Sales Forecast Inbox

Module Guide: Sales Forecast Inbox

Module Location

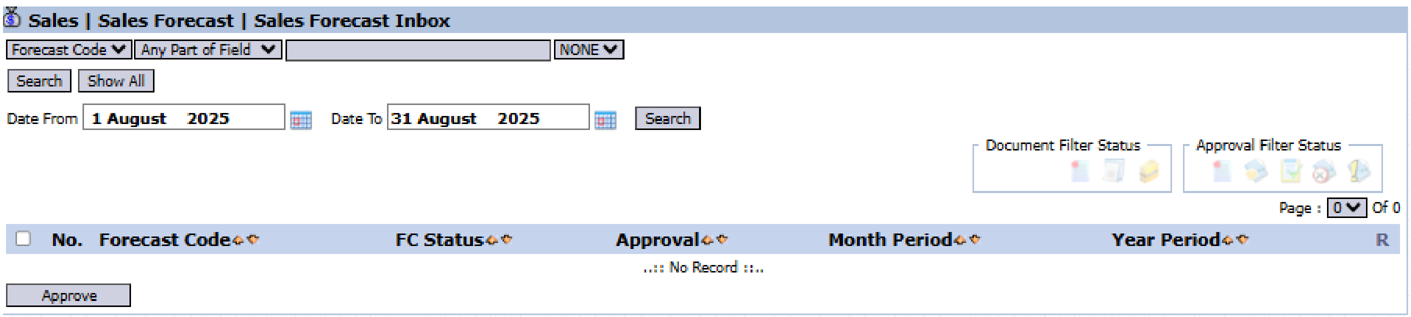
Sales > Sales Forecasting > Sales Forecast Inbox

Module Objective

The **Sales Forecast Inbox** module serves as the approval center for all sales forecast data that has been uploaded to the system. This module is used by a manager or an authorized leader to conduct a review and provide final approval before the forecast data becomes the official benchmark for production planning and other operational activities.

1. Main View (Forecast List)

The main page of this module is an "inbox" that displays all forecast documents requiring your action.



View Explanation & Filters

This page provides a summary of all forecasts that are awaiting approval.

- **Filters**: You can search for a specific forecast by **Forecast Code** or a date range (**Date From / Date To**).

- **Request List**: The table below will display all forecast documents awaiting action. The table currently shows "...No Record...".

Column Explanation

- **Forecast Code**: The unique code of the submitted forecast document.

- **FC Status / Approval**: Icons that indicate the document's status and the approval process status.

- **Month Period / Year Period**: Shows the month and year period of the forecast data.

Button Functions

- **Approve**: The main action button to approve one or more selected forecast documents.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Sales Forecast Inbox** module to see the list of forecasts that require approval.

Step 2: Review the Forecast Details

Click on one of the rows in the table to open its detail view. In the detail view (which will likely open the **Sales Forecast** report), you can check the forecast details per item and per day.

Step 3: Provide Approval

After you have reviewed and are certain about the submitted forecast data:

1. Return to the main **Inbox** page.
2. Check the box in the leftmost column for one or more forecast rows you wish to approve.
3. Click the **Approve** button located in the bottom-left section of the page to process the approval. 

3. Workflow & Integrated Business Process

1. **Submission**: Forecast data is uploaded to the system via the **Upload Data Forecast** module.
2. **Entering the Queue**: The uploaded forecast automatically enters the queue in this **Sales Forecast Inbox** module.
3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.
4. **Data Activation**: After approval, the forecast data becomes official and can be used as a valid reference by the **PPIC (Production Planning and Inventory Control)** team for production planning and by the **Finance** team for financial projections.

Revision #1
Created 6 August 2025 11:04:49 by Sayu

Updated 6 August 2025 11:12:37 by Sayu