



## Production Planning

Lesson 5 : Sales and Operation  
Planning

## Lesson Objectives



- Objectives -On successful completion of this training module, you should have:
  - Understood the basics of Sales and Operation Planning
  - Become familiar with Principle Of SOP
  - Become familiar with Features Of SOP
  - Become familiar with Processes and Roles
  - Become familiar with SOP Planning Table

## Training Agenda

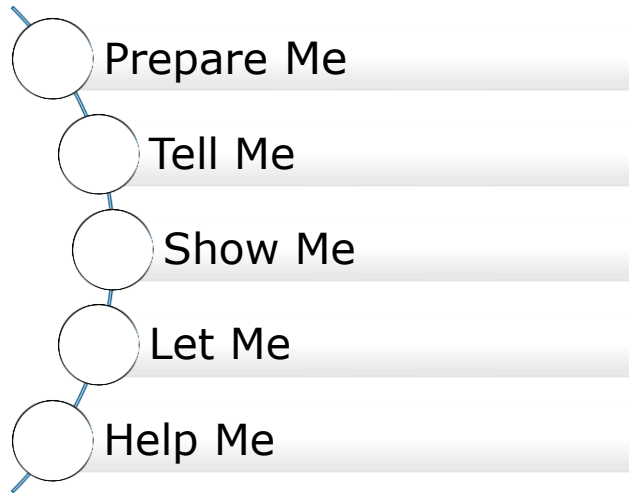


- PP Principle Of SOP
- PP Features Of SOP
- PP Process overview of SOP
- PP Processes and Roles
- PP Flow & Integration With Other Module
- PP SOP Planning Table
- PP Process Flow-MPS

## PP1009 -SOP



Add instructor notes  
here.

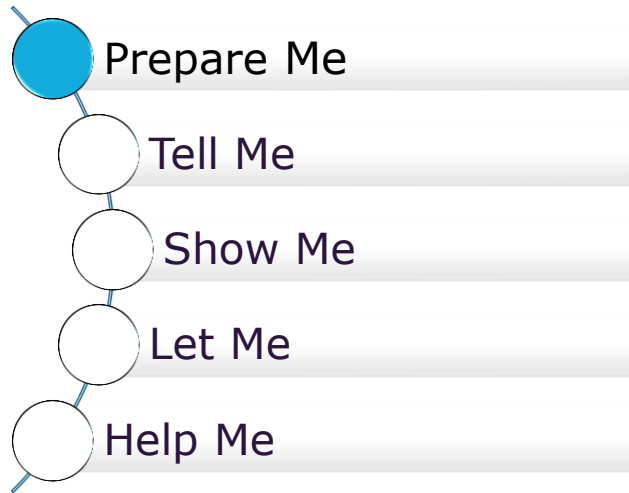


© 2018 Capgemini. All rights reserved.

4



Add instructor notes  
here.



Add instructor notes  
here.

## Prepare Me

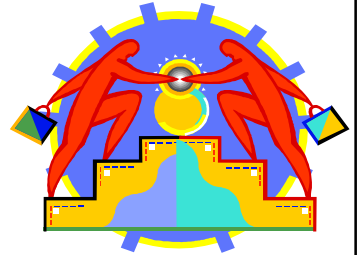


- The main purpose of sales and operations planning is to define the product types and quantities to be sold for a medium- to long-term planning period.
- The goals of SOP is to obtain the corresponding planning data for production.
- Sales planning defines the ranges of products and the sales quantity for the coming planning period on the basis of the production capabilities and the product demand in the sales market.
- The goals of sales planning is to define the sales program and to forecast the sales quantities and prices.
- SOP comes from SO76 standard information structure.

## Introduction...



- What is SOP?
- Principles of SOP
- Features of SOP



Add instructor notes here.

## What Is SOP?



- Sales & Operations Planning is a flexible forecasting and planning tool with which sales, production, and other supply chain targets can be set on the basis of historical, existing, and estimated future data.
- Rough - cut planning can also be carried out to determine the amounts of the capacities and other resources required to meet these targets.
- SOP is particularly suitable for long-and medium-term planning.
- This SOP tool will allow you to formulate a Rough-cut production plan based on the sales data that you have created.

© 2018 Capgemini. All rights reserved.

8

Add the notes here.



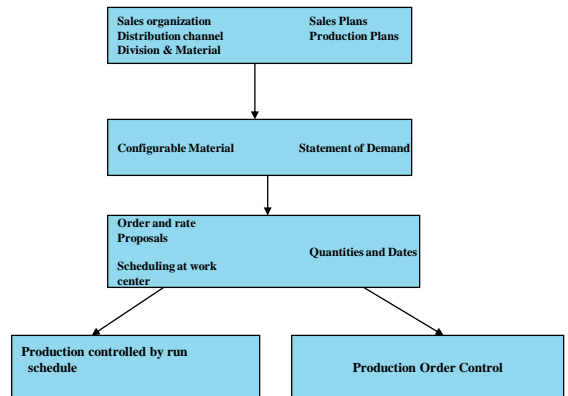
Add instructor notes here.

## Principles of SOP



Long and Medium term planning

Demand Management



© 2018 Capgemini. All rights reserved.

9

Add the notes here.

Add instructor notes here.

## Principles of SOP



- SOP can be done at all level of finished products or using product groups.
- Any combinations of materials or even of product groups can be grouped together into other product groups.
- The exact breakdown is done at the level of material and the plant.
- The planning mechanism allows the entire planning to be viewed in the central system.

© 2018 Capgemini. All rights reserved.

10

Add the notes here.

Add instructor notes here.

## Features of SOP



SOP is made for two application components such as

- Standard SOP
- Flexible Planning

### Standard SOP:

- Standard SOP comes largely preconfigured with the system.
- You work with one organizational unit, the product group, product hierarchy and plan predefined key figures in a planning table with a set layout.
- All plans in Standard SOP are based on the standard info structure S076.
- Planning can not be done at different region or different sales organization level using Standard SOP.

© 2018 Capgemini. All rights reserved.

11

Add the notes here.

Add instructor notes here.

## Features of SOP



### Flexible Planning:

Flexible Planning provides detailed way of planning based on our own characteristics.

It can be based on any info structure of your choice, either self-defined information structure or standard information structure.

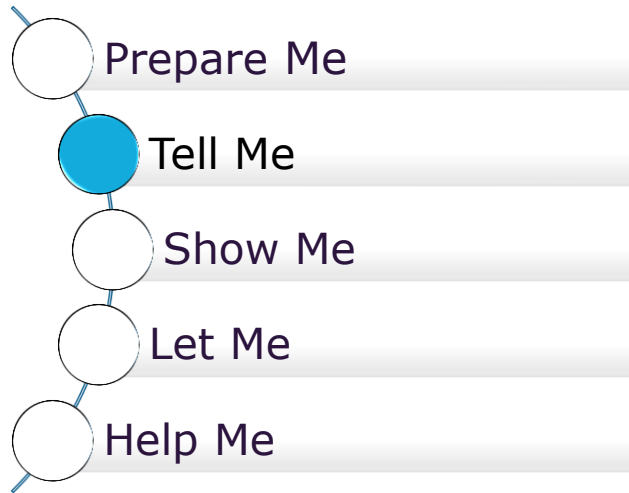
Planning can be done at different region or different sales organization level using Flexible planning.

© 2018 Capgemini. All rights reserved.

12

Add the notes here.

## Sales and Operation Planning



© 2018 Capgemini. All rights reserved.

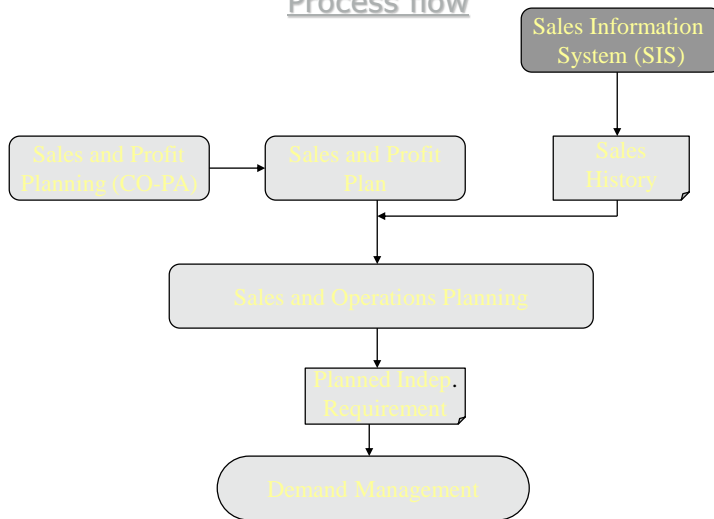
13

Add instructor notes here.

## Process overview of SOP



### Process flow



© 2018 Capgemini. All rights reserved.

14

Add instructor notes here.

Add the notes here.

Add instructor notes here.

## Process flow



- The result of sales and operations planning is the operations plan that is transferred as planned independent requirement to demand management.
- The operations plan is created on the basis of the sales plan, which is also a result of this process.
- Sales and operations planning first carries out the individual steps for creating sales plan.
- Sales planning for profitability segment, that is planning at product group level or for individual products.

© 2018 Capgemini. All rights reserved.

15

Add the notes here.

Add instructor notes here.

## Process flow



- Sales and profit planning on the basis of costs planned in controlling ( for e.g., cost of good manufactured and cost-center overhead.
- The interface with the profitability analysis (CO-PA) enables you to use the sales and profit plan as a basis for the sales plan.
- It is also possible to transfer the sales and operations planning to sales and profit planning, cost-center accounting, or activity based costing. This enables an integration of quantity and value planning.
- planner's experience or is supported by a forecast based on the historical sales data.

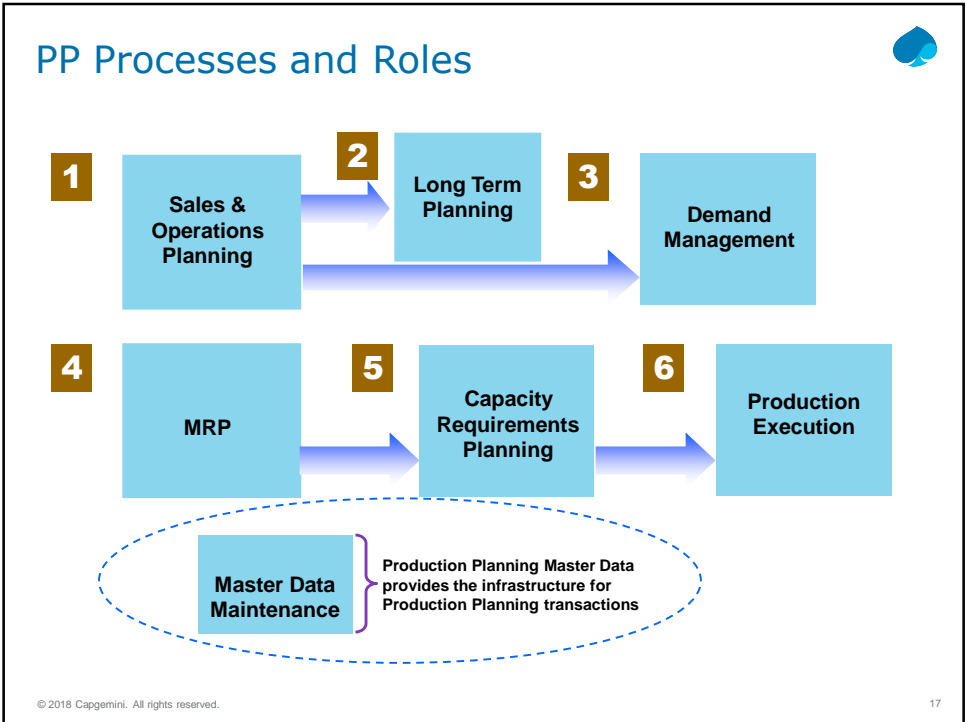
© 2018 Capgemini. All rights reserved.

16

Add the notes here.

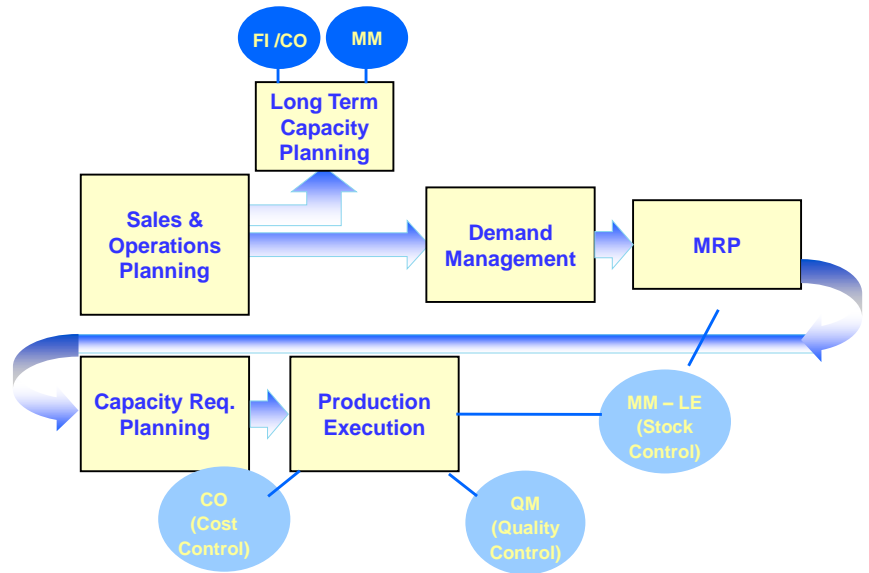


Add instructor notes here.



Add the notes here.

## PP flow & Integration with other module



© 2018 Capgemini. All rights reserved.

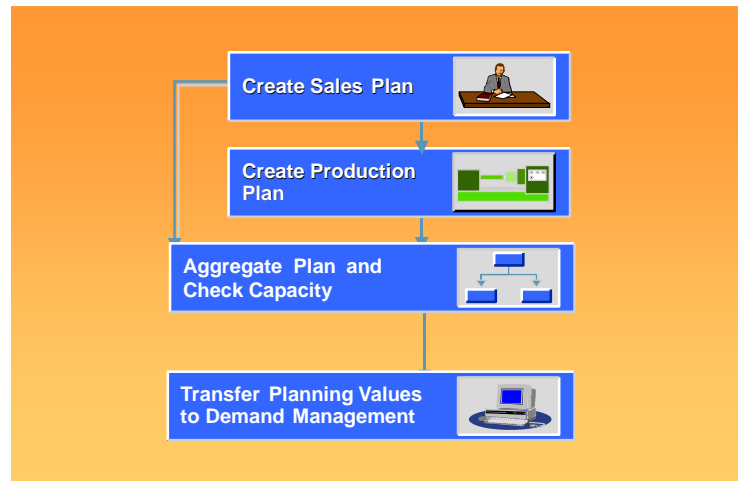
18

Add the notes here.

## How does SOP data apply to the Process?



### SOP data creation



© 2018 Capgemini. All rights reserved.

19

Add the notes here.

# SOP Planning Table



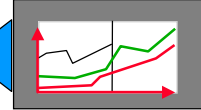
## Sales Information System

Information	
Version	_____
From	_____
To	_____
Measure	
- Sales quantity	
- Returns	

## CO / PA Module

CO/PA field name	
Version	_____
From	_____
To	_____
Measure	
- Sales quantity	

## Forecast



## SOP Planning Table

	Un	05/2005	06/2005	07/2005	...
Sales	PC	1000	1200	900	

	Value	OP	From	To
Sales	5	%+	01/1999	12/1999
Production				
Target stock hl	10	=	01/1999	12/1999
Tgt days' supply				



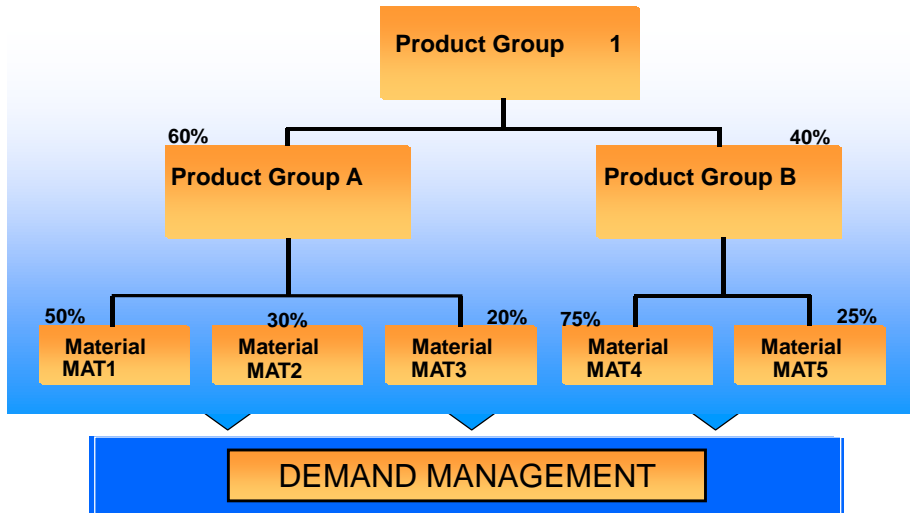
Direct - manual

© 2018 Capgemini. All rights reserved.

20

Add the notes here.

## Transfer to Demand Management

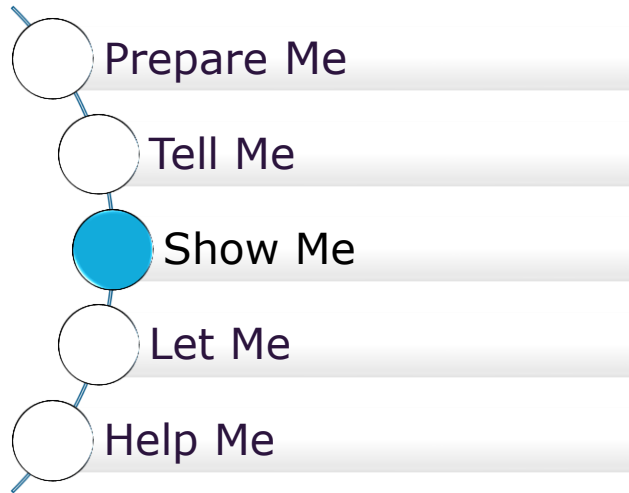


© 2018 Capgemini. All rights reserved.

21

Add the notes here.

## Sales and Operation Planning



© 2018 Capgemini. All rights reserved.

22

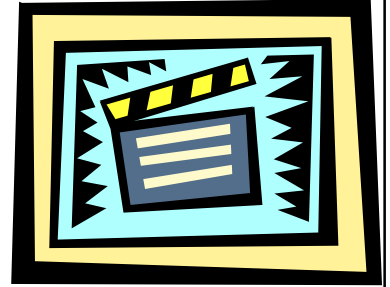
Add instructor notes here.

Add instructor notes  
here.

## Show Me....



- Environment
- Prerequisites of SOP
- Basic Terminologies used in SOP  
& their Definitions
- Master Data
- Customizing
- Integration in SOP



© 2018 Capgemini. All rights reserved.

23

Add the notes here.

Add instructor notes  
here.

## Position of MPS in the PP process flow



### Environment

The Environment in which Sales and Operations Planning runs is SAP R/3 under PP module.

© 2018 Capgemini. All rights reserved.

24

Add the notes here.



Add instructor notes here.

## Process Flow: MPS



- Information structure
- Master data like
  - Product group.
  - Planning type.
  - Planning hierarchy.
  - Rough-cut planning profile
- The whole idea of SOP/forecast etc., are to bring the requirement to Demand management in a more scientific way.
- Entire planning action of MRP/MPS run picks up the requirement from Planned Independent Requirement.

© 2018 Capgemini. All rights reserved.

25

Add the notes here.

Show Me....



## Basic Terminology used in SOP & their Definitions

- Information Structure
- Planning Type
- Product Group
- Planning Hierarchy
- Planning Table
- Resource
- Rough-Cut Planning Profile
- Planning methods



© 2018 Capgemini. All rights reserved.

26

Add the notes here.

## Show Me....



### Definitions...

#### Information Structure

- Information structure is the one which hold entire information of the required characteristics and key figure. E.g. S755
- Example of characteristics & Key figure
  - Production line -- characteristic
  - Product Size -- characteristic
  - Market -- characteristic
  - Sales --key figure
- SAP standard information structure may be used for flexible planning. Info structure should be planned for consistent planning and level be level planning.

#### Planning Type

- Planning type is a customized view on the planning table.
- Planning type defines the content and the layout of the lines in the planning table.

© 2018 Capgemini. All rights reserved.

27

Add the notes here.

Add instructor notes here.

## Show Me....



### Definitions...

- Planning data is saved on the information structure and planning type acts as a mere template on the information structure.
- There is no restriction on number of planning type per info structure.

### Planning Hierarchy

- Planning hierarchy is a combination of characteristic values based on the characteristics of one information structure.
- Planning hierarchies provide the frame work for planning.
- Examples of Planning hierarchy.
  - For information structure S755, sales quantity is planned for below characteristic
  - Production line – characteristic.
  - Product Size – characteristic
  - Market -- characteristic

© 2018 Capgemini. All rights reserved.

28

Add the notes here.

Add instructor notes here.

## Show Me....



### **Product Group**

A product group combines other product groups and materials according to whatever criteria best meet the needs of your enterprise. Mostly used in Standard SOP..

### **Planning Table**

- Planning table is the place where the planning is done.
- Planning table hold the information with different version for each plan

### **Resource**

Machine is normally referred as a work center or resource in SAP. It is the place where conversion of work takes place. Used in Rough-cut profile.

### **Rough-cut Planning profile**

- Rough-cut planning profiles are used in resource leveling.
- Rough-cut planning profiles are designed to give you an aggregate view on your resources.

© 2018 Capgemini. All rights reserved.

29

Add the notes here.

Add instructor notes here.

## Show Me...



### Definitions...

#### Planning Method

- Very importance in SOP is the planning method applied to the information structure. The planning method determines how data is distributed to different corporate units.
- You define your planning methods in Customizing (in Set parameters for info structures and key figures).

#### Three planning methods are available:

- Consistent planning
- Level-by-level planning
- Delta planning

© 2018 Capgemini. All rights reserved.

30

Add the notes here.

## Show Me...



### Master Data

- In Sales & Operations Planning, you can manage plans for various types of master data.
  - Manually created planning hierarchies.
  - Automatically generated planning hierarchies.
  - Product groups.
  - Materials.
- You maintain plans for planning hierarchies, or other branches of planning hierarchies, in Flexible planning.
- You maintain plans for product groups in Standard SOP.

© 2018 Capgemini. All rights reserved.

31

Add the notes here.

Add instructor notes here.

Show Me...



### Step by step procedure for Standard SOP

#### Four important steps in Standard SOP Process:

- Create Plan in Inactive version (MC81)
- Disaggregate product group plan & check capacity utilization (MC76)
- Convert Inactive version to Active version (MC78-Copy)
- Transfer plan to Demand Management (MC75)

### Step by step procedure for Flexible Planning

#### Three important steps in Flexible planning are

- Convert plan into Active version (MC8V-Copy)
- Transfer Material to Demand Management (MC90)
- Create Plan in Inactive version (MC93)

© 2018 Capgemini. All rights reserved.

32

Add the notes here.

Add instructor notes here.



## Show Me....



### Procedure for Standard SOP

#### 1) Create Plan in Inactive version:

Menu Path: Logistics → Production → SOP → Planning → For product group → MC81-Create

T.Code: MC81

The image shows two screenshots from the SAP system. The left screenshot displays the 'SAP Easy Access' menu structure. The path 'Logistics' → 'Production' → 'SOP' → 'Planning' → 'For Product Group' is highlighted. The 'MC81 - Create' option is selected and circled in red, with a red circle and the text 'Create Product Group' next to it. The right screenshot shows the 'Create Plan: Initial Screen'. It has fields for 'Product group' (P6-100) and 'Plant' (1000). A yellow callout bubble points to these fields with the text 'Enter Product group & Plant respectively'. Below these fields is a 'Define Version' section with a 'Version' field (000) and a 'Version description' field (Version 000). A red circle is around the 'Version' field, with a yellow callout bubble pointing to it that says 'Enter the version no & description'.

© 2018 Capgemini. All rights reserved.

33

Add the notes here.

Add instructor notes here.

Show Me...

T code-MC81

## Create Rough-Cut Plan

Product group:  PRECISION Pumps

Plant:

Version:  Version 008 New, inactive

SOP: plan individual product group

Planning table	Un	M 09 2007	M 10 2007	M 11 2007	000	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008	M 08 2008	M 09 2008
Sales	PC	100	250	300	350	400	450	500	550	600	650	700
Production	PC											
Stock level	PC	-100	-350	-650	-1000	-1400	-1850	-2350	-2900	-3500	-4150	-4850
Target stock level	PC											
Days' supply	***											
Target days' supply	***											

**Enter the sales quantities for future periods**

© 2018 Capgemini. All rights reserved.

34

Add the notes here.

## Show Me....

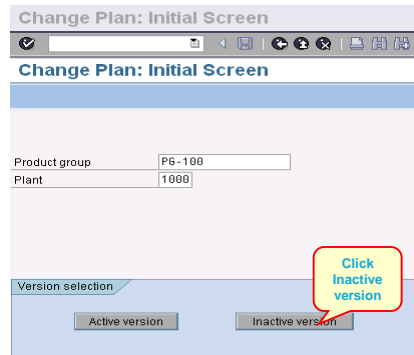
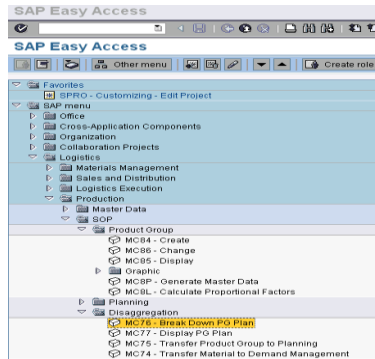


Add instructor notes here.

### Procedure for Standard SOP

#### 2) Disaggregate product group plan & Check capacity:

Menu Path: Logistics → Production → SOP → Disaggregation → MC76 Break Down PG plan  
T.Code-MC76



© 2018 Capgemini. All rights reserved.

35

Add the notes here.

Add instructor notes here.

## Show Me....



### Procedure for Standard SOP

T.Code-MC76

Change Plan: Initial Screen

Product group members

S Member number	PInt	PVer	Proportion	Aggr.fact.	Unit conv.	BUn	MTyp
<input checked="" type="checkbox"/> P-101	1000		Pump PRECISION 101				
			21,7741935	1	1	PC	FERT
<input checked="" type="checkbox"/> P-100	1000		Pump PRECISION 100				
			56,4516129	1	1	PC	FERT
<input checked="" type="checkbox"/> P-102	1000		Pump PRECISION 102				
			21,7741935	1	1	PC	FERT

Disaggregation

☒ Create sales plans

☐ Disaggregate production plan

☒ Disaggregate sales plan

☐ Disaggregate target stock

☐ Copy target days' supply

☒ Stock balance

☐ Target days' supply

☐ Target stock level

☐ Stock level = zero

☐ Synchronous to sales

☒ ☒

Select the creation of Inactive version & enter

Active create sales plan

© 2018 Capgemini. All rights reserved.

36

Add the notes here.

Show Me...



Add instructor notes here.

Procedure for Standard SOP

T.Code-MC76

Change Rough-Cut Plan													
Characteristic: 1000													
Prod group/material: F6-100 Plant: 1000 Inactive													
Version: 000   Version 000													
Aggregate information													
Un: M 09 2007 M 10 2007 M 11 2007 M 12 2007 M 01 2008 M 02 2008 M 03 2008 M 04 2008 M 05 2008 M 06 2008 M 07 2008 M 08 2008 M 09 2008													
Sales	PC	100	250	300	350	400	450	500	550	600	650	700	
Production	PC												
Stock level	PC	-100	-350	-650	-1000	-1400	-1850	-2350	-2900	-3500	-4150	-4850	-4650
Target stock level	PC												
Days' supply	***												
Target days' supply	***												
Detailed information													
Un: M 09 2007 M 10 2007 M 11 2007 M 12 2007 M 01 2008 M 02 2008 M 03 2008 M 04 2008 M 05 2008 M 06 2008 M 07 2008 M 08 2008 M 09 2008													
P-101	->1000	PC											
Sales	PC	21	54	65	76	87	97	108	119	130	141	152	
Production	PC												
Stock level	PC	-21	-75	-149	-216	-303	-400	-508	-627	-757	-898	-1050	-1050
Target stock level	PC												
Days' supply	***												
Target days' supply	***												
P-100	->1000	PC											
Sales	PC	57	141	169	197	225	255	283	311	339	367	395	
Production	PC												
Stock level	PC	-57	-198	-367	-564	-789	-1044	-1327	-1638	-1977	-2344	-2739	-2739
Target stock level	PC												
Days' supply	***												
Target days' supply	***												
P-102	->1000	PC											
Sales	PC	22	55	66	77	88	99	109	120	131	142	153	
Production	PC												
Stock level	PC	-22	-77	-143	-220	-308	-406	-515	-635	-766	-908	-1061	-1061
Target stock level	PC												
Days' supply	***												
Target days' supply	***												

Add the notes here.

Show Me...



Add instructor notes here.

## Procedure for Standard SOP

The screenshot displays the SAP S/4HANA Planning and Control (PC) interface. The 'Change' menu is open, showing options like 'Create sales plan', 'Create production plan', 'Shift-F6', 'Distribute...', 'Interactive graphics', 'Version', and 'Period splitting'. The 'Aggregate' view is selected, showing data for 'M 10 2007' to 'M 10 2008'. The 'Detailed information' view is also visible, showing data for 'M 09 2007' to 'M 10 2008'. The data table includes columns for 'Sales', 'Production', 'Stock level', 'Target stock level', 'Days supply', and 'Target days supply'.

		M 10 2007	M 11 2007	M 12 2007	M 01 2008	M 02 2008	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008	M 08 2008	M 09 2008	M 10 2008
Aggregate	FC	100	250	300	350	400	450	500	550	600	650	700		
Sales	FC													
Production	FC													
Stock level	FC	-100	-350	-650	-1000	-1400	-1850	-2350	-2900	-3500	-4150	-4850	-4650	-4050
Target stock level	FC													
Days supply	***													
Target days supply	***													

		M 09 2007	M 10 2007	M 11 2007	M 12 2007	M 01 2008	M 02 2008	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008	M 08 2008	M 09 2008	M 10 2008
Detailed information	FC														
Sales	FC	21	54	65	76	87	97	108	119	130	141	152			
Production	FC														
Stock level	FC	-21	-75	-140	-216	-303	-400	-508	-627	-757	-898	-1058	-1258	-1498	-1698
Target stock level	FC														
Days supply	***														
Target days supply	***														
P-100	->1000														
Sales	FC	57	141	186	197	225	255	283	311	339	367	395			
Production	FC														
Stock level	FC	-57	-198	-367	-564	-789	-1044	-1327	-1638	-1977	-2344	-2739	-2739	-2739	-2739
Target stock level	FC														
Days supply	***														
Target days supply	***														
P-102	->1000														
Sales	FC	22	55	66	77	88	99	109	120	131	142	153			
Production	FC														
Stock level	FC	-22	-77	-143	-220	-308	-406	-515	-635	-766	-908	-1061	-1236	-1431	-1646
Target stock level	FC														
Days supply	***														
Target days supply	***														

© 2018 Capgemini. All rights reserved.

38

Add the notes here.

Show Me...



Add instructor notes  
here.

## Procedure for Standard SOP

### Change Rough-Cut Plan

Characteristics

Prod.group/material P6-100 Plant 1000  
Version 000 Version 000 Inactive

Aggregate information	Un	M 09 2007	M 10 2007	M 11 2007	M 12 2007	M 01 2008	M 02 2008	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008
Sales	PC	100	250	300	350	400	450	500	550	600	650	700
Production	PC	100	250	300	350	400	450	500	550	600	650	700
Stock level	PC											
Target stock level	PC											
Days' supply	***											
Target days' supply	***											

Detailed information	Un	M 09 2007	M 10 2007	M 11 2007	M 12 2007	M 01 2008	M 02 2008	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008
P-101 -->1000 PL***												
Sales	PC	21	54	65	76	87	97	108	119	130	141	152
Production	PC	21	54	65	76	87	97	108	119	130	141	152
Stock level	PC											
Target stock level	PC											
Days' supply	***											
Target days' supply	***											
P-100 -->1000 PL***												
Sales	PC	57	141	169	197	225	255	283	311	339	367	395
Production	PC	57	141	169	197	225	255	283	311	339	367	395
Stock level	PC											
Target stock level	PC											
Days' supply	***											
Target days' supply	***											
P-102 -->1000 PL***												
Sales	PC	22	55	66	77	88	99	109	120	131	142	153
Production	PC	22	55	66	77	88	99	109	120	131	142	153
Stock level	PC											
Target stock level	PC											
Days' supply	***											
Target days' supply	***											

© 2018 Capgemini. All rights reserved.

39

Add the notes here.

Show Me...



Add instructor notes here.

Procedure for Standard SOP

SAP S/4HANA - Change Rough-Cut PI

Prod group/material: PG-100 / Version: 000 / Version: 000

Aggregate information

	Un	M 09 2007	M 10 2007	M 11 2007	M 12 2007	M 01 2008	M 02 2008	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008	M 08 2008	M 09 2008	M 10 2008
Sales	PC	189	250	309	356	400	458	500	558	606	650	700			
Production	PC														
Stock level	PC														
Target stock level	PC														
Days' supply	***														
Target days' supply	***														

Detailed information

P-101 ->1000 P-\*\*\*

	Un	M 09 2007	M 10 2007	M 11 2007	M 12 2007	M 01 2008	M 02 2008	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008	M 08 2008	M 09 2008	M 10 2008
Sales	PC	21	54	65	76	87	87	100	119	120	141	152			
Production	PC														
Stock level	PC														
Target stock level	PC														
Days' supply	***														
Target days' supply	***														

P-100 ->1000 P-\*\*\*

	Un	M 09 2007	M 10 2007	M 11 2007	M 12 2007	M 01 2008	M 02 2008	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008	M 08 2008	M 09 2008	M 10 2008
Sales	PC	57	141	169	197	225	255	283	311	339	367	395			
Production	PC														
Stock level	PC														
Target stock level	PC														
Days' supply	***														
Target days' supply	***														

P-102 ->1000 P-\*\*\*

	Un	M 09 2007	M 10 2007	M 11 2007	M 12 2007	M 01 2008	M 02 2008	M 03 2008	M 04 2008	M 05 2008	M 06 2008	M 07 2008	M 08 2008	M 09 2008	M 10 2008
Sales	PC	22	55	66	77	88	88	100	120	131	142	153			
Production	PC														
Stock level	PC														
Target stock level	PC														
Days' supply	***														
Target days' supply	***														

Add the notes here.



Add instructor notes here.

Show Me...



Procedure for Standard SOP

T.Code-MC76

Resource load	Un	M 09.2007	M 10.2007	M 11.2007	M 12.2007	M 01.2008	M 02.2008	M 03.2008	M 04.2008	M 05.2008	M 06.2008	M 07.2008
1310 1000 002	***											
Available capacity	H	168	308	294	266	308	294	266	308	266	294	322
Capacity reqmts	H	1000	3500	3000	3500	4000	4500	5000	5500	6000	6500	7000
Capacity load	%	595			315	1298	1530	1879	1785	2255	2218	2173

This slide is shown by capacity load & required capacity

Add the notes here.

## Show Me...



### Procedure for Standard SOP

T.Code-MC78

3) Convert Inactive version to Active version (version management)

Menu path: Logistics → Production → SOP → Planning → Version Management → MC78 Copy

The image shows two screenshots from the SAP system. The left screenshot displays the SAP Easy Access menu path: Logistics → Production → SOP → Planning → Version Management → MC78 Copy. The right screenshot shows the 'Copy Planning Version' dialog box. In this dialog, the 'Copy' button is circled in red. A yellow callout box with the text '1. Enter Inactive version' points to the 'Source version' field, which contains '008'. Another yellow callout box with the text '2. Enter Active version a00' points to the 'Target version' field, which contains 'A00'. A third yellow callout box with the text 'Click Yes' points to the 'Yes' button in the 'Before copying takes place' dialog box. The 'Period' field shows 'From 13.09.2007 To 12.06.2008'.

© 2018 Capgemini. All rights reserved.

42

Add the notes here.

Add instructor notes here.

## Show Me...

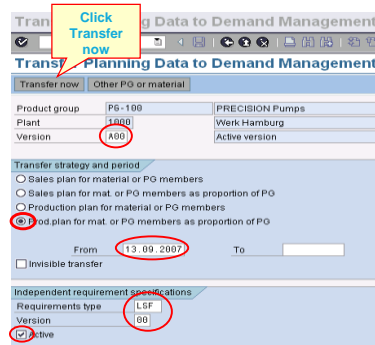
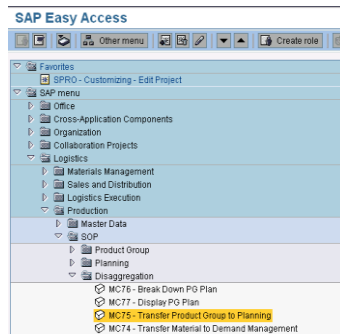


### Procedure for Standard SOP

T.Code-MC75

4) Transfer plan to Demand Management:

Menu Path: Logistics → Production → SOP → Disaggregation → MC75 Transfer product group to planning



© 2018 Capgemini. All rights reserved.

43

Add the notes here.

Add instructor notes here.

Show Me...



## Procedure for Standard SOP

T. code: MC75

Pinnd ind. reqmts: Planning Table

Pinnd ind. reqmts: Planning Table

Planning start 13.09.2007 Ping finish

Table Items Sched. lines

Material	MRP	V	A	BU	M 09.2007	M 10.2007	M 11.2007	M 12.2007	M 01.2008	M 02.2008	M 03.2008	M 04.2008	M 05.2008	M 06.2008
P-180	1000	00	<input checked="" type="checkbox"/>	PC	56	141	189	198	226	254	282	310	339	367
		00	<input checked="" type="checkbox"/>											
		00	<input checked="" type="checkbox"/>											

Now the plan is transferred to Demand Management. Similar to Disaggregation & Aggregation can also be done

© 2018 Capgemini. All rights reserved.

44

Add the notes here.

Add instructor notes here.

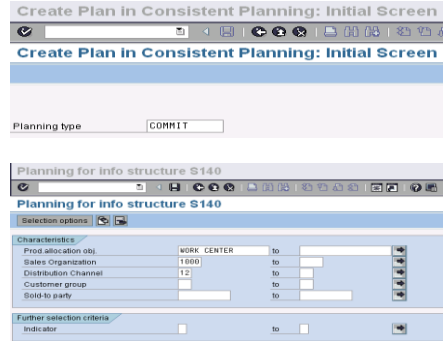
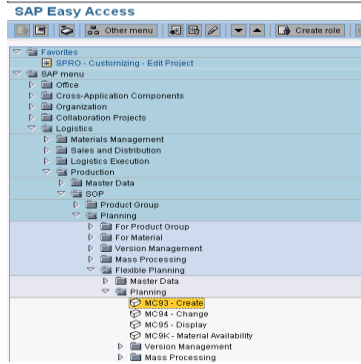
## Show Me...



### Procedure for Flexible Planning

#### 1. Create Plan in Inactive version:

Menu path: Logistics → Production → SOP → Planning → Flexible planning → Planning → MC93  
Create



© 2018 Capgemini. All rights reserved.

45

Add the notes here.

Add instructor notes here.

## Show Me...



### Procedure for Flexible Planning T.code: MC95

The image shows two screenshots from the SAP MC95 transaction. The left screenshot, titled 'Define Version', shows the 'Version' field with the value '001' circled in red. The right screenshot, titled 'Create Plan (Consistent Planning)', shows the 'Version' field with the value '001 Version 001'. A red callout box with the text 'Enter the quantity & save it' points to the 'Maintain allocation' table.

Aggregate information		Un	M 08 2007	M 10 2007	M 11	M 12	M 01 2008	M 02 2008	M 03 2008	M 04 2008
WORK CENTER 1000 12		***								
Customer requests	CAR	100	200	300	400	500	600	700		
ProdAllocQty	CAR									
Plans not covered	CAR									
Incoming orders qty	CAR									
Open product alloc.	CAR									

© 2018 Capgemini. All rights reserved.

46

Add the notes here.

## Show Me...



Add instructor notes here.

### Procedure for Flexible Planning

#### 2) Convert plan into Active version (MC8V-Copy)

Menu Path: Logistics → Production → SOP → Planning → Flexible planning → Planning → Version management → MC8V copy

The screenshot displays the SAP Easy Access interface. On the left, the menu path is highlighted: Logistics → Production → SOP → Planning → Flexible planning → Planning → Version management → MC8V copy. The main window shows the 'Copy Planning Version' dialog. The 'Copy' button is circled in red. The 'Info structure' field contains 'S148' (circled in red), and the 'Product allocations' field is empty. The 'Source version' section shows 'Version 001' (circled in red) with 'Active' and 'Inactive' buttons. The 'Target version' section shows 'A00' (circled in red) with 'Active', 'Inactive', and 'New' buttons. The 'Period' section shows 'From 13.09.2007' and 'To 12.06.2008'. A confirmation message box is open, stating 'Before copying takes place, Target versIA00 reset', with 'Yes' (circled in red), 'No', and 'Cancel' buttons.

© 2018 Capgemini. All rights reserved.

47

Add the notes here.

## Show Me...



Add instructor notes here.

### Procedure for Flexible Planning

#### 3) Transfer Material to Demand Management (MC90)

Menu Path: Logistics → Production → SOP → Planning → Flexible planning → Environment → MC90 Transfer Material to Demand management

SAP Easy Access

Transfer Planning Data to Demand Management

Transfer Planning Data to Demand Management

Transfer now

Material number: 100-100, Plant: 1000, Info structure: S149, Version: 800

Material number: 170DS55001C-184M, Plant: Werk Hamburg

Transfer horizon and key figure

Key figure: KQCTY, From: 13.09.2007, To:

Invisible transfer: ☐

Independent requirement specifications

Requirements type: LSF, Version: 00, Active: ☒

© 2018 Capgemini. All rights reserved.

48

Add the notes here.



Add instructor notes here.

## Show Me...



### Procedure for Flexible Planning

T.code: MC90

The screenshot shows the SAP MC90 transaction interface. The title bar reads "Plnd ind. reqmts: Planning Table". Below the title bar, there are fields for "Planning start" (01.01.2004) and "Plng finish" (01.01.2007). The interface has tabs for "Table", "Items", and "Sched. lines". The "Table" tab is active, displaying a table with columns for Material, PInt, DV, Ac, B..., and months M 01.2005, M 02.2005, and M 03.2005. The material "TEST-SOP-001" is selected, and its requirements are shown for two different planning dates (01 and 0001).

Material	PInt	DV	Ac	B...	M 01.2005	M 02.2005	M 03.2005
TEST-SOP-001	01	00	<input checked="" type="checkbox"/>	EA	1.000	1.400	2.000
	0001	00	<input checked="" type="checkbox"/>				

© 2018 Capgemini. All rights reserved.

49

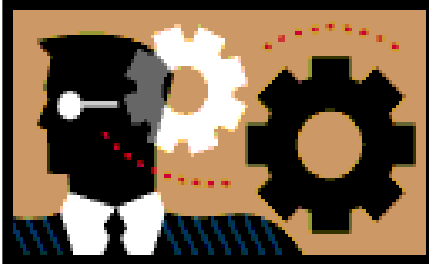
Add the notes here.

Show Me...



Add instructor notes here.

## Configuration of SOP



© 2018 Capgemini. All rights reserved.

50

Add the notes here.

Add instructor notes here.

Show Me...



## Configuration of SOP

Standard SOP does not require much configuration. Only SOP master data like Product group and rough-cut planning profile is sufficient for standard SOP.

The following steps involved in the configuration.

- Create info structure (MC23)
- Set parameter for info structure and key figure (MC7F)
- Define Transfer Profile
- Define Activity
- Define Key figure assignment
- Define copy profile

© 2018 Capgemini. All rights reserved.

51

Add the notes here.

Add instructor notes here.

## Show Me...



### Configuration of SOP

#### 1) Create Information Structure:

IMG → Logistics-General → Logistics Information system (LIS) → Logistics Data Warehouse → Data basis → Information structure → Maintain self defined information structure (MC23)

#### 2) Set parameter for info structure and key figure:

IMG → Logistics-General → Logistics Information system (LIS) → Planning → Master data → Set parameters for info structure and key figures (MC7F)

#### 3) Maintain Transfer profile:

IMG → Production → Sales and Operations Planning → Functions → Mass processing → Maintain Transfer profiles.

© 2018 Capgemini. All rights reserved.

52

Add the notes here.

Show Me...



## Configuration of SOP

### 4. Define Activity:

IMG → Production → SOP → Planning → Functions → Mass processing → Define Activity

### 5. Define Key Figures:

SAP Menu → Logistics → Production → SOP → Settings → Mass processing → MC8Z-Key Figures Assignments

### 6. Define Copy Profile:

SAP Menu → Logistics → Production → SOP → Settings → Mass processing → MC9D-Copy Profiles

These are steps mostly involved in the configuration of SOP.

© 2018 Capgemini. All rights reserved.

53

Add the notes here.

Add instructor notes here.

Add instructor notes here.

## Sales and Operation Planining



© 2018 Capgemini. All rights reserved.

54

Add instructor notes here.

## Let Me...



- Understand the Basic Business scenario of SOP
- Understand the Process of SOP, Integration with other modules
- Understand two different processes such as Standard SOP & Flexible Planning as discussed in previous slides



© 2018 Capgemini. All rights reserved.

55

Add the notes here.

Add instructor notes here.

## References



- Tips and Tricks
- Additional Info



© 2018 Capgemini. All rights reserved.

56

Add the notes here.



Add instructor notes here.

## Tips & Tracks...



Comparison of the Different Planning Methods in SOP :

Function	Consistent	Level by Level	Delta
1. Automatic Aggregation	Yes	No	Yes
2. Automatic disaggregation based on factors saved in Database	Yes	No	No
3. Create Planning hierarchy	Yes	Yes	Not required
4. Forecast	Yes	Yes	
5. Resource Leveling	Yes	Yes	No
6. Background Processing	Yes	Yes	No
7. Fix Key figure values in the planning table	Yes	No	No
8. Standard Analysis for Info Structure	Yes	No	No
9. Transfer to Demand Management	Yes	Yes	No

© 2018 Capgemini. All rights reserved.

57

Add the notes here.

Add instructor notes here.

## Additional Information....



### LIS Structure/Control Table:

TMC4 – Global Control Elements: LIS Info Structure

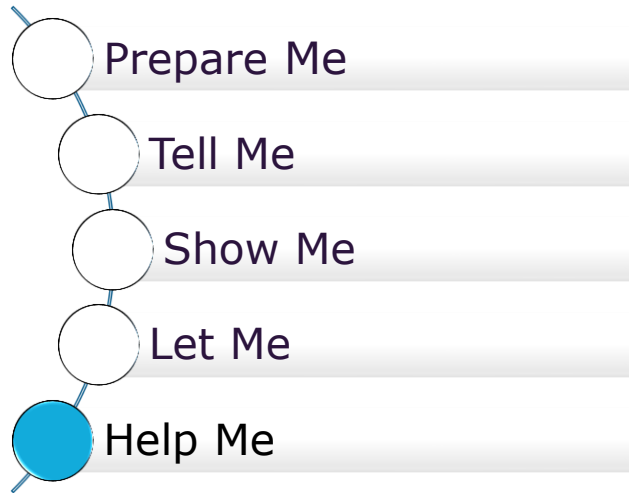
© 2018 Capgemini. All rights reserved.

58

Add the notes here.



Add instructor notes  
here.



Add instructor notes here.

## Frequently Used Transactions for SOP



Practice the following transactions generally used for Sales & Operations Planning

- MC21/MC22 Create/Change Information Structure
- MC7F Planning parameters of the Information structure
- MC84/MC85 Create/Change Product Groups
- MC91 Graphical presentation of Product Groups
- MC61 Create Planning Hierarchy
- MC62 Planning Hierarchy –Edit proportional factors
- MC9A Generate Master Data for Flexible Planning
- MC8A/MC8B Create/Change Planning Type
- MC87/MC88 Create/Change Standard SOP (Material)
- MC81/MC82 Create/Change Standard SOP (Product Group)
- MC93/MC94 Create/Change Flexible Planning
- MC96 Forecast Profile
- MC35/MC36 Create/Change Rough-cut profile
- MC74 Transfer Standard SOP to Demand Management (Material)
- MC75 Transfer Standard SOP to Demand Management (Product Group)
- MC90 Transfer Flexible Planning to Demand Management

© 2018 Capgemini. All rights reserved.

60

Add the notes here.

Add instructor notes here.

## Summary



The main purpose of sales and operations planning is to define the product types and quantities to be sold for a medium- to long-term planning period.

The goals of SOP is to obtain the corresponding planning data for production.

Sales & Operations Planning is a flexible forecasting and planning tool with which sales, production, and other supply chain targets can be set on the basis of historical, existing, and estimated future data.

SOP can be done at all level of finished products or using product groups.

Any combinations of materials or even of product groups can be grouped together into other product groups.

Flexible Planning provides detailed way of planning based on our own characteristics.

© 2018 Capgemini. All rights reserved.

61

Add the notes here.

Add instructor notes here.

## Review Questions



1. The result of sales and operations planning is the operations plan

*Check whether the statement is true or false*

- a. True
- b. False

2. Sales and operations planning first carries out the individual steps for creating sales plan

*Check whether the statement is true or false*

- a. True
- b. False

3. The interface with the profitability analysis (CO-PA) enables you to use the sales and profit plan as a basis for the sales plan.

*Check whether the statement is true or false*

- a. True
- b. False

© 2018 Capgemini. All rights reserved.

62

Add the notes here.