
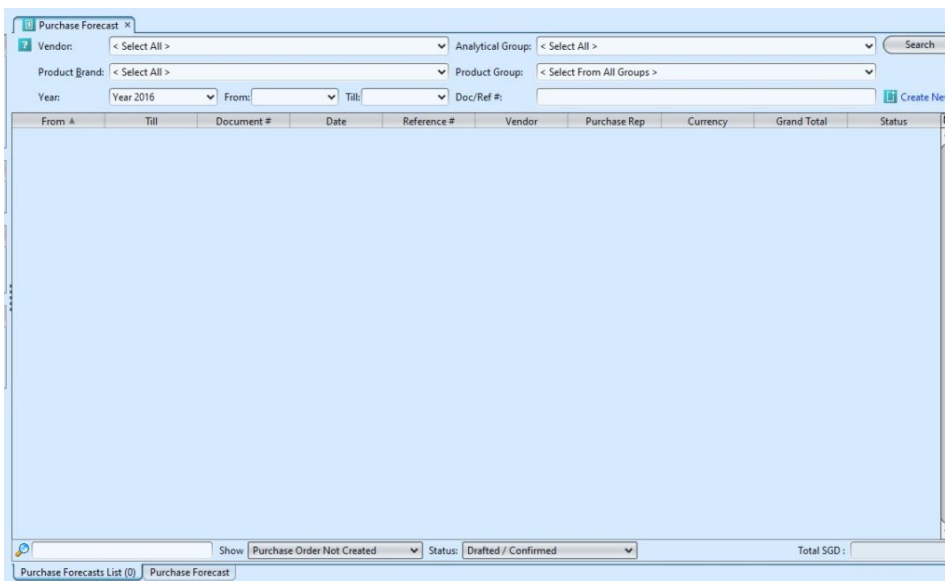


# Purchase Forecast

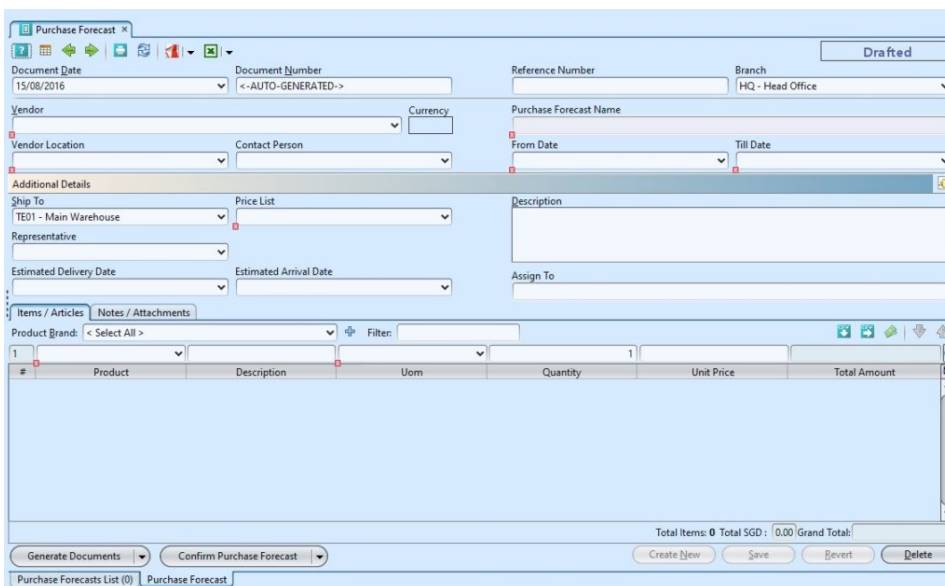
In the purchase forecast application there are two folders: **Purchase Forecast List** and **Purchase Forecast**. Below are available actions for the user from **"Purchase Forecast"**:

 Create new purchase forecast, update, save, revert and delete it

 Have detailed view of the forecast purchase



The screenshot shows the 'Purchase Forecast List' application interface. At the top, there are search filters for Vendor, Analytical Group, Product Brand, Product Group, Year (Year 2016), From, Till, and Doc/Ref #. A 'Create New' button is visible on the right. Below the filters is a table with columns: From, Till, Document #, Date, Reference #, Vendor, Purchase Rep, Currency, Grand Total, and Status. The table is currently empty. At the bottom, there are buttons for 'Purchase Forecasts List (0)' and 'Purchase Forecast', and a 'Total SGD' field.



The screenshot shows the detailed 'Purchase Forecast' application interface. It features a 'Drafted' status indicator. The form includes fields for Document Date (15/08/2016), Document Number (<-AUTO-GENERATED->), Reference Number, Branch (HQ - Head Office), Vendor, Vendor Location, Contact Person, Currency, Purchase Forecast Name, From Date, and Till Date. There is an 'Additional Details' section with fields for Ship To (TED1 - Main Warehouse), Price List, Representative, Estimated Delivery Date, Estimated Arrival Date, Description, and Assign To. Below this is the 'Items / Articles' section with a table for Product, Description, Uom, Quantity, Unit Price, and Total Amount. The table is currently empty. At the bottom, there are buttons for 'Generate Documents', 'Confirm Purchase Forecast', 'Create New', 'Save', 'Revert', and 'Delete'. A summary bar at the bottom right shows 'Total Items: 0 Total SGD: 0.00 Grand Total: 0.00'.

**Purchase Forecasts List:**

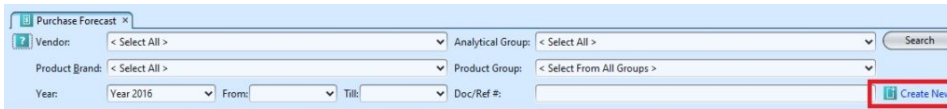
Field Name	Explanations
Vendor	Select the Vendor
Analytical Group	Select the Analytical Group
Product Brand	Select the appropriate Product Group
Product Group	Select the Product Group
Year – From – Till	Self-explanatory
Doc/Ref#	Any relevant document references number

## Purchase Forecast Details:

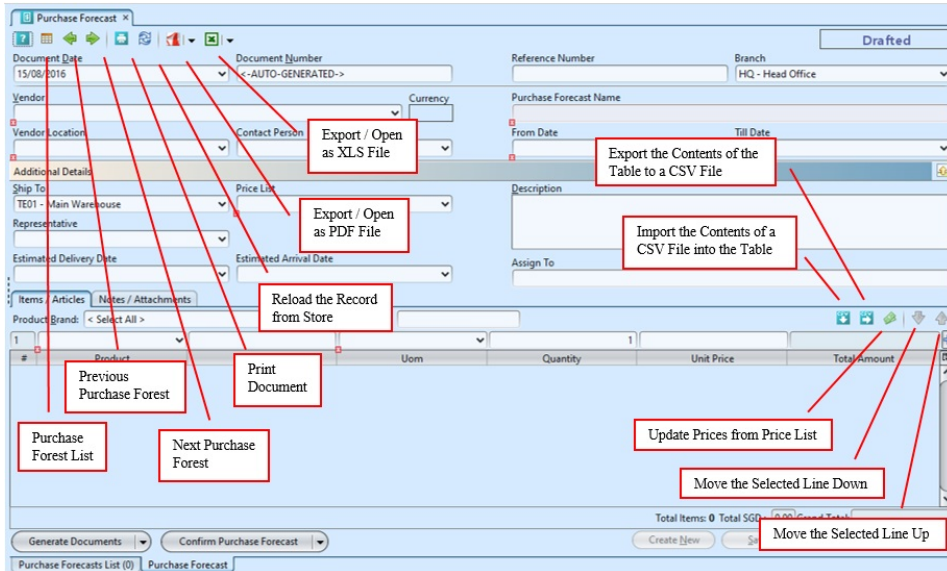
Field Descriptions	Explanations	Mandatory Information
Document Date	Select the Date	Y
Document Number	Auto generated	Y
Reference Number	Supporting documents reference number	N
Branch	Select the Branch	Y
Vendor	Select the Vendor	Y
Currency	Self-Explanatory	–
Purchase Forecast Name	Self-Explanatory	Y
Vendor Location	Select vendor location	Y
Contact Person	Select Contact Person	N
From Date	Self-Explanatory	Y
Till Date	Self-Explanatory	Y
Ship To	Self-Explanatory	Y
Price List	Self-Explanatory	Y
Description	Self-Explanatory	N
Representative	Self-Explanatory	N
Estimated Delivery Date	Self-Explanatory	N
Estimated Arrival Date	Self-Explanatory	N
Assign to	Person responsible for the purchase.	N

## Create New Purchase Forecast:


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



2. Fill up the information on the top half of screen then click **“Save”** button at the bottom right side of screen.



3. Filter the products list by selecting a brand from **“Product Brand”** drop-down list. Add product into the purchase order by searching for the product from the product drop-down list in the table on **“Items / Articles”** tab

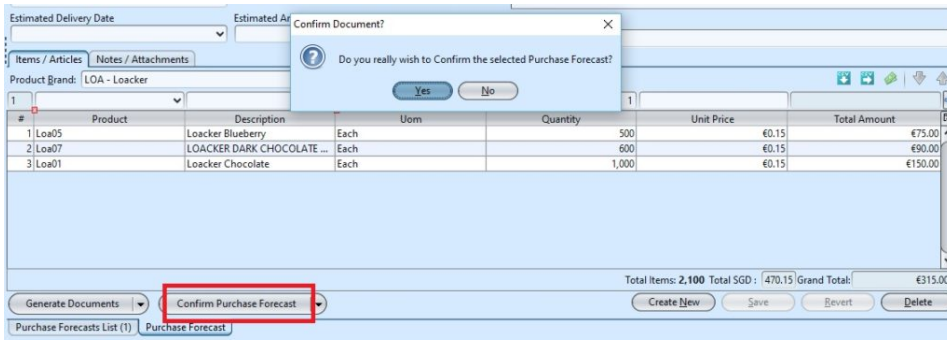
4. Enter the product’s info and click  button or **“Enter”** to add the product into the purchase forecast



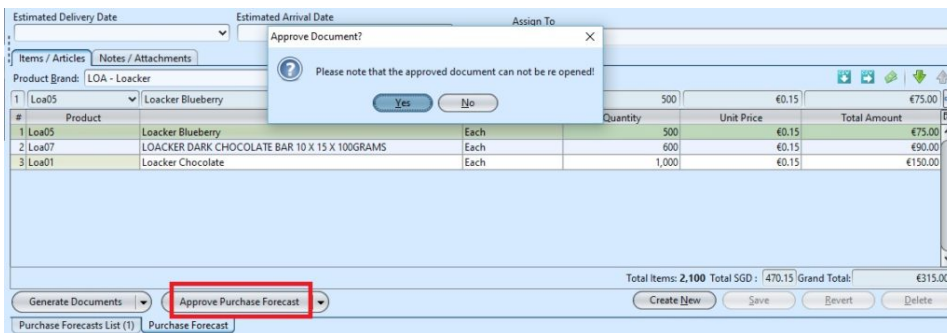
5. There is also a tab for Notes and Attachments. Click on **“Notes / Attachments”** tab at the middle of screen to add notes or files attachment for the purchase forecast.

6. Click on **“Save”** button at the bottom right of screen when completed

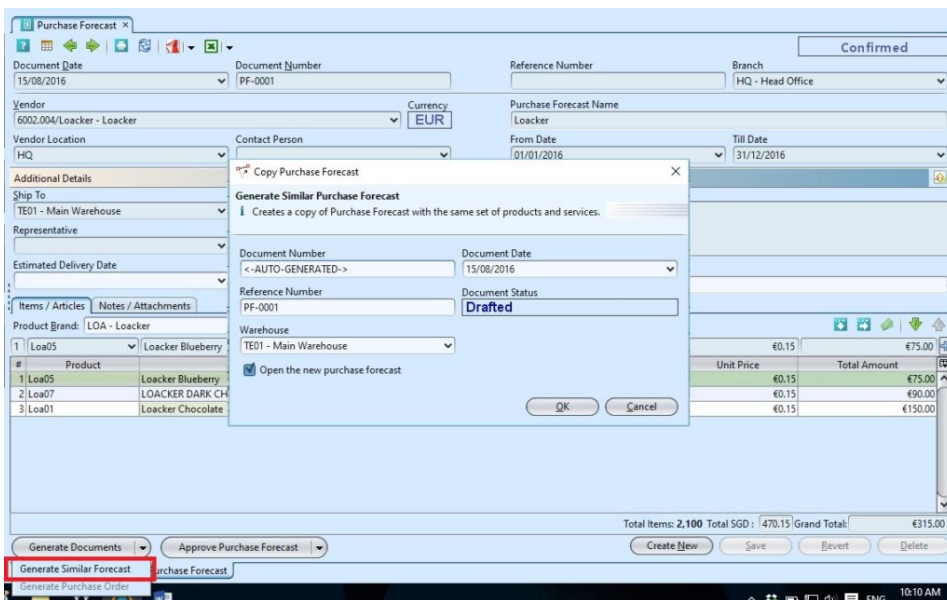
7. Click on **“Confirm Purchase Forecast”** button at the bottom of screen to confirm the purchase forecast

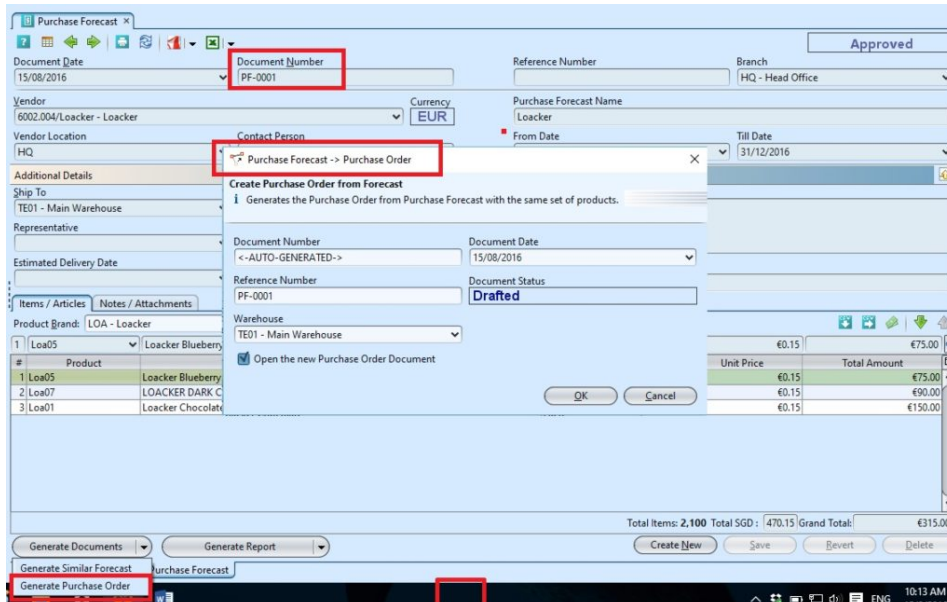


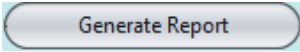
8. Click on **“Approve Purchase Forecast”** button at the bottom of screen to approve the document.

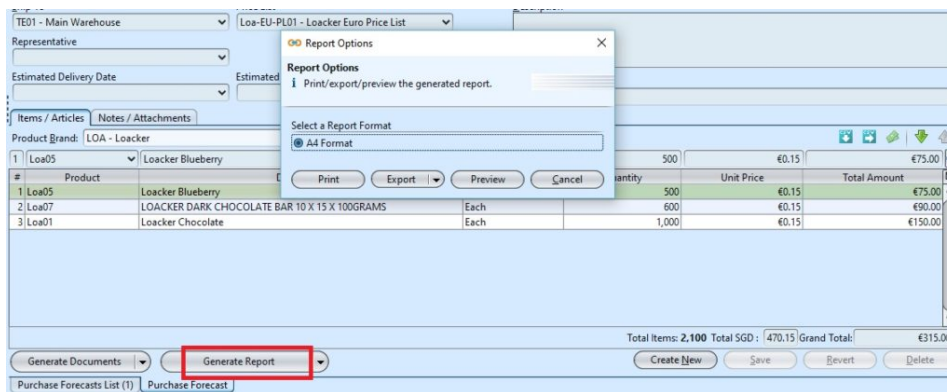


9. The user must Confirm the Purchase Forecast and has the ability to Generate the following documents : Generate Similar Forecast and Generate Purchase Order.





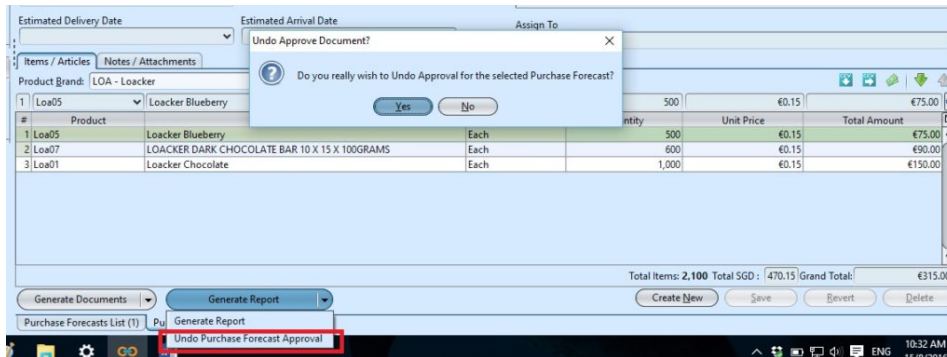
10. Click arrow on  button at the bottom left of screen to generate the purchase forecast report.



## Update Purchase Forecast Details:

1. Click on **"Purchase Forecast List"** tab at the bottom of screen
2. Double click on purchase forecast to be updated, it will bring up the details on **"Purchase Forecast"**

tab for the selected document. If a purchase forecast's status is **"Confirmed"** or **"Approved"**, click arrow on the **Generate Report** button and select reopen / undo approval of the purchase forecast first.



3. Make change(s) on the purchase forecast information

4. Click on **"Save"** button at the bottom right of screen when done

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 Purchase Forecast"** button at the bottom of screen to confirm the purchase forecast

7. Click on **"Approve Purchase Forecast"** button at the bottom of screen to approve the document.

## Delete Purchase Forecast:

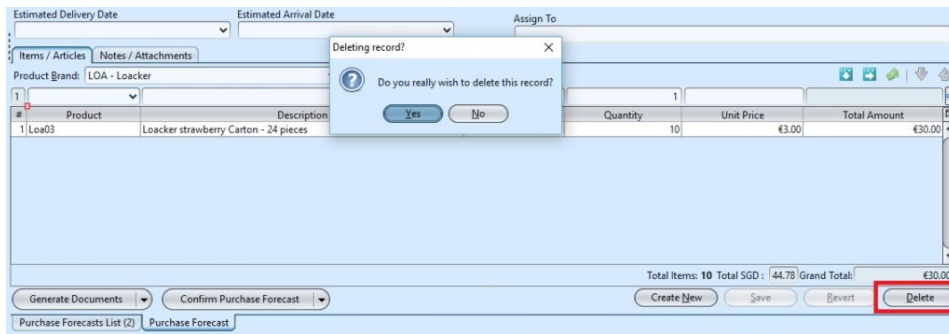
1. Click on **"Purchase Orders List"** tab at the bottom of screen

2. Double click on purchase forecast to be deleted, it will bring up the details on **"Purchase Forecast"** tab for the selected document. If a purchase forecast's status is **"Confirmed"** or **"Approved"**, click arrow on the **Generate Report** button and select reopen / undo approval of the purchase

forecast first.

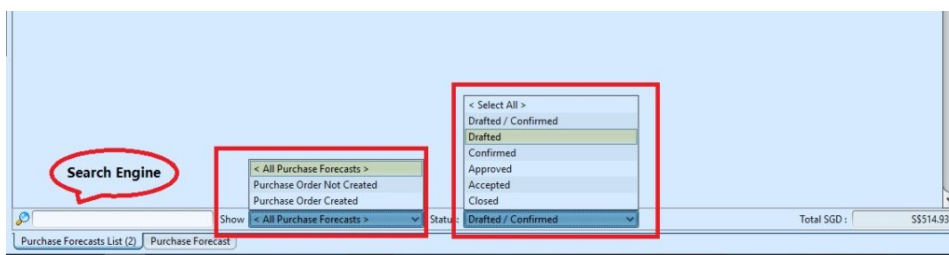
3. Click on **“Delete”** button at the bottom right side of screen

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

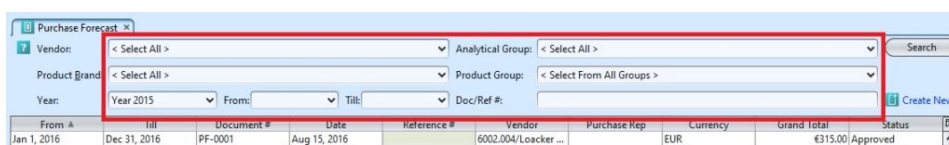


## View and Search for Purchase Forecast Details:

1. In the purchase forecast list the users are able to view the lists of Purchase Forecast, which have different statuses i.e in the Show: Purchases Order Not Created and Purchase Order Created. In the Statuses they can select Draft/Confirm, Draft, Confirm, Approved, Accepted and Closed.



2. Enter search parameter to filter the result, i.e. type in which vendor to search for in the **“Vendor”** text field box or select from drop-down list



3. The user can double Click on any line item which will take them into the full detailed document list

in Purchase Forecast.

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