

Sales Forecast Report

Report Module Guide: Sales Forecast Report

Module Location

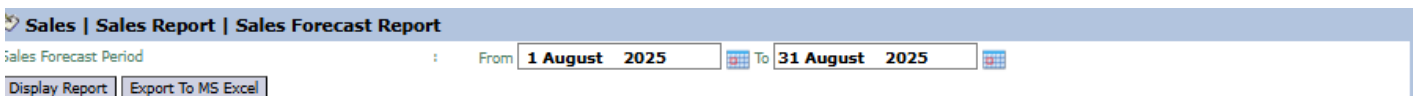
Sales > Reports > Sales Forecast Report

Module Objective

The **Sales Forecast Report** module is used to generate an analytical report that summarizes sales forecast data and compares it with historical data as well as other operational data. This report provides a high-level view for the **Sales and Operations Planning (S&OP)** process.

1. Report Parameters

The main page of this module is a simple form containing a date parameter for the report.



The screenshot shows a web interface for the 'Sales Forecast Report'. At the top, there is a breadcrumb trail: 'Sales | Sales Report | Sales Forecast Report'. Below this, the 'Sales Forecast Period' is defined by a 'From' date of '1 August 2025' and a 'To' date of '31 August 2025'. There are two buttons at the bottom: 'Display Report' and 'Export To MS Excel'.

Here is an explanation for each parameter:

- **Sales Forecast Period:**

- Specify the **From** and **To** date range to define the report period you wish to analyze (e.g., August 1, 2025, to August 31, 2025).

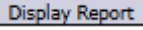
2. Steps to Generate the Report

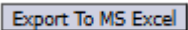
Step 1: Set Report Parameters

Define the date range in the **Sales Forecast Period** fields.

Step 2: Generate the Report

After the parameters are set, click one of the two buttons at the bottom:

- **Display Report:** To preview the report directly on your screen. 
- **Export To MS Excel:** To download the report data in an Excel file format.



3. Example of the Report View

After you click, the system will generate a detailed report like the following, which summarizes and analyzes the forecast data.

 Print Close



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Sales Forecast Report

Period : Agustus 2025

Product Name	Last 3 Month Average	Last month	Forecast (F)	Order (O)	Selling (S)	O/F	S/O	S/F	Beginning Stock (BS)	Production Output (P)	(BS) + (P)	[(BS) + (P)] / (F)
Total	0.00	0.00	0.00	0.00	0.00	0	0	0	0.00	0.00	0.00	0

Report Explanation: This report displays a comparison between historical sales data, the forecast, and other operational data for each product.

Key Columns:

- **Product Name:** The name of the product being analyzed.

- **Last 3 Month Average:** The average sales of the last 3 months.
- **Last month:** The previous month's sales data.
- **Forecast (F):** The sales forecast quantity for the selected period.
- **Order (O):** The quantity of incoming Sales Orders.
- **Selling (S):** The quantity of actual sales (from invoices).
- **Beginning Stock (BS):** The beginning stock for the period.
- **Production Output (P):** The quantity of production output.
- **Calculation Columns:** The columns on the right (**[BS] + (P)**, **[(BS) + (P)] / (F)**) are calculations used for S&OP analysis, such as calculating **coverage days**.

Tips & Important Notes

- This report is a crucial **strategic analysis tool** for Management, the Sales team, and the PPIC team.
- Use this report in **monthly S&OP meetings** to align sales plans, production capabilities, and inventory levels.
- To get an accurate analysis, ensure the forecast data has been uploaded and approved, and that all sales and production transaction data has been entered correctly.