Sales Forecasting

Capture expected future demand so it shows up alongside your real orders

Introduction

A Sales Forecast is a simple planning document in Data Fusion where you record what you expect to sell — an item, a quantity, and a date you expect to need it — before a real sales order exists. It's not a sales order and it doesn't reserve stock or trigger anything automatically. Its purpose is to give you and your planning team early visibility of expected demand, so it can be weighed up alongside actual orders when deciding what to produce or buy.

Each forecast is a single document that can hold many lines (one line per item). You can create as many forecasts as you need — for example one per customer, one per project, or one per sales period — whatever grouping makes sense for your business.

Before You Begin — Prerequisites

- Sales Forecasting is part of Module 2 (the planning and production module). If you don't see "Sales Forecasts" in your navigation menu, your company's subscription may not include this module.
- Even with Module 2 enabled, your user account also needs the specific "Sales Forecast" permission turned on. Ask your Data Fusion administrator to grant this to your user if the menu option is missing.
- Only items marked Active and Physical (stock items) are available to select on a forecast line — service or non-stock items won't appear in the item list.

Key Terms — Glossary

Term	What It Means
Forecast	One planning document — a header (customer/reference/created by) plus one or more lines of expected demand.
Forecast Line	A single row on a forecast: one item, one quantity, and one due date.
Reference	A free-text note on the forecast header — use it to describe what the forecast is for.
Due Date	The date you expect to need that quantity of that item — this is what drives when it shows up in downstream planning.
Line Comment	An optional note you can attach to a single forecast line for extra context.
Finished Goods Demands	A separate Module 2 report that brings together everything currently expected to move — sales orders, job cards, and forecasts — in one combined view.

The Full Workflow

1. Open Sales Forecasts. Click "Sales Forecasts" in the main navigation menu (requires Module 2 and the Sales Forecast permission).
2. Create a new forecast. Click "Add New Forecast" and confirm. A blank forecast is created, dated today, ready for you to fill in.
3. Fill in the header. Type in the Customer and Reference fields to describe what this forecast is for, and Created By to note who captured it.

5. Add your forecast lines. For each line:

- **Item Code** — pick the item from the drop-down list.
- **Description and Qty** — the description fills in automatically; check and adjust the quantity.
- **Due Date** — pick the date you expect to need this quantity.
- **Save** — click the save icon on that line. A new blank line automatically appears underneath, ready for your next item.

4. Add a comment (optional). Click the comment icon on a line to attach a short note — it displays under the item description.
5. Save the forecast header. Click "Save Forecast" to save your Customer, Reference and Created By entries — line-level saves don't update these header fields.
6. Delete lines or the whole forecast when no longer needed. Both ask you to confirm before deleting, since deleting a forecast removes all of its lines as well.

Understanding How Forecasts Are Used

- **Forecasts feed into Finished Goods Demands.** Every forecast line you capture is automatically included as expected demand in the Finished Goods Demands report, alongside demand from open sales orders and job cards. This gives your planning team one combined view of everything expected to move, not just what's already been ordered.
- **A forecast doesn't reserve stock or create any transaction.** It's a planning figure only. Nothing is deducted from stock and no document is sent anywhere else in the system until a real sales order is raised.
- **Quantity resets to 1 when you pick an item.** As soon as you select an Item Code, the Qty field is set to 1 — always update it to the quantity you actually expect before saving the line.
- **Customer and Created By are free text, not a lookup.** They aren't validated against your customer list, so use consistent spelling if you plan to search or group forecasts by customer later.
- **There's always a spare blank line waiting.** You don't need an "add line" button — Data Fusion keeps one empty line ready at the bottom of the grid as soon as the previous one has a description on it.
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Common Mistakes to Avoid

- **Leaving the quantity at the default of 1.** It's easy to select the item, add a due date, and save without noticing the quantity needs changing.
- **Editing the header but forgetting to click Save Forecast.** Changes to Customer, Reference or Created By are only kept once you click the Save Forecast button — the per-line save button only saves that line.
- **Deleting a forecast without considering the Finished Goods Demands report.** Because forecast lines feed straight into that report, deleting a forecast removes that expected demand immediately.
- **Typing customer names inconsistently.** Since the Customer field isn't linked to your customer master, small spelling differences will show up as separate "customers" when you're reviewing forecasts later.