



Purchase Forecast Group

The user can establish purchase forecast group to monitor the product Brands activities for purchasing activities. Below are available actions for the user from “**Purchase Forecast Group**” view:

-  Create, edit and delete purchase forecast group
-  View and search for the purchase forecast group details

Purchase Forecast Group

PF-01 - Purchase Forecast (0)

Forecast Group Name

Group Code

☐ Is a Grouping Plan

☒ Sub Groups Allowed

Sub Group Of

Description

Create New

Save

Revert

Delete

purchaseForecastGroupView.assignedforecasts.label

Fiscal Calendar Year 2016

Name	From Date	Till Date	Warehouse	Currency	Grand Total
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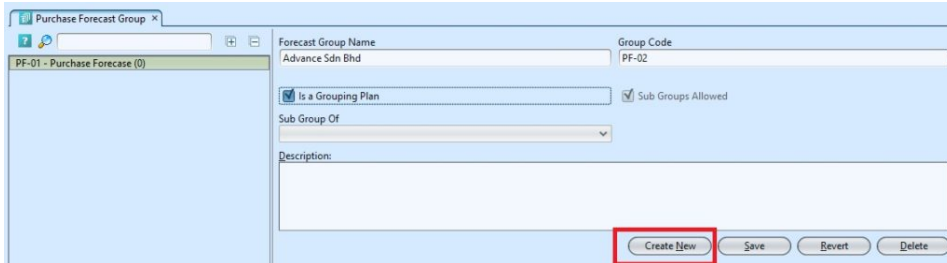
Total Qty: 0

Total SGD:

Field Name	Description	Mandatory Information
Forecast Group Name	A name for the Forecast Group	Y
Group Code	Assign a code to the Group	Y
Sub Group Allowed	Check the box, if sub group allowed	N
Sub Group Of	Select the sub Group	N
Description	Self-explanatory	N
Fiscal Calendar	Self-explanatory	—
Name	Self-explanatory	—
From Date	Self-explanatory	—
Till Date	Self-explanatory	—
Warehouse	Self-explanatory	—
Currency	Self-explanatory	—
Grand Total	Self-explanatory	—

Create New Purchase Forecast Group

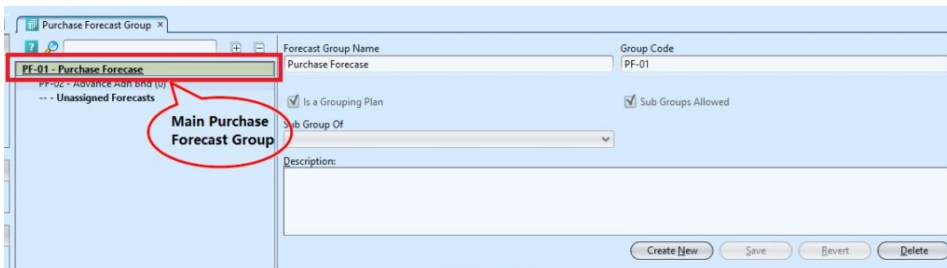
1. Click **“Create New”** button at the right side of screen



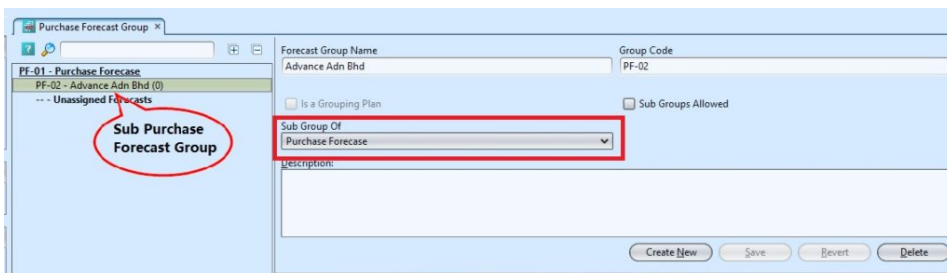
The screenshot shows the 'Purchase Forecast Group' form. The 'Forecast Group Name' field contains 'Advance Sdn Bhd' and the 'Group Code' field contains 'PF-02'. The 'Is a Grouping Plan' checkbox is checked, and the 'Sub Groups Allowed' checkbox is also checked. The 'Sub Group Of' dropdown menu is empty. The 'Description' field is empty. The 'Create New' button is highlighted with a red box.

2. Fill up the information on the form on the right side of the screen

3. Optional: User is allows to create sub group under selected main purchase forecast group.

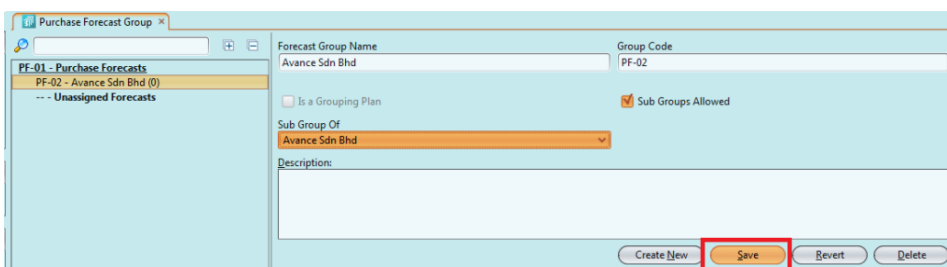


The screenshot shows the 'Purchase Forecast Group' form. The 'Forecast Group Name' field contains 'Purchase Forecast' and the 'Group Code' field contains 'PF-01'. The 'Is a Grouping Plan' checkbox is checked, and the 'Sub Groups Allowed' checkbox is also checked. The 'Sub Group Of' dropdown menu is empty. The 'Description' field is empty. The 'Create New' button is highlighted with a red box. A red circle highlights the 'PF-01 - Purchase Forecast' item in the left pane, with a callout label 'Main Purchase Forecast Group'.



The screenshot shows the 'Purchase Forecast Group' form. The 'Forecast Group Name' field contains 'Advance Adn Bhd' and the 'Group Code' field contains 'PF-02'. The 'Is a Grouping Plan' checkbox is unchecked, and the 'Sub Groups Allowed' checkbox is also unchecked. The 'Sub Group Of' dropdown menu is set to 'Purchase Forecast'. The 'Description' field is empty. The 'Create New' button is highlighted with a red box. A red circle highlights the 'PF-02 - Advance Adn Bhd' item in the left pane, with a callout label 'Sub Purchase Forecast Group'.

4. Click **“Save”** button at the right side of screen when done.



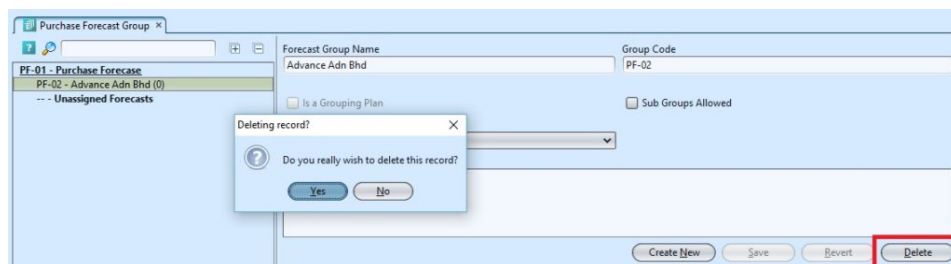
The screenshot shows the 'Purchase Forecast Group' form. The 'Forecast Group Name' field contains 'Advance Sdn Bhd' and the 'Group Code' field contains 'PF-02'. The 'Is a Grouping Plan' checkbox is unchecked, and the 'Sub Groups Allowed' checkbox is checked. The 'Sub Group Of' dropdown menu is set to 'Advance Sdn Bhd'. The 'Description' field is empty. The 'Save' button is highlighted with a red box.

Update Purchase Forecast Group Details

1. Double click on group to be updated, it will bring up the selected group details on the right side of the screen
2. Click **“Save”** button at the bottom right side of the screen when done with the updates

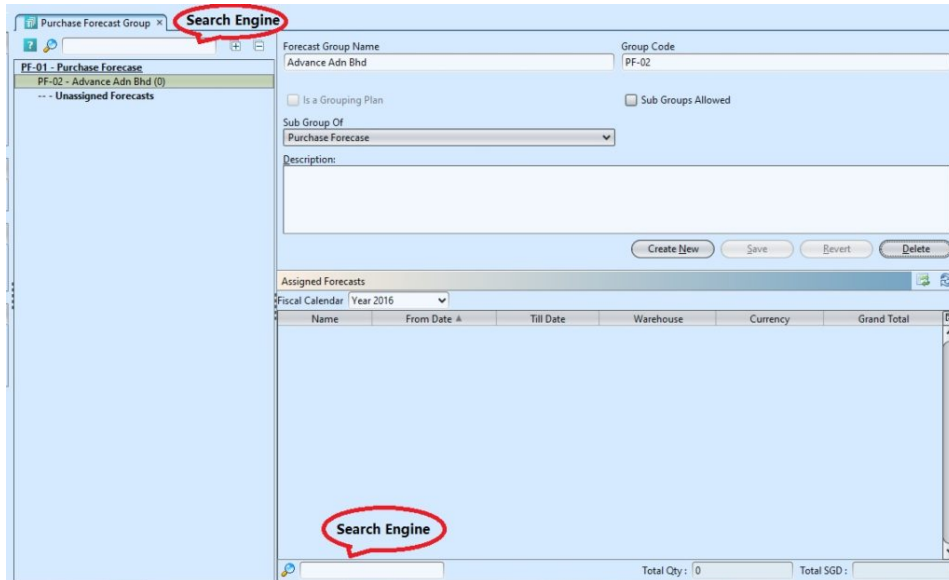
Delete Purchase Forecast Group

1. Double click on group to be deleted, it will bring up the selected group on the right side of the screen
2. Click on **“Delete”** button at the right side of screen
3. Click on **“Yes”** button on the pop-up window to confirm group deletion



View and Search for Purchase Forecast Group Details

1. Enter search parameter to filter the result, i.e. type in the group name in the search textfield box at the bottom left of the screen.



2. Double click on group to view, it will bring up the selected group details on the right side of the screen

Assigned Purchase Forecast Groups

1. Click the ***"Unassigned Customers"*** at the list of Purchase Forecast Group
2. Right click on the mouse on a partner in the ***"Assigned Forecasts"*** table, select ***"Move to Forecast Group"*** and click "OK" after the selection.