

Upload Data Forecast

Module Guide: Upload Data Forecast

Module Location

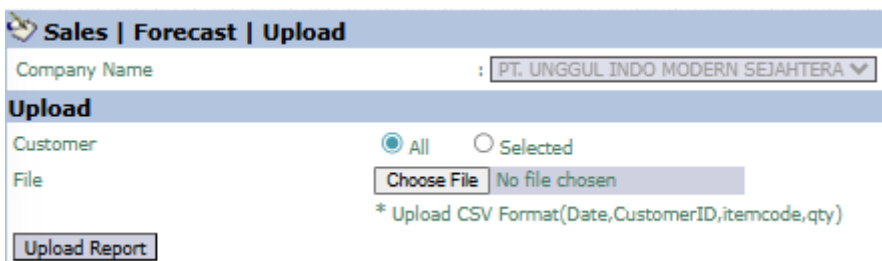
Sales > Sales Forecasting > Upload Data Forecast

Module Objective

The **Upload Data Forecast** module serves as a tool to upload or import sales forecast data in bulk into the system. This process uses a file in CSV (Comma-Separated Values) format, which allows for the efficient input of large amounts of data, especially for data that comes from external parties like distributors.

1. Main View and Parameters

The main page of this module is a simple form for performing the file upload process.



The screenshot shows the 'Sales | Forecast | Upload' interface. At the top, there is a breadcrumb trail 'Sales | Forecast | Upload'. Below it, a 'Company Name' field is populated with 'PT. UNGGUL INDO MODERN SEJAHTERA'. The main section is titled 'Upload' and contains a 'Customer' field with two radio button options: 'All' (selected) and 'Selected'. Below this is a 'File' field with a 'Choose File' button and the text 'No file chosen'. A note below the file field reads '* Upload CSV Format(Date, CustomerID, itemcode, qty)'. At the bottom left, there is an 'Upload Report' button.

Here is an explanation for each parameter:

- **Customer:**

- Select the customer scope. The **All** option is likely used if your CSV file contains data from many customers.

- **File:**

- Use the **Choose File** button to find and select the CSV file from your computer that contains the forecast data.

Upload File Format (Important!)

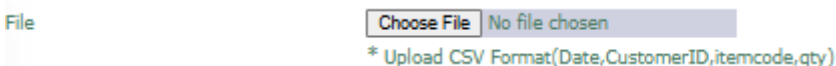
To ensure the data can be uploaded successfully, your file **must** be in CSV format and have **4 columns** with the following exact order and names:

- **Date** (Forecast date)
- **CustomerID** (Customer Code)
- **itemcode** (Product Code)
- **qty** (Forecast quantity amount)

2. Steps to Upload Forecast Data

Step 1: Prepare and Select the File

Prepare your forecast data in a CSV file according to the instructions above. Then, on the module page, click the **Choose File** button to find and select that file from your computer.



Step 2: Start the Upload Process

After the file is selected, click the **Upload Report** button in the bottom-left section to start the process of uploading the data into the system. [Upload Report](#)

Step 3: Verification

After the upload process is complete, you must verify that the data has been entered correctly. Open the **Sales Forecast** or **Distributor Sales Forecast** module to see the data you just uploaded.

Tips & Important Notes

- Upload failures are most often caused by an **incorrect CSV file format**. Ensure the column names and their order are an exact match.
- Successfully uploaded data will likely go to the **Sales Forecast Inbox** first for an approval process before it becomes official forecast data.
- This module is very efficient for importing forecast data that is received routinely from external parties like distributors

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