data or add new accounts after you create the target lists.

This task is a step in [“Process of Account Targeting” on page 4](#).

### *To save a target list*

- 1 Click the Save Target List button (located on the toolbar).

**NOTE:** Do not use the keyboard shortcut CTRL+S, the Edit, Query, and then Save command (from the menu bar), or the Save Query As dialog box to save the query unless you want to make a complex query public or unless the query is run frequently. For more information about making a query public, see [“Making Predefined Queries Public” on page 4](#).

- 2 In the Save to List dialog box, enter a unique name for the target list in the blank List Name field.

**NOTE:** If you enter a name that is in use, an error message advises you to save the list with a unique name.

- 3 Click Save.

The target list is saved.

# 15 Inventory and Order Management

This chapter describes the inventory and order management process in Oracle's Siebel Consumer Goods. Topics include:

- [About Inventory and Order Management on page 1](#)
- [Scenario for Managing Inventory and Orders on page 2](#)
- [Process of Managing Inventory and Orders on page 3](#)
- [Associating Assets with Inventory Locations \(End User\) on page 3](#)
- [Recording Van Information \(End User\) on page 4](#)
- [Verifying Van Inventory \(End User\) on page 4](#)
- [Reviewing Billings \(End User\) on page 5](#)
- [Taking Retail Orders \(End User\) on page 6](#)
- [Recording Deposits \(End User\) on page 7](#)

## About Inventory and Order Management

Sales representatives, presales representatives, and delivery representatives often capture orders, invoice, and collect payments. In addition to these primary sales responsibilities, they might also collect payment for outstanding billings, exchange products with other delivery representatives, and deposit payments at the local bank. All these activities are part of the inventory and order management process.

A business process is a set of activities organized to achieve a business objective. A business process model depicts the flow of work that users or software applications typically follow to complete a sequence of tasks. The Conduct Retail Visit subprocess business flow shows a greater level of detail for the high-level tasks represented in a business process diagram.

Figure 2 shows an example of a Conduct Retail Visit subprocess business flow.

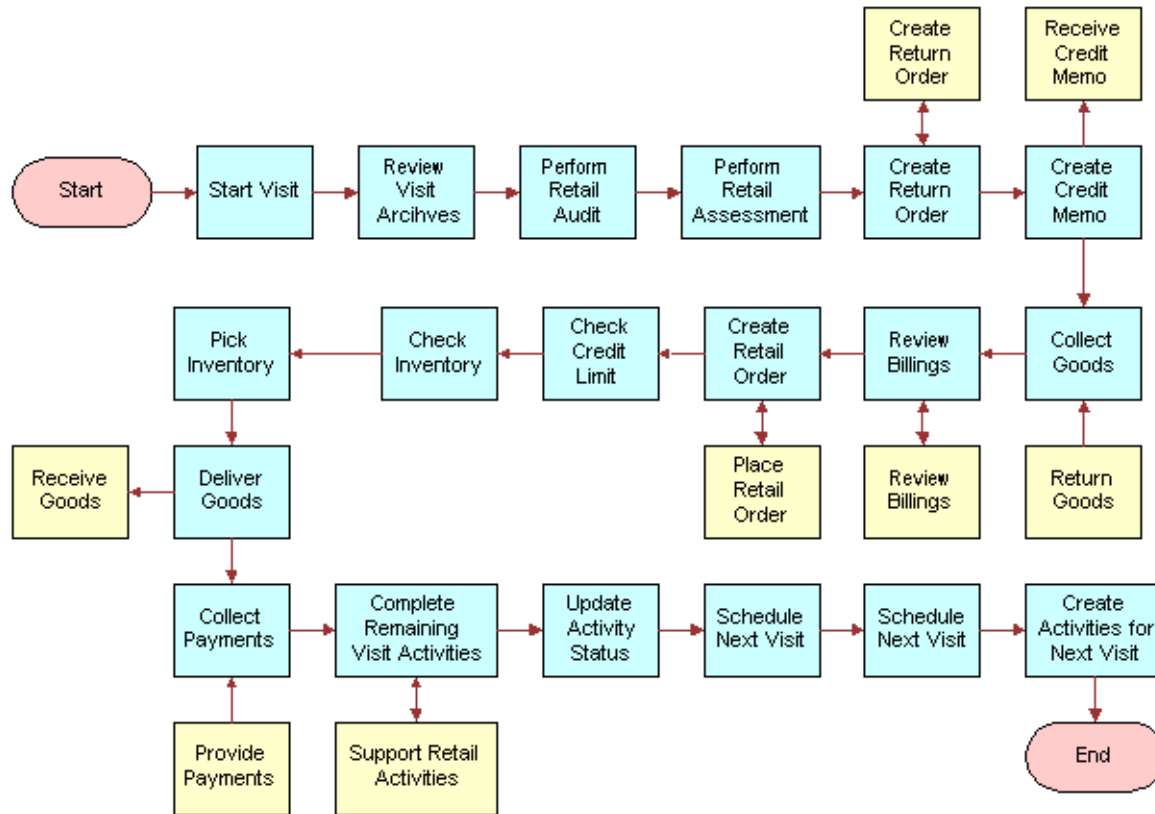


Figure 2. Conduct Retail Visit Subprocess Business Flow

For more information about inventory and order management, see the following documents on the *Siebel Bookshelf*:

- *Siebel Pricing Administration Guide*
- *Siebel Product Administration Guide*
- *Siebel Order Management Guide*

## Scenario for Managing Inventory and Orders

Delivery sales representatives perform the process in this example scenario for managing inventory and orders. Your company might follow a different process according to its business requirements.

Ace Corporation East just bought a new van to use in the delivery of inventory to different outlets. A delivery sales representative at Ace Corporation East drives off the van. He decides to associate the new delivery van with Ace Corporation East's physical location. Before he goes on his first delivery in the van, he registers some information about the van, for example, the van's mileage. Also, he makes sure that the van's inventory on the laptop matches the physical inventory in the van. He is now ready to make the deliveries.

The delivery sales representative drives to the first retail outlet and makes the initial delivery. Also, at this point, he checks for outstanding invoices, collects payments, and records payments. He also talks with the stores manager at the outlet about any orders that the stores manager wants to place, and records these orders. He is now ready to make his next delivery.

Over the course of the day, the delivery sales representative might collect payments and decide to deposit these payments at a designated bank. He must record these deposits.

## Process of Managing Inventory and Orders

This topic lists the tasks that sales representatives typically perform to manage inventory and orders. Your company might follow a different process according to its business requirements.

The following list shows the tasks that end users perform to manage inventory and orders:

- 1 ["Associating Assets with Inventory Locations \(End User\)" on page 3](#)
- 2 ["Recording Van Information \(End User\)" on page 4](#)
- 3 ["Verifying Van Inventory \(End User\)" on page 4](#)
- 4 ["Reviewing Billings \(End User\)" on page 5](#)
- 5 ["Taking Retail Orders \(End User\)" on page 6](#)
- 6 ["Recording Deposits \(End User\)" on page 7](#)

## Associating Assets with Inventory Locations (End User)

A van sales representative can associate assets with inventory locations.

This task is a step in ["Process of Managing Inventory and Orders" on page 3](#).

### *To associate assets with an inventory location*

- 1 Navigate to the Inventory Location Management screen.
- 2 In the Inventory Locations list, select the inventory location to which you want to associate assets, and click the select button in the Asset field.
- 3 In the Pick Asset dialog box, select the appropriate records, and click OK.

## Recording Van Information (End User)

Before leaving the depot, a van sales representative verifies the van identification information and records the van's mileage.

This task is a step in ["Process of Managing Inventory and Orders"](#) on page 3.

### *To record van information*

- 1 Navigate to the Inventory Location Management screen.
- 2 Drill down on the Name field hyperlink for an inventory location, and click the Readings view tab.
- 3 Verify that the Van Plate number and Serial number are correct.
- 4 Scroll down to the Asset list, create a new record, and complete the necessary fields.

The following table describes some fields.

| Field      | Comments                                                                                                  |
|------------|-----------------------------------------------------------------------------------------------------------|
| Reading    | Enter the van's current mileage.                                                                          |
| U/M        | The unit of measure specified when the asset is set up.                                                   |
| Time Taken | The time that you note the mileage. This time might be before or at the time that you create this record. |
| Reading #  | A unique ID number for each reading.                                                                      |
| Created    | The time that you create this record.                                                                     |
| Complete   | Select this check box to commit the record when you complete it.                                          |

## Verifying Van Inventory (End User)

Before visiting outlets, a van sales representative needs to verify that the inventory on the laptop matches the physical inventory in the van. The representative verifies the inventory by performing a cycle count.

This task is a step in ["Process of Managing Inventory and Orders"](#) on page 3.

### *To perform a cycle count*

- 1 Navigate to the Cycle Counting screen, then the Cycle Count List view.
- 2 Create a new Cycle Count record, and drill down on the Status field hyperlink.
- 3 In the Cycle Count form, record the start time, and change the status to In Progress.



- 4 In the Products list, click List Products.

The list of products for the cycle count appears.

**NOTE:** Clicking List Products displays all products in the current van inventory belonging to a sales representative. Various products are also associated with a correct product status, for example, Good or Defective.

- 5 Verify the count of the stock in your van, and enter the amounts of each item in the Count column.

**NOTE:** You can also use the Count UOM1 and Count UOM2 fields to capture the count of the physical inventory. These fields represent two units of measure that are related by case pack, which is a value the administrator sets up. Updates to the Count UOM1 and Count UOM2 fields also update Count when it is committed based on the case pack.

- 6 When you finish entering the amounts for your inventory, click Count Complete.

The Cycle Count records are converted to read-only.

- 7 Click the Variance view tab to compare your count with the original inventory.

- 8 To update inventory with the current count, select those products with variances greater than or less than zero, and click Adjust.

- 9 When your cycle count is complete, record the end time, and change the status to Done.

## Reviewing Billings (End User)

A common activity at retail outlets is reviewing billings. The sales representative reviews all outstanding invoices, collects payments, and records payments. The following procedure assumes a Review Billings activity is assigned to the visit.

This task is a step in [“Process of Managing Inventory and Orders” on page 3](#).

### *To review outstanding invoices, collect a payment, and record a payment*

- 1 Navigate to the Visit Execution screen.
- 2 From the Activities list, drill down on the Review Billings hyperlink in the Activity Type field.

The All Invoices view in the Accounts screen appears, showing all outstanding invoices for the current account.

- 3 Drill down on the Invoice # field hyperlink for an invoice record.

The Invoice Line Items view in the Invoices screen appears.

- 4 Click the Payments view tab, and in the Payments list, create a new payment record.

- 5 Click the select button in the Payment # field.

The Pick Payment dialog box appears showing all residual payments or credits that you can apply to the current invoice.

To pay an invoice, you can collect a new payment from the customer, or use existing credit.

- 6 To collect a new payment from the customer, perform the following steps:
  - a In the Pick Payment dialog box, create a new record.
  - b Enter the payment amount in the Amount field.  
**NOTE:** The payment amount cannot exceed the amount in the Total Due field on the invoice.
  - c Select a value from the Method drop-down list.
  - d Click Save, and then click OK.  
The payment record details appear in the Payments list.
- 7 To use an existing credit to pay the invoice, perform the following steps:
  - a In the Pick Payment dialog box, select a record for the current account.  
**NOTE:** This record is an open credit memo or a residual payment credited to the customer.
  - b Enter the amount to apply to the invoice in the Amount field.
  - c Click OK.

## Taking Retail Orders (End User)

At retail outlets, another frequent activity for sales representatives is taking retail orders. For more information, see the chapter about creating a quote or sales order in *Siebel Order Management Guide*.

In the procedure in this topic, the application completes the following actions when you click Invoice in the Sales Order form:

- Checks each line item to see if sufficient on-hand stock exists to fulfill the order.
- If enough inventory exists, checks if the order total exceeds the Available Credit.
- Changes the status of the order to Billed.
- Removes all zero-quantity line items.
- Creates the invoice.
- Opens the Invoice Line Items view.

In the procedure in this topic, the application completes the following actions when you click Deliver from the Invoice Line Items view:

- Updates the inventory base on the order.
- Changes the status of the invoice to Delivered or Booked.
- Checks the invoice balance against the account's available credit.

This task is a step in ["Process of Managing Inventory and Orders"](#) on page 3.

### *To take a retail order*

- 1 Navigate to the Sales Orders screen, then the List view.

- 2 Create a new sales order record.
- 3 Drill down on the Order # field hyperlink.  
The Catalog view appears.
- 4 Click the Line Items view tab, and enter the order details.  
The Start Price and List Tax fields are automatically populated based on the product listed. The Bonus Quantity, Extended Tax, and Price fields are calculated based on the quantity.  
You can enter Order Qty for two units of measure in the fields Qty Ordered (UOM1) and Qty Ordered (UOM2). For more information about Qty UOM1 and Qty UOM2, see ["Verifying Van Inventory \(End User\)" on page 4](#).
- 5 When the order is complete, click Book in the Sales Order form.  
The order status changes to Booked.
- 6 To generate an invoice, click Invoice in the Sales Order form.
- 7 From the Invoice Line Items view, click Deliver.  
For information about collecting payment for the invoice, see ["Reviewing Billings \(End User\)" on page 5](#).

## Recording Deposits (End User)

As a van sales representative, you might need to deposit payments that you collect during the day. You can record the deposit information.

This task is a step in ["Process of Managing Inventory and Orders" on page 3](#).

### *To record a deposit*

- 1 Navigate to the Payments screen, then the Deposit Payments view.
- 2 Create a new deposit record.
- 3 In the Deposits list, drill down on the Deposit Date field hyperlink.
- 4 From the Payments list, select all the payments that are included in the deposit.
- 5 In the Deposit form, click Deposit.



# Index

## A

**Account Allocation Level parameter** 106

**account catalogs**

assigning product categories to 66  
reviewing 69

**account credit memos, reviewing** 234

**account deductions, viewing** 232

**account distribution lists**

adding unauthorized products to 67  
amending product details for 64  
copying 64  
defining product categories for 63  
defining products for 62  
defining subaccounts for 61  
deleting products from 65  
modifying 67

**account hierarchies**

allocating changes down levels in 99  
creating account-subaccount relationships  
for 42  
setting up 41

**account managers' reports** 22

**account market segments, about** 57

**account products**

associating with merchandising locations 73  
reviewing information for 264

**account profile attribute, about using**

**Account Information view to  
query** 280

**account promotions**

about 113  
about relationship to corporate  
promotions 116  
adding attachments to 151  
adding promoted categories to 141  
adding promoted products to 143  
allocating field values in 149  
associating objectives with 151  
attaching literature to 152  
creating 137  
creating deals for 160  
creating from corporate promotions 127  
deal fields for 178  
enabling phasing for 162  
end-user procedures for 136  
fields for 168  
finalizing 167

general fields for 168

resolving deductions for 235

retaining when deleting corporate  
promotions 190

revenue fields for 171

reviewing deals for 209

reviewing information for 264

simulating promotion results for 156

spending fields for 175

tactic fields for 170

transferring incremental volume for 150

viewing audit trail for 153

viewing calendars for 152

viewing performance data for 128

volume fields for 171

**Account Targeting**

about 275

about importance of database  
synchronization 280

about saving queries using keyboard  
shortcut 282

about updating contents of saved target lists  
for 282

administrator procedures for 278

creating target lists for 279

creating target lists for based on

demographics and assessments 280

creating target lists for based on orders 281

creating target lists for based on store  
conditions 281

deleting saved predefined queries for 279

end-user procedures for 278

making predefined queries public for 278

refining queries for 280

saving target lists for 282

scenario for creating target lists 277

scenario for creating target lists for sales  
representatives 276

**account teams, removing yourself from** 43

**Account type classification, about** 34

**account-category hierarchies**

about setting up 85

associating categories with accounts in 86  
associating subcategories with accounts

in 86

deleting 87

modifying 87

- resetting account and category levels in 98
  - account-category relationships**
    - building 88
    - maximizing aggregation performance and 80
    - parallel aggregation processing for 89
  - account-product data, entering** 97
  - account-product nodes**
    - locking 103
    - manually locking 103
  - account-product trees**
    - populating locks for 91
    - resetting levels for 100
    - resetting locks for 100
  - accounts**
    - about 33
    - about account hierarchies for 34
    - about allocations for 105
    - about assigning categories to using the
      - Account Category view 66
    - Account Allocation Level parameter for 106
    - adding merchandising locations to 45
    - adding to routes 270
    - administrator procedures for 37
    - analyzing deductions for 238
    - associating supply sources with products
      - in 72
    - associating with activities 44
    - associating with contacts 45
    - associating with products 52
    - creating account-subaccount relationships
      - for 42
    - creating addresses for 43
    - creating or modifying 38
    - deleting 41
    - end-user procedures for 37
    - profiling 42
    - removing yourself from team in 43
    - reviewing information for 264
    - reviewing objectives for 257
    - scenario for 34
    - setting up account hierarchies for 41
    - standard classifications for 34
    - targeting to objectives 248
  - accrual funds**
    - automatically creating 205
    - defined 199
    - forecasting 212
    - manually creating 203
  - Acquire Categories action, about running** 85
  - activities**
    - adding during retail visits 263
    - associating with accounts 44
    - changing statuses of 251
    - checking statuses of 251
    - creating for objectives 246
    - creating for retail visits 263
    - reviewing in account's objectives 257
    - reviewing prior to retail visits 257
    - viewing statuses for 251
  - activity plans, creating for deductions** 233
  - activity templates, creating** 231
  - Add High-Level Categories button, trade promotion configuration for** 185
  - addresses**
    - associating with accounts 43
    - creating accounts for 43
  - administrative setup tasks**
    - other guides for 25
    - table of 25
  - Aggregate action**
    - about 80
    - about performing periodically 99
    - improving performance of 80
    - parallel aggregation processing and 89
  - Aggregate button, trade promotion configuration for** 185
  - Allocate button, SVP configuration for** 107
  - applets, in home page** 22
  - Apply button**
    - ensuring proper functioning of 75
    - objective configuration for 252
    - product distribution configuration for 74
    - trade fund configuration for 220
  - Apply Period button, using** 249
  - Apply Updates button, trade promotion configuration for** 184
  - Approve button, deduction configuration for** 242
  - assessments, creating target lists based on** 280
  - assets, associating with inventory locations** 285
  - attachments**
    - adding to account promotions 151
    - adding to corporate promotions 126
    - adding to plans for account promotions 135
    - creating for deductions 233
  - audit trail**
    - viewing for account promotions 153
    - viewing for plans for account promotions 136
  - audits, reviewing account information for** 264
- B**
- baseline basis quantities**
    - copying 95

- establishing 91
    - generating for existing products 92
    - generating for new products 93
    - precalculating adjusted quantities 94
  - Baseline button, trade promotion configuration for** 186
  - baseline data**
    - associating with promoted products 144
    - changing dates for retrieval of 192
    - definition 78
    - sources 79
    - viewing 100
  - baseline planning, about** 79
  - billings, reviewing** 287
  - business solutions, table of** 15
  - buttons**
    - deductions and claims 242
    - objectives 252
    - product distribution 74
    - retail visits 266
    - routes 274
    - sales volume planning 106
    - trade funds 220
    - trade promotions 183
  - buying groups**
    - about and associating products with 57
    - associating member accounts with 70
    - associating products with 71
    - associating supply sources with products in 72
    - creating 70
    - overview of process for creating 70
- C**
- Calculate Source button, SVP configuration for** 107
  - calendars**
    - viewing for account promotions 152
    - viewing for plans for account promotions 136
  - catalog-category hierarchies, about** 47
  - catalogs, about administration of** 47
  - categories**
    - about allocations for 105
    - acquiring 84
    - assigning to account catalogs 66
    - associating with products 84
    - unadopting products for 85
  - Category Aggregation**
    - configuring 109
    - configuring baseline custom fields for 109
    - using 111
  - category baseline data, executing queries for** 100
  - Category button, product distribution configuration for** 74
  - category-product hierarchies**
    - acquiring categories for 84
    - associating products with categories for 84
    - creating 82
    - setting up 82
    - setting up account hierarchies for 82
    - unadopting products for 85
  - CG Payment Process**
    - accessing 222
    - CG Payment business service and 218
    - executing 221
    - exporting 221
    - importing 221
    - testing 221
    - using 221
  - child objectives, creating** 249
  - claims**
    - about 241
    - adding attachments to 241
    - creating and editing 241
    - end-user procedures for 241
    - resolving 242
  - Commit button**
    - objective configuration for 252
    - route configuration for 274
  - competitor products, about viewing** 51
  - Conduct Retail Visit subprocess, about configuration information** 283
    - buttons for deductions and claims 242
    - buttons for objectives 252
    - buttons for product distribution 74
    - buttons for retail visits 266
    - buttons for routes 274
    - buttons for sales volume planning 106
    - buttons for trade funds 220
    - buttons for trade promotions 183
    - Siebel EIM configuration for funds 219
    - user properties for trade funds 220
  - Consumer Goods**
    - about 15
    - screens for 19
  - Consumer Goods funds**
    - about CG Payment business service for 218
    - about rolling up paid payments for 217
    - accessing CG Payment Process 222
    - executing workflow process 221
    - exporting CG Payment Process 221
    - importing CG Payment Process 221
    - testing workflow process 221
    - using CG Payment Process for 221
  - consumption**

- definition 78
  - sources 79
  - viewing data 100
  - contacts, associating with accounts** 45
  - Copy ADL button, product distribution configuration for** 74
  - corporate promotions**
    - about 113
    - about relationship to account promotions 116
    - adding attachments to 126
    - adding promoted categories to 122
    - adding promoted products to 124
    - attaching literature to 127
    - creating 116
    - creating account promotions from 127
    - end-user procedures for 116
    - fields for 168
    - retaining account promotions when deleting 190
    - tactic fields for 170
    - viewing performance data for account promotions in 128
  - Create Account Promotions button, trade promotion configuration for** 184
  - credit memos**
    - creating or modifying 229
    - reviewing for accounts 234
  - Current Year button, SVP configuration for** 107
  - cycle count, performing** 286
- D**
- dates, changing for objectives** 249
  - deals**
    - closing 212
    - creating for account promotions 160
    - creating for promoted categories 161
    - creating for promoted products 161
    - end-user procedures for 160
    - reconciling against payments 212
    - reviewing for account promotions 209
    - reviewing for funds 210
    - reviewing for promoted categories 210
    - reviewing for promoted products 210
  - deductions**
    - about 224
    - about generating 224
    - about resolving 224, 235
    - about stages for resolution of 239
    - adding literature to 228
    - administrator procedures for 226
    - analyzing for accounts 238
    - analyzing workloads for 230
    - approving or rejecting payments for 237
    - associating and modifying invoices for 233
    - button configuration for 242
    - creating activities for 232
    - creating activity plans for 233
    - creating activity templates for 231
    - creating and editing 227
    - creating attachments for 233
    - creating credit memos for 229
    - creating notes for 234
    - end-user procedures for 226
    - resolving for account promotions 235
    - resolving for HQ 237
    - reviewing 231
    - reviewing account credit memos for 234
    - reviewing literature for 235
    - scenario for account promotion type of 225
    - scenario for HQ type of 225
    - splitting 229
    - types of 224
    - viewing for accounts 232
    - voiding and canceling payments for 236
  - Delete button, product distribution configuration for** 74
  - demographics, creating target lists based on** 280
  - deposits, recording** 289
  - direct distribution, about** 61
  - distribution codes**
    - about classification type 34
    - creating 60
  - distribution lists**
    - about 56
    - about creating and modifying 58
    - scenario for 57
    - unauthorized products for 59
    - viewing products for accounts in 66
  - distribution methods, about** 56
- E**
- Execute Action button, SVP configuration for** 107
  - Execute button, SVP configuration for** 107
- F**
- fixed funds**
    - automatically creating 201
    - defined 199
    - manually creating 201
  - Forecast button**
    - configuring 194
    - trade promotion configuration for 189



**funds**

- about CG Payment business service for 218
- about rolling up paid payments for 217
- accessing CG Payment Process 222
- adding child funds to parent funds in 208
- adding grandchild funds to 208
- adjusting 209
- approving transfers for 214
- automatically creating accrual 205
- automatically creating fixed 201
- button configuration for 220
- configuring Siebel EIM for 219
- defined 199
- executing workflow process 221
- exporting CG Payment Process 221
- importing CG Payment Process 221
- manually creating accrual 203
- manually creating fixed 201
- reviewing 216
- reviewing deals for 210
- reviewing payments for 211
- submitting payments for 215
- testing workflow process 221
- transferring amounts for with constraint 214
- transferring amounts for without constraint 211
- user properties for 220
- using CG Payment Process for 221

**G**

- Generate button, trade fund configuration for** 220
- grandchild funds, adding to funds** 208

**H****hierarchies**

See account-category hierarchies

**high-level promotions**

- creating for account promotions 129
- fields for 168
- general fields for 168
- revenue fields for 171
- simulating promotion results for 155
- spending fields for 175
- tactic fields for 170
- volume fields for 171

**home page, about** 22**HQ deductions**

- about 224
- resolving 237

**I****incremental data set**

definition 78

sources 79

**incremental volumes, transferring to SVP** 150**inventory and order management**

- about 283
- associating assets with inventory locations for 285
- end-user procedures for 285
- recording deposits for 289
- recording van information for 286
- reviewing billings for 287
- scenario for 284
- taking retail orders for 288
- verifying van inventory for 286

**invoices**

- about viewing all 233
- associating and modifying 233
- reviewing outstanding 287

**L****lift factors, importing and copying** 154**List Products button, retail visit configuration for** 266**literature**

- adding to account promotions 152
- adding to deductions 228
- attaching to corporate promotions 127
- reviewing for deductions 235

**Load from File button, SVP configuration for** 107**local database, system administration on** 26**Lock button, SVP configuration for** 107**M****Market segment classification type, about** 34**mass change**

- configuring 109
- making extra fields available for 111

**Mass Change button, SVP configuration for** 108**member accounts, associating with buying groups** 70**merchandising audits, performing** 259**merchandising locations**

- adding to accounts 45
- associating with account products 73

**N****Next Year button, SVP configuration for notes, creating for deductions** 108 234

**number handling, about** 106

## O

### **objective data set**

definition 78  
sources 79

### **objectives**

about 243  
administrator procedures for 244  
applying 249  
associating with account promotions 151  
button configuration for 252  
changing dates for 249  
changing statuses of activities associated with 251  
checking statuses of 251  
creating 245  
creating child objectives 249  
creating recommended activities for 246  
end-user procedures for 245  
maintenance procedures for 245  
reviewing 250  
role of trade promotions in 243  
scenario for 244  
scheduling store visits for 250  
targeting accounts to 248

### **OK button, product distribution configuration for** 74

### **order management**

See inventory and order management

### **orders, creating target lists based on** 281

### **outstanding invoices, reviewing** 287

## P

### **parallel aggregation processing** 89

### **parent funds, adding child funds to** 208

### **parent-child relationships, creating payments**

about rolling up 217  
about using Siebel EIM to update 219  
approving or rejecting 237  
reconciling deals to 212  
recording and collecting 287  
reviewing for funds 211  
submitting against funds 215  
voiding and canceling 236

### **percentage basis calculation** 106

### **Period Type list of values, creating values for** 28

### **periods**

conflicting start dates for 28  
creating values for Period Type list of values 28

features that use 28

### **period-type aggregation, about** 80

### **personalization attributes, setting up** 65

### **Phase button, trade promotion configuration for** 186

### **phasing**

about results 181  
enabling for account promotions 162  
end-user procedures for 162  
finalizing results for 167  
promoted categories 164  
promoted products 166

### **plans for account promotions**

adding account promotions to 137  
adding attachments to 135  
creating 131  
creating high-level promotions for 129  
end-user procedures for 130  
viewing audit trail for 136  
viewing calendars for 136

### **predefined queries**

deleting saved 279  
making public 278

### **Prior Year button, SVP configuration for** 108

### **product baseline data, executing queries for** 100

### **product distribution**

about account market segments for 57  
about buying groups for 57  
about controlling 55  
about distribution lists for 56  
administrator procedures for 60  
amending product details for distribution lists in 64  
assigning product categories to account catalogs in 66  
button configuration for 74  
copying distribution lists in 64  
creating account distribution lists for 61  
creating distribution codes for 60  
defining product categories for distribution lists in 63  
defining products for distribution lists in 62  
deleting products from distribution lists in 65  
end-user procedures for 60  
scenario for 57  
setting up personalization attributes for 65

### **Product Explorer, using** 53

### **product lines, creating** 52

### **products**

about administration of 47  
about catalog-category hierarchies for 47  
administrator procedures for 49  
associating with accounts 52

- associating with buying groups 71
- associating with categories 84
- associating with supply sources 72
- creating product lines for 52
- defining 50
- deleting from account distribution lists 65
- end-user procedures for 50
- exchanging between sales
  - representatives 261
- reviewing information for 264
- scenario for 48
- unadopting and deleting 85
- unauthorized 59
- using Product Explorer for 53

**Products button**

- trade fund configuration for 220
- trade promotion configuration for 187

**promoted categories**

- about phasing recalculation results for 182
- about phasing results for 181
- adding to account promotions 141
- adding to corporate promotions 122
- creating deals for 161
- fields for 168
- phasing 164
- recalculating phasing results for 165
- reviewing deals for 210

**promoted products**

- adding to account promotions 143
- adding to corporate promotions 124
- associating baseline and shipment data
  - with 144
- creating deals for 161
- fields for 168
- phasing 166
- recalculating phasing results for 167
- reviewing deals for 210

**Q****quota data set**

- definition 78
- sources 79

**R****Recalculate button, trade promotion configuration for 186****recalculating phasing results**

- about 182
- for promoted categories 165
- for promoted products 167

**Refresh button**

- SVP configuration for 108
- trade fund configuration for 220

**Reject button, deduction configuration for 242****Release Commitments button, trade fund configuration for 220****reports**

- in home page 22

**retail activities**

- performing 259
- performing merchandising audits in 259

**retail assessments, performing 260****retail audits, performing 262****retail orders, taking 288****retail visits**

- about 255
- adding activities during 263
- button configuration for 266
- creating activities for 263
- ending 265
- end-user procedures for 256
- exchanging products between sales
  - representatives for 261
- performing assessments for 260
- performing merchandising audits for 259
- performing retail activities for 259
- performing retail audits for 262
- planning 257
- reviewing account audits for 264
- reviewing account products for 264
- reviewing account promotions for 264
- reviewing account's objectives prior to 257
- reviewing activities prior to 257
- reviewing store conditions for 263
- scenario for 256
- starting 259

**Route Accounts view, using to add accounts to a routes 270****Route Explorer view, using to add accounts to routes 270****routes**

- about 267
- about limited durations in 269
- adding accounts to 270
- assigning target lists to 272
- button configuration for 274
- creating 269
- end-user procedures for 269
- scenario for creating 268
- scenario for creating for sales
  - representatives 268
- scenario for creating frequently
  - changing 269
- using to schedule visits 273

**S**

**sales representatives, exchanging products between** 261

**sales volume planning**

about algorithms for 104  
 about category and account level allocation for 105  
 about percentage basis calculation for 106  
 about period-type aggregation for 80  
 adjusting source data in 101  
 administrator procedures for 81  
 building account-product trees for 88  
 button configuration for 106  
 copying baseline basis quantities in 95  
 creating periods for 98  
 data sets for 77  
 defining account-category hierarchies for 85  
 end-user procedures for 82  
 entering data for 97  
 establishing baseline basis quantities for 91  
 executing queries for baseline data in 100  
 generating baseline basis quantities for existing products in 92  
 generating baseline basis quantities for new products in 93  
 importing or copying data for 98  
 locking account-product nodes in 103  
 locking nodes in 102  
 manually locking account-product nodes in 103  
 modifying business service for 109  
 performing administrative tasks for 97  
 populating locks for account-product trees in 91  
 predetermining adjusted baseline basis quantities in 94  
 scenario for 81  
 setting up category-product hierarchies for 82  
 viewing data for 100

**Sales Volume Planning module**

about using with account-subcategory hierarchy 48  
 baseline and target planning for 79  
 process overview of workflow policies for 29

**Save to File button, SVP configuration for** 107

**Schedule - Routes More Info view button, route configuration for** 274

**Schedule - Target Accounts view button, route configuration for** 274

**screens, described** 19

**Select Categories button, product**

**distribution configuration for servers, parallel aggregation processing on multiple** 74  
 89

**setup tasks**

creating periods 28  
 creating values for Period Type list of values 28  
 implementation of multiple modules or options and 27  
 other guides for 25  
 setting up Siebel workflow policies 29  
 table of 25

**shared notes, about** 234

**Shipment button, trade promotion configuration for** 187

**shipment data**

associating with promoted products 144  
 definition 78  
 sources 79  
 viewing 100

**Siebel Business Applications**

business solutions for 15  
 screens for 19

**Siebel Enterprise Integration Manager**

configuring for funds 219  
 using to update status of Payment records 219

**Simulate button, trade promotion configuration for** 189

**simulations, end-user procedures for** 153

**Skip All button, SVP configuration for source data, excluding or skipping** 108

**Spread button**

configuring 192  
 trade promotion configuration for 188

**store conditions**

about querying on 281  
 creating target lists based on 281  
 reviewing 263

**store visits, scheduling** 250

**subcategories, about designating as SVP adoptees** 83

**supply sources, associating with products** 72

**SVP Adopt button, SVP configuration for** 108

**SVP Adoptee field, about populating automatically** 84

**T****target data set**

definition 78  
 sources 79

viewing 100

### **target lists**

- about saving queries using keyboard shortcut 282
- about synchronizing with Siebel Server 280
- about updating contents of saved 282
- assigning to routes 272
- creating based on demographics and assessments 280
- creating based on orders 281
- creating based on store conditions 281
- creating for Account Targeting 279
- refining queries for 280
- saving 282

### **target planning, about** 79

#### **trade funds**

- adding child funds to parent funds in 208
- adding grandchild funds to 208
- adjusting 209
- administrator procedures for 200
- approving transfers for 214
- automatically creating accrual 205
- automatically creating fixed 201
- button configuration for 220
- configuring Siebel EIM for 219
- end-user procedures for 200
- manually creating accrual 203
- manually creating fixed 201
- reviewing 216
- reviewing payments for 211
- scenario for 200
- transferring amounts for with constraint 214
- transferring amounts for without constraint 211
- user properties for 220

### **Trade Promotion deductions, about** 224

#### **trade promotions**

- about relationship between corporate and account promotions 116

- button configuration for 183
- end-user procedures for 115
- role of objectives in 243
- scenario for 114
- types of 113

### **trade promotions, configuring**

- changing dates for baseline data retrieval 192
- changing visibility filter for team members 190
- retaining account promotions when deleting corporate promotions 190

### **transfers**

- approving for funds 214
- performing for funds 211, 214

## **U**

### **unauthorized products**

- adding to account distribution lists 67
- defined 59

### **Unlock button, SVP configuration for** 108

#### **Update button**

- configuring 195
- retail execution configuration for 266
- trade promotion configuration for 189

## **V**

### **van information, recording** 286

### **van inventory, verifying** 286

### **visibility filter, changing for team members** 190

### **visits, using routes to schedule** 273

## **W**

### **workflow policies, Consumer Goods modules that use** 29

### **workloads, analyzing for deductions** 230

