Anytime 500 Sales Forecasting/MPS

Industries

- Manufacturers
- Wholesale Distributors
- Retail/Point-of-Sale
- Business and Personal Services

Required Modules

- Inventory Management (Sage)
- Material Requirements Planning or Inventory Replenishment (Sage)

Integrated Modules

- Inventory Management (Sage)
- Material Requirements Planning or Inventory Replenishment (Sage)
- Light Management (Sage)
- Advanced Management (Sage)
- Enhanced MRP (e2b)
- Forecast Modeling (e2b)

Benefits Overview

- Single Item or Forecast by Group
- What-if Analysis & Audit Trails
- Integrates with Microsoft Excel
- Import forecasts from CRM, EDI, or other external systems
- Drive MRP from sales forecasts
- Optionally calculate statistical forecasts using Sage 500 ERP sales data and Forecast Modeling

ClientCare Plans

- Free Upgrades and Hot Fixes
- Unlimited Product Support
- Installation Assistance & Training
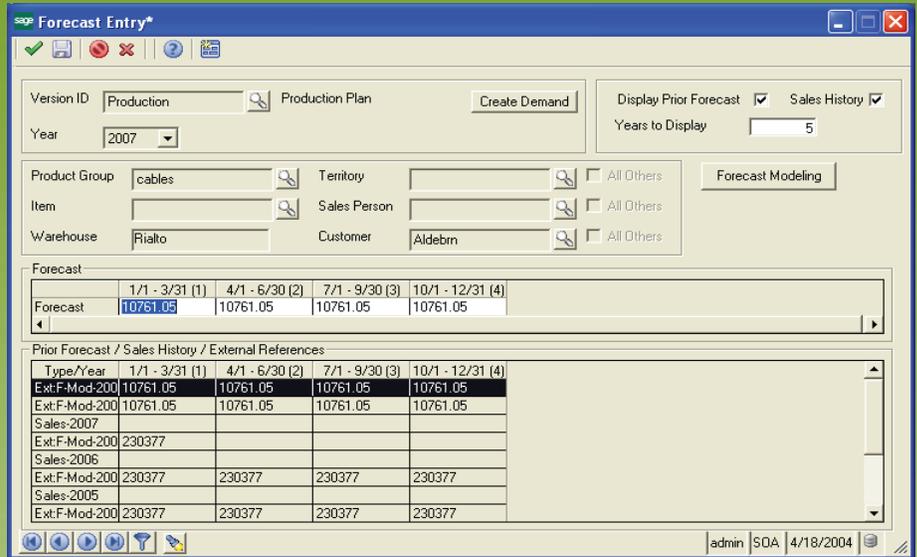
Prepare super-accurate demand forecasts with Sales Forecasting and MPS

Accurate sales forecasts are fundamental for wholesale distributors, discrete manufacturers and other companies who stock and sell products from inventory.

Forecasting helps companies predict what they plan to sell and when they plan to sell it. As such, an accurate sales forecast helps companies maintain adequate stock levels to avoid stockouts, improve customer service, and to determine what raw materials and components are needed to meet current and future demand. Further, accurate forecasts help companies manage extended supply chains.

Forecasts can be maintained within the Sales Forecasting module or imported from built-in Microsoft Excel templates. Forecasting is organized by a forecast group which may contain any number of inventory items independent of purchase product line or buyer.

Forecasts are maintained in daily, weekly, monthly, quarterly, or yearly time periods for single inventory items or groups of items.

Utilities are provided to allocate a percentage of the forecast to each product when one is forecasting quantities for multiple products, For example, companies may forecast sales of 100 units for their shovel product line and allocate 50% to spade shovels, 30% to snow shovels, and 20% to their specialty shovels. According to APICS, forecasting quantities for groups of products is more accurate than forecasting sales for unique items.

Discrete manufacturers can optionally utilize the Master Production Schedule integration to push Sales Forecasts into the Sage 500 ERP IR/MRP module for top-level material planning.

Product Features

Forecast Group
Forecast to individual items or allocate forecasted quantities to groups of products based on a percentage for all items in the product group.

Forecast Criteria
Create multiple forecasts by item, forecast product group, salesperson, customer or any combination of these data elements. In most businesses, the Pareto principle suggests that 80% of revenue is generated by 20% of a company's customers. As such, companies can use Sales Forecasting to maintain detailed forecasts for the top 20% of their customers but use a general forecast for the lower 80%.

What-If Analysis
Virtually unlimited forecasts are supported providing optimal flexibility to create master and alternative forecasts for "what-if" analysis. For example, a company may want to see what effect a promotion could have on product unit forecasts (and subsequent resources) for a given period.

Excel Integration
Use built-in Microsoft Excel templates to input forecast data offline. Forecasts created or edited in Excel can be imported directly into Sales Forecasting with full data validation.

Import From CRM/EDI
Import forecasts from Excel or ASCII delimited files from CRM systems or Electronic Data Interchange (EDI).

Multi-Site
Forecasts can be maintained by warehouse location per item, forecast product group, salesperson, or customer providing flexible and specific forecasts. Further, forecast versions allow for specific forecast periods for each physical location.

Forecast Modeling
A separate module is available for companies who need to generate statistical forecasts based on prior sales history from Sage 500 ERP. The Forecast Modeling product provides several advanced features including the ability to define introduction and retirement dates for item forecasts; replacement item definition, and forecast templates for new items that have no sales history.

MRP Calculations
500 ERP MRP can optionally use either historical demand from Inventory Replenishment or forecasted demand from MPS. Sales forecasts can be modified and maintained in the MPS module to drive demand for 500 ERP MRP calculations.

Time Periods
Items and forecast product groups may be forecasted daily, weekly, monthly, quarterly, yearly, or a combination of any of these time periods.

Demand Smoothing
Forecast quantities can be smoothed into differing demand periods. For example, the quantity forecast be smoothed into yearly, quarterly, monthly, weekly, or daily periods. This is helpful since many companies may create annual forecasts by item or product group but they want to smooth the yearly forecast into quarterly or monthly periods for planning. In addition, forecast smoothing can be weighted on different periods. For example, a yearly item forecast for 450 units smoothed to quarters would be distributed at 112 units per period with 2 units remaining (112 x 4 = 448 + 2 remaining units = 450). The remaining two units would then be allocated to quarters based on the following smoothing methods.

Audit Trail
Original forecasts are saved automatically. In addition, a copy utility is provided to create new forecast revisions each time a major modification to the forecast is made.

Product Features

Historical References　　Actual sales history from Sage 500 ERP and previous forecasts are displayed on the forecast maintenance screen as a reference to assist planners when preparing new sales forecasts.

IR Alternative　　Unless your product demand is predictable based on previous history, there is no easy way to maintain product forecasts in Sage 500 ERP. Standard Sage 500 ERP Inventory Replenishment calculates demand based on prior history. You may make adjustments to demand but this requires an adjustment for each item and each planning period. Further, demand adjustments cannot be made for specific customers, sales reps, or by territory. Sales Forecasting provides a simple tool to manage demand forecasts which may be used by MRP for planning.

Distribution or Mfg　　Sales Forecasting can be used by distributors to forecast sales quantities which will drive purchase requirements. It is also useful for manufacturers since forecasts may be defined for finished goods. so that planners can review how accurate their forecasts were against actual sales history. In addition, historical sales information is useful as a reference to assist planners when preparing new sales forecasts.

Actual vs. Forecast　　Actual sales history from Sage 500 ERP and previous forecasts are displayed on the forecast maintenance screen so that planners can review how accurate their forecasts were against actual sales history. In addition, historical sales information is useful as a reference to assist planners when preparing new sales forecasts.

MRP Integration　　Sales Forecasting is integrated with either the Sage 500 ERP MRP module or the e2b Enhanced MRP module.

Roll Forward　　You can optionally roll forward unconsumed, forecasted demand to future MRP periods. For example, if you forecast 100 units of an item in January but only receive sales orders for 80 units, you can roll forward the unconsumed forecast of 20 units to February (or the next MRP period) so that the next MRP period includes the unconsumed demand and the existing period demand.

Forecast API　　An API is available to automate sales forecast input from external systems such as EDI where forecasts are received on a regular basis from customers or other sources.

Product Features

Setup Forecast Product Groups

Product Group Id: cables Product Description: Cable Items

Field	Value
Warehouse	Rialto
Forecast Type	Cust, Item
Selection Cycle	
Forecast Period Type	Quarterly
Smoothing Method	True Smoothing Front

☑ Allocate Quantities by Percentage

Smooth Period Type: Monthly

Roll 11 Demand Periods Forward in MRP

Buttons: Allocate | Clear Grid | Select Items

Item Allocations

Item ID	Item Desc	Allocation %
Cable/FT	1000FT Cat5 UTP Cable Bulk	10.00
Cable100	100' Standard Cable	13.00
Cable200	200' Standard Cable	9.00

Demand Forecast Maintenance

Version ID: Production Production Plan
Year: 2007 ☑ Use for MRP Generation
Revision Number: 0 Revision Comment: System Generated

Edit Line

Demand

Item	Whse	Sales Prod	Dec?	Per. Type	Total	Per. 1	Per. 2	Per. 3	Per. 4
Cable/FT	Rialto	Peri	☑	Monthly (12)	6080	440.0000	440.0000	440.0000	473.3330
Cable100	Rialto	Peri	☐	Monthly (12)	7904	572.0000	572.0000	572.0000	616.0000
Cable200	Rialto	Peri	☐	Monthly (12)	5472	396.0000	396.0000	396.0000	426.0000
Cable300	Rialto	Peri	☐	Monthly (12)	6080	440.0000	440.0000	440.0000	474.0000
Cable400	Rialto	Peri	☑	Monthly (12)	4864	352.0000	352.0000	352.0000	378.6670
Cable50	Rialto	Peri	☐	Monthly (12)	6688	484.0000	484.0000	484.0000	521.0000
Cable500	Rialto	Peri							
Cat5 Cable	Rialto	Peri							
Cold Beer	Tampa								
NB-0100-010	Tampa								
NB-0300-010	Tampa								
NB-0400-010	Tampa								
Shovel-A100	Tampa								
Shovel-A200	Tampa								
Shovel-P100	Tampa								

Copy/Import/Export Forecasts

Desired action: Import

Version: Production Production Plan
Year: 2008 Forecasts Exist

Import File: _____ Set
Results File: _____

☑ Assume Missing Srep, Customer and Territories as *Unspecified* when required
☑ Use Item Class if Item listed without a Product Group
☑ Add Items to Product Group if necessary and not an Allocated Product Group

Action when Forecast exists: ⊙ Add together ○ Replace with Newest ○ Keep original

admin | SOA | 4/18/2004