



smart planning solutions for SAP SAC



Integrated planning in SAP SAC

Cost-efficient and quickly implementable planning solutions
with guaranteed success

The perfect combination of SAP technology and planning content from
the specialists for integrated planning: smartPM.solutions

The engine for your company's success: Integrated planning

Do you want to connect all departments, ACTUAL and PLAN data in a single point of truth? Do you want all your sub-plans to interlock logically and ensure prudent, flexible and secure corporate management? This is exactly what the widely used financial planning solutions from smartPM.solutions support.

You can think of smartPM's Integrated Financial Planning (IFP) as a puzzle that brings together all the financial parts of a company to provide a complete picture of the company's financial situation. It can be seen as a closed system of P&L, balance sheet and cash flow statement, in which all parts are logically linked and automatically derived from the sub-plans.

In this factsheet we show you:

- ✓ The benefits of integrated financial planning in SAP SAC for your company
- ✓ How integrated planning in SAP SAC can be implemented efficiently and quickly in your company
- ✓ All functionalities and dashboards of the smartPM financial planning solution

For you as a SAP SAC user, this means:

- Fast implementation thanks to predefined content
- Increased efficiency, process optimization and high transparency
- Better decision-making thanks to practice-proven planning approaches
- Modern planning methods, such as scenarios, what-if analyses and much more, "out of the box"
- Strategic planning and monitoring of measures to achieve targets

Customer opinion:

"Since the introduction of our integrated planning solution including project portfolio management, we have achieved an annual improvement in earnings of € 450,000 per year. And that's not even taking into account the simplifications in the process and therefore in quality."

Arbi Araks, Head of Controlling & Finance, LIST GC

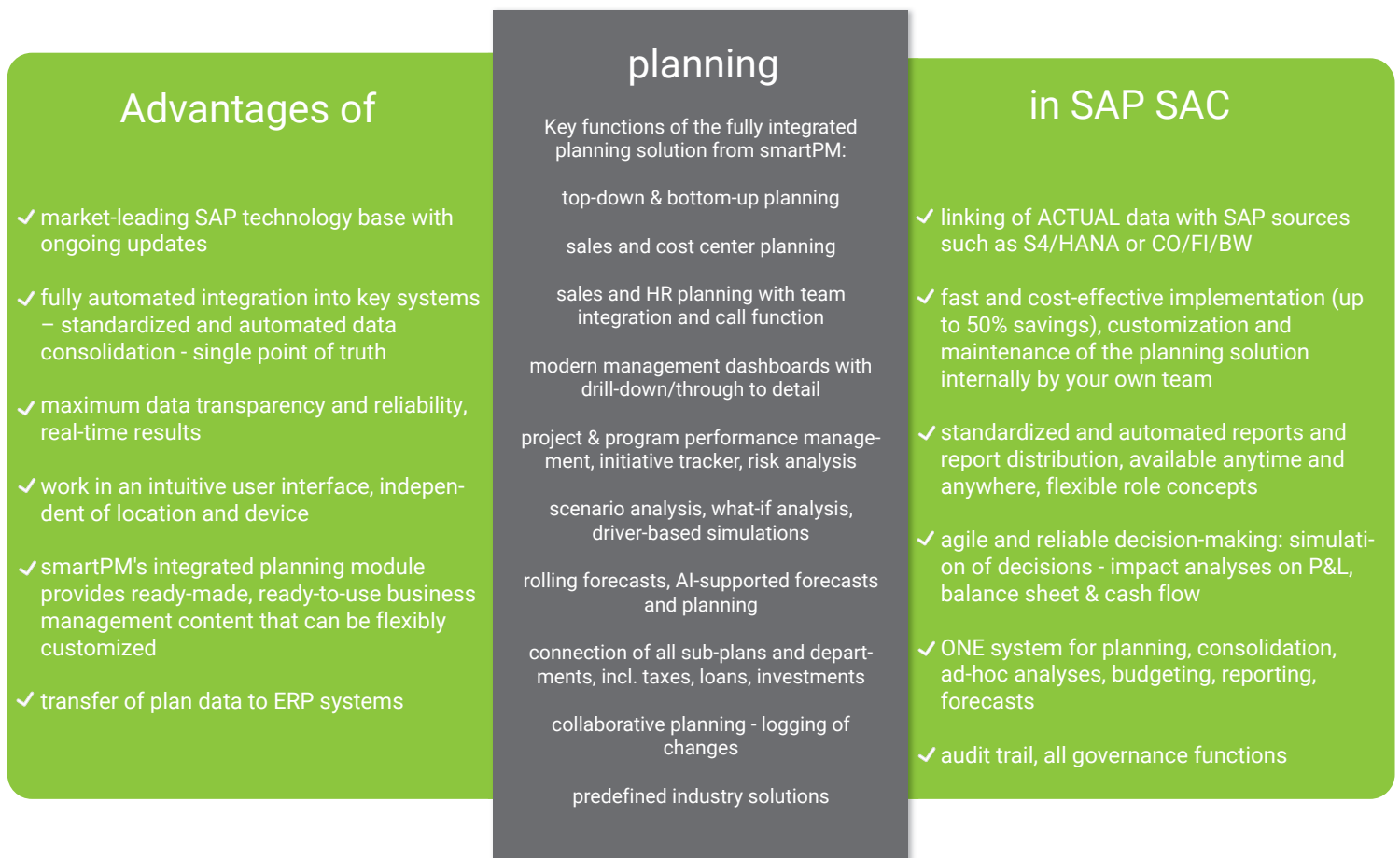


The advantages of smartPM financial planning in SAP SAC at a glance

The financial planning solution from smartPM.solutions provides you with predefined business management models for fully integrated planning, management consolidation, ad-hoc analysis, budgeting, reporting and forecasting. All content is available in several languages and for different industries. Actual, budget and forecast data are connected and can be analyzed and optimized using BI functions. All data, reports and dashboards can be opened in real time for different roles and are always up to date. Data can be updated at the click of a button and time-consuming and error-prone data imports and exports are a thing of the past.

The proven planning logic can be extended from the finance department to other departments such as HR, sales and production.

All advantages at a glance:



smartPM is not only a specialist for planning solutions, but also the perfect sparring partner for you. Our competent consulting team has a background in controlling and is very experienced in projects. During and after the project, you will be supported by reliable expert consultants for all business and technological issues. This includes change management.

How to implement integrated planning in SAP SAC quickly and securely in your company

SAP brings smartPM.solutions on board as a specialist for integrated planning. This guarantees the optimum combination of flexible, market-leading software and business planning expertise. The smartPM planning content is predefined and practice-proven. This means that these user-friendly solutions incorporate the best content from numerous successful projects. It gives you the perfect state-of-the-art planning solution that is optimized for immediate use in SAP. Look forward to rapid success for you and your team.



Compared to standard SAP projects, you save up to 50% implementation time, as existing best-of-breed content is only adapted to your requirements. So you benefit threefold - (1) from the know-how that has gone into the solutions from 25 years of project experience, (2) from rapid implementation and (3) cost efficiency, because far fewer consulting days are required. This is unique on the market - at smartPM.solutions.

The smartPM implementation and support team is also available to you after the project for all your questions in the form of support agreements (SLA - Service Level Agreements). smartPM projects achieve very high satisfaction ratings from independent rating platforms: Project satisfaction: 4.9 out of 5 points in over 40 criteria; support rating: 6.8 out of a possible 7 points.

"Our project-experienced consulting team not only adapts the predefined planning solutions to the company's requirements, but also helps to set up smart workflows and optimize processes. Our plus: a wealth of expertise and practical solutions from over 20 years of market experience".

Alexander Hein, CEO smartPM.solutions

Hands on: SAP SAC for planning with the fully integrated planning solution from smartPM

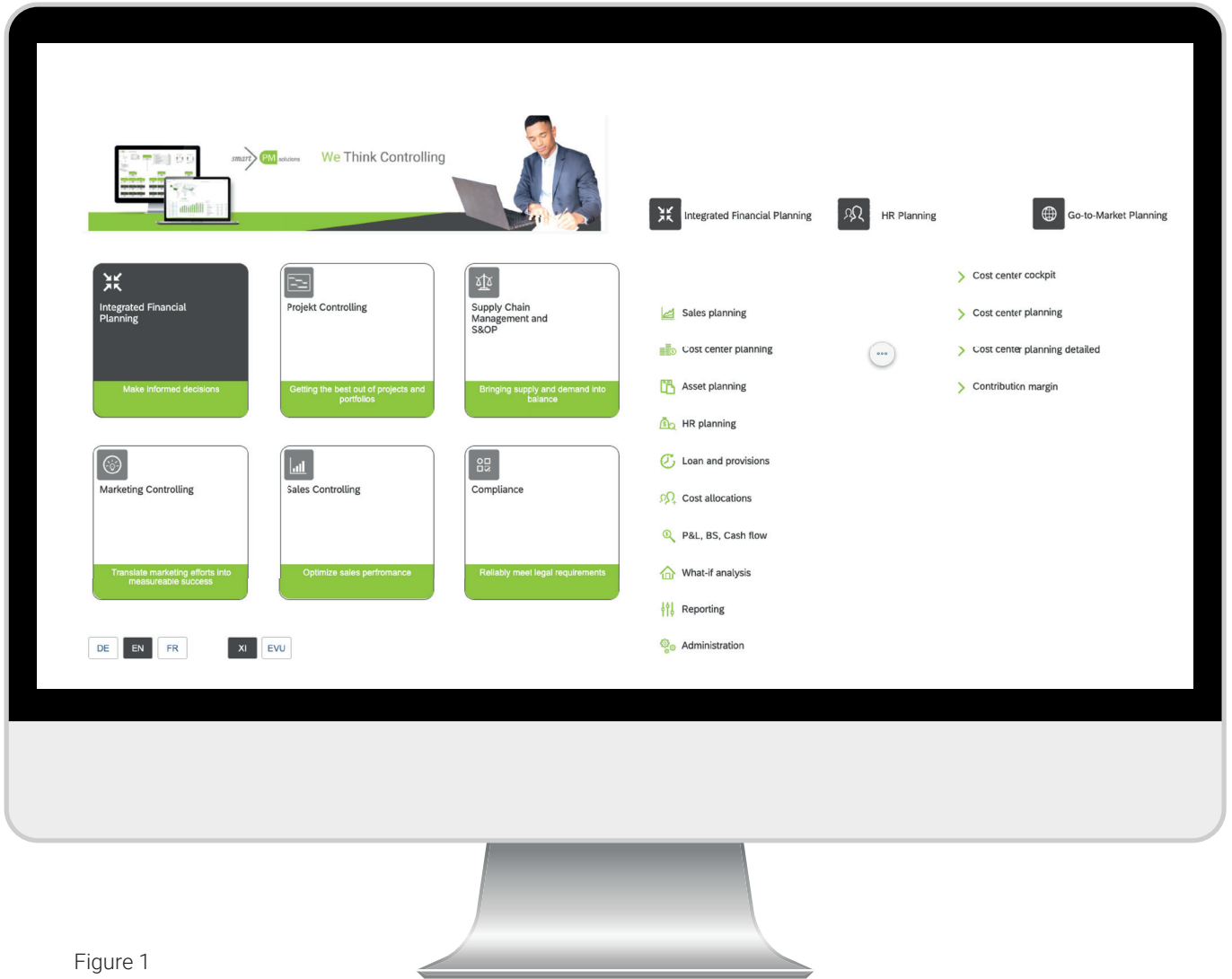


Figure 1

Let's now take a look directly at the planning solution from smartPM.solutions in SAP SAC. Figure 1 shows the start page of the smartPM planning solution with all sub-plans at a glance. Thanks to the modular structure of the planning solution you can plan on a department-specific or cross-departmental basis. From integrated financial planning to project and program performance management, HR and capacity planning, every smartPM solution can be used individually or in combination. This gives you the option of connecting all loose ends via a single user interface. The user interface can be individually adapted to your requirements.

Keep an eye on everything with the Performance Dashboard



Figure 2

The MS Teams integration shown in the Performance Dashboard enables easy collaboration and fast tracking of joint initiatives. A Gantt chart can be used to plan tasks and also adjust their chronological order.

The current degree of target achievement of the top-down targets is measured by comparing actual and forecast figures. Planning and ad-hoc analysis are multidimensional across products, product groups, sales territories, periods, value types, sales reps, etc.



WE THINK CONTROLLING smartPM stands for ...

... modern, market-leading technology for integrated planning, analysis, budgeting, forecasting, reporting, and consolidation in combination with extensive business know-how and outstanding consulting and service.

4,9/5 ★ Projektzufriedenheit 6,8/7 ★ Supportzufriedenheit

Efficient planning, reliable decision-making

Figure 3 shows top-down and bottom-up planning in SAP SAC. The ability to set and track measures ensures that corporate goals are achieved. The clear organization of initiatives allows them to be managed down to the level of responsibility. Initiatives can be used for all types of projects and measures, such as sales promotions, cost-saving measures or construction projects.

The integrated financial planning solution from smartPM also supports you in choosing the right strategy, for example in the questions "Which investments should be prioritized?" and "What measures are needed to achieve the set goals?"

Initiatives at a glance
 Figure 3 shows an overview of initiatives using the example of strategic measures. Such measures can be prioritized, assigned to responsible persons and released or rejected via different levels of responsibility. A tree view allows the degree of implementation to be monitored with regard to bottom-up and top-down objectives.

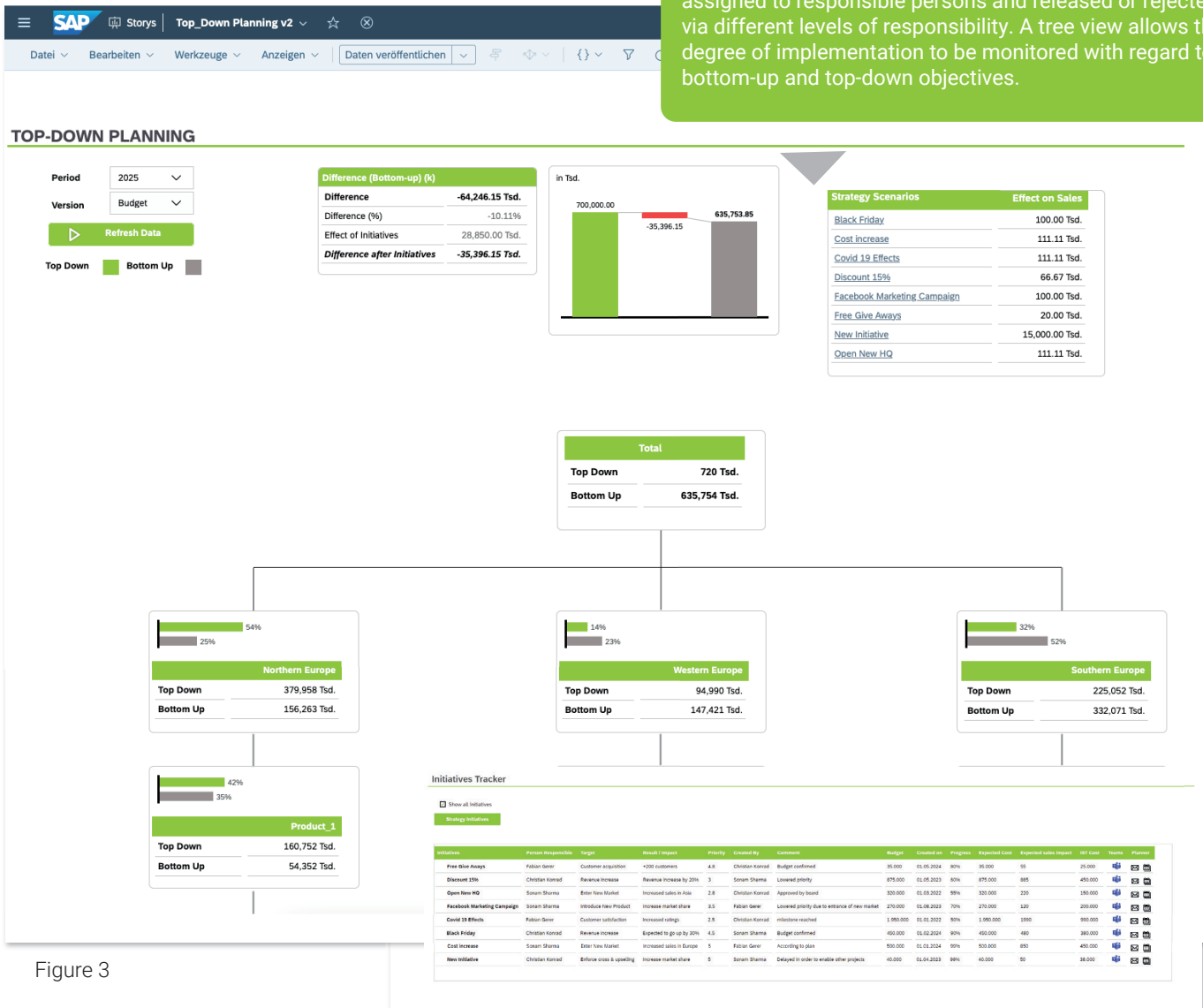


Figure 3

Classic bottom-up planning (see Figure 6 using the example of sales planning) is also preconfigured in the smartPM planning standard.

Planning and forecasting with artificial intelligence (AI)

Figure 4 uses the example of a sales forecast to show how decisions can be optimally supported by precise forecasts. Based on different forecasting methods including AI (neural networks), the most accurate forecast is determined and suggested based on the error values. AI methods have the advantage that a lot of external influencing factors can be taken into account in the forecast. In addition, NLP (Natural Language Processing) integration can support market research and recommendations for the development of a go-to-market strategy.

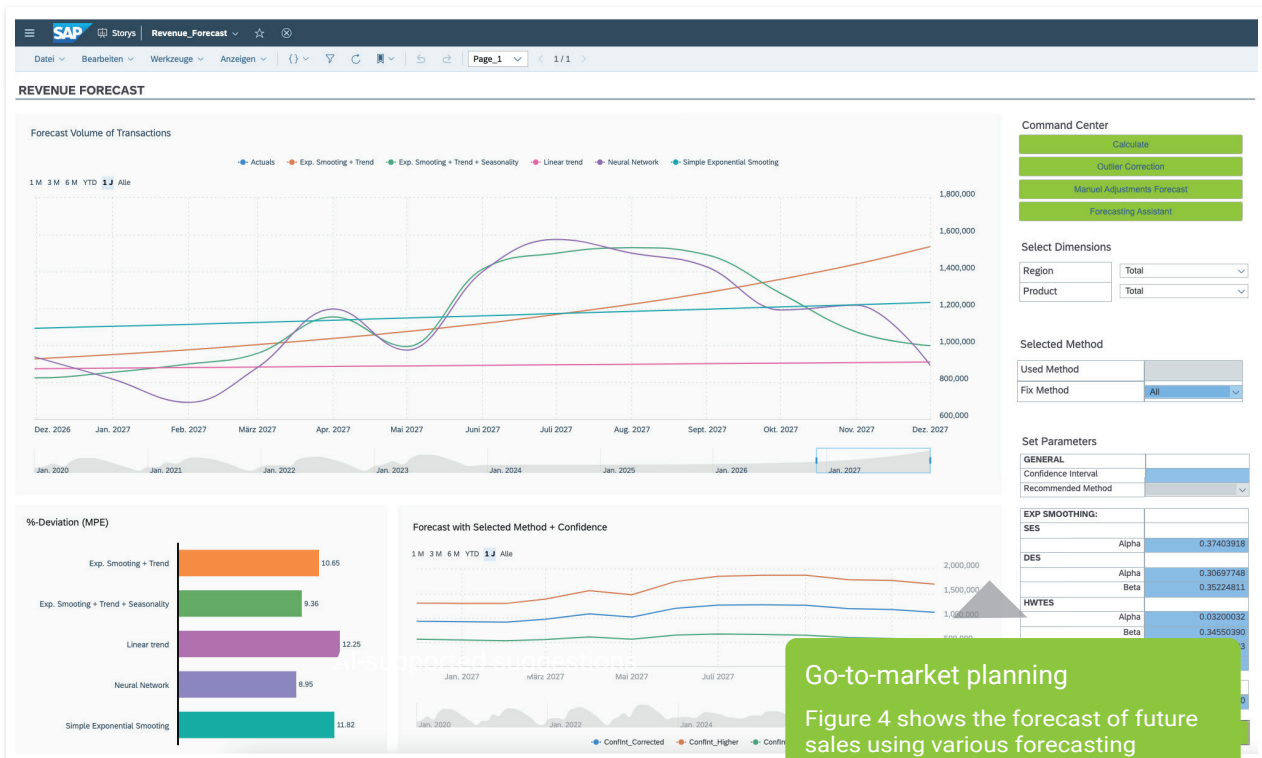


Figure 4

AI-supported suggestions
Table elements such as initiatives can be filtered and sorted by the AI-supported system creating meaningful suggestions for the application of filter criteria.

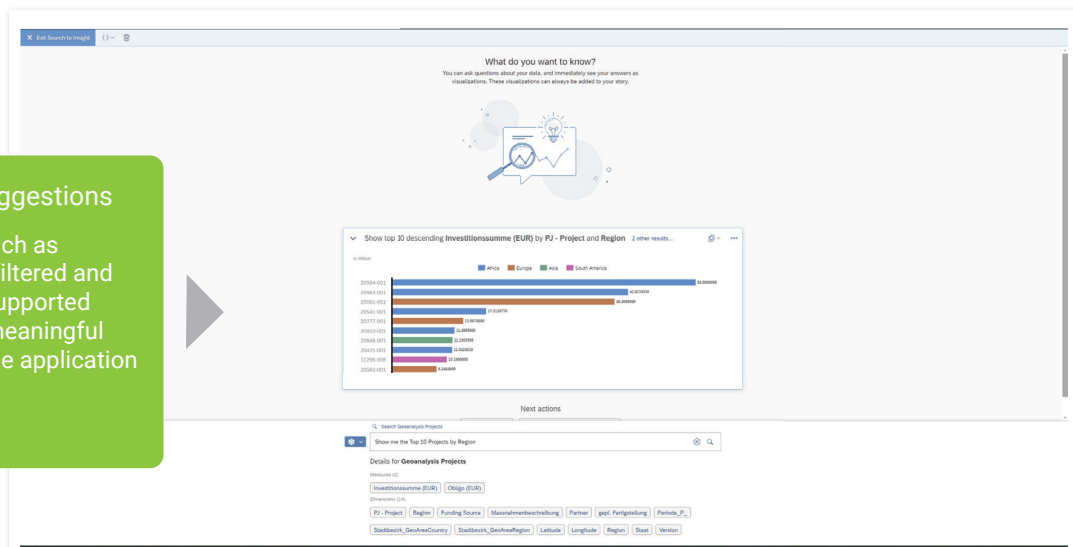


Figure 5

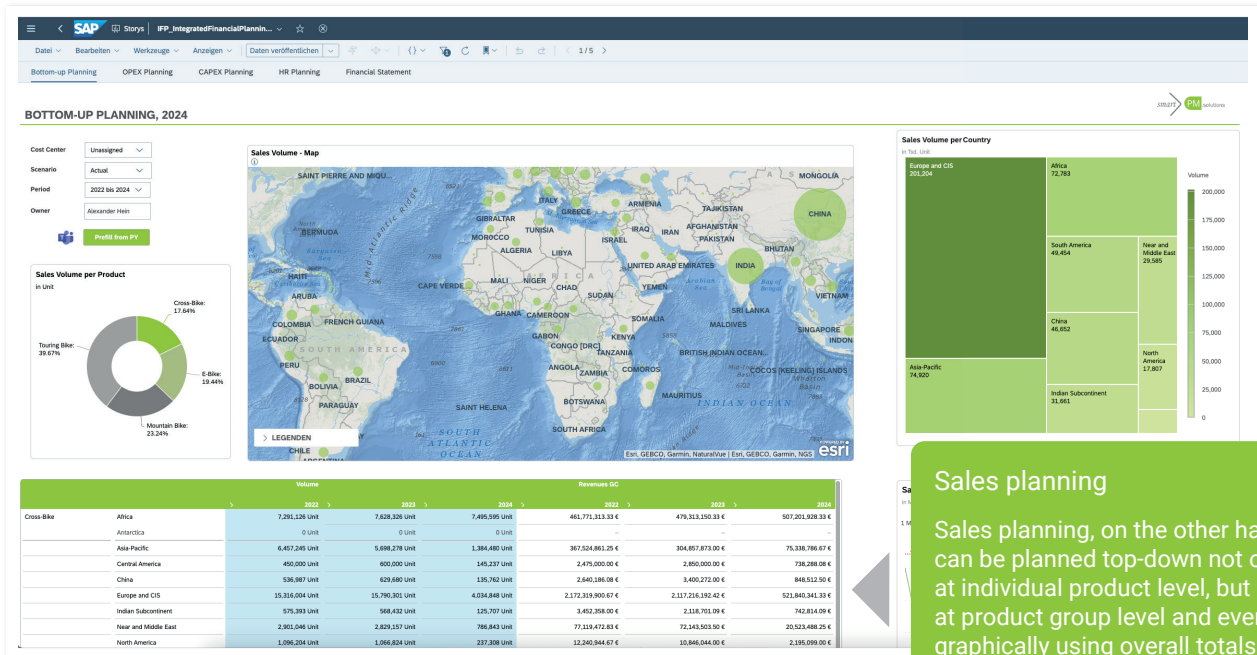


Figure 6

Sales planning
Sales planning, on the other hand, can be planned top-down not only at individual product level, but also at product group level and even graphically using overall totals (see Figure 6).

Even more comprehensive planning approaches, such as a driver-based scenario simulation, can be implemented quickly and easily in the smartPM financial planning solution (see Figure 7). AI assistants (machine learning, NLP) can be used for this purpose when interpreting or creating scenarios.

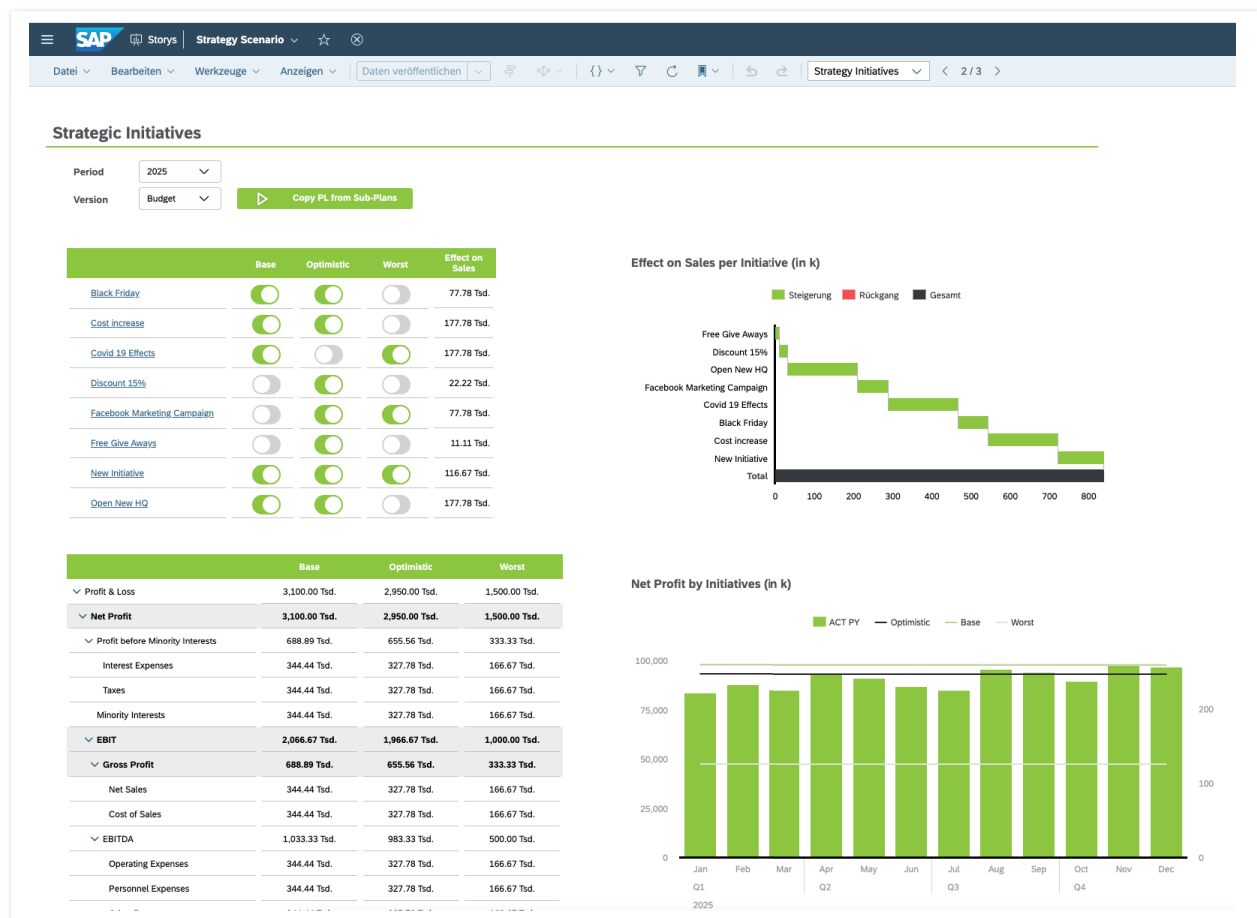


Figure 7

All in one system: cost center, HR and project planning

In "classic" cost center planning with commenting function, allocations, transfer of data from reference periods, variance analyses and drill-downs are possible.

Cost-center planning

The "classic" cost center planning is also available in the smartPM planning module. Drill-down function via the green arrows on the left of the screen.

OPEX PLANNING, 2024

Cost Center: (Alle) Scenario: (Alle) Period: 2024 Owner: Alexander Hein

Cost Distribution by Cost Center, 2024
Operating Expenses in Tsd.

11 Production Department	-1	52
12 Auxiliary Departments		
13 Administrative Departments		

YoY Overview
Operating Expenses in Tsd.

Year	ACT	BUD
2022	64,556	
2023	49,963	
2024	45,994	
2025		-52,158

OTHER OPERATING EXP. 2024
163.36 Tsd. 51.66%

2024	2024			Deviation			
	ACT PY	ACT YTD	FC Remaining	Total CY	BUD NY	▲ ACT - ACT PY (%)	▲ BUD NY - FC (%)
66 8. Other operating expenses	337.93 Tsd.	91.90 Tsd.	71.46 Tsd.	163.36 Tsd.	55,048.56 Tsd.	51.66%	62.58%
670 Other operating expenses, rents, fees, commissions	115.20 Tsd.	38.50 Tsd.	20.78 Tsd.	59.27 Tsd.	2,425.90 Tsd.	48.55%	87.63%
670000 rent and utilities - distr.	15.70 Tsd.	11.50 Tsd.	0.14 Tsd.	11.64 Tsd.	-	25.86%	-
670100 rent and utilities - adm.	-16.71 Tsd.	3.43 Tsd.	1.57 Tsd.	5.00 Tsd.	-	129.94%	-
670200 maintenance buildings / offices distr.	5.27 Tsd.	4.08 Tsd.	0.14 Tsd.	4.22 Tsd.	-	19.89%	100.00%
670230 maintenance buildings / offices admn.	18.13 Tsd.	8.74 Tsd.	-4.02 Tsd.	4.72 Tsd.	-	73.94%	-
670300 maintenance office equipment	23.22 Tsd.	2.90 Tsd.	-0.24 Tsd.	2.66 Tsd.	1,277.98 Tsd.	88.55%	-
671000 operate leasing	5.68 Tsd.	1.17 Tsd.	-0.30 Tsd.	0.87 Tsd.	-	84.66%	100.00%
671100 operate leasing cars & vehicles	18.33 Tsd.	1.95 Tsd.	-0.03 Tsd.	1.92 Tsd.	125.00 Tsd.	89.51%	-
671900 Leasing IC	2.12 Tsd.	1.14 Tsd.	16.94 Tsd.	18.09 Tsd.	-	-752.93%	100.00%
672000 licence fees	21.50 Tsd.	-0.63 Tsd.	4.05 Tsd.	3.43 Tsd.	1,022.92 Tsd.	84.06%	-
672900 licence fees IC	15.94 Tsd.	1.53 Tsd.	1.26 Tsd.	2.79 Tsd.	-	82.48%	-
674000 limited-term employment	6.02 Tsd.	2.66 Tsd.	1.26 Tsd.	3.92 Tsd.	-	34.77%	100.00%
675 bank charges,commissions	14.78 Tsd.	3.67 Tsd.	0.09 Tsd.	3.76 Tsd.	-	74.53%	-
677 audit fees, consultant expenses,							
680 office supply, IT cost, communica							
685 travel expenses,							

2025

	202501	202502	202503	202504	202505	202506	202507	202508	202509	202510	202511	202512	Comment
66 8. Other operating expenses	473.62 k	45.40 k	38.35 k	42.08 k	38.02 k	38.00 k	38.03 k	36.02 k	37.02 k	37.02 k	41.84 k	41.84 k	
670 Other operating expenses, rents, fees, commissions	176.37 k	21.10 k	14.07 k	17.70 k	13.71 k	13.71 k	13.71 k	13.71 k	13.71 k	13.71 k	13.71 k	13.71 k	
675 bank charges,commissions	16.09 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	
675000 bank charges and commission fees	16.09 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	1.39 k	
677 audit fees, consultant expenses, legal protection	6.25 k	0.52 k	0.52 k	0.52 k	0.52 k	0.52 k	0.52 k	0.52 k	0.52 k	0.52 k	0.52 k	0.52 k	
680 office supply, IT cost, communication,postal serv.	9.76 k	1.15 k	1.13 k	1.14 k	1.15 k	1.13 k	1.16 k	2.15 k	0.15 k	0.15 k	0.15 k	0.15 k	
680000 office supply	1.04 k	0.12 k	0.01 k	0.10 k	0.15 k	0.14 k	0.15 k	0.28 k	0.02 k	0.02 k	0.02 k	0.02 k	
681000 newspapers and magazines, specialized literature	2.17 k	0.25 k	0.28 k	0.25 k	0.25 k	0.25 k	0.25 k	0.47 k	0.03 k	0.03 k	0.03 k	0.03 k	
682000 Postal and shipping cost administration	0.67 k	0.08 k	0.09 k	0.08 k	0.08 k	0.08 k	0.08 k	0.14 k	0.01 k	0.01 k	0.01 k	0.01 k	
683000 tele-communication costs	0.37 k	0.04 k	0.05 k	0.04 k	0.04 k	0.04 k	0.04 k	0.08 k	0.01 k	0.01 k	0.01 k	0.01 k	
683020 tele-communication costs	1.17 k	0.14 k	0.15 k	0.14 k	0.13 k	0.14 k	0.14 k	0.25 k	0.02 k	0.02 k	0.02 k	0.02 k	
688000 IT costs	1.28 k	0.15 k	0.15 k	0.15 k	0.15 k	0.14 k	0.15 k	0.28 k	0.02 k	0.02 k	0.02 k	0.02 k	
689000 other costs for communication	3.06 k	0.36 k	0.39 k	0.37 k	0.35 k	0.35 k	0.35 k	0.66 k	0.05 k	0.05 k	0.05 k	0.05 k	
685 travel expenses,	4.17 k	0.35 k	0.35 k	0.35 k	0.35 k	0.35 k	0.35 k	0.35 k	0.35 k	0.35 k	0.35 k	0.35 k	
686 guest catering and entertaining	13.52 k	1.13 k	1.13 k	1.13 k	1.13 k	1.13 k	1.13 k	1.13 k	1.13 k	1.13 k	1.13 k	1.13 k	
687 marketing and advertising	18.37 k	1.53 k	1.53 k	1.53 k	1.53 k	1.53 k	1.53 k	1.53 k	1.53 k	1.53 k	1.53 k	1.53 k	
690 Insurance expenses	38.70 k	3.22 k	3.22 k	3.22 k	3.22 k	3.22 k	3.22 k	3.22 k	3.22 k	3.22 k	3.22 k	3.22 k	
692 contributions to trade associations and chambers	3.00 k	0.25 k	0.25 k	0.25 k	0.25 k	0.25 k	0.25 k	0.25 k	0.25 k	0.25 k	0.25 k	0.25 k	
693 exchange losses	20.02 k	1.67 k	1.67 k	1.67 k	1.67 k	1.67 k	1.67 k	1.67 k	1.67 k	1.67 k	1.67 k	1.67 k	
695007 Unmatched IC transactions	9.91 k	0.83 k	0.83 k	0.83 k	0.83 k	0.83 k	0.83 k	0.83 k	0.83 k	0.83 k	0.83 k	0.83 k	
693000 exchange losses	10.12 k	0.84 k	0.84 k	0.84 k	0.84 k	0.84 k	0.84 k	0.84 k	0.84 k	0.84 k	0.84 k	0.84 k	Testkommentar
695900 Consolidated Exchange Losses	-	-	-	-	-	-	-	-	-	-	-	-	
694 other misc. operating expenses	28.69 k	2.39 k	2.39 k	2.39 k	2.39 k	2.39 k	2.39 k	2.39 k	2.39 k	2.39 k	2.39 k	2.39 k	
694000 allocations to warranty reserves	17.81 k	1.48 k	1.48 k	1.48 k	1.48 k	1.48 k	1.48 k	1.48 k	1.48 k	1.48 k	1.48 k	1.48 k	
699000 exp. not related to the accounting period	10.88 k	0.91 k	0.91 k	0.91 k	0.91 k	0.91 k	0.91 k	0.91 k	0.91 k	0.91 k	0.91 k	0.91 k	
699800 exp. not related to the accounting period	-	-	-	-	-	-	-	-	-	-	-	-	
695 losses from the depreciation of current asset	66.36 k	4.33 k	4.33 k	4.33 k	4.33 k	4.33 k	4.33 k	4.33 k	4.33 k	4.33 k	4.33 k	11.95 k	11.95 k
695100 losses from the depreciation of current asset	13.06 k	0.96 k	0.96 k	0.96 k	0.96 k	0.96 k	0.96 k	0.96 k	0.96 k	0.96 k	0.96 k	1.74 k	1.74 k
695300 damages / losses on receivables / penalties	4.74 k	0.39 k	0.39 k	0.39 k	0.39 k	0.39 k	0.39 k	0.39 k	0.39 k	0.39 k	0.39 k	0.39 k	0.39 k
697100 Fair value losses on financial instruments	13.93 k	1.16 k	1.16 k	1.16 k	1.16 k	1.16 k	1.16 k	1.16 k	1.16 k	1.16 k	1.16 k	1.17 k	1.17 k

Figure 8

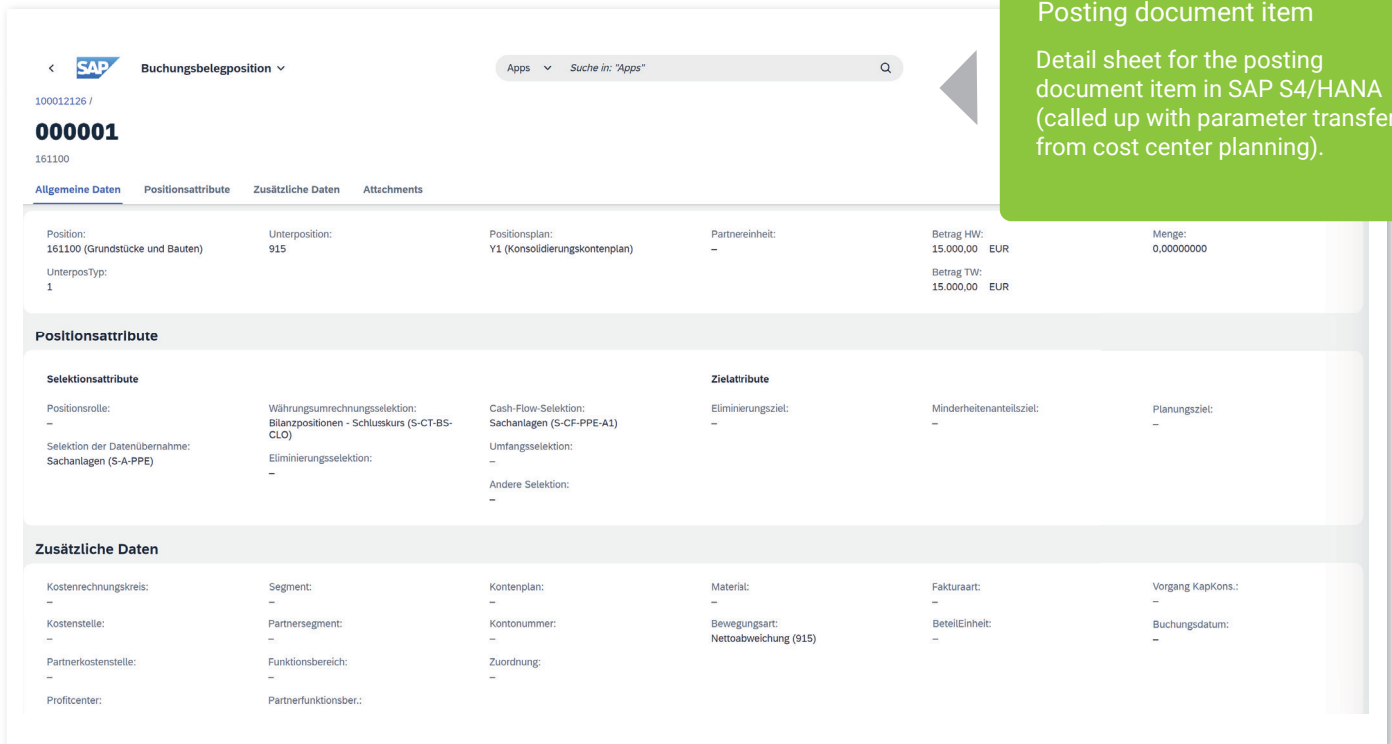


Figure 9

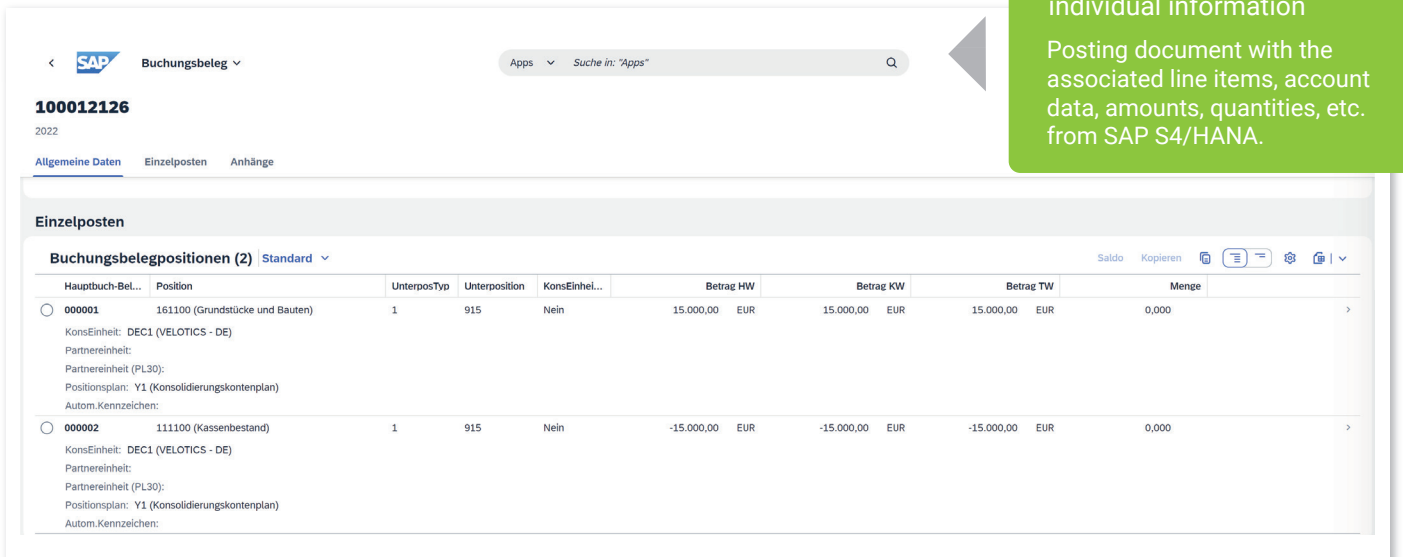
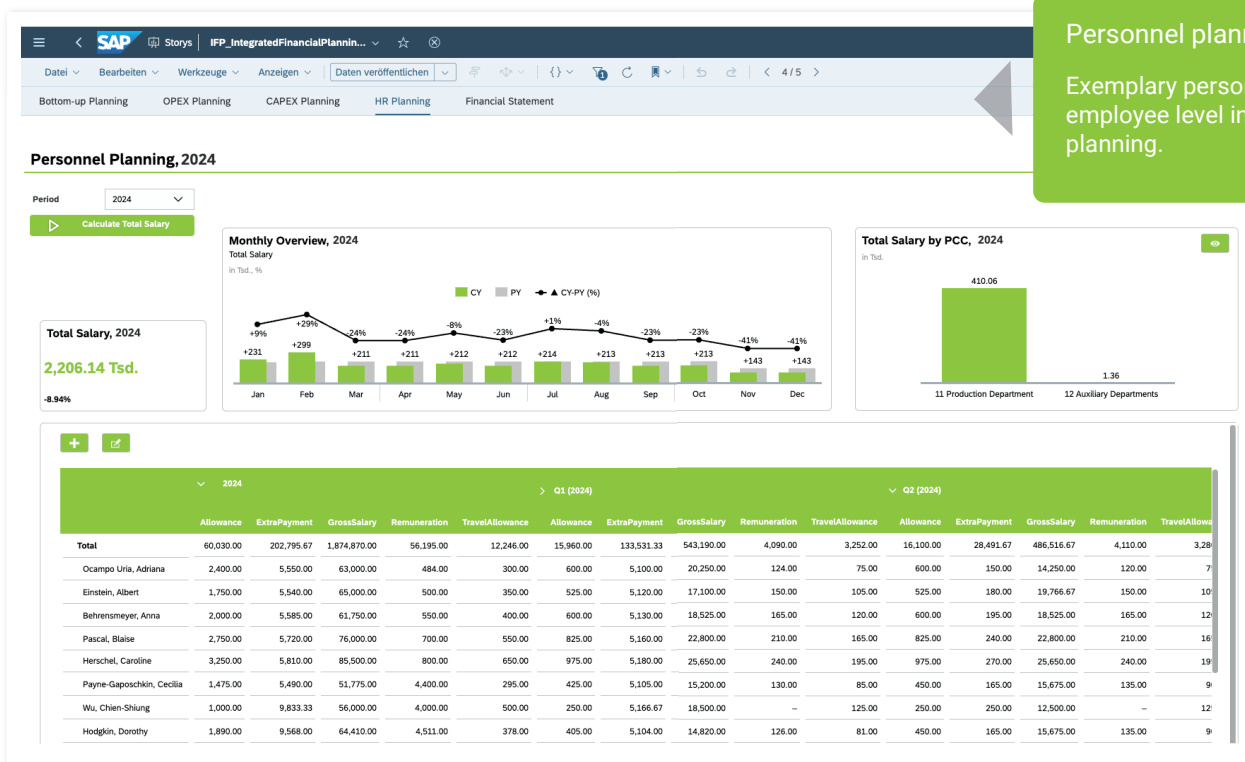


Figure 10

All smartPM planning solutions can be analyzed or "drilled down" to the document level of the underlying transaction systems. Figures 9 shows the drill-down to SAP: to posting document item and to individual information.

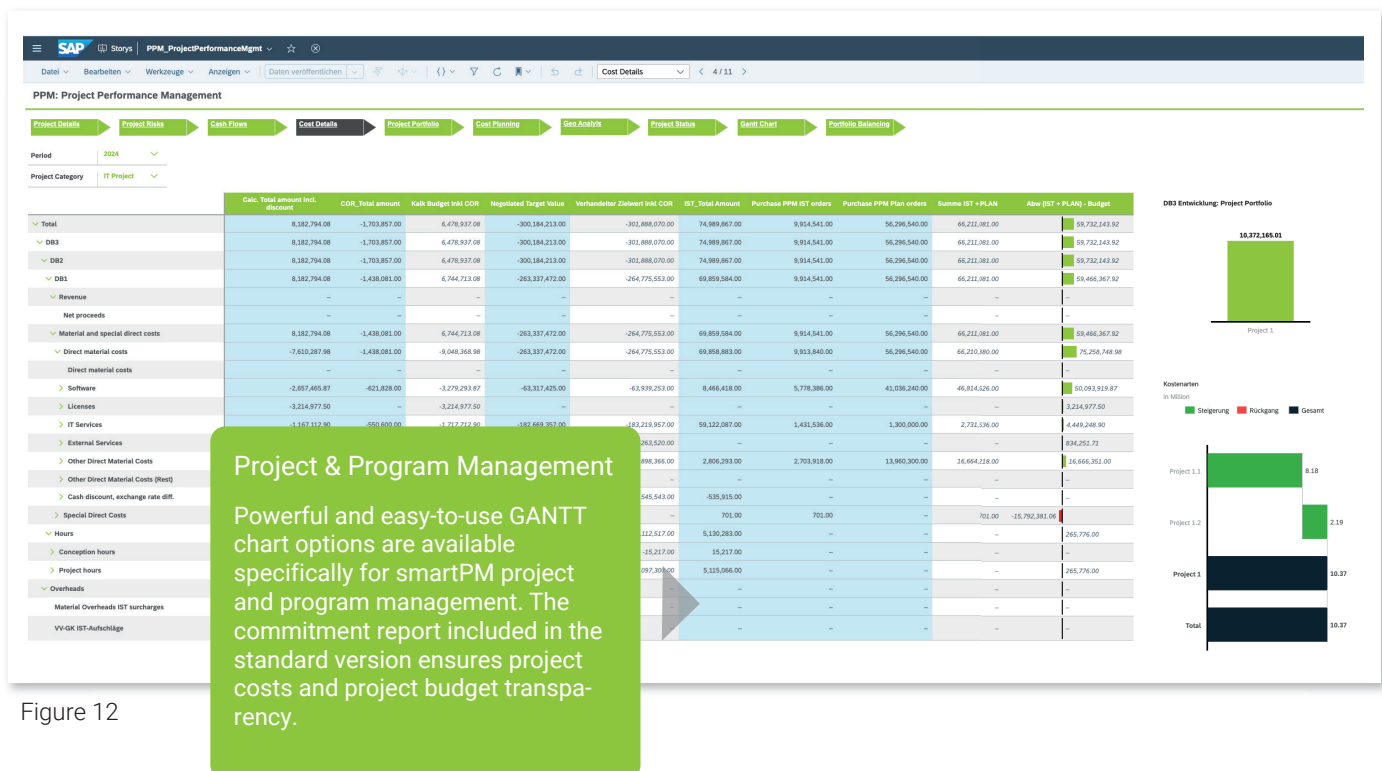
Personnel planning, on the other hand, can be carried out at employee level or at cost center level in a wide variety of ways.



Personnel planning
Exemplary personnel planning at employee level in SAP SAC for planning.

Figure 11

Project planning is just as diverse as personnel (cost) planning. While the focus is clearly on monitoring and optimizing individual projects and entire portfolios, elements of project management can also be easily integrated. For example, GANTT diagrams, milestone deviation analyses and project profiles have proven to be very helpful in practice. Figure 12 shows a typical commitment report for tracking available budgets:



Project & Program Management
Powerful and easy-to-use GANTT chart options are available specifically for smartPM project and program management. The commitment report included in the standard version ensures project costs and project budget transparency.

Figure 12

In addition, investment controlling and CAPEX planning can be carried out fully automatically in the system.

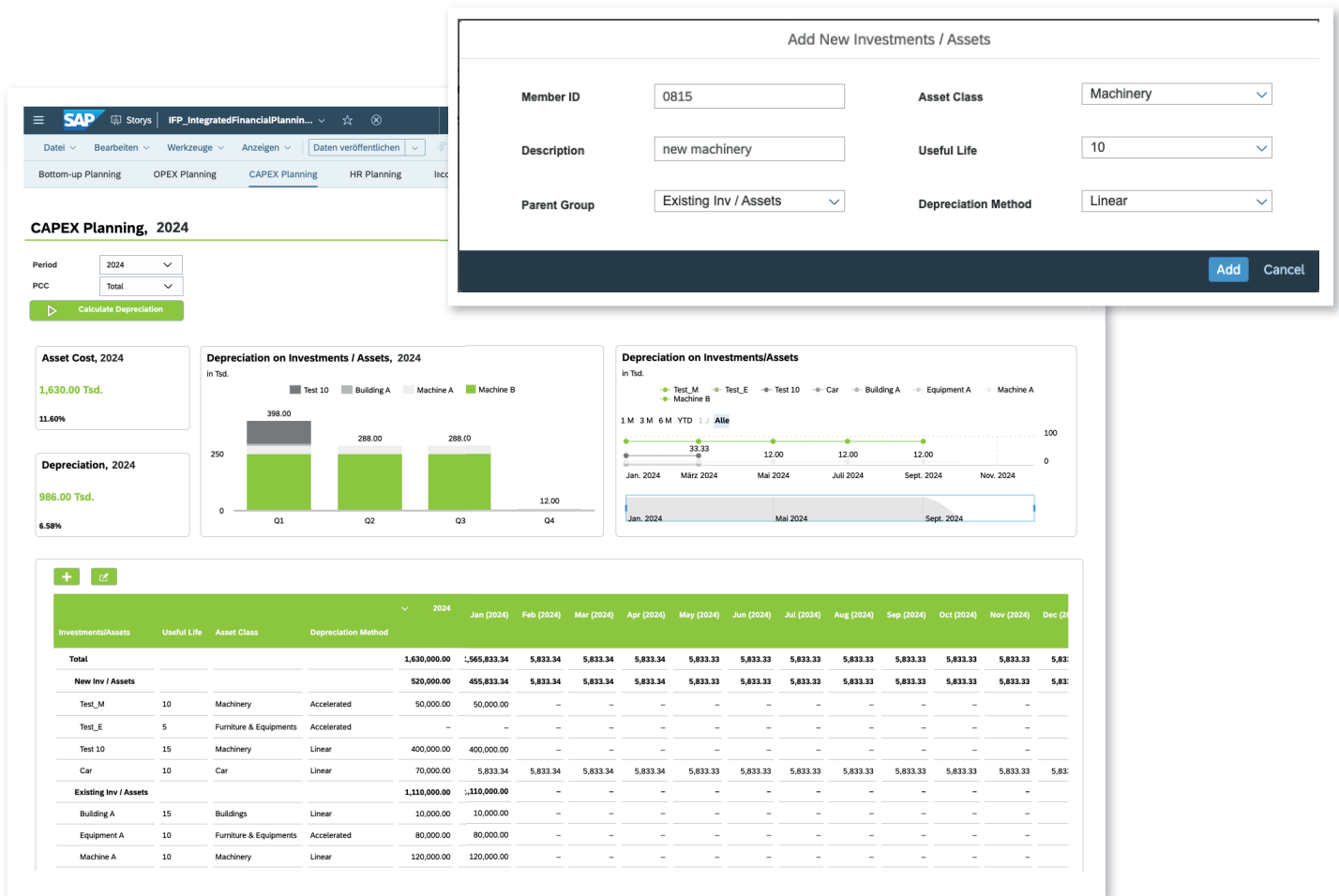


Figure 13

The depreciation preview for inventory investments is taken from the ERP module (HANA or FI) and new investments are planned here.

"The expertise and support were key factors in our decision to choose smartPM.solutions. Our focus was: how is the implementation team, how is the support and how does it work after the project? This is now also proving to be a key success factor. We are glad that we have smartPM as a business and technological partner."

Daniel Olthaus, Head of Financial Analysis, ROSEN Group

ROSEN GROUP

Optimizing capacities - balancing supply and demand

The consideration of procurement and S&OP processes is also extremely useful from a corporate management perspective. Figure 14 shows the option of balancing demand and supply. For this purpose, various forms of forecasts are automatically harmonized with the production possibilities and adjusted top-down specifications.

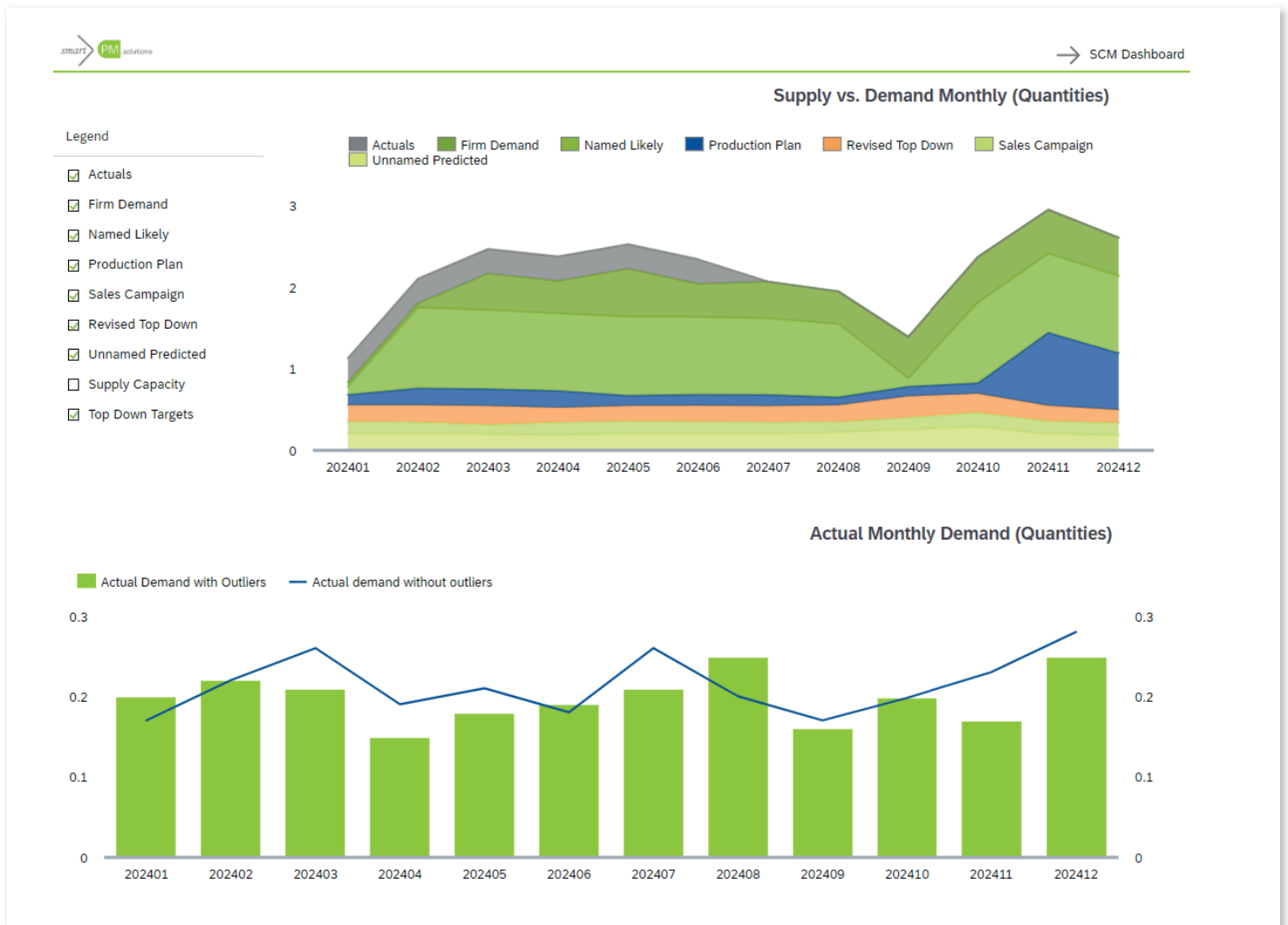


Figure 14

Changed specifications for production can be passed on to the SAP ERP.

Integrated financial planning ensures the company's success

As a central prerequisite for integrated financial planning, the income statement, including its sub-plans, is linked to the balance sheet. The cash flow is derived from the income statement and the balance sheet (see Figure 15).




Figure 15

For the reconciliation of P&L items to the balance sheet and cash flow, the corresponding allocations can be defined (for example, that sales become receivables, and these are then recognized in cash using payment factors).

IBCS-compliant commentary functions via the corresponding visuals make it easier to understand the data and enable the clear communication of important messages and recommendations.

7 Good reasons for smartPM

Why we are the right partner for your company!


-  A single point of truth: upstream systems seamlessly and automatically networked in SAP
-  Planning solutions with predefined business content
-  Integrated financial planning, analysis, budgeting, forecasting and reporting from a single source
-  User-friendly, innovative & customizable solutions with artificial intelligence
-  Competent and experienced team with a financial controlling background; 4.9/5 project rating
-  Your reliable SAP partner for digitalization in financial controlling before, during and after the project
-  Guaranteed fast and successful implementation, 50% time saving

You might also be interested in:

An expert meeting on 'Planning in SAP SAC'


Find the best solution

Our business management experts will be happy to help you find the right planning content for your company.
Reliable, structured, organized.



Expert meeting with live demo

MO.	DI.	MI.	DO.	FR.	SA.	SO.
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4



<https://smartpm.solutions/request-live-demo/>

