SAP CRM - ACCOUNT PLANNING

Account planning function in CRM allows organizations to manage planned revenues, costs and contribution margin. Organizations can take strong decisions during planning and control of the costs for spends and discounts.

These planning functions are integrated in the account management functions and can be integrated with SAP ECC and BI as well. This reduces the effort to maintain data and increases the data accuracy.

Key Features of Account Planning

The key features of Account Planning are as follows –

- To enter non-promoted sales figures for an account.

- You can include planned promotion volumes and costs.

- To plan regular sales as well as regular discounts.

- To plan the account-related costs.

- To check the total volume forecast plus corresponding promotional and non-promotional costs.

- To understand the contribution margins.

- To adjust planned revenues wherever they are necessary.

General Data in Account Planning

You can define account planning period by going to **SPRO → IMG → Customer Relationship Management → Account Planning → General Setting → Define Planning Periods**.
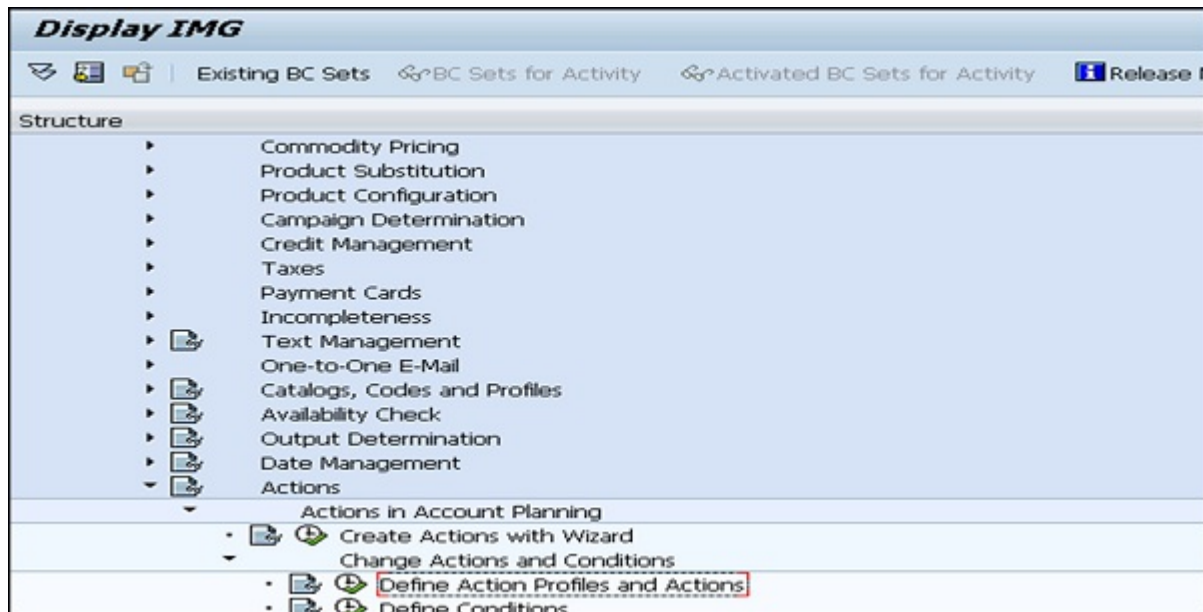

To create a new planning period, click on New Entries and enter the following details in it –

- Planning Period

- Start Date and End Date

- Planning Period Description

Planning Period	Start Date	End Date	Planning Period Description
PLANNING 2006	01.01.2006	31.12.2006	Planning Cycle 2006
PLANNING 2007	01.01.2007	31.12.2007	Planning Cycle 2007
PLANNING 2008	01.01.2008	31.12.2008	Planning Cycle 2008

The next step is to define action profiles and actions in CRM. This can be done by going to **SPRO → IMG → CRM → Basic Functions → Actions → Actions in Account Planning → Change Actions and Conditions → Define Action Profiles and Actions**.

Display IMG

Existing BC Sets   BC Sets for Activity   Activated BC Sets for Activity   **Release N**

Structure

- Commodity Pricing
- Product Substitution
- Product Configuration
- Campaign Determination
- Credit Management
- Taxes
- Payment Cards
- Incompleteness
- Text Management
- One-to-One E-Mail
- Catalogs, Codes and Profiles
- Availability Check
- Output Determination
- Date Management
- Actions
  - Actions in Account Planning
    - Create Actions with Wizard
    - Change Actions and Conditions
      - Define Action Profiles and Actions
      - Define Conditions

The general data for account plans include the following details –

- Territory ID
- Planning Period
- Employee Responsible
- Valid from and Valid To
- Planning Profile Group
- Action Profile
- Product Planning Basis
- Organizational Data
- Currency
- Authorization Group