


# Sales Forecast

The Sales Forecasting uses embedded analytic which are the key that enables for the VP of sales, sales operations and front-end sales organizations to move from a culture based only on gut feeling and perception-based excels decision making to one based on factual data supporting tactical and strategic decision making. It all start with defining the Demand Planning, with the creation of the Sales Forecast List.The user can create different demand groups that are linked to forecast groups. Once the sales forecast list is created the sales forecast reporting can be activated using the different selected parameters in the sales forecast applications. Below actions are available under **“Sales Forecast”**:

-  Create new sales forecast, update, delete, view and search for proforma invoice details

Sales Forecast

Demand Group: < Select All >

Forecast Group: < Select From All Groups >

Search

Year: Year 2016

From:

Title:

Doc/Ref#:

Create New

Date ▲	Document #	Reference #	Demand Group #	Demand Group Name	Forecast Group #	Forecast Group Name	Status
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Status: Drafted / Confirmed

Sales Forecasts List

Sales Forecast

**Sales Forecast**

Document Date: Year 2015, June 2015, June 2015  
 Document Number: SF-0003  
 Reference Number:   
 Branch: HQ - Head Office  
 Forecast Group: FG01 - Products L'Oreal  
 Demand Group: DG001 - Third Party Customers  
 Description:   
 Approved

Items / Articles Notes / Attachments

Product Brand: < Select All > Search: Show: Quantity

Forecast Group / Product	Unit ...	Unit ...	To...	Jun...	Jul...	Aug...	Se...	Oct...	Nov...	De...	Jan...	Feb...	Mar...	Apr...	May...	Jun...	Jul...	Aug...	Se...	Oct...	Nov...	De...	Jan...	Feb...	Mar...	Apr...	May...	Jun...
BD04-002562 - Master Eye Liner in Brown	SS7.60	SS4.03	1...	80	80	90	80	120	90	90	130	90	90	90	40	120	78	79	77									
Suggested	SS7.60	SS4.03	1...	113	74	87	77	110	92	89	130	84	84	92	35	114	78	79	77									
Regular	SS7.60	SS4.03	1...	80	80	90	80	120	90	90	130	90	90	90	40	120	78	79	77									
Promotion																												
Grand Total :	0	0	1,424	80	80	90	80	120	90	90	130	90	90	90	40	120	78	79	77	0	0	0	0	0	0	0	0	0

Generate Report Create New Save Revert Delete

Sales Forecasts List (4) Sales Forecast

Field Name	Explanation	Mandatory Information
Document Date	Select the date of document	Y
Document Number	Self-Explanatory	Y
Reference Number	Self-Explanatory	N
Branch	Self-Explanatory	N
Forecast Group	Select the forecast group	Y
Demand Group	Select the demand group	Y
Description	Self-Explanatory	N

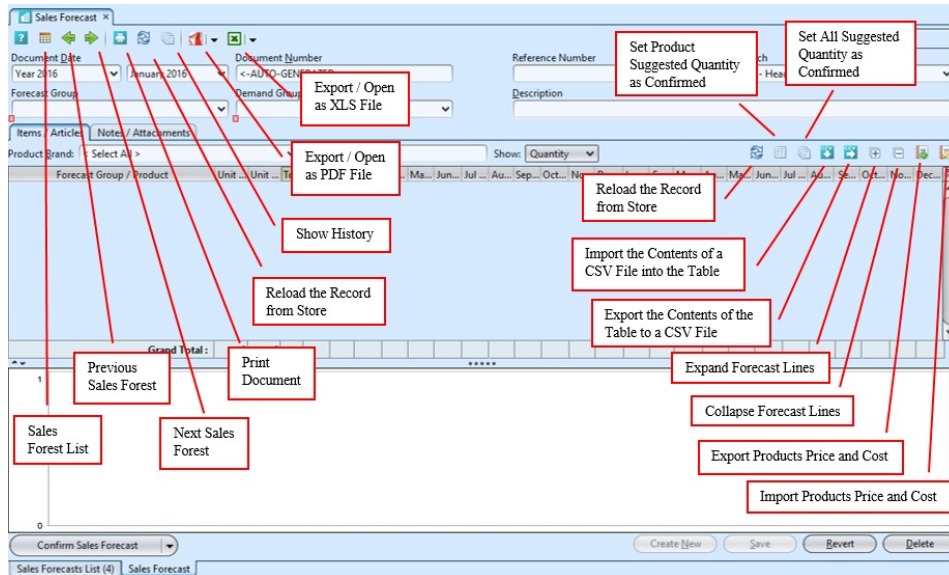
## Create New Sales Forecast

1. Click on **“Create New”** at the top right of screen of **“Sale Forecasts List”** tab, it will open **“Sales Forecast”** tab with empty form

**Sales Forecast**

Demand Group: < Select All > Forecast Group: < Select From All Groups > Search:   
 Year: Year 2015 From: Till: Doc/Ref#:   
 Create New

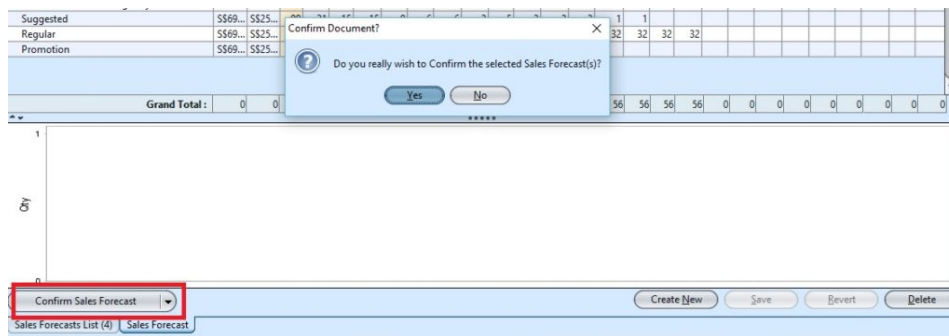
2. Fill up the information



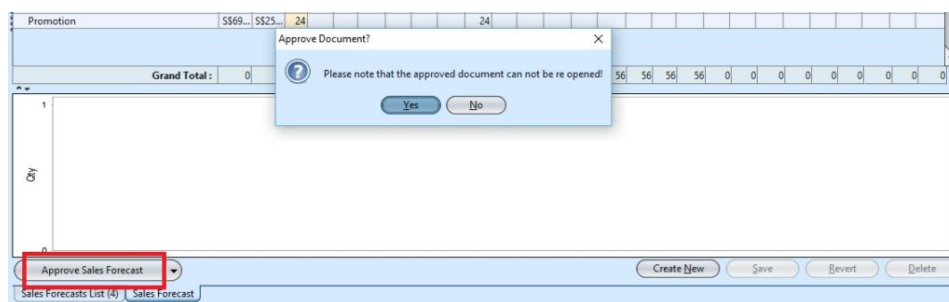
3. Optional: Click on **“Notes / Attachments”** tab at the middle of screen to add notes or files attachment for the sales forecast

4. Click **“Save”** button at the bottom right side of screen to save the sales forecast.

5. Click on **“Confirm Sales Forecast”** button at the bottom of screen to confirm the sales forecast.

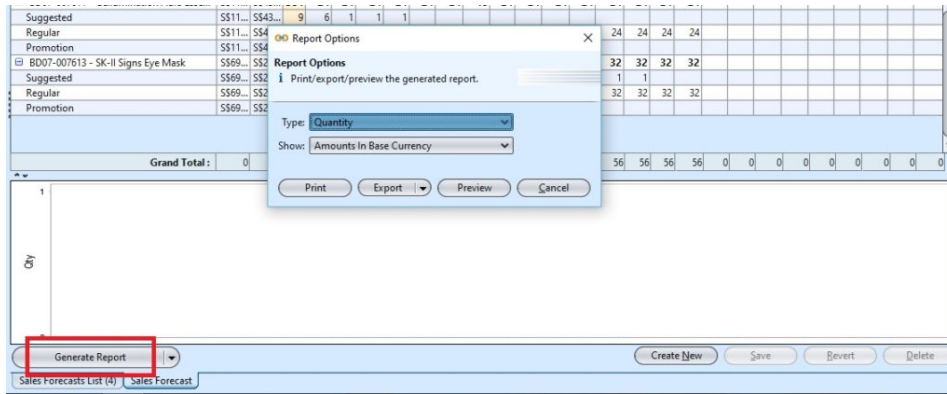


6. Click on **“Approve Sales Forecast”** button at the bottom of screen to approve the sales forecast.



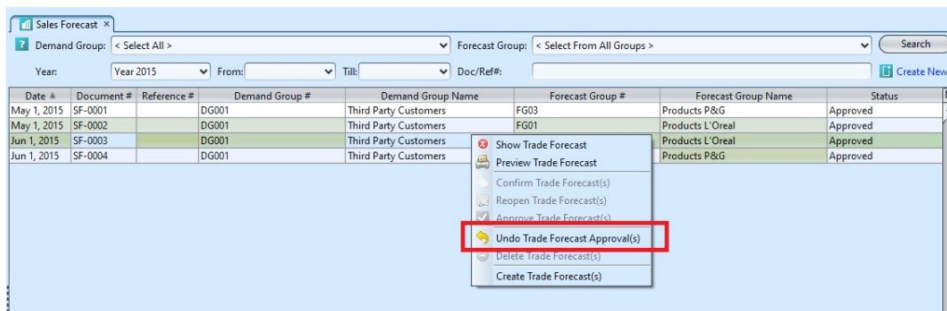
7. Click arrow on **Generate Report** button to

generate report.



## Update Sales Forecast Details

1. Click on ***“Sales Forecast List”*** tab at the bottom of screen
2. Double click on sales forecast to be updated, it will bring up the details on ***“Sales Forecast”*** tab for the selected document. If a sales forecast’s status is ***“Confirmed”*** or ***“Approved”***, right click on the order and reopen / undo approval of the order first



3. Make change(s) on the sales forecast information
4. Click on ***“Save”*** button at the bottom right of screen to save

5. Click on **“Revert”** button at the bottom right of screen or refresh icon at the top of the screen to roll back the changes

6. Click on **“Confirm Sales Forecast”** button at the bottom of screen to confirm the sales forecast.

7. Click on **“Approve Sales Forecast”** button at the bottom of screen to approve the sales forecast.

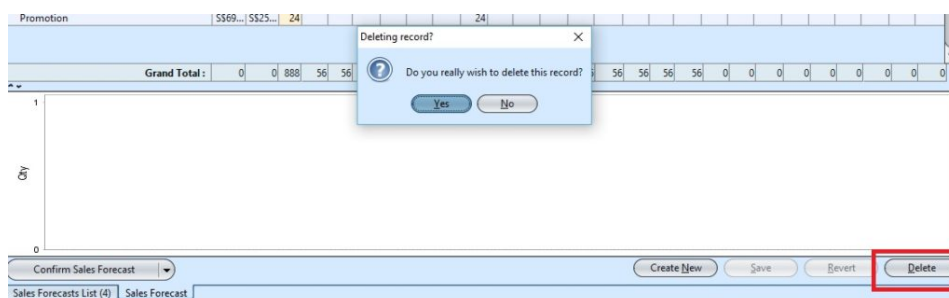
## Delete Sales Forecast

1. Click on **“Sales Forecast List”** tab at the bottom of screen

2. Double click on sales forecast to be deleted, it will bring up the details on **“Sales Forecast”** tab for the selected document. If a sales forecast’s status is **“Confirmed”** or **“Approved”**, right click on the order and reopen / undo approval of the order first

3. Click on **“Delete”** button at the bottom right side of screen

4. Click on **“Yes”** button on the pop-up window to confirm sales order deletion



## View and Search for Sales Forecast Details

1. Click on **“Sales Forecast List”** tab at the bottom of screen.

2. Enter search parameter to filter the result, i.e. type in which demand group to search for in the **"Demand Group"** text field box or select from drop-down list

The screenshot shows the 'Sales Forecast' application window. At the top, there are search filters: 'Demand Group' (set to '< Select All >'), 'Forecast Group' (set to '< Select From All Groups >'), 'Year' (set to 'Year 2015'), 'From:', 'To:', and 'Doc/Ref#'. A 'Search' button is on the right. Below the filters is a table with columns: Date, Document #, Reference #, Demand Group #, Demand Group Name, Forecast Group #, Forecast Group Name, and Status. The table contains four rows of data. At the bottom left, a 'Search Engine' button is circled in red. At the bottom right, there is a 'Create New' button.

Date	Document #	Reference #	Demand Group #	Demand Group Name	Forecast Group #	Forecast Group Name	Status
May 1, 2015	SF-0001		DG001	Third Party Customers	FG03	Products P&G	Approved
May 1, 2015	SF-0002		DG001	Third Party Customers	FG01	Products L'Oreal	Approved
Jun 1, 2015	SF-0003		DG001	Third Party Customers	FG01	Products L'Oreal	Approved
Jun 1, 2015	SF-0004		DG001	Third Party Customers	FG03	Products P&G	Drafted

3. Result can be sorted alphabetically by clicking the fields' columns

The screenshot shows the same 'Sales Forecast' application window as before. The table is visible, and the 'Demand Group Name' column header is highlighted with a red box, indicating it can be clicked to sort the results.

Date	Document #	Reference #	Demand Group #	Demand Group Name	Forecast Group #	Forecast Group Name	Status
May 1, 2015	SF-0001		DG001	Third Party Customers	FG03	Products P&G	Approved
May 1, 2015	SF-0002		DG001	Third Party Customers	FG01	Products L'Oreal	Approved

4. Double click on sales forecast to view full details of the document, it will bring up the details on **"Sales Forecast"** tab for the selected forecast.