
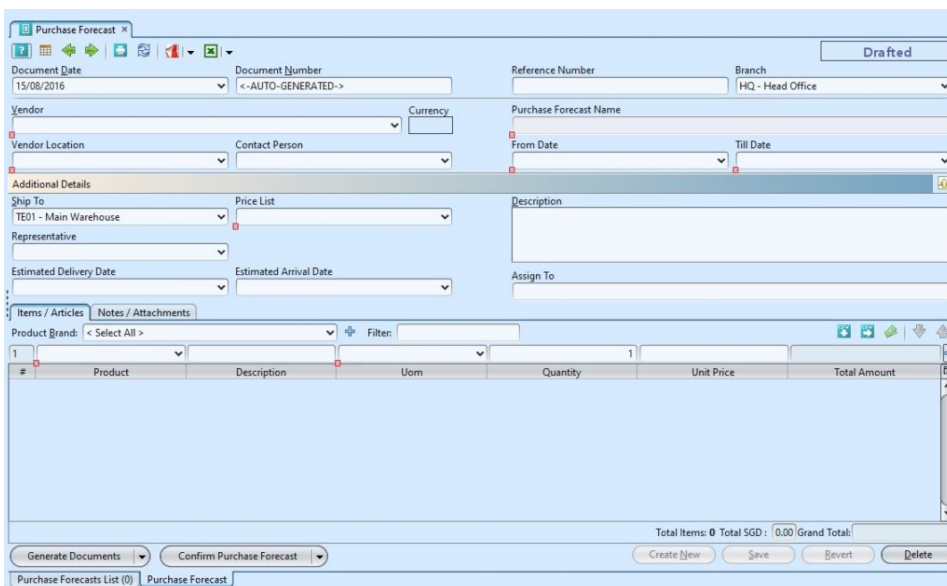
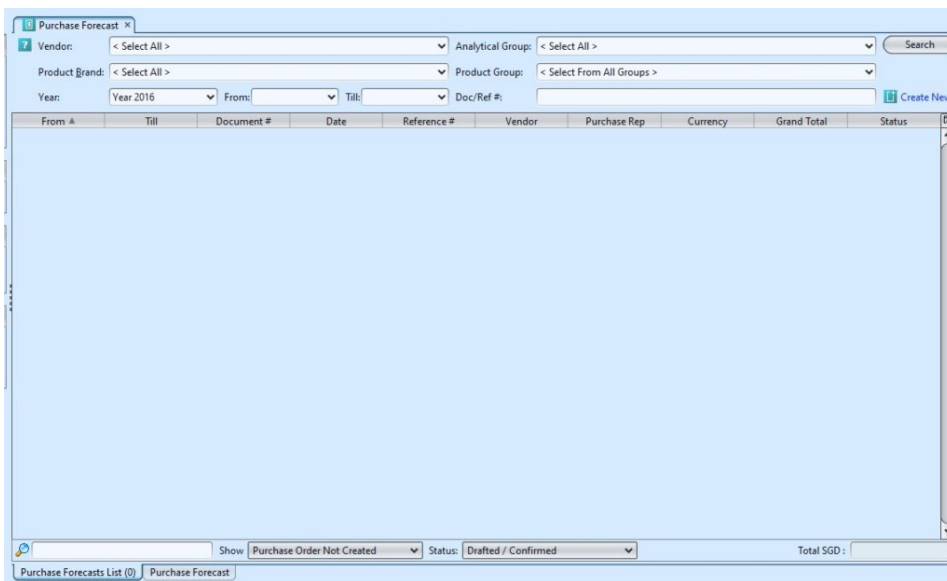


Purchase Forecast

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



Purchase Forecasts List:

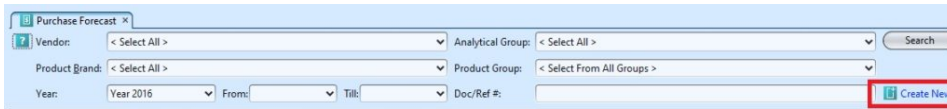
Field Name	Explanations
Vendor	Select the Vendor
Analytical Group	Select the Analytical Group
Product Brand	Select the appropriate Product Group
Product Group	Select the Product Group
Year – From – Till	Self-explanatory
Doc/Ref#	Any relevant document references number

Purchase Forecast Details:

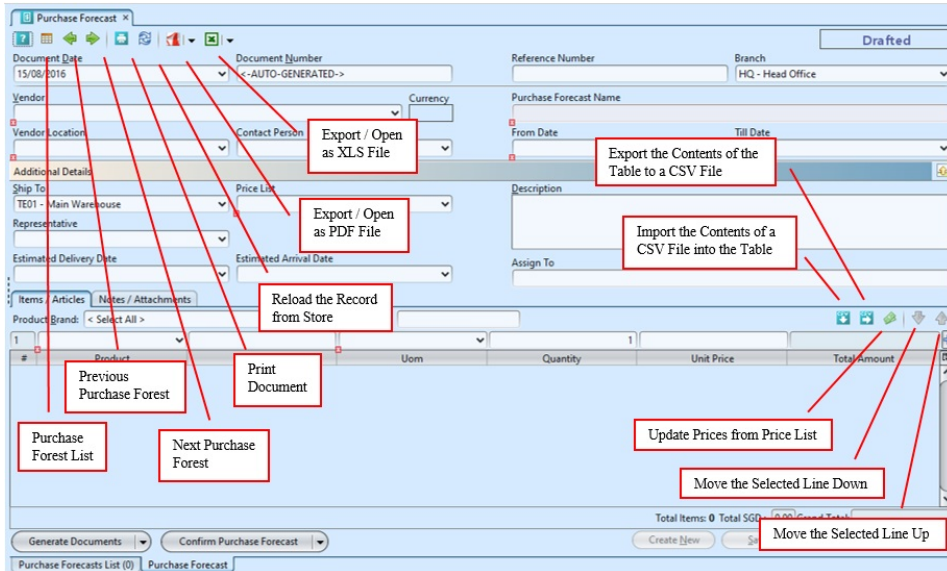
Field Descriptions	Explanations	Mandatory Information
Document Date	Select the Date	Y
Document Number	Auto generated	Y
Reference Number	Supporting documents reference number	N
Branch	Select the Branch	Y
Vendor	Select the Vendor	Y
Currency	Self-Explanatory	–
Purchase Forecast Name	Self-Explanatory	Y
Vendor 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

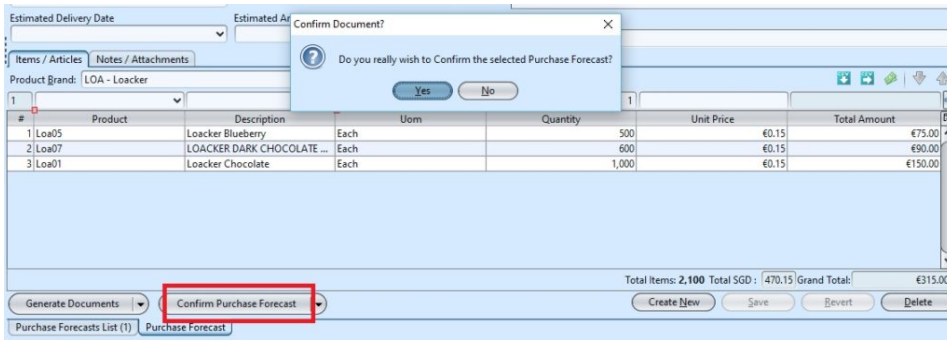
4. Enter the product’s info and click  button or **“Enter”** to add the product into the purchase forecast



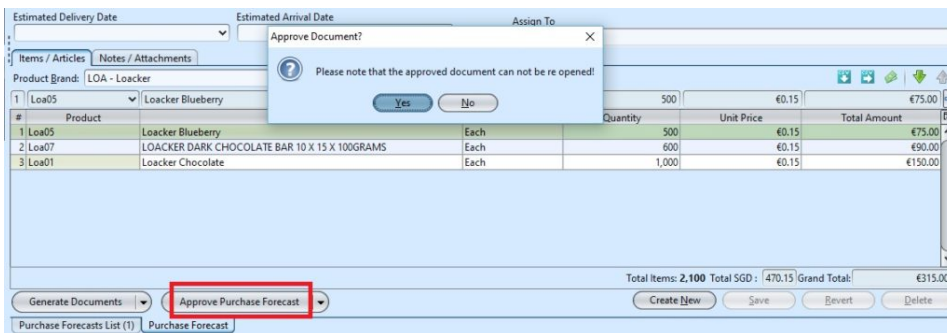
5. There is also a tab for Notes and Attachments. Click on **“Notes / Attachments”** tab at the middle of screen to add notes or files attachment for the purchase forecast.

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

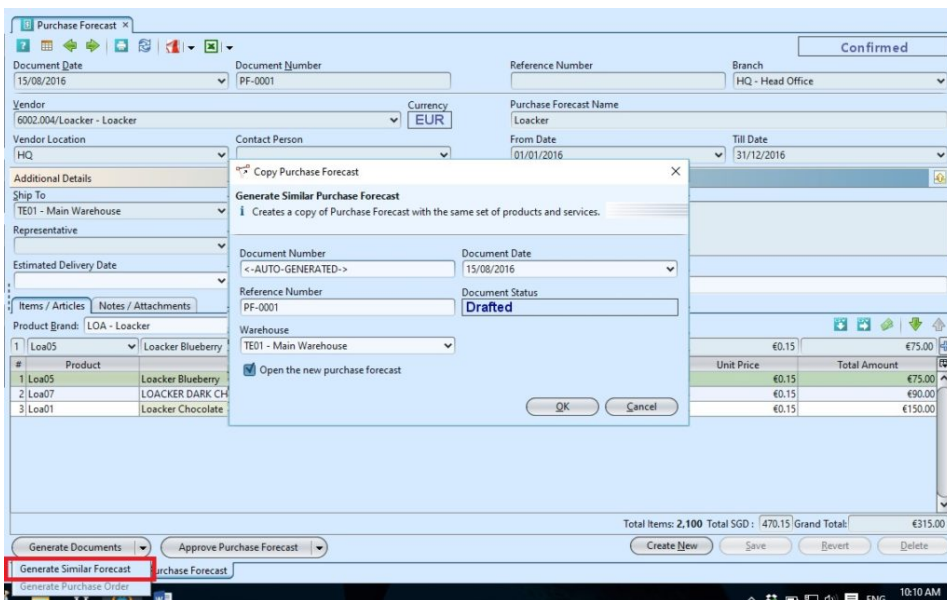
7. Click on **“Confirm Purchase Forecast”** button at the bottom of screen to confirm the purchase forecast

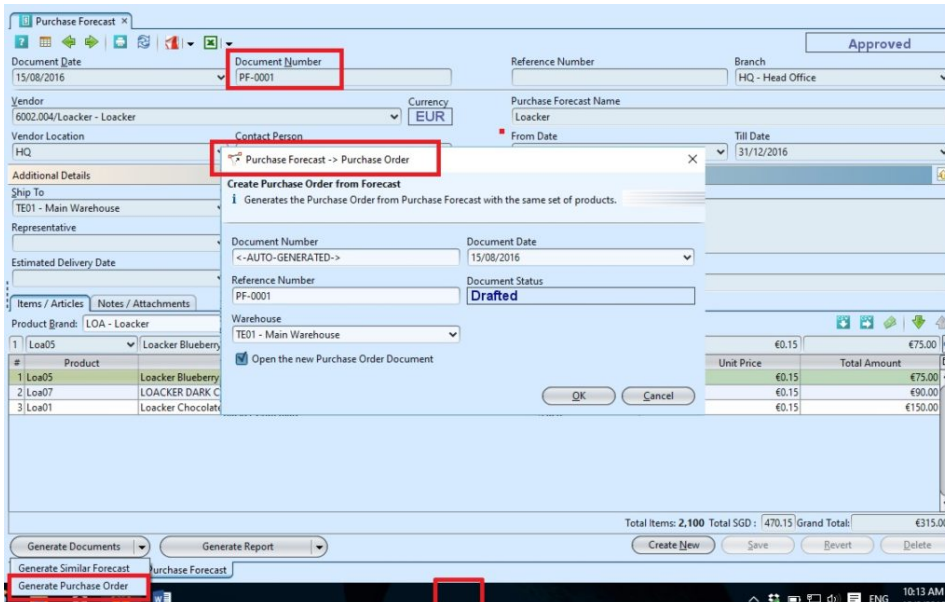


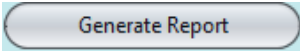
8. Click on **“Approve Purchase Forecast”** button at the bottom of screen to approve the document.

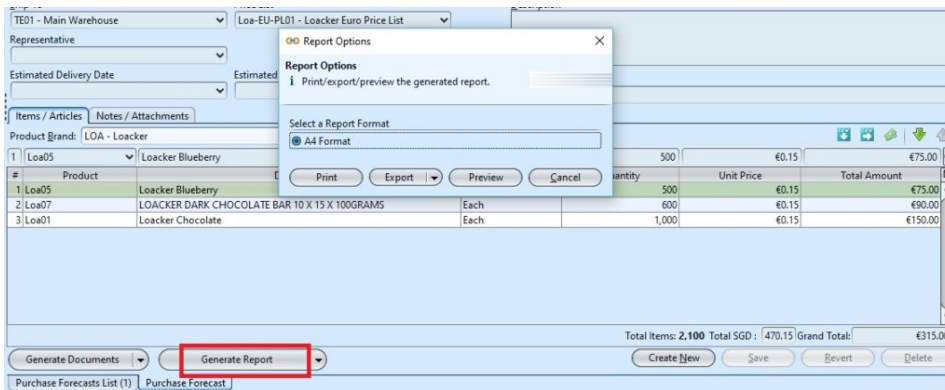


9. The user must Confirm the Purchase Forecast and has the ability to Generate the following documents : Generate Similar Forecast and Generate Purchase Order.





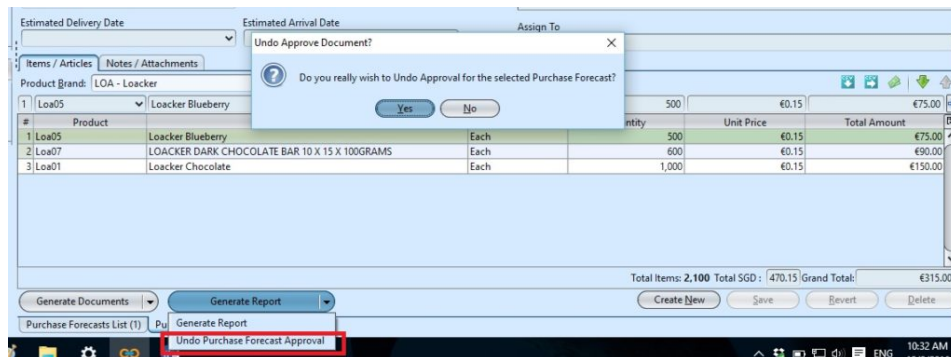
10. Click arrow on  button at the bottom left of screen to generate the purchase forecast report.



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:

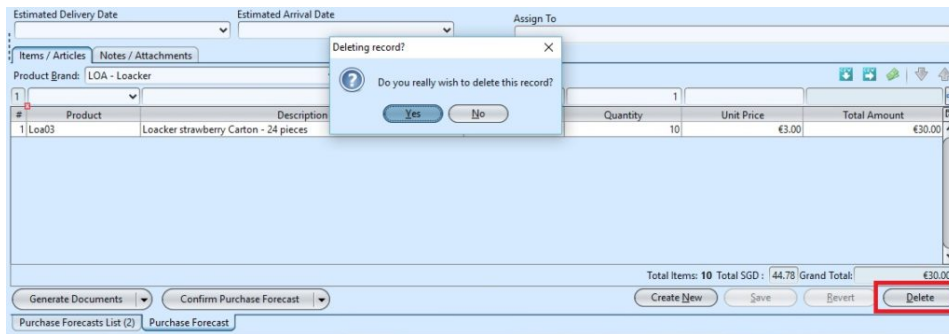
1. Click on **"Purchase Orders List"** tab at the bottom of screen

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.

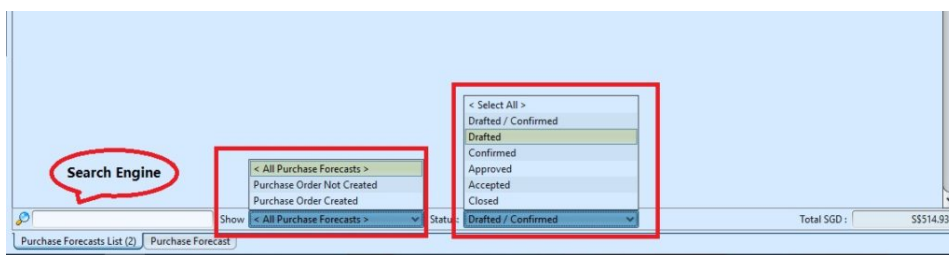
3. Click on **“Delete”** button at the bottom right side of screen

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

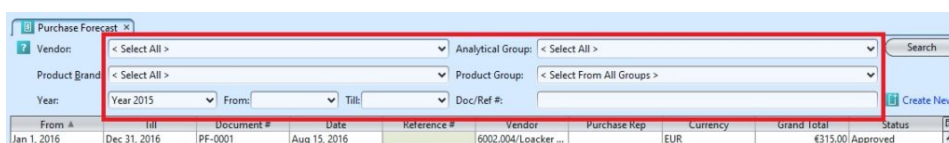


View and Search for Purchase Forecast Details:

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.
