Adroit Forecaster

Adroit North America

User Guide

June 3rd, 2025

Version: 1.2

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1 OVERVIEW

Adroit Forecaster allows users to extend the Business Central Forecasted Demand Plan, providing analytical insights into Inventory Positions and Planning Attributes. This user guide covers all of the asps of the current version of the Adroit Forecaster. This guide should be used for first time users of the system or any refresher training or reviews needed.

2 FORECASTER PERMISSIONS

2.1 Permissions Setup

Adroit Forecaster has 2 permissions that could be assigned to users. The first is the Basic User assigned to all day to day users. Also the Admin User is available that would provide all of the basic user access but also ability to edit and update key setup details for the application.

2.2 Permission Access

- **AOT BASIC USER**
  - Full access to edit and maintain forecasts, create new forecasts, view Dashboard, load sales data and load forecast data
- **AOT ADMIN USER**
  - All access from AOT BASIC USER +
    - Can view and edit the configurations on the Adroit Forecast Setup
      - i.e. set the Default location, Timeseries set for default to Moving Average Period.
    - Cannot use Assisted setup to configure everything for Adroit App.
    - Cannot copy the Item Ledger Entries to Sales History.

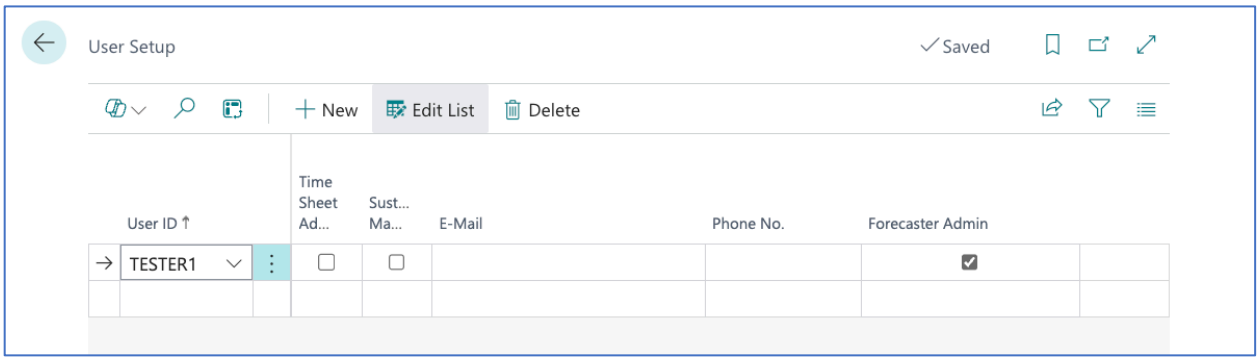
3 FORECASTER ADMIN SETTINGS

3.1 Admin Setting

Adroit Forecaster provides the ability to establish one or multiple ADMINS that have the ability to edit sales history. This setting prevents all users from manipulating sales data but provides the ability to update the data if necessary. Examples could be to delete the Sales History altogether or simply identify it as "outlier" that will eliminate it from the Forecast Calculations.

3.2 Setting Management

To maintain the setting to enable the ADMIN setting go to the User Setup page and scroll to the end of the list of settings. You will see a 'Forecaster Admin' setting that should be checked to turn on the functionality. You can update this later to turn off the functionality if needed and move to another user.

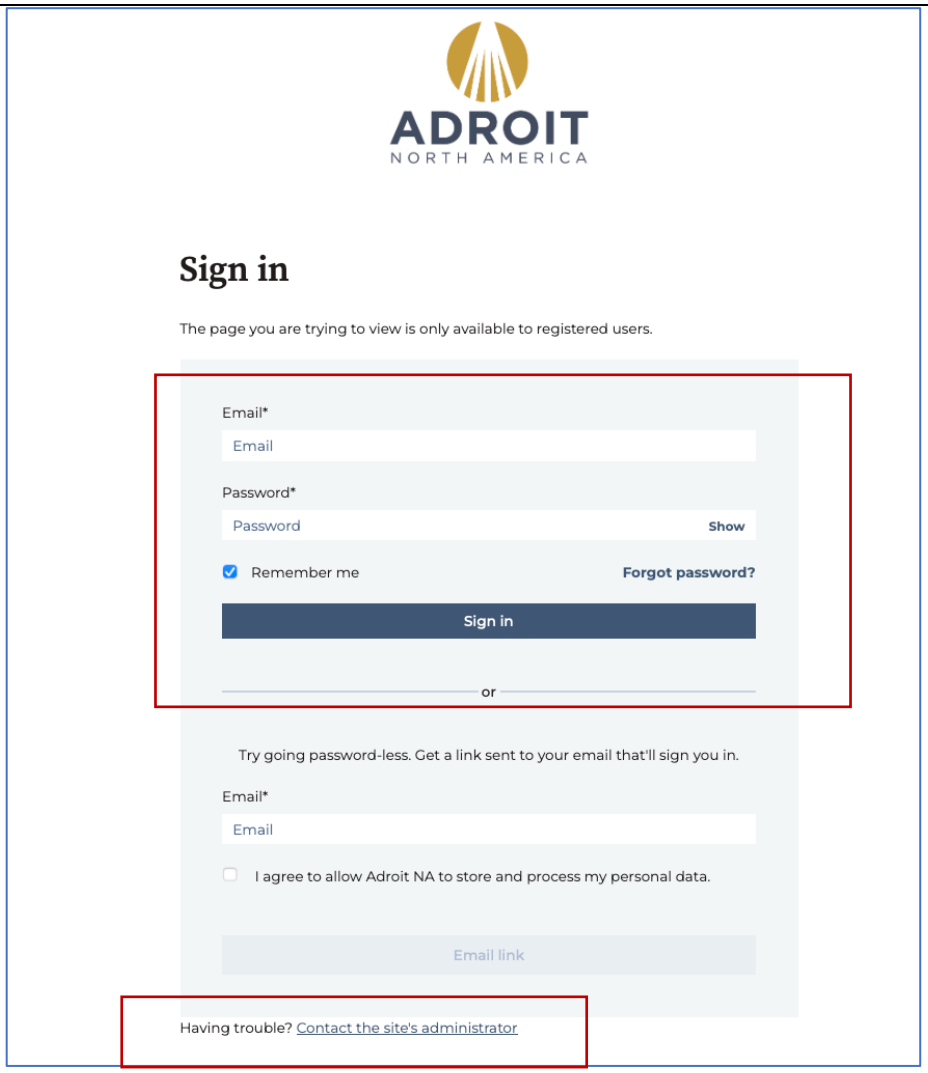


Logging a Support Ticket

If the issue can not be resolved by the FAQ or material on the Support site then enter a ticket into our support system for help. Click on the 'please submit a ticket here' wording on the main page.

A new page will open up asking for user name and password. Those should have been provided to you at the handoff from our support team. If you do not have one please contact your internal support team for assistance.

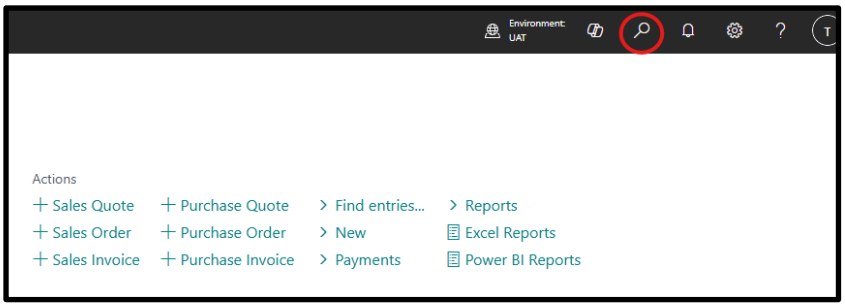
If they can't resolve the access issue send an email to Adroit Support via the link at the bottom of the page. This will open an email to the support team. State your company, your name and the request.


ADROIT
NORTH AMERICA
Sign in
The page you are trying to view is only available to registered users.
Email*
Email
Password*
Password
Show
Remember me
Forgot password?
Sign in
or
Try going password-less. Get a link sent to your email that'll sign you in.
Email*
Email
I agree to allow Adroit NA to store and process my personal data.
Email link
Having trouble? Contact the site's administrator

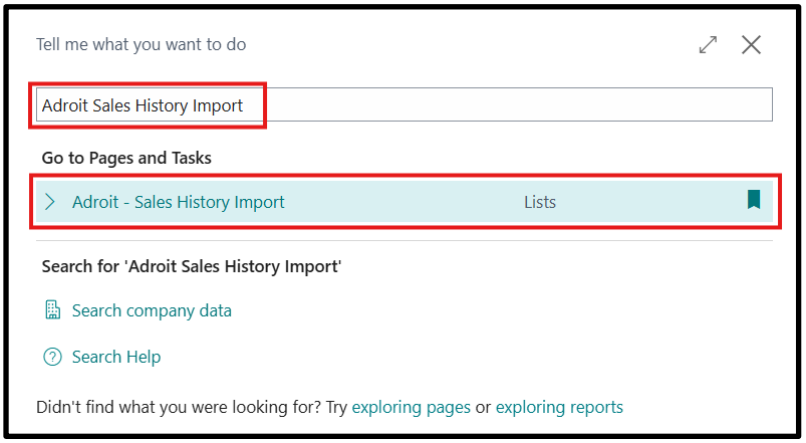
4 SALES HISTORY IMPORT PROCESS

4.1 Navigation to Sales History Import

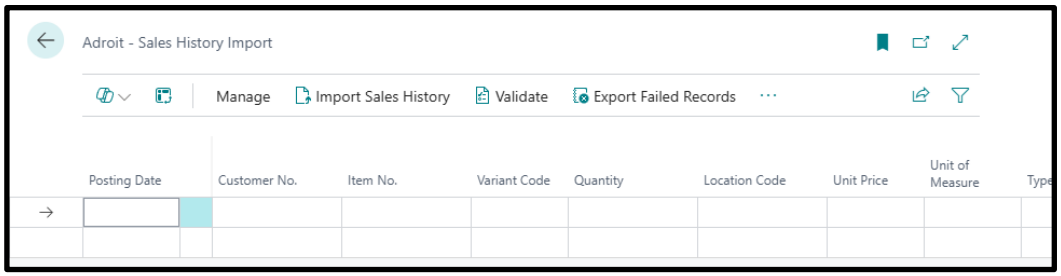
1. Click the search tool from the top menu.



2. Search for "Adroit Sales History Import" and select from list.
Note: Line will not show highlighted until cursor hovers over the selection.

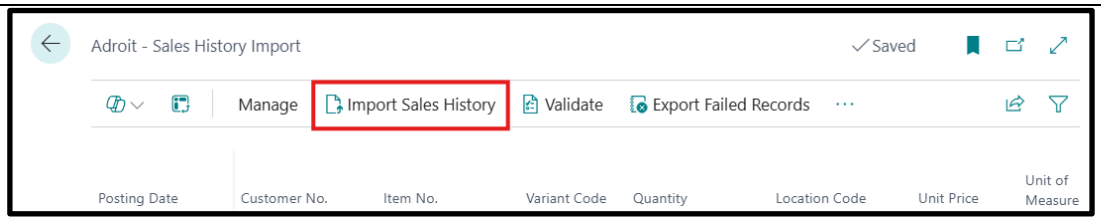


3. Sales History Import will load with previous data or blank if no prior data has been uploaded, as shown below.

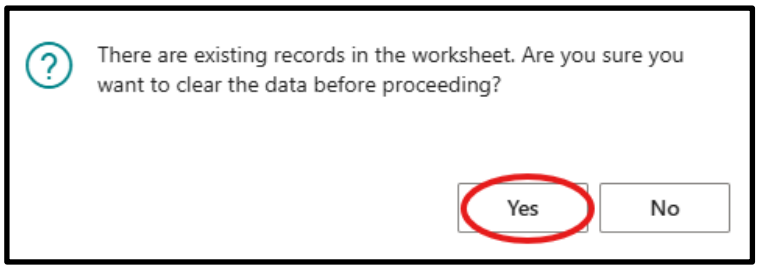


4.2 Importing Sales History Data

1. Select the 'Import Sales History' button from the top menu.

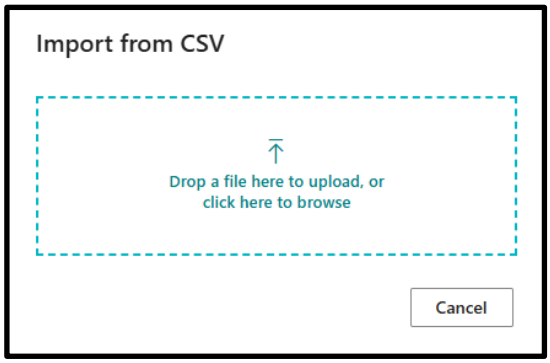


2a. If previous data has been uploaded, select 'Yes' button to proceed with clearing existing data and uploading a new import.
Note: this prompt will not appear if no data has been uploaded previously.



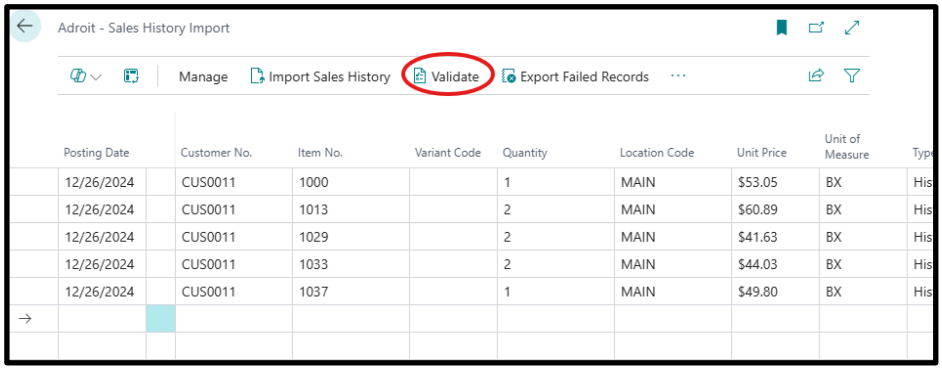
2b. If previous data has been uploaded but not yet loaded to sales history, the following message will display. Click 'OK' to proceed. Skip to step 5 and then return to step 3 for new data upload.
Note: new records cannot be added until the existing records have been added to sales history (steps 5-8 below).

3. Drag and drop a file into the box or upload file from computer by clicking into the box.
Note: Only .csv files are accepted.

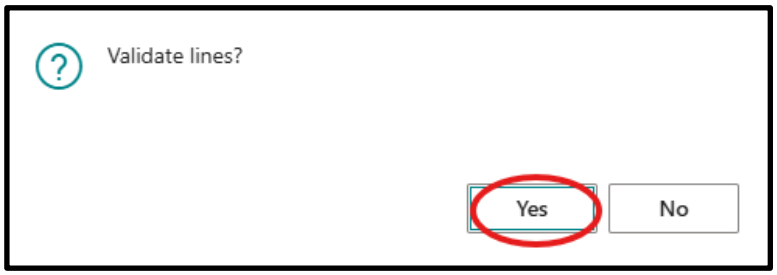


4. Select sales history file from computer and click 'Open'.

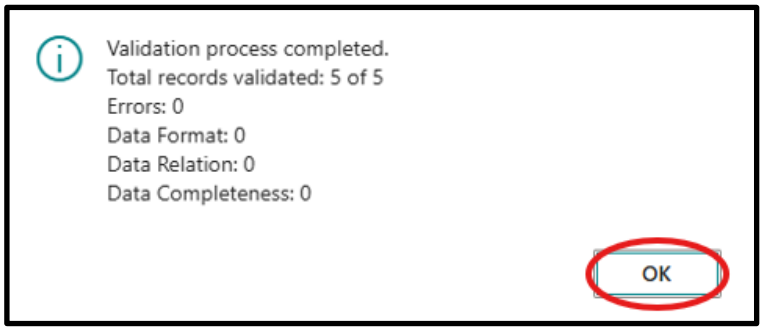
5. Once data is loaded, select 'Validate' from the top menu.
Note: It is critical to check that the data is correct before uploading to ensure accurate forecasting. Forecaster's Validation checks data format but cannot assess the accuracy of sales history data.



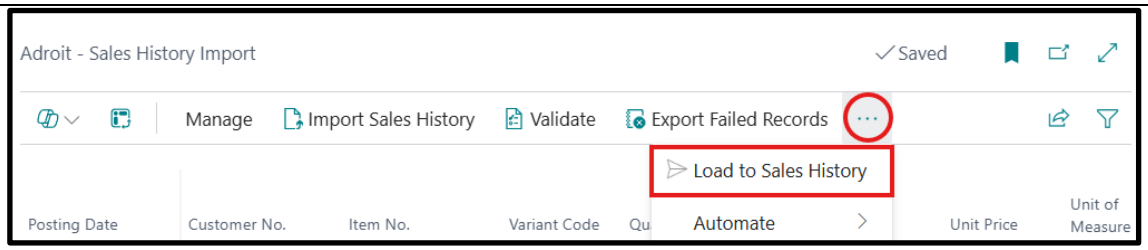
6. Click 'Yes' to validate data.



7. Validation results will appear. Select 'OK' to continue
Note: successful validation will provide 0 errors. If validation returns errors, see section 2.3 for support.

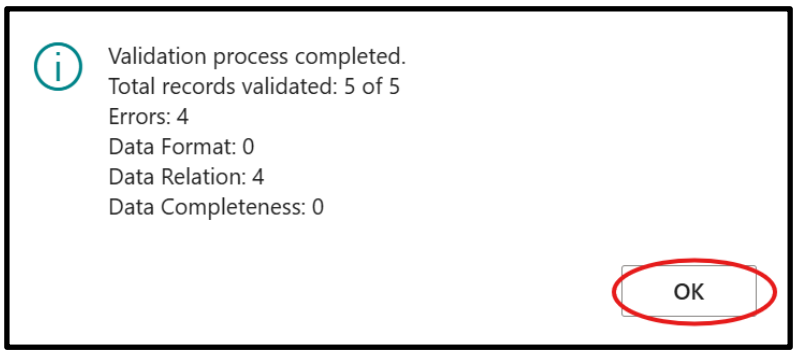


8. If all records are validated, data can be pushed into sales history by clicking the 3 dots to show all options in the menu bar and then selecting 'Load to Sales History'.
Note: This pushes the data into Forecaster's master sales records, where all sales are available to be selected for forecasting.

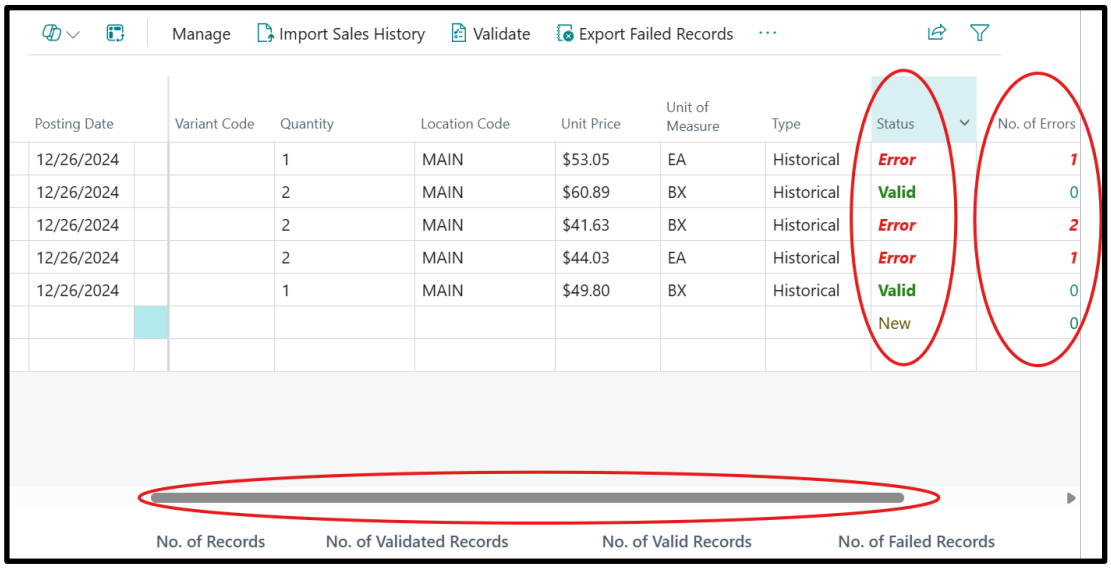


4.3 Validation with Errors

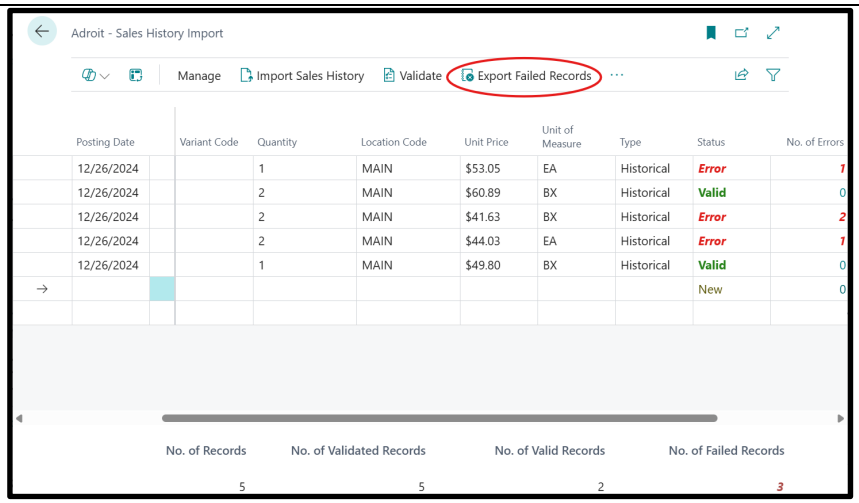
1. If validation returns with errors, click 'OK' to proceed.



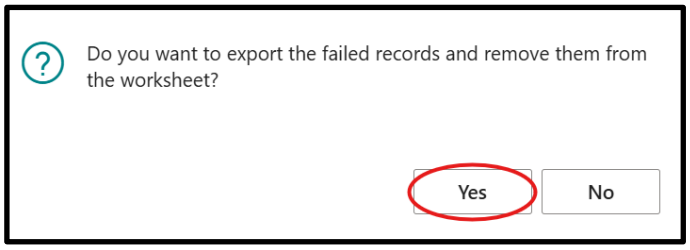
2. Using the scroll bar at the bottom of the chart, scroll right to view validation status for each line. This will also indicate the number of errors per item that cannot be validated.



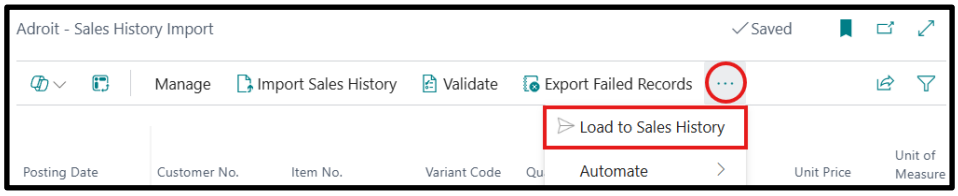
3. Select 'Export Failed Records' from the top menu.



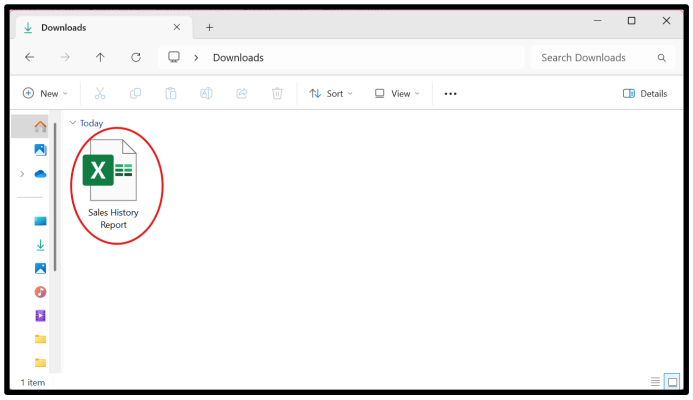
4. Select 'Yes' to create a downloadable report of errors and remove them from the dataset, leaving only validated lines of data.



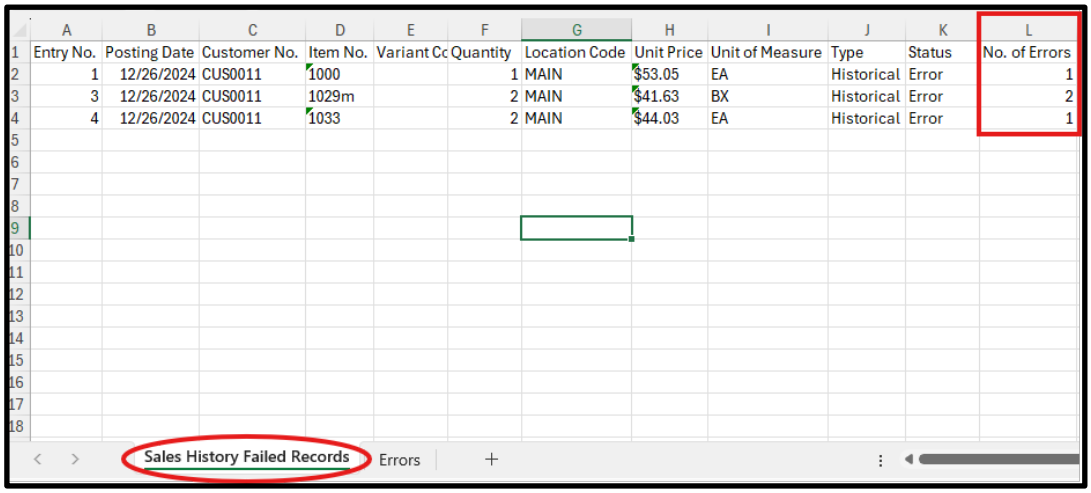
5. Validated data can be pushed into sales history by selecting the 3 dots to show all options in the top options bar and then selecting 'Load to Sales History'.



6. To view the report, open 'Downloads' folder and find the Excel file generated by the system titled 'Sales History Report'.



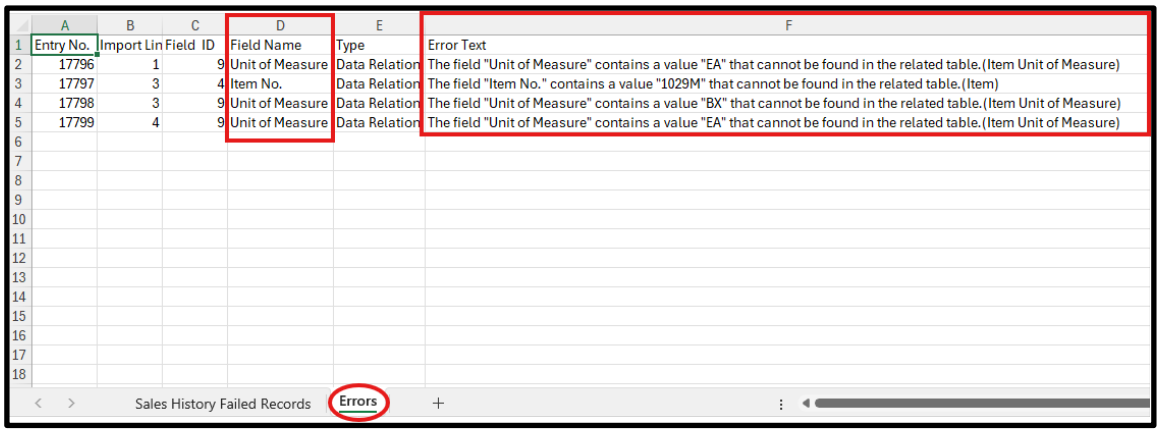
7. View the lines that could not be validated on the 'Sales History Failed Records' tab, displaying which items did not pass the validation as well as the number of errors per line in column L.



Entry No.	Posting Date	Customer No.	Item No.	Variant Cc	Quantity	Location Code	Unit Price	Unit of Measure	Type	Status	No. of Errors
1	12/26/2024	CUS0011	1000		1	MAIN	$53.05	EA	Historical	Error	1
3	12/26/2024	CUS0011	1029m		2	MAIN	$41.63	BX	Historical	Error	2
4	12/26/2024	CUS0011	1033		2	MAIN	$44.03	EA	Historical	Error	1

Sales History Failed Records | Errors

8. Select the 'Errors' tab to view details for each error. Information displayed indicates which field caused an error in column D and a more detailed explanation in column F.



Entry No.	Import Lin	Field ID	Field Name	Type	Error Text
17796	1	9	Unit of Measure	Data Relation	The field "Unit of Measure" contains a value "EA" that cannot be found in the related table.(Item Unit of Measure)
17797	3	4	Item No.	Data Relation	The field "Item No." contains a value "1029M" that cannot be found in the related table.(Item)
17798	3	9	Unit of Measure	Data Relation	The field "Unit of Measure" contains a value "BX" that cannot be found in the related table.(Item Unit of Measure)
17799	4	9	Unit of Measure	Data Relation	The field "Unit of Measure" contains a value "EA" that cannot be found in the related table.(Item Unit of Measure)

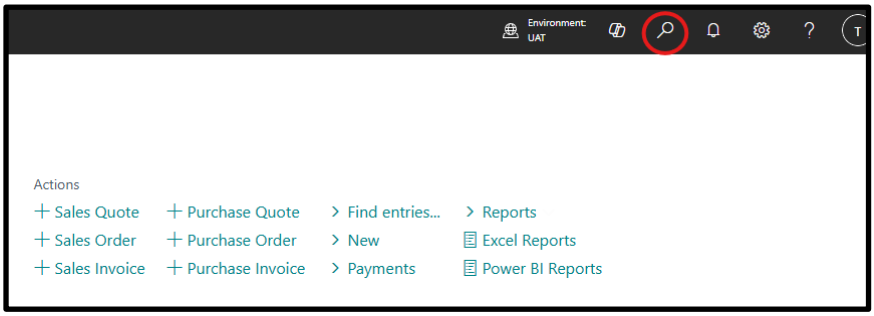
Sales History Failed Records | Errors

9. Correct the errors in data file and reupload following steps in section 2.2, starting at step 3.

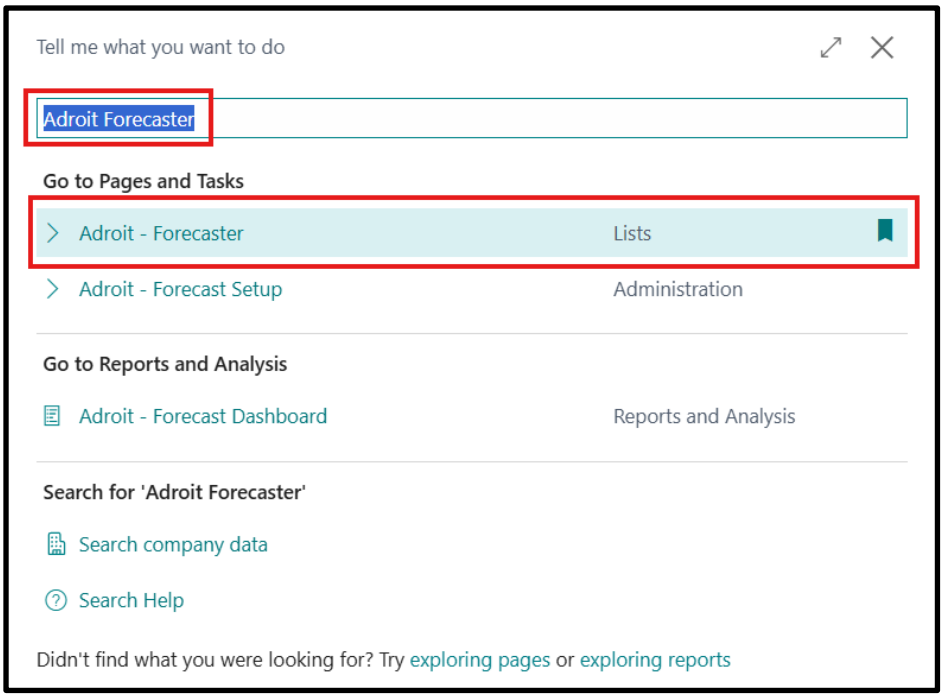
5 FORECASTER PROCESS

5.1 Navigation to Adroit Forecaster

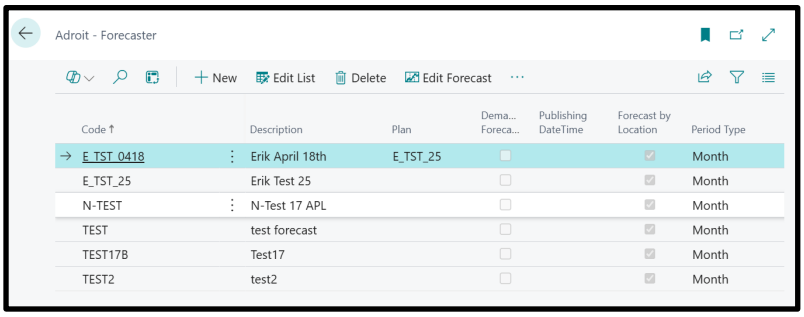
1. Click the search tool from the top menu.



2. Select 'Adroit Forecaster' from the menu list

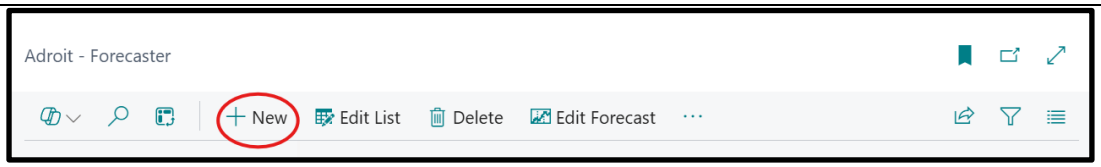


3. Forecaster will load with list of previous forecasts created or empty if no prior forecasts have been created.

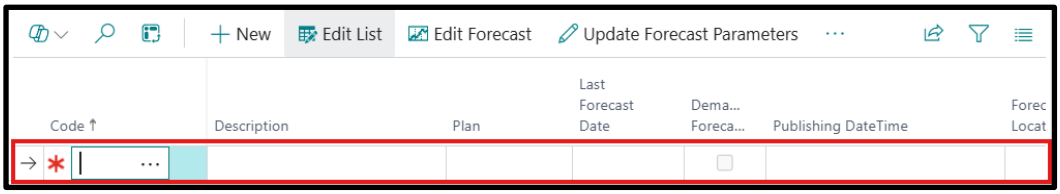


5.2 Creating a New Forecast

1. Select the 'New' button from the top menu.

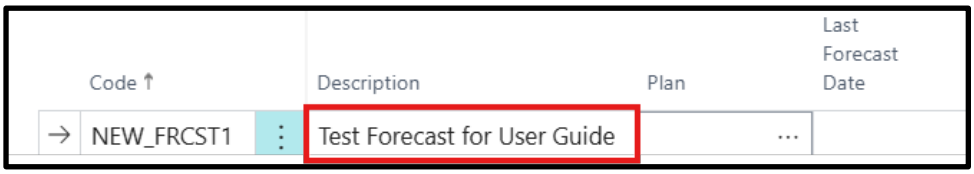


2. A New line will be created to enter data and parameters for new forecast.

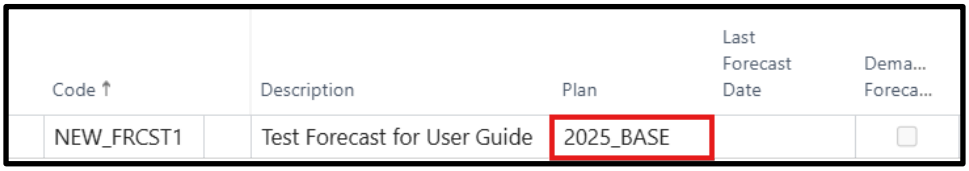


3. Enter the Code for the new forecast. This will be used by the system to reference this forecast in related tables

4. Add a description for the new forecast. This is for users to easily identify the purpose behind each forecast.



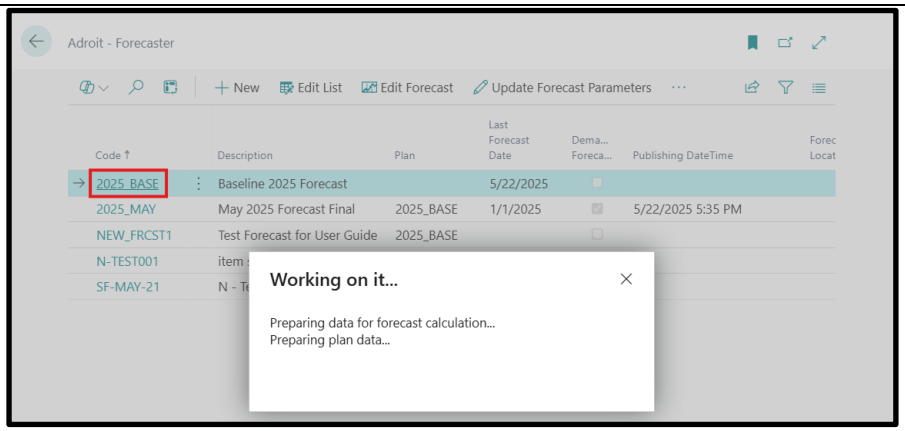
5. Optional: Enter a Plan Forecast serving as the Budget or Baseline Forecast. This will be a non-editable reference plan the newly created forecast can be evaluated against.



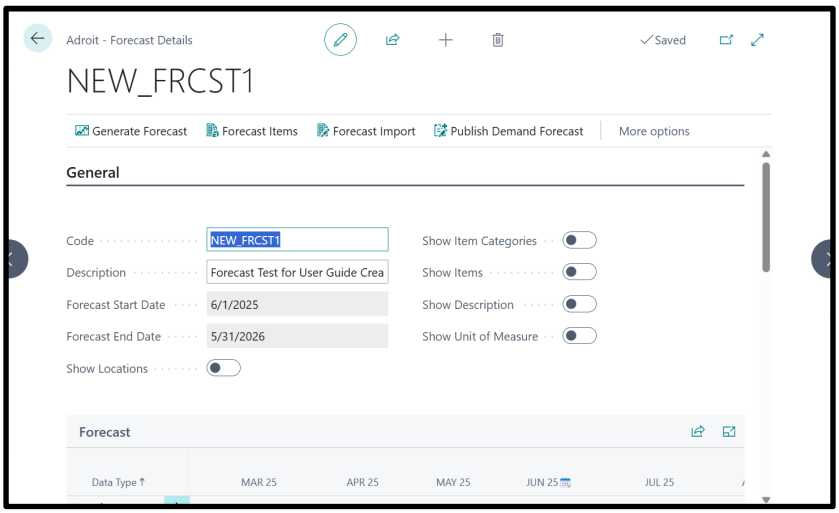
Note: the remainder of the forecast parameters and controls on this screen can be adjusted through the Sales Inventory Set Up page. See ***section 2.4.1*** for detailed information on full forecast controls and ***section 2.4.2*** for information on time series model settings.

5.3 Adding Data to a New Forecast

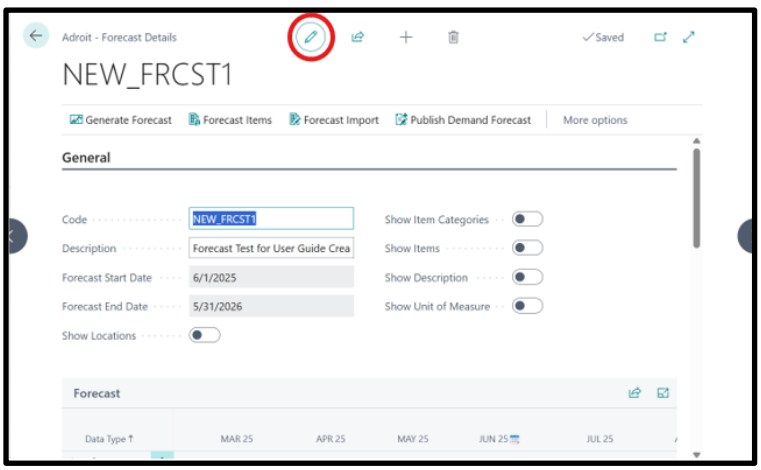
1. If on the main Forecaster screen, clicking the text in the 'Code' column will navigate to the forecast details page, showing the following prompt while loading.
Note: Clicking 'Edit Forecast' from the top menu will also open the same page for the selected forecast.



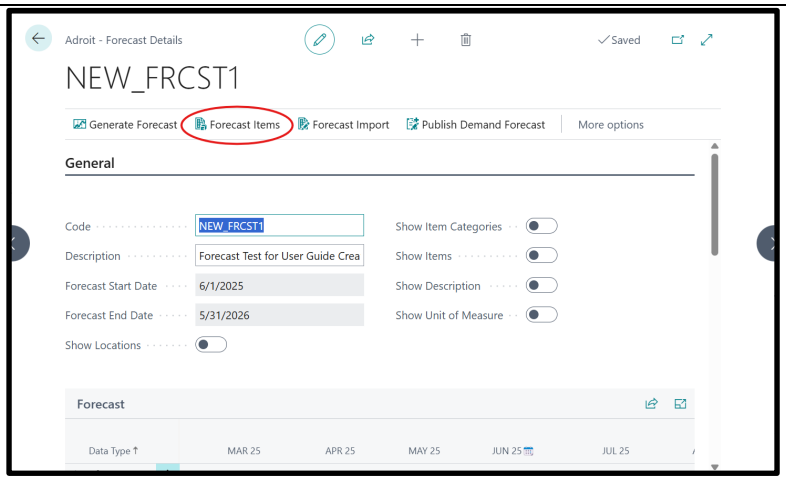
2. Forecaster will open the Forecast Details page, shown below.



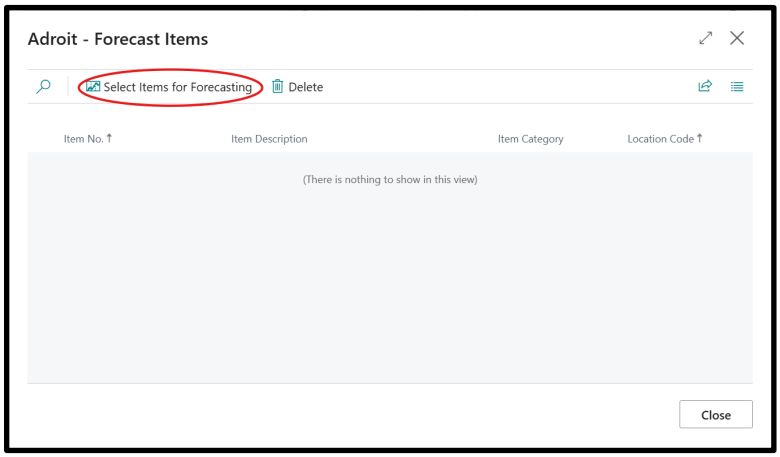
3. Click the pencil icon at the top to make fields editable.
Note: clicking the pencil icon again will switch back to read-only mode, locking all fields from edits.



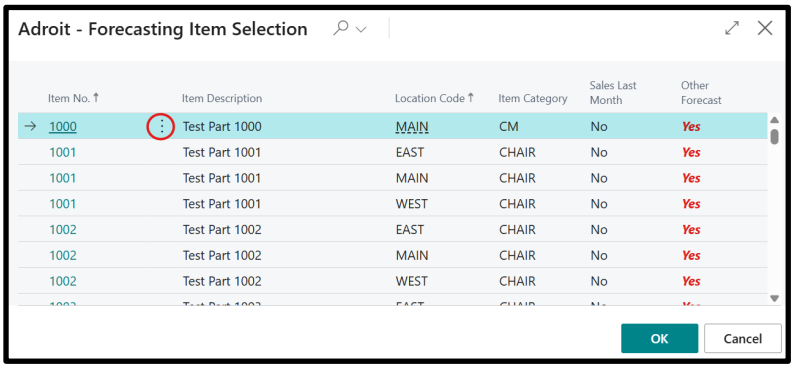
4. Select 'Forecast Items' from the top menu.



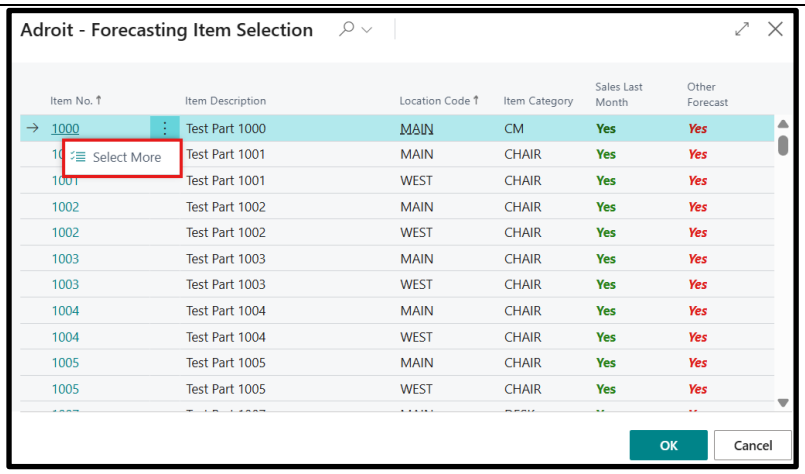
5. Click ‘Select Items for Forecasting’.



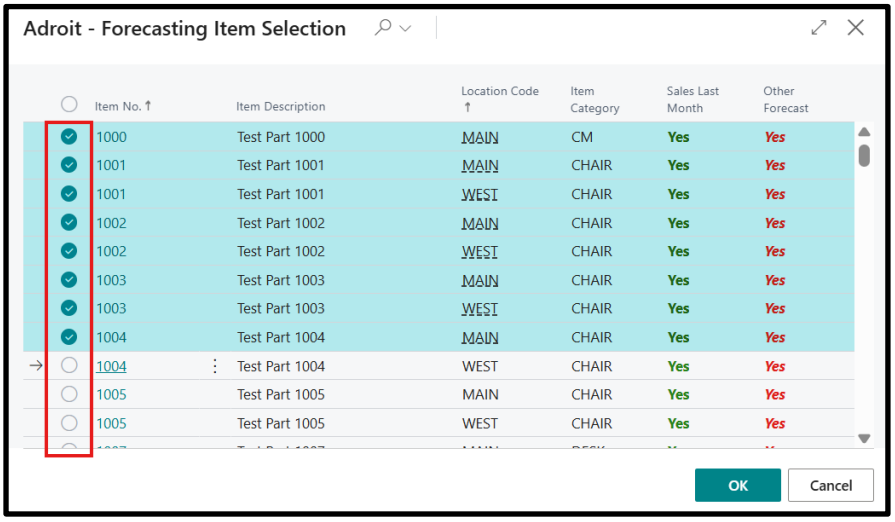
6. This will bring up the master list of items, currently included in the Sales History Import tool. To select items for forecasting, first select one item and then clicking the three dots that appear.



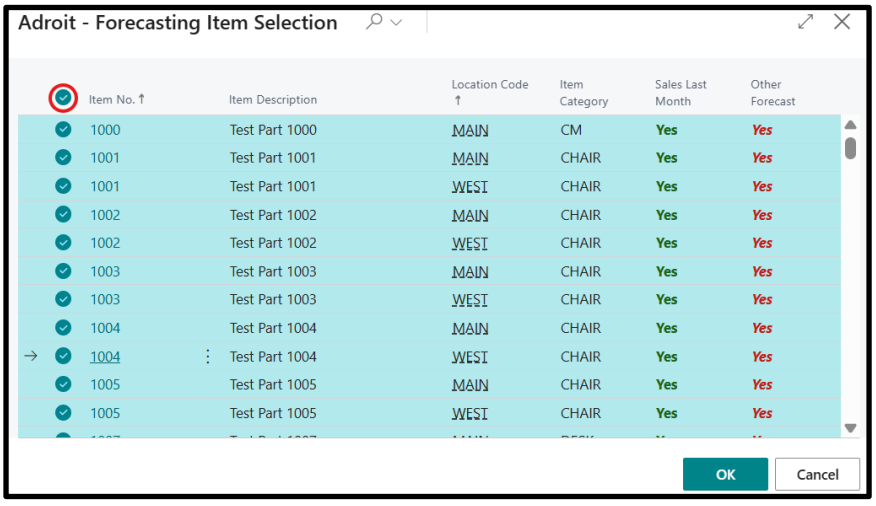
7. Click ‘Select More’.



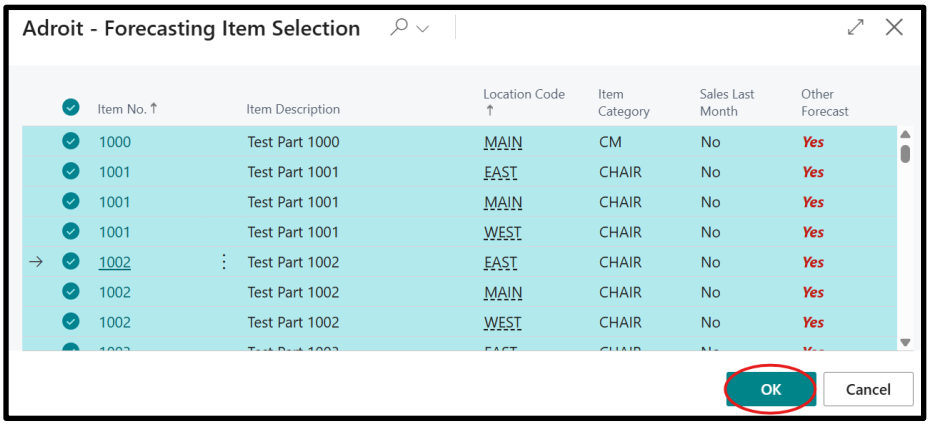
8a. Select the circle to the left of the items to include in this forecast.



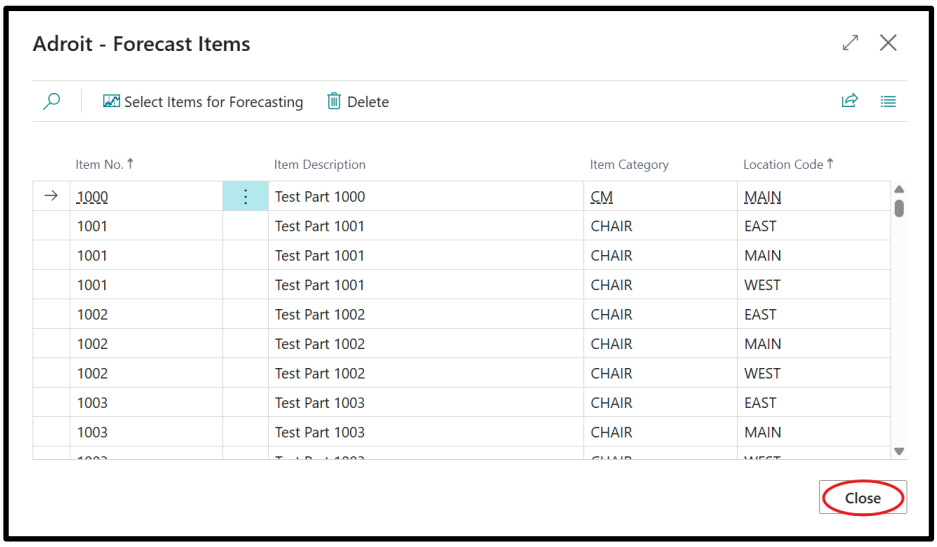
8b. To select all items, click the top circle to the left of the ‘Item No.’ label.



9. Click 'Ok' to save.



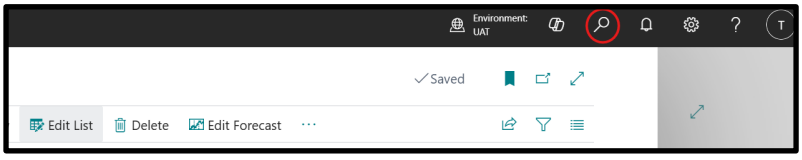
10. Items will appear on list. Click 'Close' to continue.



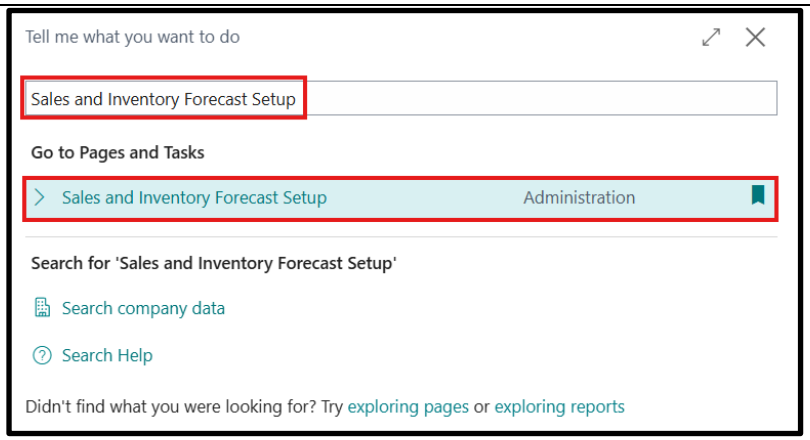
5.4 Editing Forecast Parameters

Editing Forecasting parameters in the Sales and Inventory Setup tool adjusts settings for **all** forecasts. Setting selections are stored in the system and used for all forecasts, until adjusted.
Note: Forecast parameter changes do not apply to existing forecasts. Forecasts must be recreated after settings have been updated for the new parameters to apply.

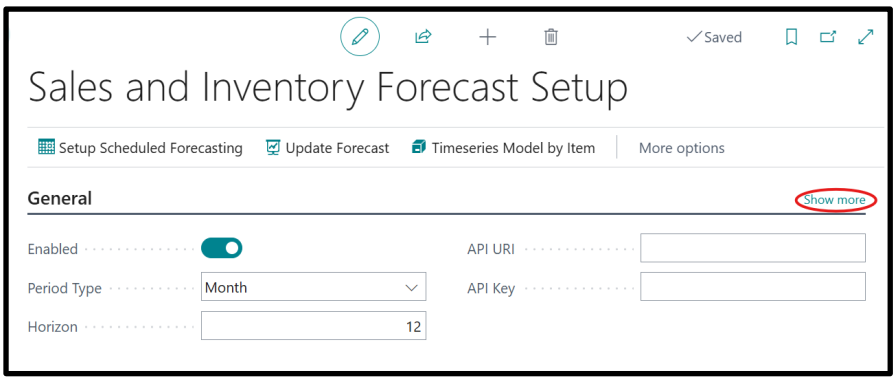
1. Click the search tool from the top menu.



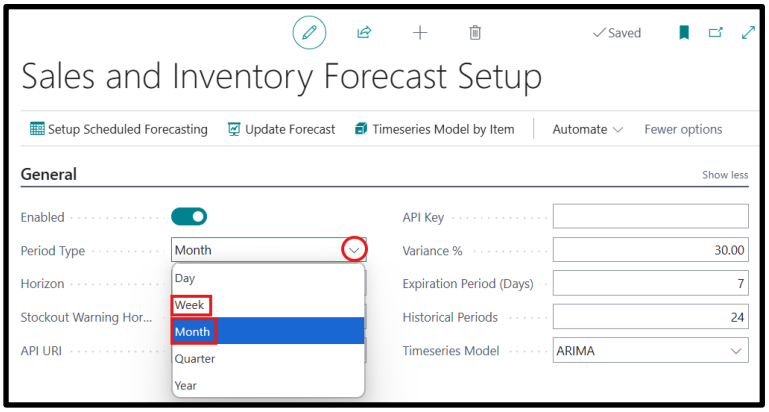
2. Search for "Sales and Inventory Forecast Setup" and select from list.
Note: Line will not show highlighted until cursor hovers over the selection.



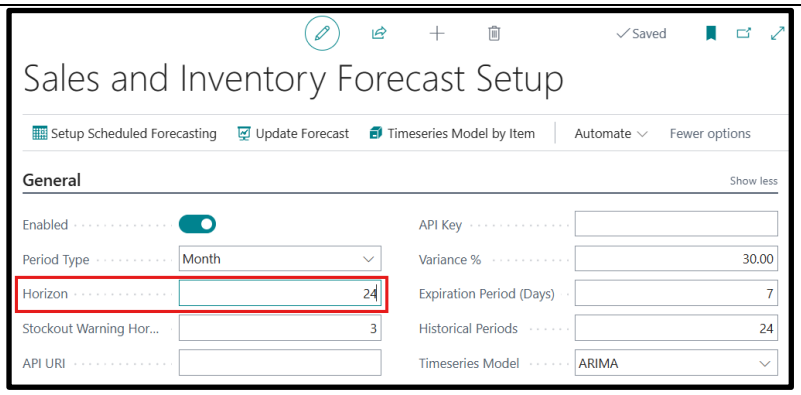
3. Set up page will load. Select 'Show More' to see all editable options.
Note: Once clicked, the option to 'Show Less' will appear to switch back.



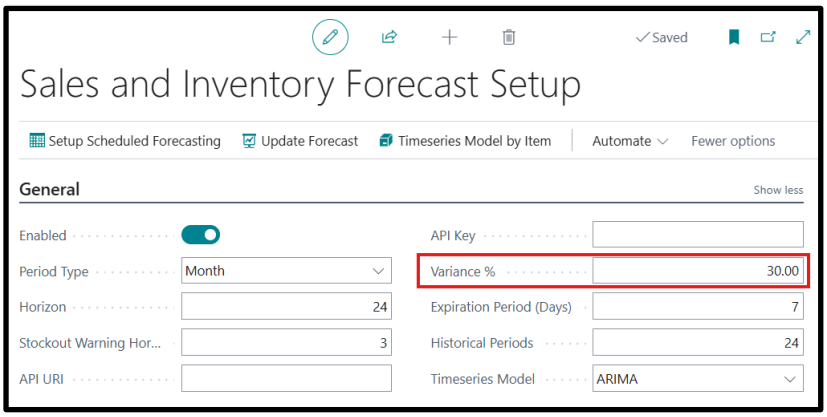
4. Select the Period Type desired for forecast. This can be set in Month or Week by selecting one of the two options from the following.
Note: Month and Week are the only options supported by the Forecaster.



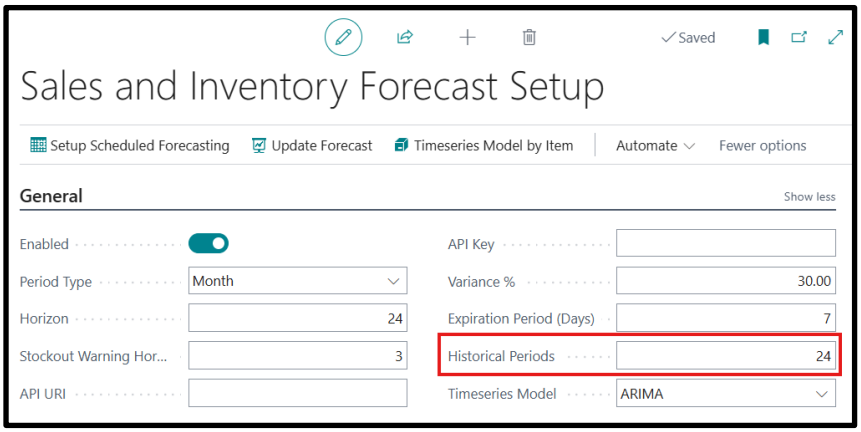
5. Set the desired Horizon. This controls how many periods the Forecaster will project forward.
Note: Enter a number between 1 and 36.



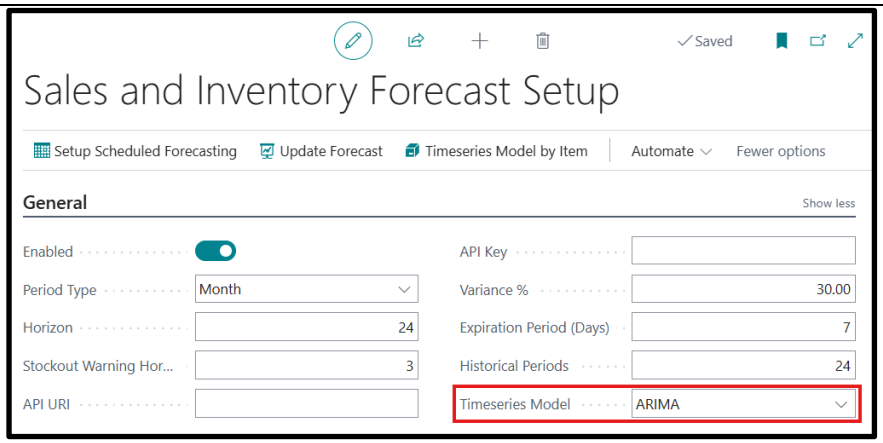
6. Variance %: Controls the delta percentage allowance for any forecast. Forecast results falling outside the variance percentage is not included in the forecasted results. The default is 30%.
Note: A lower number is associated with a more accurate forecast, where a large number will include wide variance, accounting for larger swings in data.



7. Historical Periods: Controls how many periods (in the Period Type unit selected on the left side) of past sales data is used in the Forecast.
Note: Users can use up to 36 periods of past sales data.

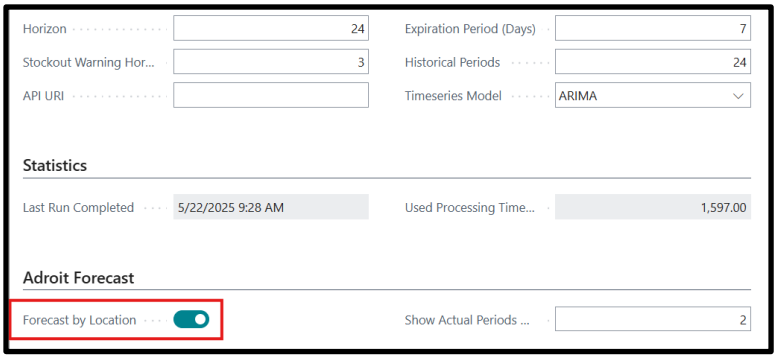


8. Timeseries Model**:** The default model that the Forecast will use to generate forecasts. Each option will provide a different forecast based on the model's statistical approach.
Note: Model can be adjusted for specific items during the forecasting process. For more information, see section 2.4.2 below.

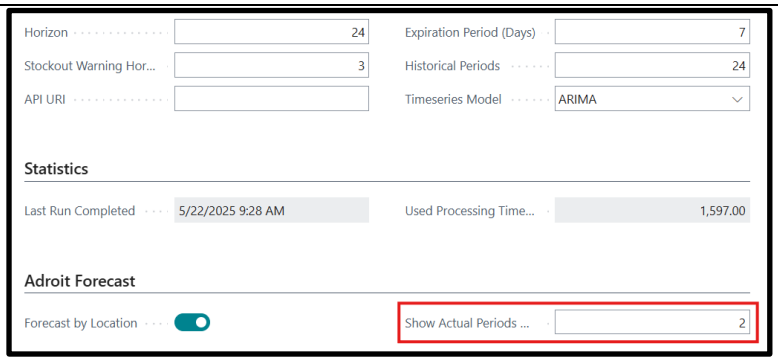


- **ARIMA (Autoregressive Integrated Moving Average**) – A time series model that uses past **actual** values and **previous forecast** error**s** to forecast future data. Best for data with consistent trends but no clear seasonal pattern.
- **ETS (Error, Trend, Seasonal)** – A forecasting model based on exponential smoothing that captures trends and adjusts for seasonality. It adapts quickly as new data becomes available and patterns shift.
- **STL (Seasonal-Trend decomposition using Loess**) – A forecasting model that separates a time series into seasonal, trend, and remainder components. It's ideal for data with complex, evolving seasonal patterns.
- **ETS + ARIMA** – A hybrid model that combines ETS for trend and seasonality with ARIMA for handling residual noise, making it versatile for a wider range of data patterns.
- **ETS + STL** – Applies STL decomposition to isolate complex seasonal patterns before using ETS, making it ideal for data with evolving seasonality.
- ALL – Not currently an option for the Microsoft Statistical API.
  Note: This is still in process and will be communicated to customers once it is available for use.
- **TBATS** – A flexible model designed to handle complex, non-regular seasonal patterns, including multiple seasonal cycles. Ideal for high-frequency data or data with intricate seasonal variations.

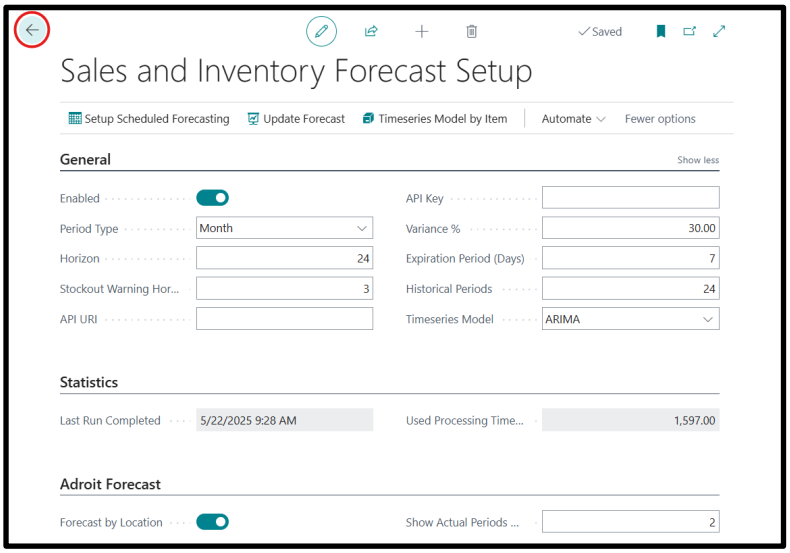
9. If forecasting data for multiple locations, toggle **on** right 'Forecasts by Location' to enable the Forecaster to generate data separated by location.
Note: If toggled <u>off</u> (left), all data in the Forecaster will roll up at the part level with no distinction between locations.



10. Show Actual Periods: Controls how many actual periods of sales data (in the Period Type units selected above) of data will be displayed in the Forecaster Details when viewing detailed forecast data.
Note: More information on detailed forecast data can be found in the Forecast Utilization Guide.



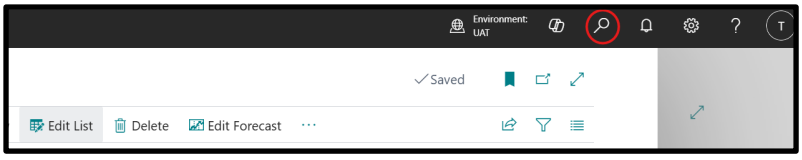
11. Select the back button to return to the Forecaster.



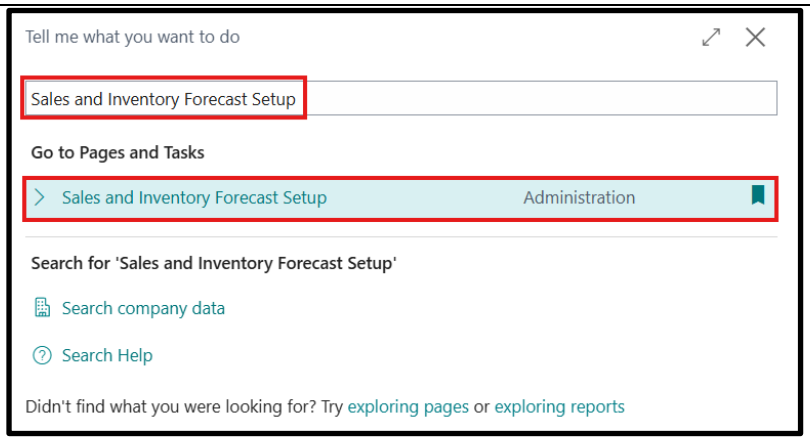
5.5 Editing Time Series Model for Specified Item(s)

Users can specify a time series model for a specific item that may differ from the default. This setting will not change when the default is updated and will continue to be forecasted with the individually selected model.

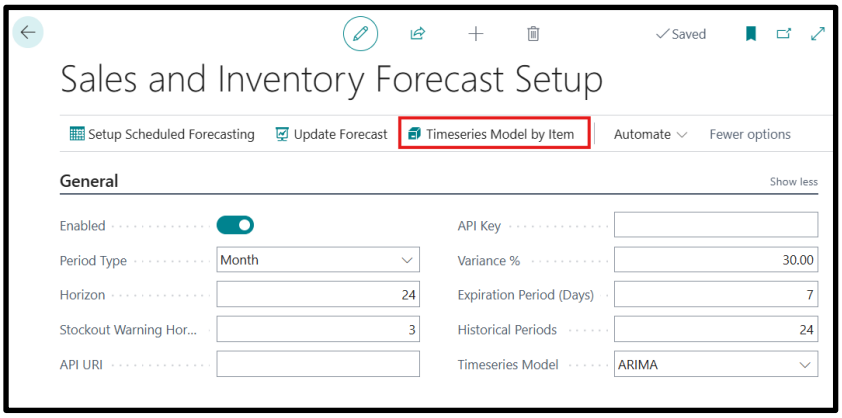
1. Click the search tool from the top menu.



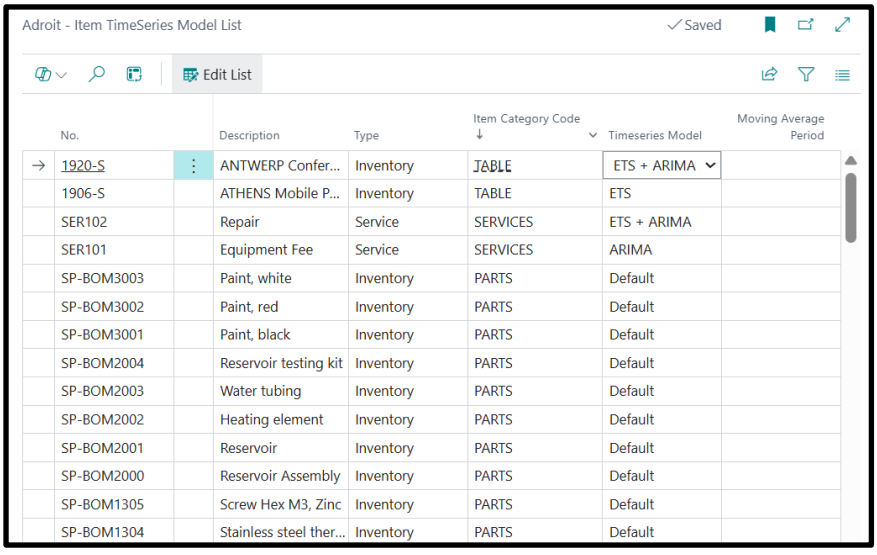
2. Search for “Sales and Inventory Forecast Setup” and select from list.
Note: Line will not show highlighted until cursor hovers over the selection.



3. Select 'Timeseries Model by Item' from the top menu.



4. Forecaster will display the 'Item TimeSeries Model List' that is on the default time series model plus two additional models, Moving Average and Last 12 Months.

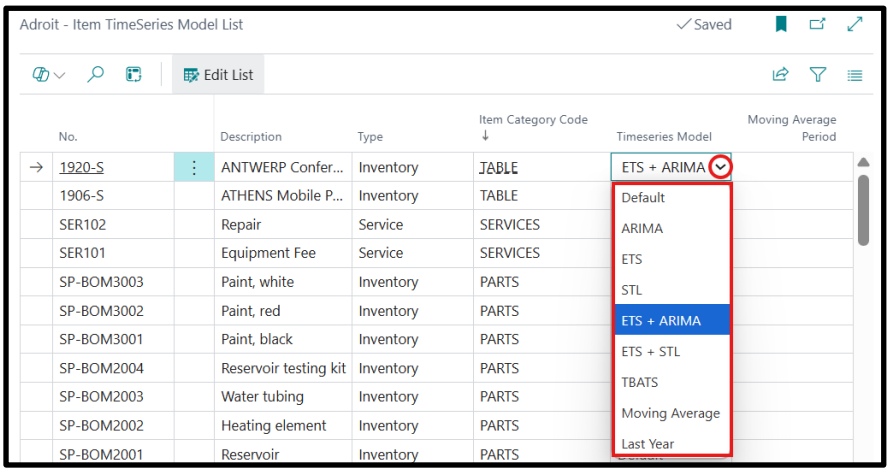


No.	Description	Type	Item Category Code	Timeseries Model	Moving Average Period
1920-S	ANTWERP Confer...	Inventory	TABLE	ETS + ARIMA	
1906-S	ATHENS Mobile P...	Inventory	TABLE	ETS	
SER102	Repair	Service	SERVICES	ETS + ARIMA	
SER101	Equipment Fee	Service	SERVICES	ARIMA	
SP-BOM3003	Paint, white	Inventory	PARTS	Default	
SP-BOM3002	Paint, red	Inventory	PARTS	Default	
SP-BOM3001	Paint, black	Inventory	PARTS	Default	
SP-BOM2004	Reservoir testing kit	Inventory	PARTS	Default	
SP-BOM2003	Water tubing	Inventory	PARTS	Default	
SP-BOM2002	Heating element	Inventory	PARTS	Default	
SP-BOM2001	Reservoir	Inventory	PARTS	Default	
SP-BOM2000	Reservoir Assembly	Inventory	PARTS	Default	
SP-BOM1305	Screw Hex M3, Zinc	Inventory	PARTS	Default	
SP-BOM1304	Stainless steel ther...	Inventory	PARTS	Default	

• Moving Average – A basic forecast model based on the specific number of periods set by moving average periods.
Note: Value can be between 6 and 12 periods (in period type units set in forecast set up) See section 2.5 below for more information.

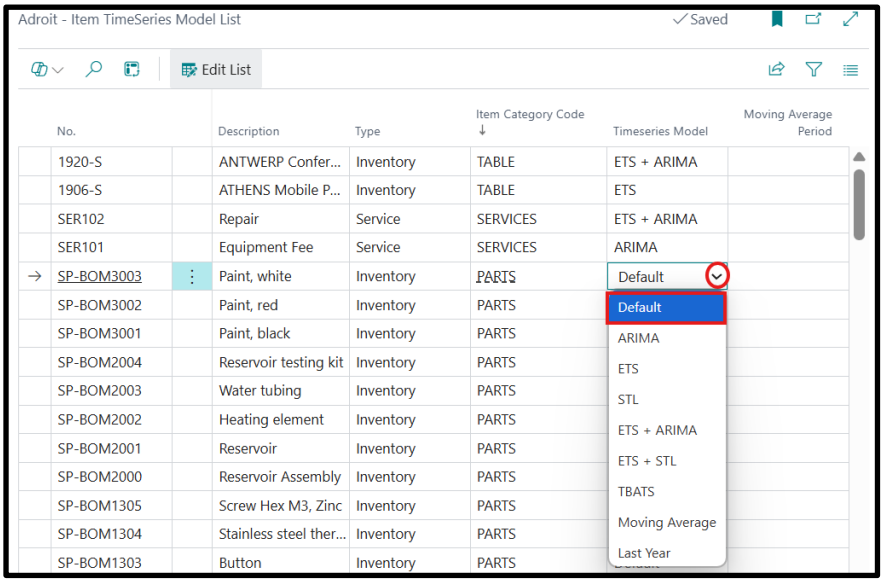
• **Last Year** – Copies previous year data exactly, pushing it forward a specific set of periods (in period type units set in Forecast Set Up).
Note: Minimum value is 12.

5. Find the desired item and select the appropriate time series model from the dropdown menu. Note: Time series model can only be changed for individual items. There is no multiple selection option.



Selections are automatically saved. The forecast must be regenerated to update values utilizing the model selected here.

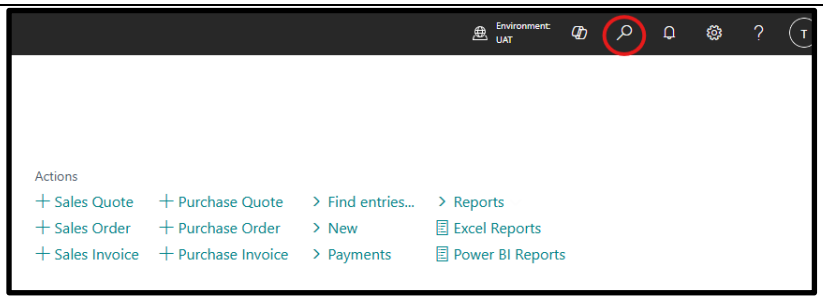
6. To “turn off” item-specific model selection, select ‘Default’ from the dropdown menu. The item will revert to being forecasted by the time series model selected in Sales and Inventory Forecast Setup.



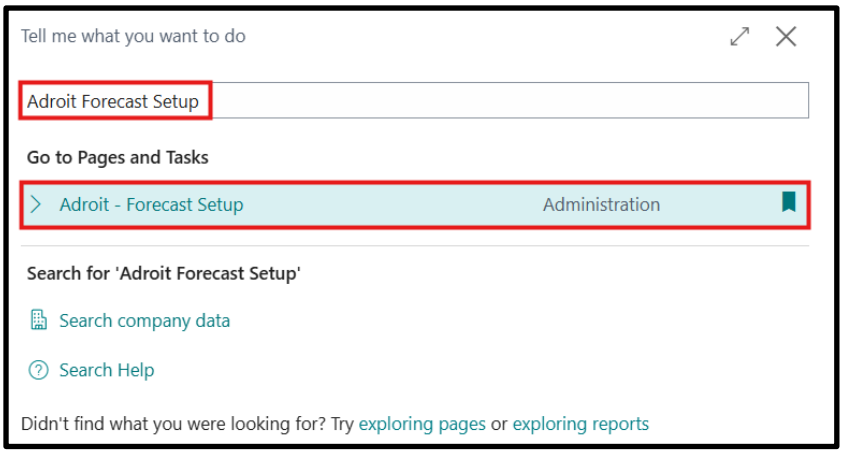
5.6 Forecast Setup

The Forecast Setup page allows users to adjust default settings for all forecasts. Some of these settings can be adjusted on an induvial basis to differ from the default, but changes made here will automatically apply to all forecasts unless otherwise specified.

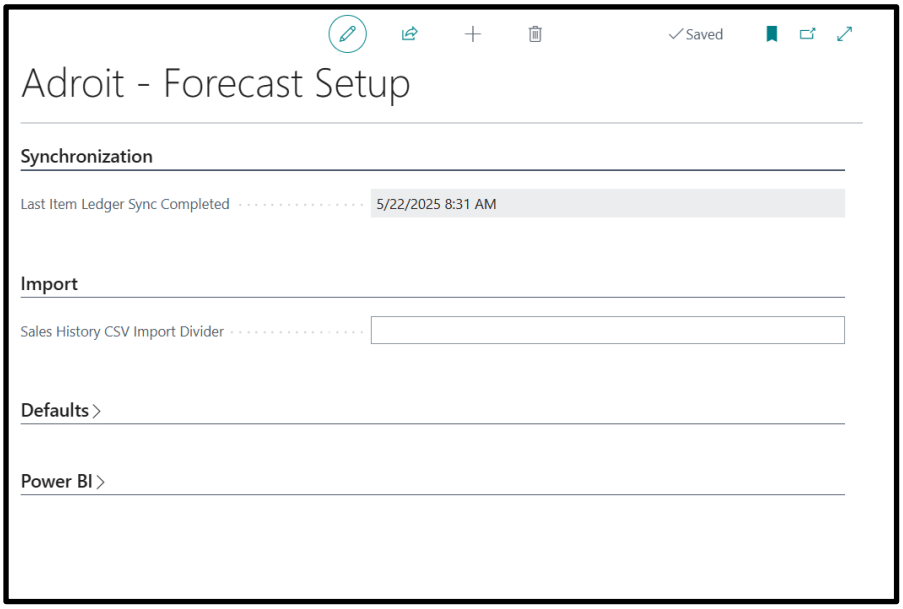
1. Click the search tool from the top menu.



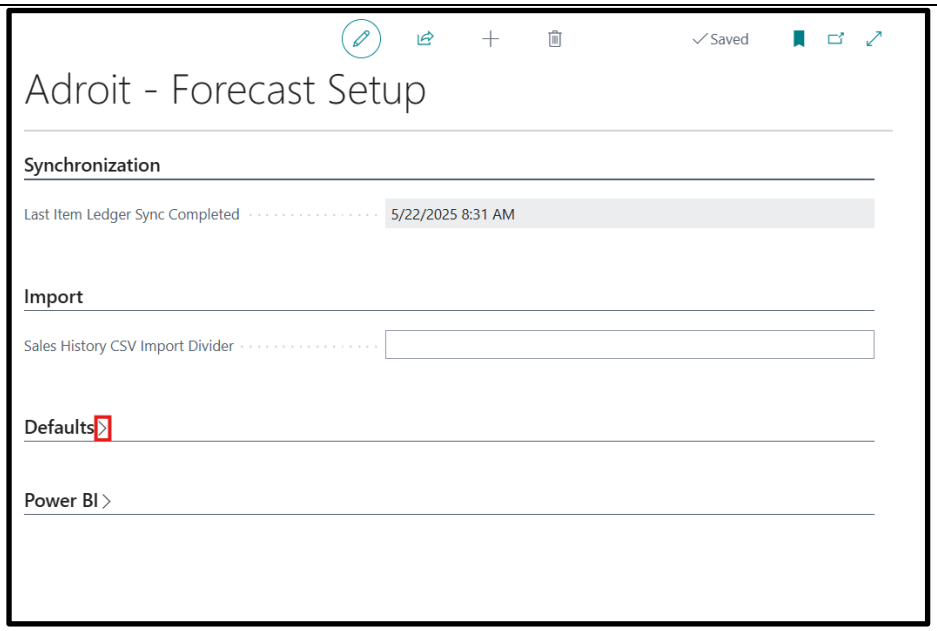
2. Search for “Adroit Forecast Setup” and select from list.
Note: Line will not show highlighted until cursor hovers over the selection.



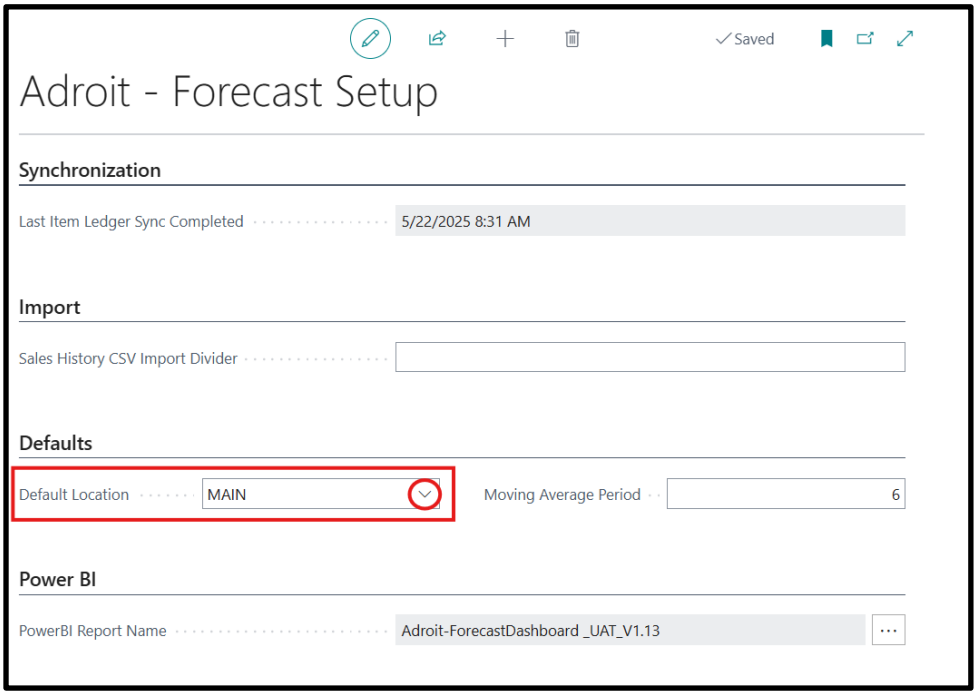
3. This will bring up the Forecast Setup page which has several further options for forecasting.



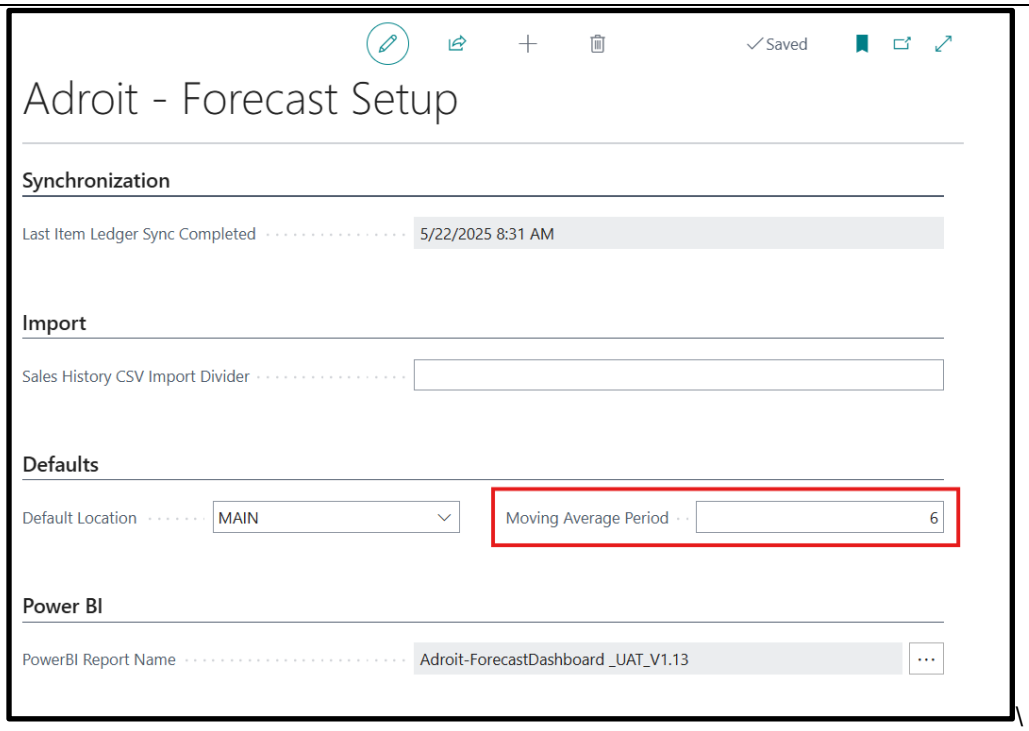
4. Select the arrows next to each section header to expand the section.
Note: expanding the section will make the arrow disappear. Click on the name of the section header to collapse again.



5. In the 'Defaults' section, users can set a default location for forecasting by selecting from the dropdown menu, which lists all available locations based on the forecast data uploaded. This setting will apply to all future forecasts.

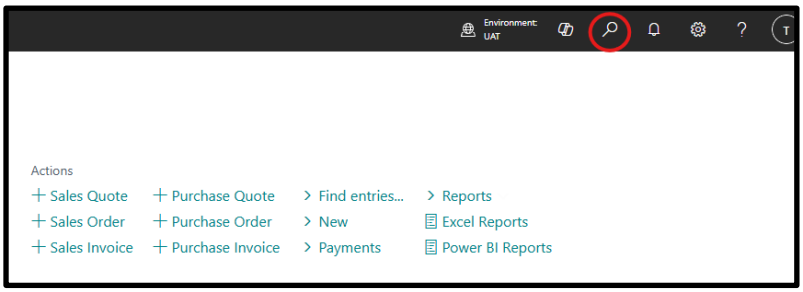


6. Adjustment can also be made to the default number of periods (in period type units set in forecast set up) that selecting 'Moving Average' forecast will push the existing forecast forward. ***Note: Value can be between 6 and 24.***

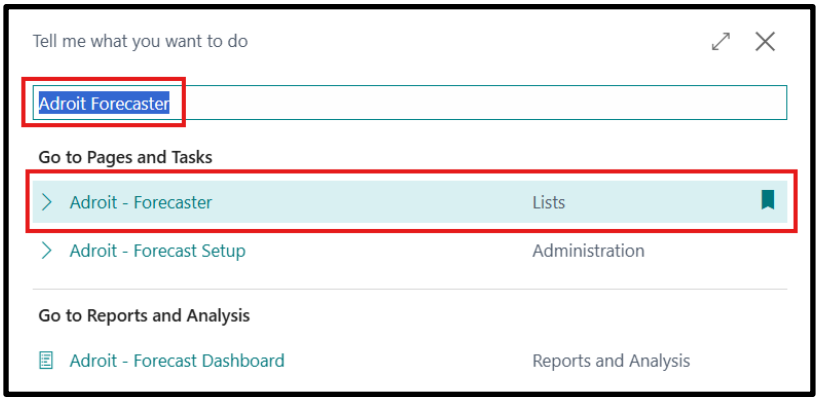


5.7 Deleting A Forecast

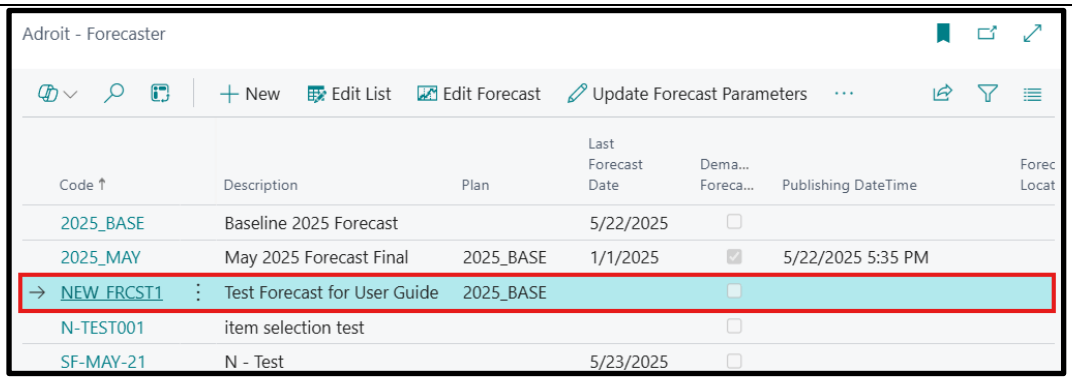
1. Click the search tool from the top menu.



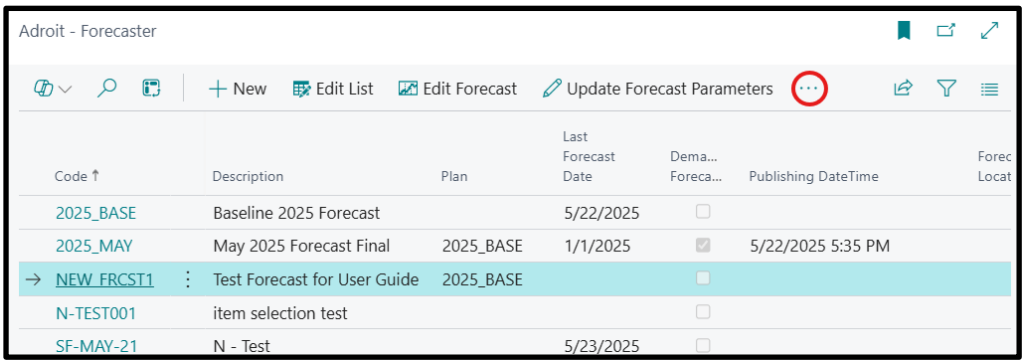
2. Search for “Adroit Forecaster” and select from list.
Note: Line will not show highlighted until cursor hovers over the selection.



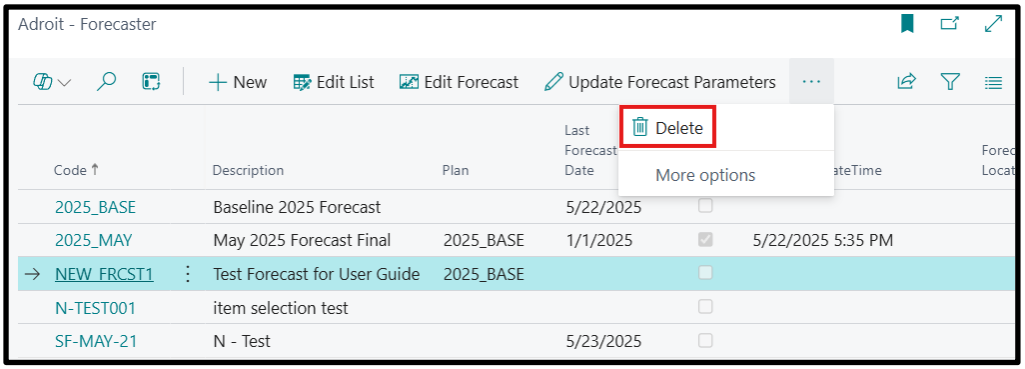
3. Highlight the desired forecast from the list.



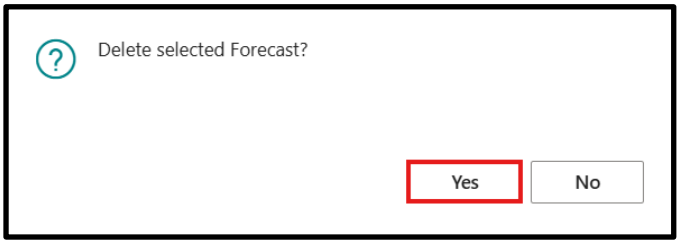
4. Select the three dots from the top menu.



5. Click 'Delete'.



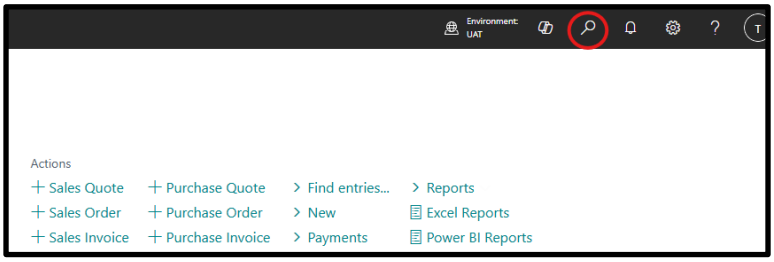
6. Select 'Yes'.



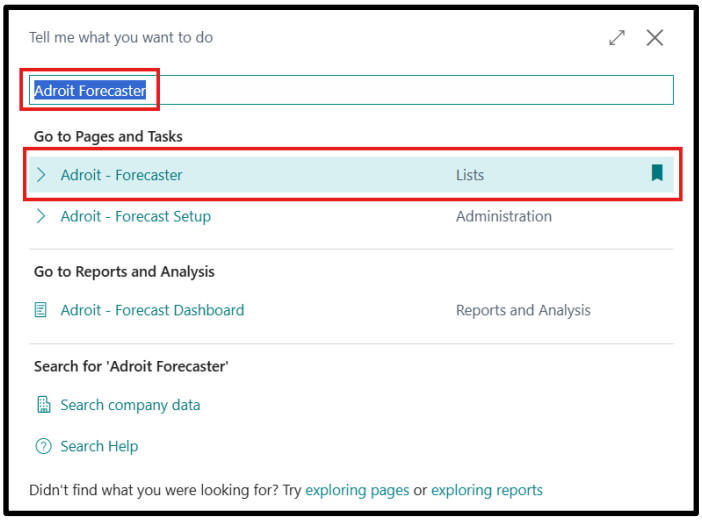
8. The system will return to the Forecaster page and forecast will be deleted.
Note: Deleted forecasts cannot be recovered and all data associated with the forecast is permanently erased.

6 GENERATING A STATISTICAL FORECAST

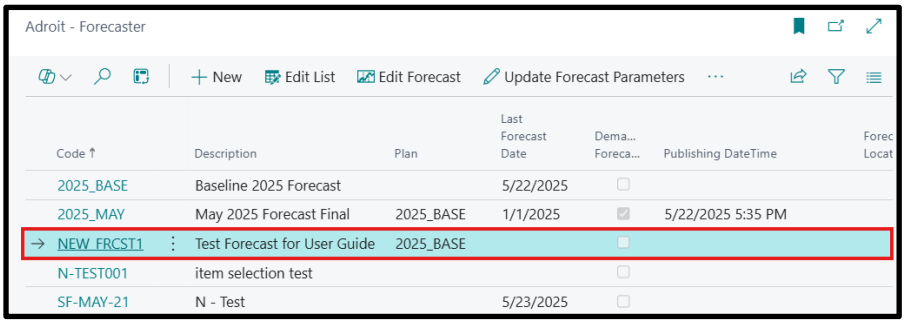
1. Click the search tool from the top menu.



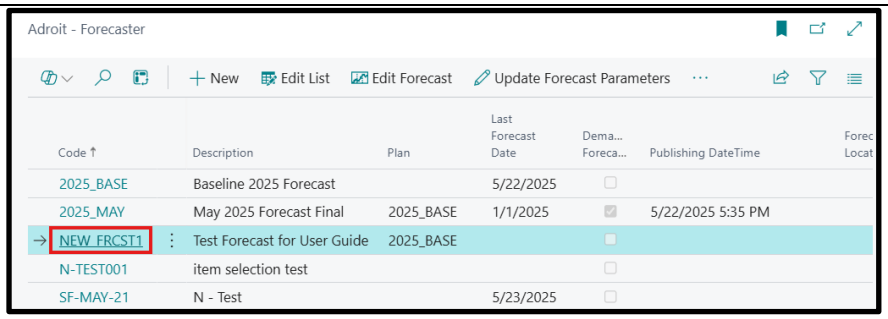
2. Search for “Adroit Forecaster” and select from list.
Note: Line will not show highlighted until cursor hovers over the selection.



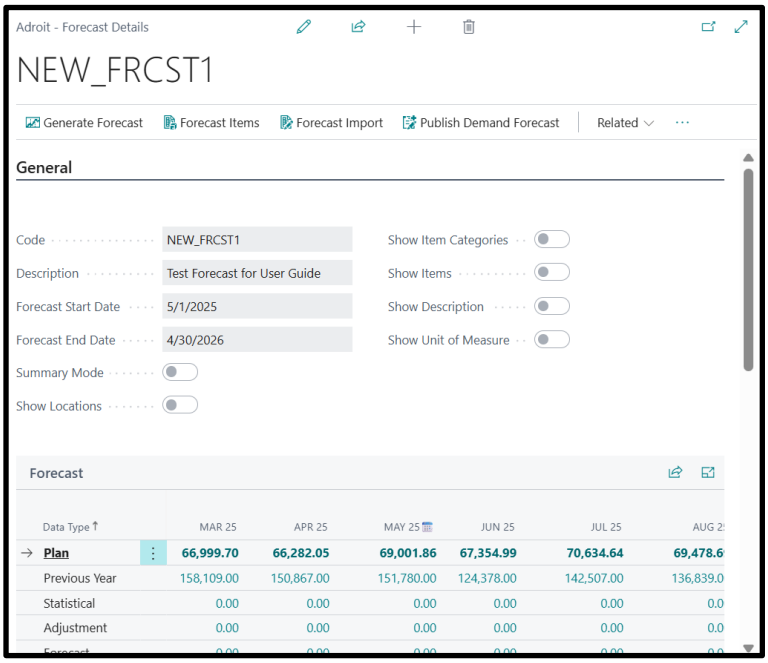
3. Select desired forecast from the list, it will appear in blue highlight.



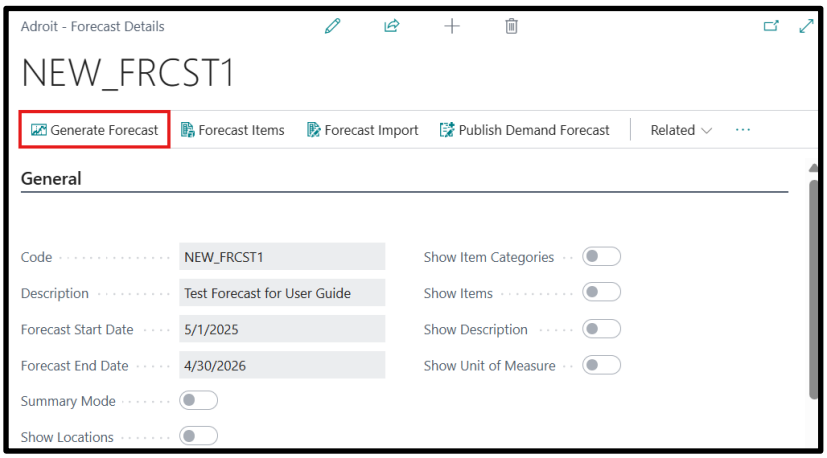
4. Click on the text in the ‘Code’ column to open the forecast.



5. Forecaster will open the Forecast Details for this forecast.

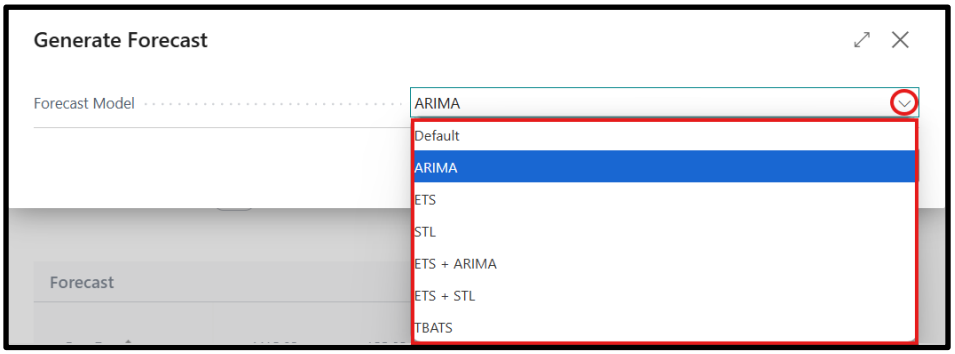


6. Select 'Generate Forecast' from the top menu. This will kick off the statistical forecast generation process.

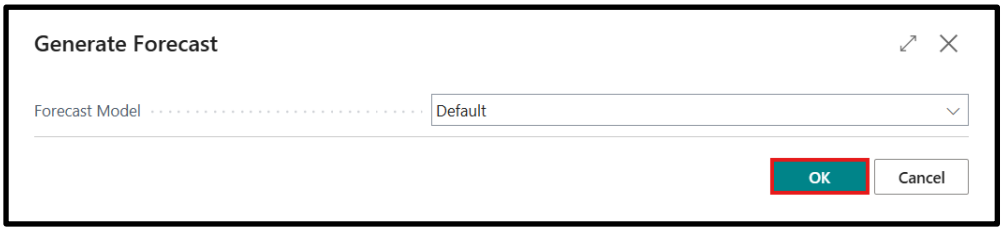


7. Select the time-series model desired from the dropdown menu. This will only apply to items that are set to default and do **not** have an item-specific time series model defined (outlined in section 2.4.2 of Forecast Set Up User Guide) .

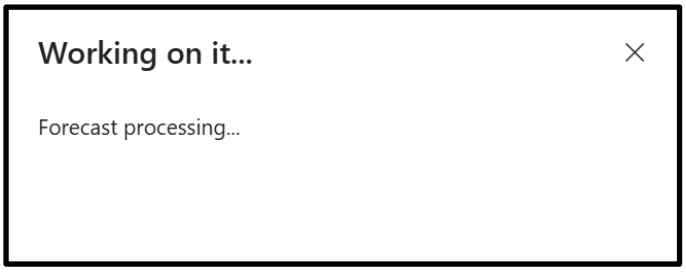
Note: Selecting 'Default' will use the time series model defined in Forecast Set Up (more information can be found in section 2.4.1 of the Forecast Set Up User Guide)



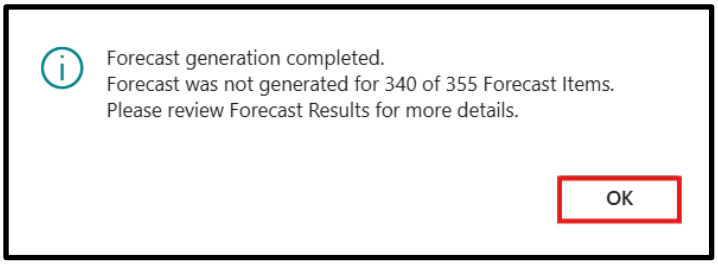
8. Click 'Ok' to continue.



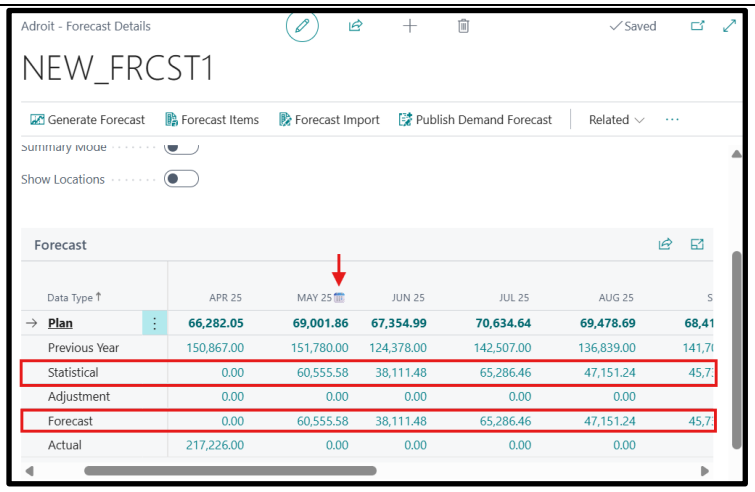
Note: Forecast will take a few moments to generate.



9. System will display number of items successfully forecasted out of total items processed. Click 'OK' to continue.



10. Screen will return to Forecast Details and data will populate in both the Statistical and Forecast lines of the Forecast matrix for all items that generated a forecast. The forecast line is simply an addition of the Statistical and Adjustment rows.
Note: The Statistical Forecast will start in the current month, indicated by a Calendar Icon as shown below. Actual sales from previous months will also be shown in previous months in the Actual row.

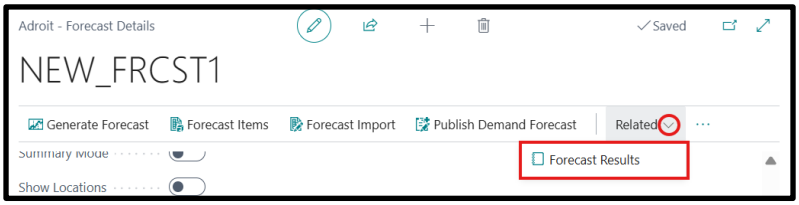


For any items that did not generate a forecast, continue to section 3 Forecast Results below to understand errors and correct. Then repeat steps 6-10 above.

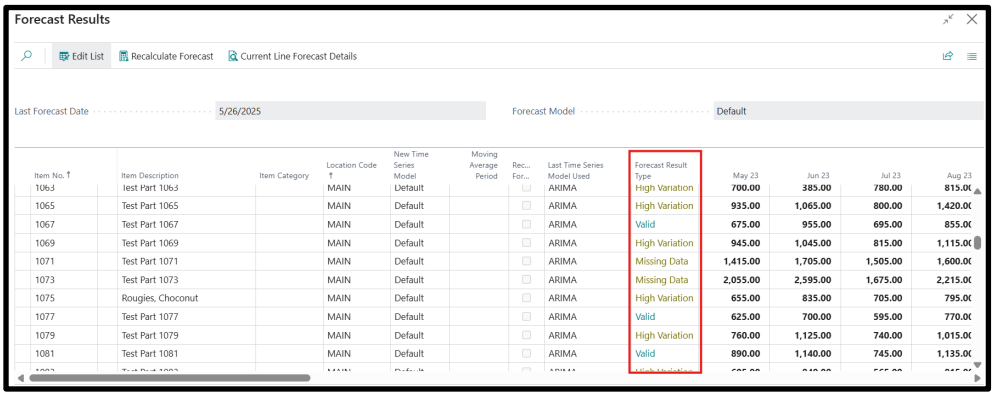
7 FORECAST RESULTS

When a forecast is generated, some items may not return forecast data. The Forecast Results section displays all items — by location, if location-based forecasting was enabled during setup — along with the time series model applied, complete sales history from the defined historical period, and the full forecast across the selected timeframe. To review and address any items that could not be forecasted, navigate to the Forecast Results page within the selected forecast.

1. From the Forecast Details page, click 'Related' and select 'Forecast Results'.

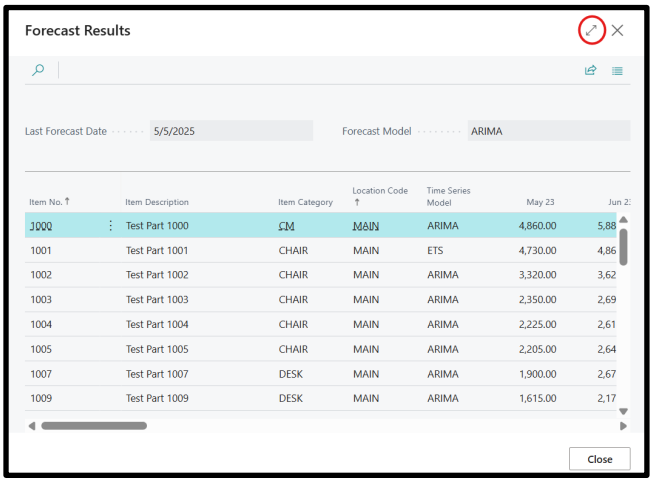


2. This will open the Forecast Results page, where the column 'Forecast Result Type' indicates status of each line. This will either show 'Valid' in green or display 'High Variation' or 'Missing Data' in yellow, indicating why a forecast was unable to be generated.



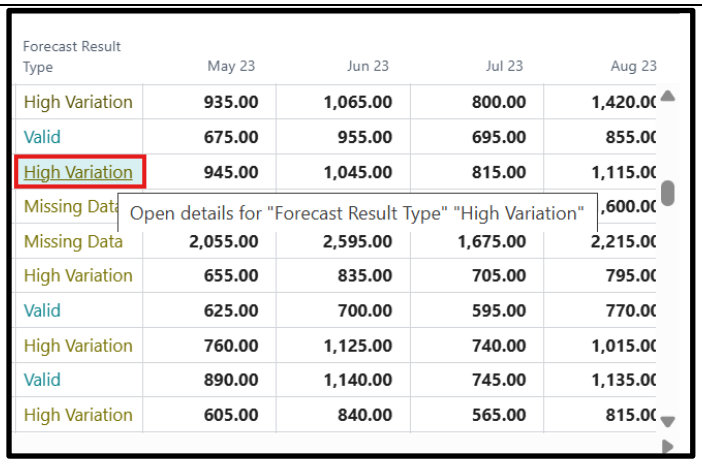
Item No.	Item Description	Item Category	Location Code	New Time Series Model	Moving Average Period	Rec... For...	Last Time Series Model Used	Forecast Result Type	May 23	Jun 23	Jul 23	Aug 23
1063	Test Part 1063		MAIN	Default			ARIMA	High Variation	700.00	385.00	780.00	815.0(
1065	Test Part 1065		MAIN	Default			ARIMA	High Variation	935.00	1,065.00	800.00	1,420.0(
1067	Test Part 1067		MAIN	Default			ARIMA	Valid	675.00	955.00	695.00	855.0(
1069	Test Part 1069		MAIN	Default			ARIMA	High Variation	945.00	1,045.00	815.00	1,115.0(
1071	Test Part 1071		MAIN	Default			ARIMA	Missing Data	1,415.00	1,705.00	1,505.00	1,600.0(
1073	Test Part 1073		MAIN	Default			ARIMA	Missing Data	2,055.00	2,595.00	1,675.00	2,215.0(
1075	Rougies, Choconut		MAIN	Default			ARIMA	High Variation	655.00	835.00	705.00	795.0(
1077	Test Part 1077		MAIN	Default			ARIMA	Valid	625.00	700.00	595.00	770.0(
1079	Test Part 1079		MAIN	Default			ARIMA	High Variation	760.00	1,125.00	740.00	1,015.0(
1081	Test Part 1081		MAIN	Default			ARIMA	Valid	890.00	1,140.00	745.00	1,135.0(

3. Click the arrows in the upper right corner to expand the table.



Item No.	Item Description	Item Category	Location Code	Time Series Model	May 23	Jun 2:
1000	Test Part 1000	CM	MAIN	ARIMA	4,860.00	5,88
1001	Test Part 1001	CHAIR	MAIN	ETS	4,730.00	4,86
1002	Test Part 1002	CHAIR	MAIN	ARIMA	3,320.00	3,62
1003	Test Part 1003	CHAIR	MAIN	ARIMA	2,350.00	2,69
1004	Test Part 1004	CHAIR	MAIN	ARIMA	2,225.00	2,61
1005	Test Part 1005	CHAIR	MAIN	ARIMA	2,205.00	2,64
1007	Test Part 1007	DESK	MAIN	ARIMA	1,900.00	2,67
1009	Test Part 1009	DESK	MAIN	ARIMA	1,615.00	2,17

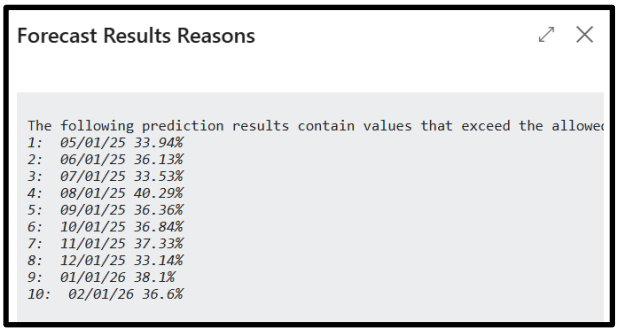
4. Click on the text in the Forecast Result Type column to get specific details.



Forecast Result Type	May 23	Jun 23	Jul 23	Aug 23
High Variation	935.00	1,065.00	800.00	1,420.0(
Valid	675.00	955.00	695.00	855.0(
High Variation	945.00	1,045.00	815.00	1,115.0(
Missing Data				,600.0(
Missing Data	2,055.00	2,595.00	1,675.00	2,215.0(
High Variation	655.00	835.00	705.00	795.0(
Valid	625.00	700.00	595.00	770.0(
High Variation	760.00	1,125.00	740.00	1,015.0(
Valid	890.00	1,140.00	745.00	1,135.0(
High Variation	605.00	840.00	565.00	815.0(

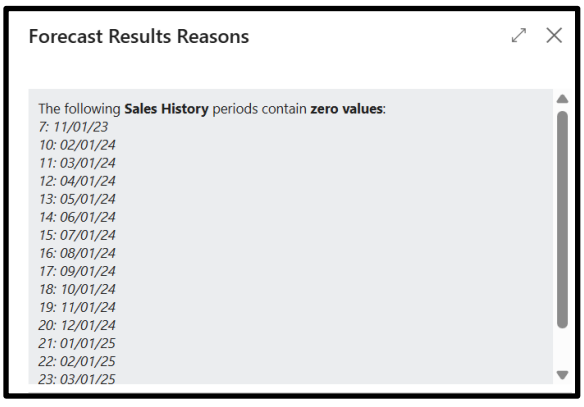
Open details for "Forecast Result Type" "High Variation"

5a. High Variation will display which periods have variation outside of the set acceptable range (as set during forecast set up) as well as what the variance for that period is.



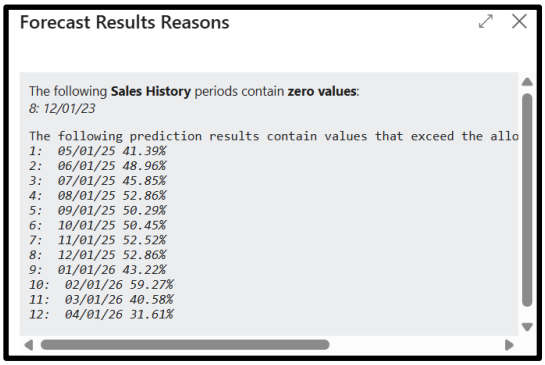
To adjust the variance percentage, see Forecaster Set Up Guide section 2.4.1.

5b. Missing Data will display which periods do not have any sales history data.
Note: Forecaster requires 12 months of consistent sales history data to generate a forecast. If no sales were made for the item during any period, consider using 1 unit in order to generate a forecast or select a time series model that is acceptable to gaps in sales, like Moving Average or Last Year.

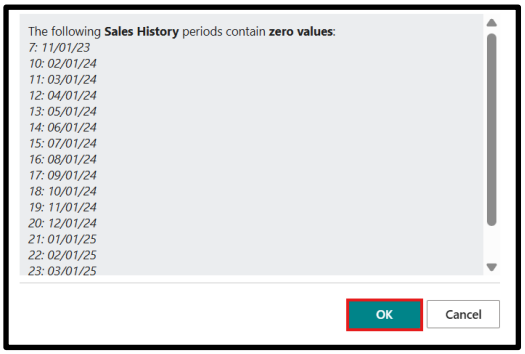


Data identified as missing can be added through the Sales History Import process, outlined in the Forecaster Sales History Import User Guide.

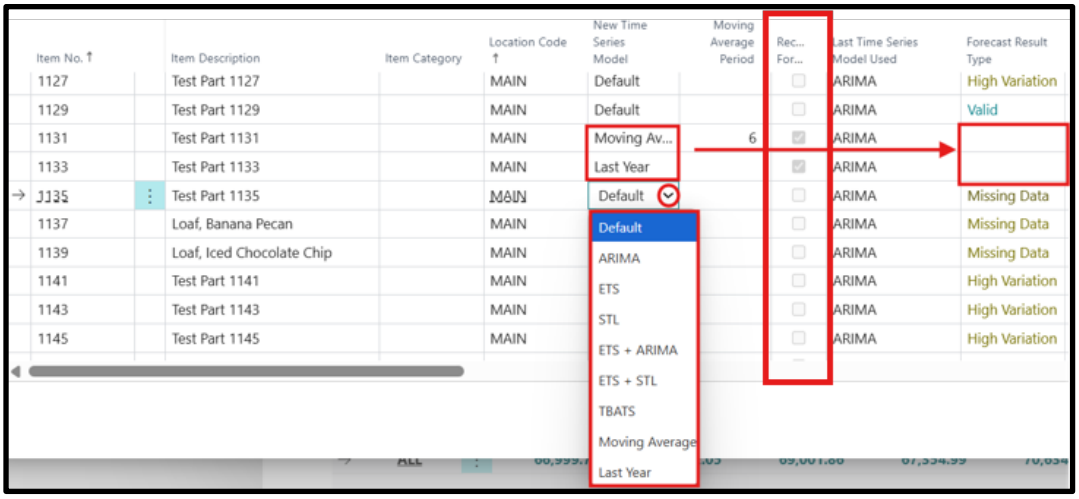
5c. Items that have both errors will show one of the errors in the Forecast Results table, but when clicked, the Forecast Results Reasons window will show information for both errors.



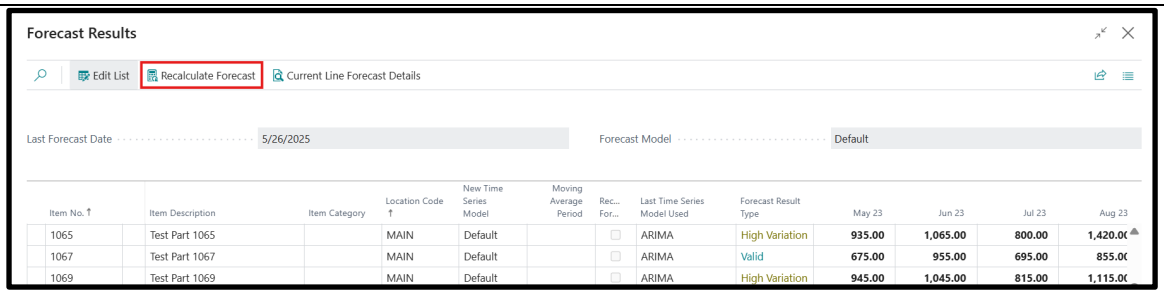
6. For any error, select 'OK' to continue.



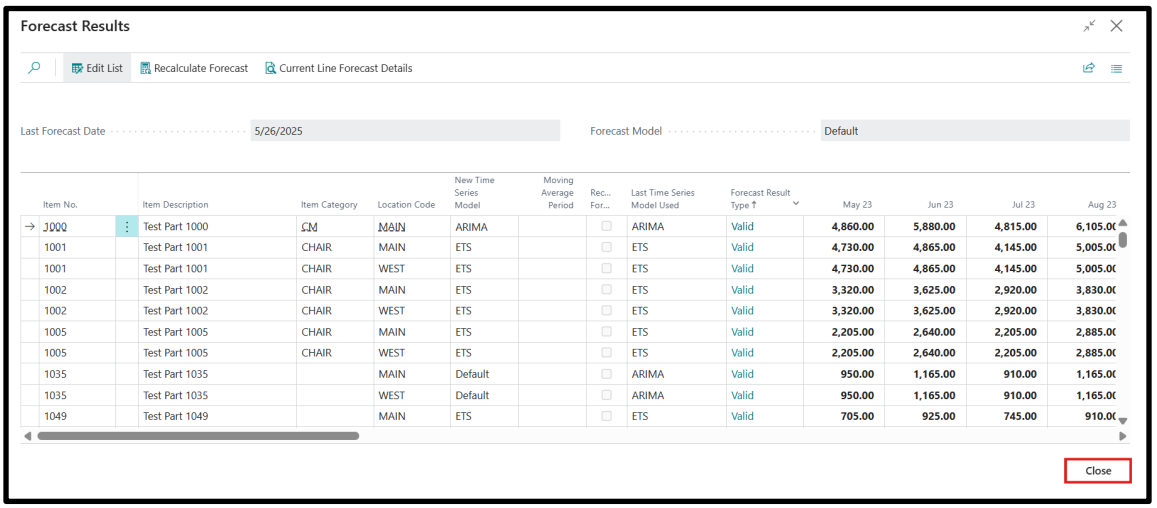
7. If desired, users may update the time series model for individual items here by selecting the dropdown menu in the column 'New Time Series Model'.
Note: Selecting a new model will remove data from the 'Forecast Result Type' column and check the box in the 'Recalculate Forecast' column to indicate those items will be regenerated.



8. To generate an updated forecast after changing to a different time series model, select 'Recalculate Forecast' from the top menu. This will rerun the statistical forecast for only the products with the checkmark in the Recalculate Forecast column.



9. To return to the forecast, click ‘Close’.

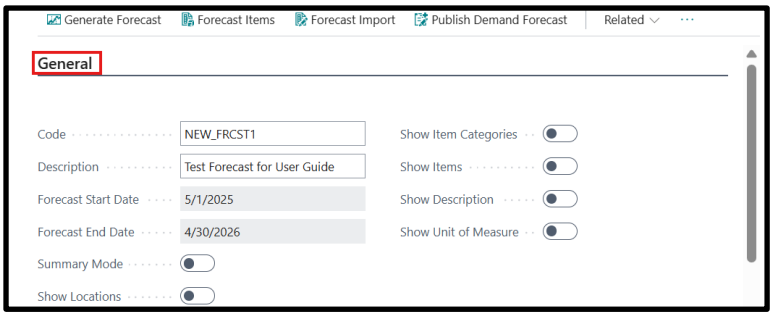


8 UTILIZING FORECAST DETAILS

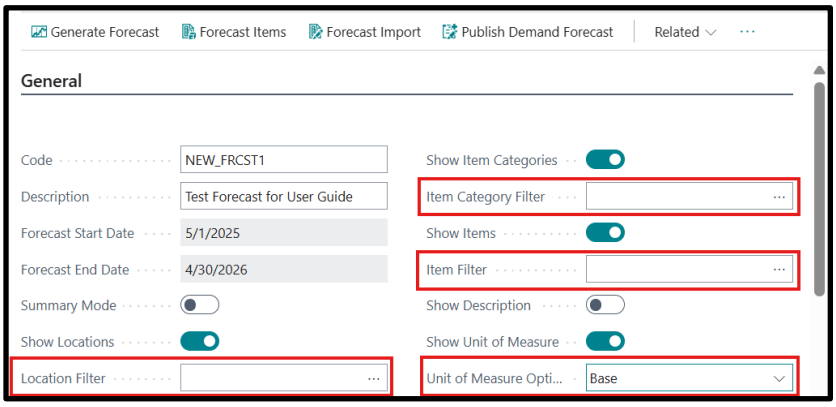
The Forecast Details page includes a general controls section, two data matrices, and a visual chart. These tools allow users to view, explore, and adjust forecast data as needed.
Note: Data from both matrices can be exported to Excel for further analysis using the export button located at the top of each section.

8.1 General Section – Information Controls

In the Forecast Details General section, users can adjust how the forecast will display data and will change the display in the sections below.

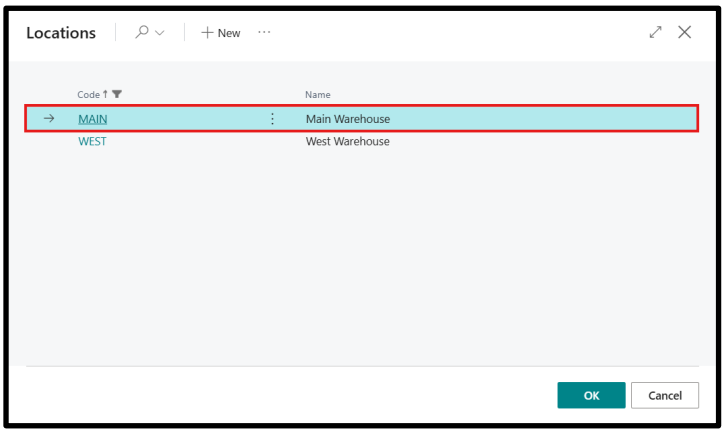


- Show Locations: Displays the locations data is associated with (if forecasting for multiple locations).
- Show Item Categories: Displays the categories each line item is associated with.
- Show Items: Displays all line items.
- Show Unit of Measure: allows user to see forecast in either base or sales units.
  Note: This will change the values of the forecast if the Sales UoM is different than Base UoM (i.e. BX to PCS). The system will default to Base.
  Note: Once toggled on, all items above will display a box to filter by the related field.

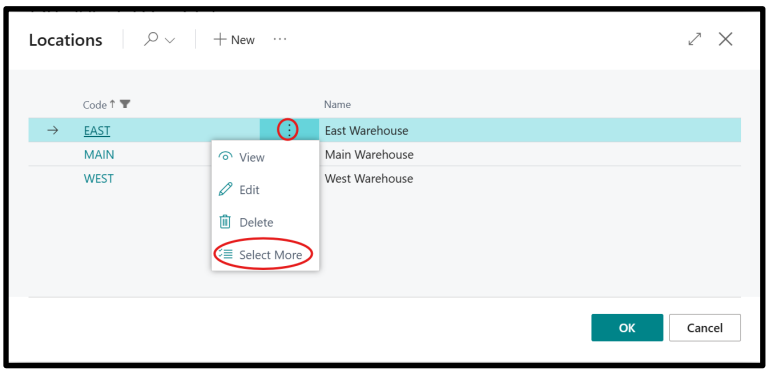


1. To add items to the filter, select the three dots in the filter box

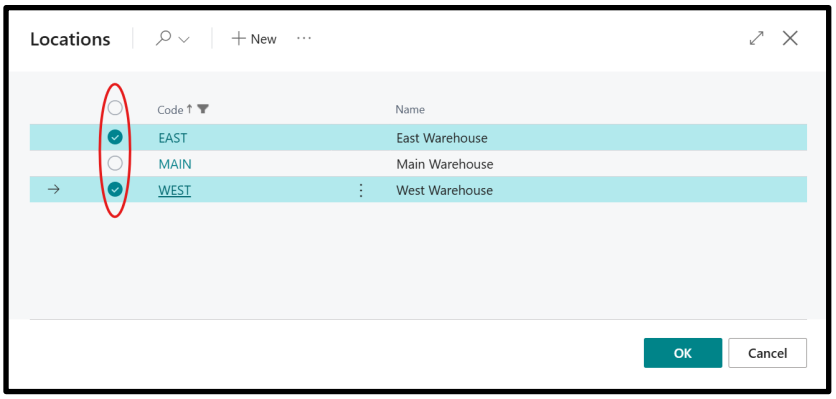
2a. To select one item, highlight the item desired.



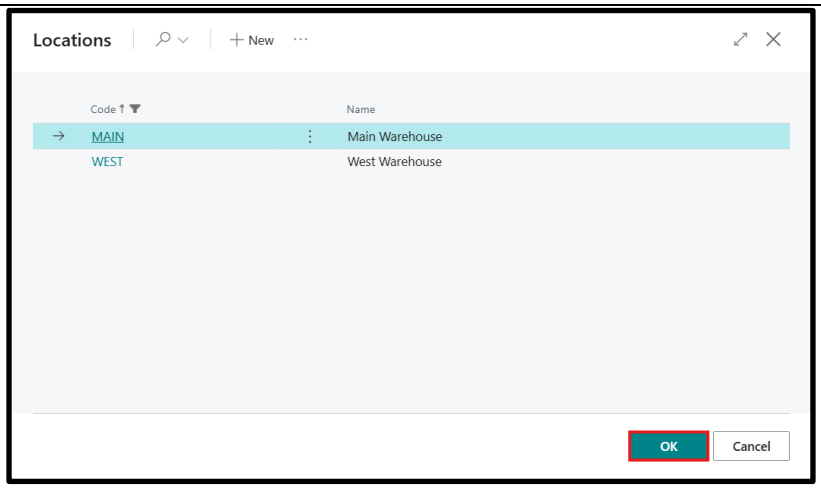
2b1. To select multiple locations, highlight and click the three dots on any item then click 'Select More'.



2b2. Click the circles on any items desired to include or the circle next to the label 'Code' to select all.



3. Click 'OK' to continue.

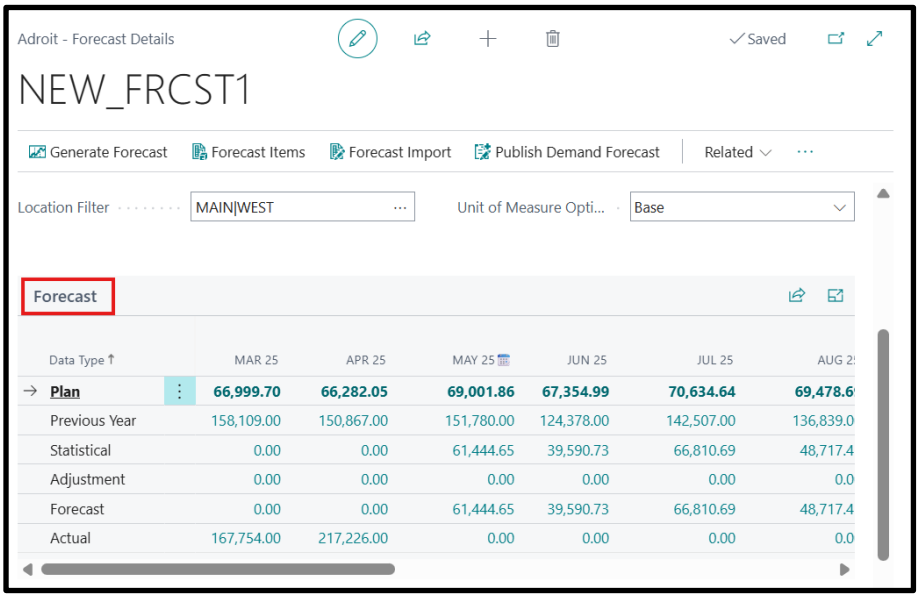


Note: Selection of multiple items is represented with a bar text symbol (\|). To type this symbol for manual entry, use CTRL + \.

8.2 Interpreting the Forecast Matrix

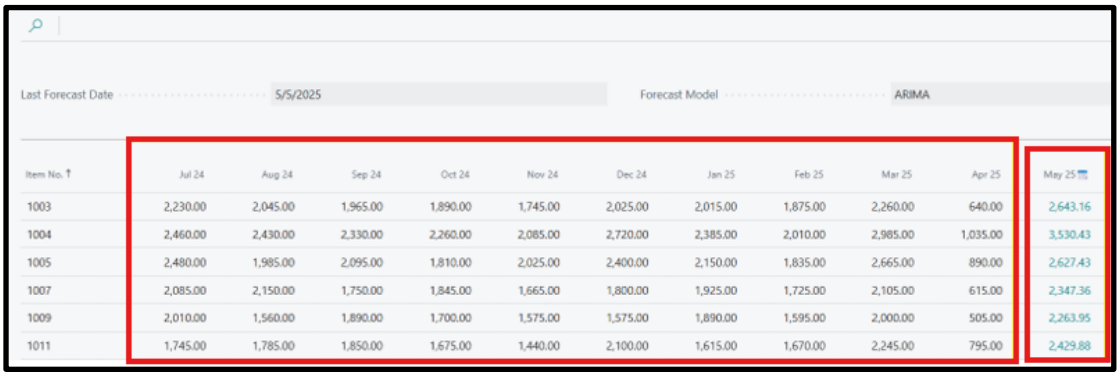
This chart displays all lines of data used to create and assess the forecast. Each line corresponds to a different dataset, as outlined below.

- Plan: The plan added during forecast set up. The selected plan can be viewed from the Forecaster page displaying the list of available forecasts in the 'Plan' column.
  Note: the 'Plan' field can be removed or changed at any time. The forecast is not based on the plan, data is displayed here for analytical purposes only.
- Previous Year: Actual sales in the previous year same period, using historical sales data.
- Statistical: The forecast as generated prior to any manual adjustments.
- Adjustment: Manual changes made for future periods.
  Note: More information on making manual adjustments can be found in the Forecast Adjustments User Guide.
- Forecast: The statistical forecast +/- the Adjustment line.
- Actual: Actual sales in the current year for past periods.



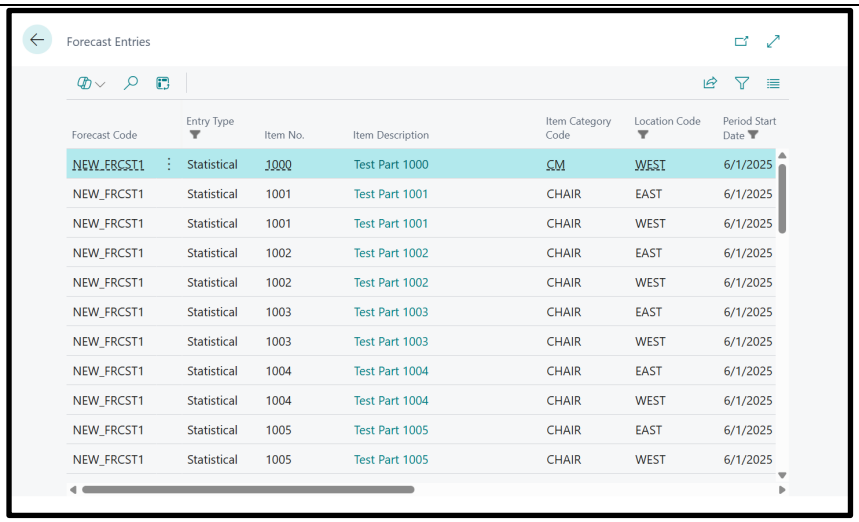
Data Type	MAR 25	APR 25	MAY 25	JUN 25	JUL 25	AUG 25
Plan	**66,999.70**	**66,282.05**	**69,001.86**	**67,354.99**	**70,634.64**	**69,478.6**
Previous Year	158,109.00	150,867.00	151,780.00	124,378.00	142,507.00	136,839.0
Statistical	0.00	0.00	61,444.65	39,590.73	66,810.69	48,717.4
Adjustment	0.00	0.00	0.00	0.00	0.00	0.0
Forecast	0.00	0.00	61,444.65	39,590.73	66,810.69	48,717.4
Actual	167,754.00	217,226.00	0.00	0.00	0.00	0.0

Note: Historical Sales data appears in black while forecasted data appears in blue.

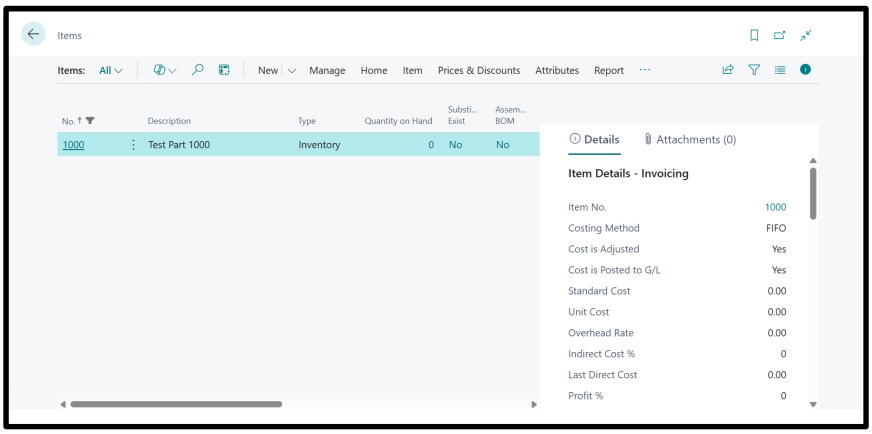


Item No.	Jul 24	Aug 24	Sep 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25	Apr 25	May 25
1003	2,230.00	2,045.00	1,965.00	1,890.00	1,745.00	2,025.00	2,015.00	1,875.00	2,260.00	640.00	2,643.16
1004	2,460.00	2,430.00	2,330.00	2,260.00	2,085.00	2,720.00	2,385.00	2,010.00	2,985.00	1,035.00	3,530.43
1005	2,480.00	1,985.00	2,095.00	1,810.00	2,025.00	2,400.00	2,150.00	1,835.00	2,665.00	890.00	2,627.43
1007	2,085.00	2,150.00	1,750.00	1,845.00	1,665.00	1,800.00	1,925.00	1,725.00	2,105.00	615.00	2,347.36
1009	2,010.00	1,560.00	1,890.00	1,700.00	1,575.00	1,575.00	1,890.00	1,595.00	2,000.00	505.00	2,263.95
1011	1,745.00	1,785.00	1,850.00	1,675.00	1,440.00	2,100.00	1,615.00	1,670.00	2,245.00	795.00	2,429.88

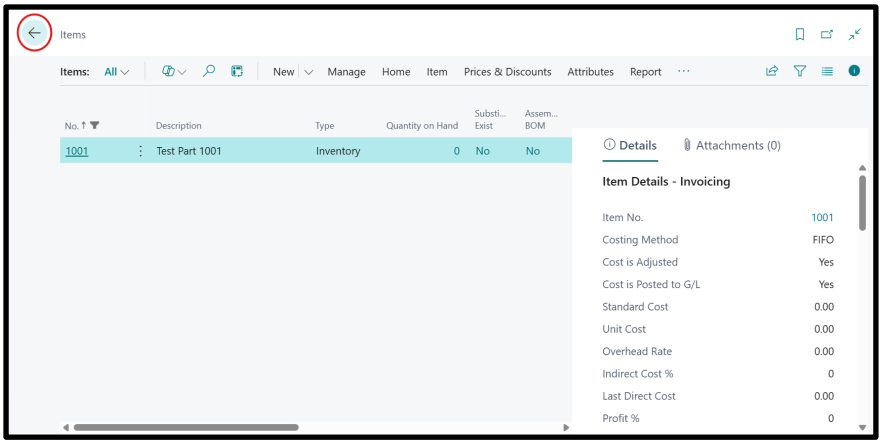
By clicking on any of the above numbers, a window will open displaying full item level information for each line that rolls up into the datapoint selected.



Clicking on any item description will open further details of that line item.

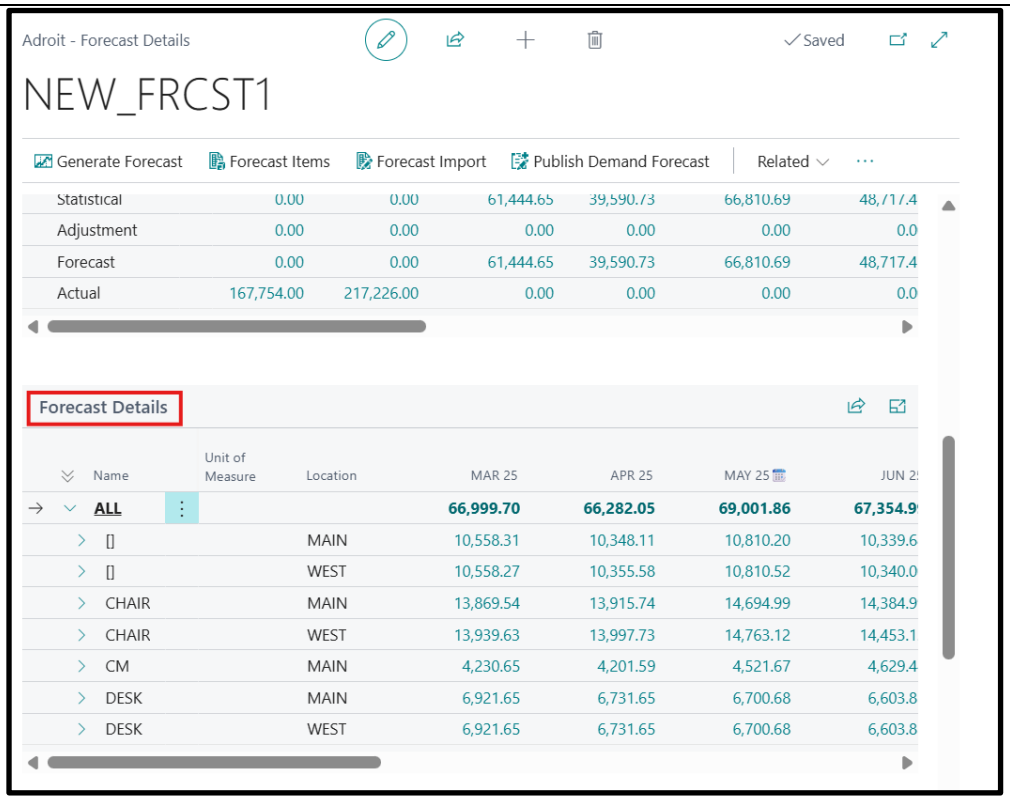


To navigate back, clicking the left arrow in the top left of the page will take you to the screen before, until you are back at the homepage.



8.3 Forecast Details Matrix

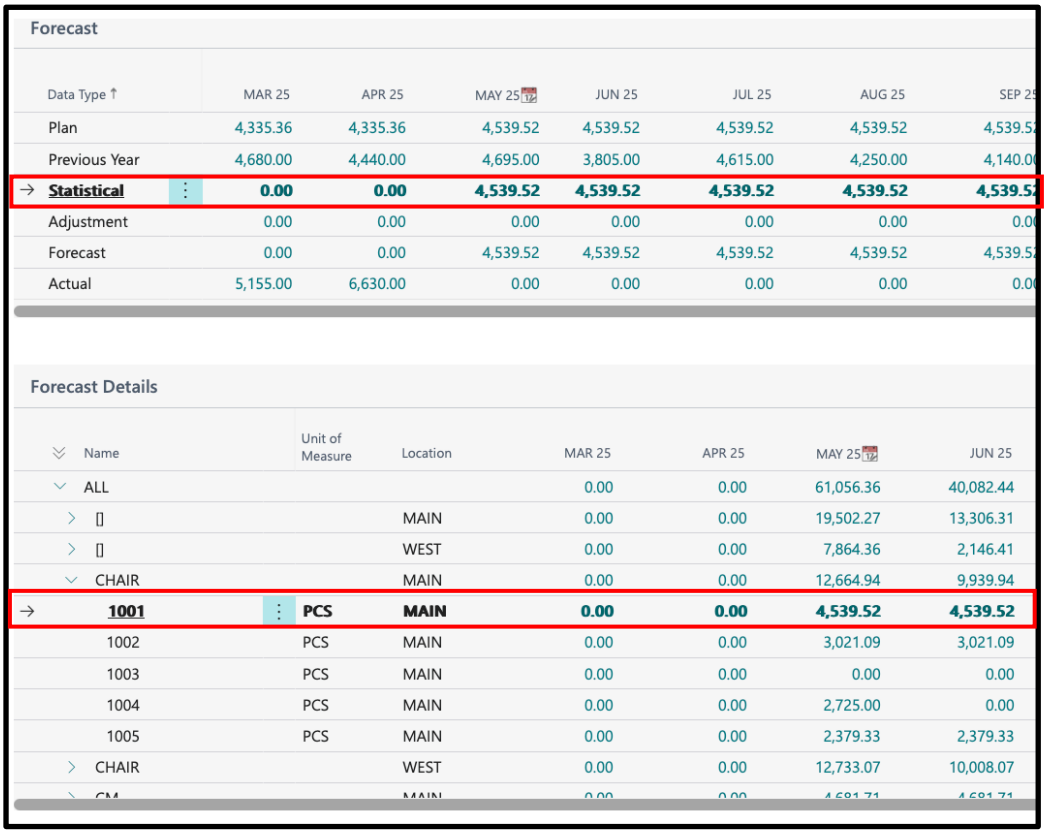
The Forecast Details section is set up in a drilldown free structure, flowing from item category to part to location. This allows the user to utilize controls at the top of the page and within the table to categorize items and display data in various configurations, always maintaining the ability to get down to specific, individual information.
Note: Clicking data in the Forecast Details Matrix will cause the Forecast matrix above to update according to the current selection.



To expand data, click the arrow pointing towards the text so it points downward and cascading information will appear.

8.4 Using Forecast Details

When navigating the Forecast Details matrix you will have immediate feedback on the details of the item in review. For example, when part # 1001 is selected in the detail page, the Forecast area filters automatically for that value displaying the Plan, Previous Year, Statistical, Adjustments, Forecast and Actual data for that part. This applies to any part, category and 'All' that shows all parts and categories.



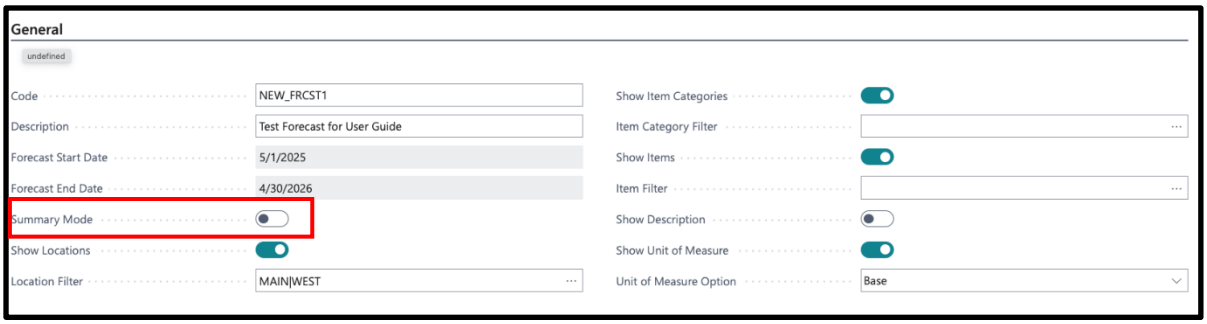
Forecast

Data Type	MAR 25	APR 25	MAY 25	JUN 25	JUL 25	AUG 25	SEP 25
Plan	4,335.36	4,335.36	4,539.52	4,539.52	4,539.52	4,539.52	4,539.52
Previous Year	4,680.00	4,440.00	4,695.00	3,805.00	4,615.00	4,250.00	4,140.00
Statistical	**0.00**	**0.00**	**4,539.52**	**4,539.52**	**4,539.52**	**4,539.52**	**4,539.52**
Adjustment	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Forecast	0.00	0.00	4,539.52	4,539.52	4,539.52	4,539.52	4,539.52
Actual	5,155.00	6,630.00	0.00	0.00	0.00	0.00	0.00

Forecast Details

Name	Unit of Measure	Location	MAR 25	APR 25	MAY 25	JUN 25
ALL			0.00	0.00	61,056.36	40,082.44
[]		MAIN	0.00	0.00	19,502.27	13,306.31
[]		WEST	0.00	0.00	7,864.36	2,146.41
CHAIR		MAIN	0.00	0.00	12,664.94	9,939.94
1001	**PCS**	**MAIN**	**0.00**	**0.00**	**4,539.52**	**4,539.52**
1002	PCS	MAIN	0.00	0.00	3,021.09	3,021.09
1003	PCS	MAIN	0.00	0.00	0.00	0.00
1004	PCS	MAIN	0.00	0.00	2,725.00	0.00
1005	PCS	MAIN	0.00	0.00	2,379.33	2,379.33
CHAIR		WEST	0.00	0.00	12,733.07	10,008.07

To turn this feature off simply select the Summary Mode and turn this checkbox on. This this on to remove the auto-filtering process

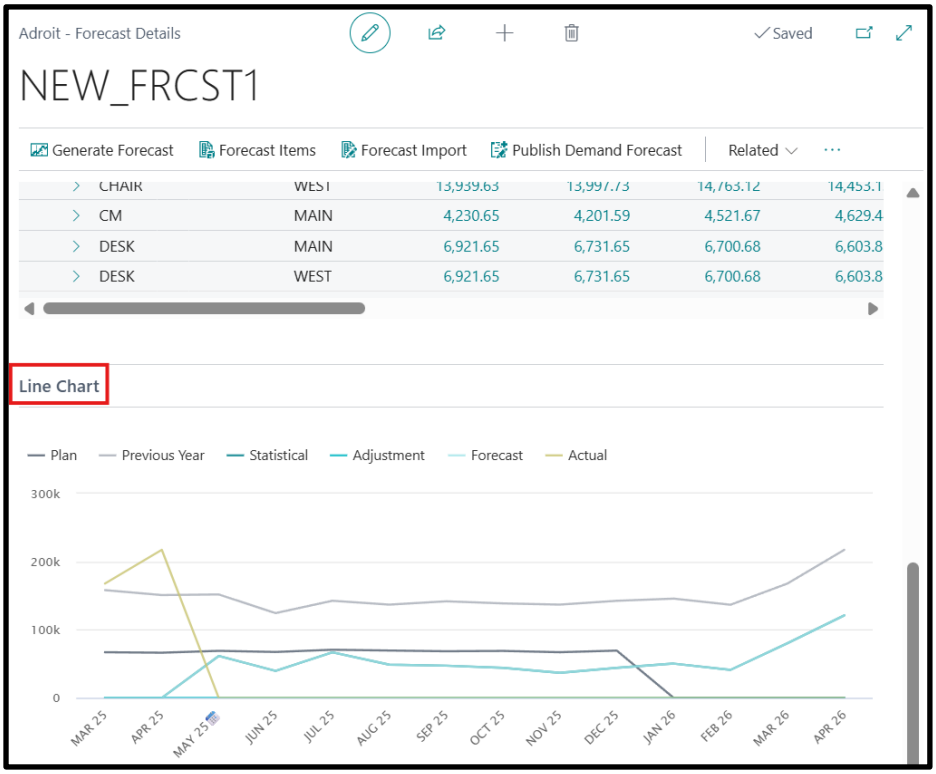


General

Code	NEW_FRCST1	Show Item Categories	On
Description	Test Forecast for User Guide	Item Category Filter	
Forecast Start Date	5/1/2025	Show Items	On
Forecast End Date	4/30/2026	Item Filter	
Summary Mode	Off	Show Description	Off
Show Locations	On	Show Unit of Measure	On
Location Filter	MAIN|WEST	Unit of Measure Option	Base

8.5 Using the Line Chart

The Line Chart allows users to visually display information and will update based on the data selection above in the Forecast Details matrix. As the above data is filtered or changed, the line chart will adjust automatically.



To adjust which lines of data are displayed, click on the name of the desired data to remove it from the display. This will grey out the name and remove the associated line from the graph.

To display again, click the title a second time. This will make title appear in full color and add the associated line back to the chart.

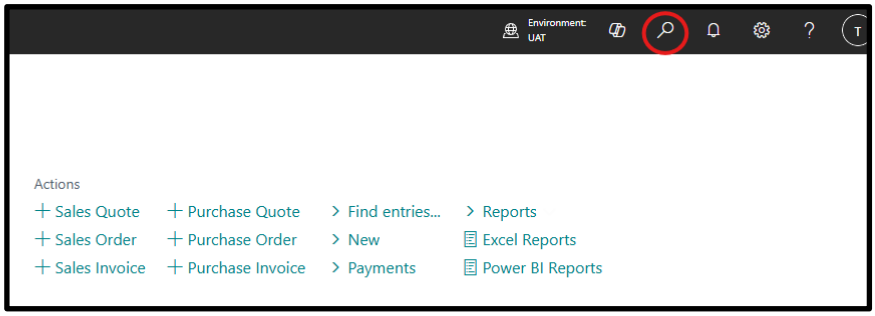
Plan
Previous Year
Statistical
Adjustment
Forecast
Actual
300k
200k
100k
0
MAR 25
APR 25
MAY 25
JUN 25
JUL 25
AUG 25
SEP 25
OCT 25
NOV 25
DEC 25
JAN 26
FEB 26
MAR 26
APR 26

9 MANUAL FORECAST ADJUSTMENTS

9.1 Adjustment Reasons Set Up

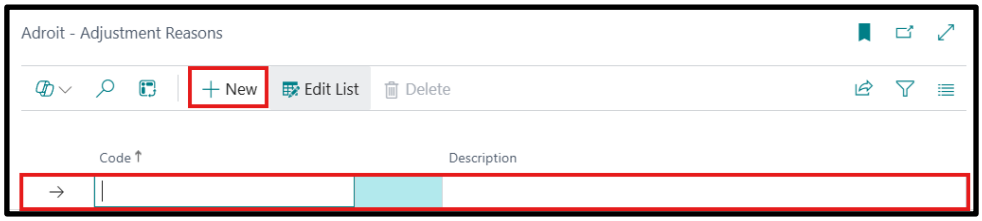
Adroit Forecaster provides the ability for users to manually adjust the forecast data for a specified item or category in a specific period when factors outside of standard forecasting may have impact. The 'Adjustment Reasons' list will create the options for users to select why a manual adjustment is being used. This list should be set up to contain common reasons sales history may not accurately allow Forecaster to generate the value that is expected, and manual data adjustment would be needed. Some examples may be promotions or events that may drive an increase in sales for a group or single products.

1. Click the search tool from the top menu.

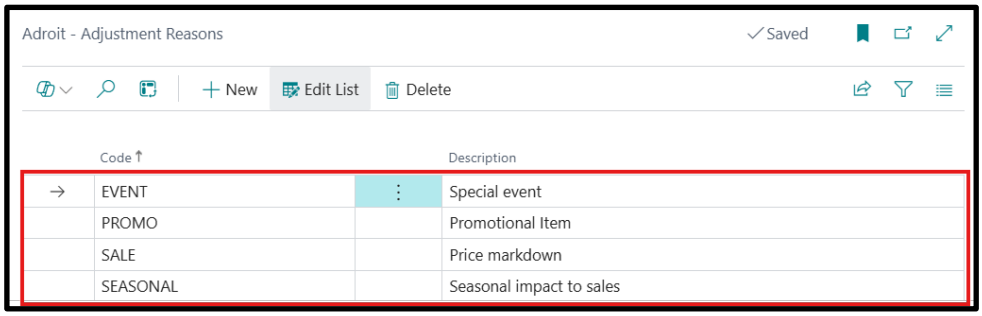


2. Search for "Adroit - Adjustment Reasons" and select from list.
Note: Line will not show highlighted until cursor hovers over the selection.

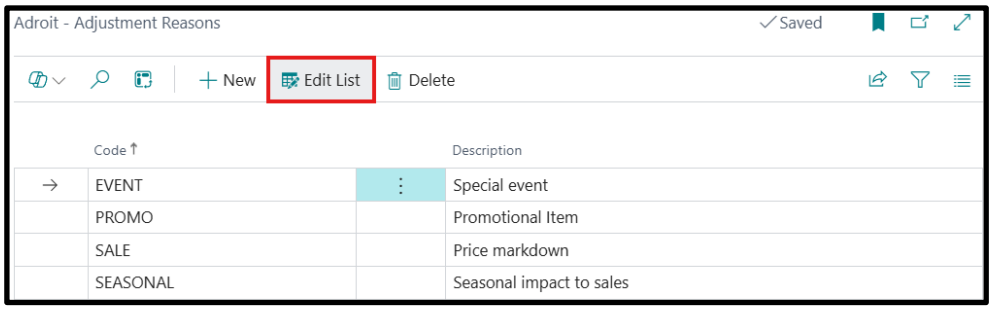
3. Click 'New' from the top menu to create a new entry. This will generate a blank line in the table to input a new reason and its corresponding description.



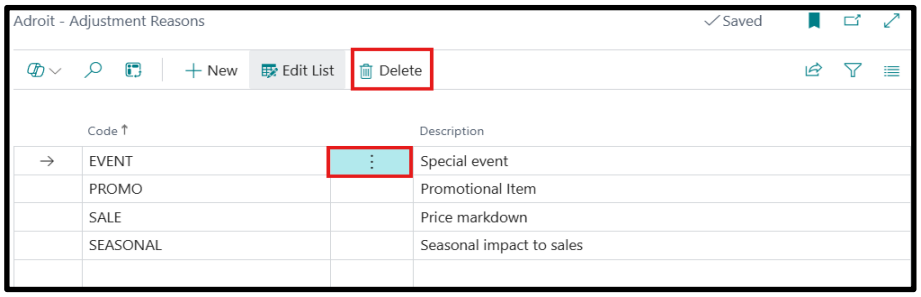
4. Add the Code(s) and a Description(s) for potential reasons that will require manual adjustments.



5. To edit items in the list, select 'Edit List' from the top menu. This unlocks the entire list to be editable.
Note: to lock the list after making changes, click 'Edit List' again.



6. To delete items from the list, click in the row of data no longer wanted, which will show blue highlighted dots between the 'Code' and 'Description' columns when selected. Then click 'Delete' from the top menu.

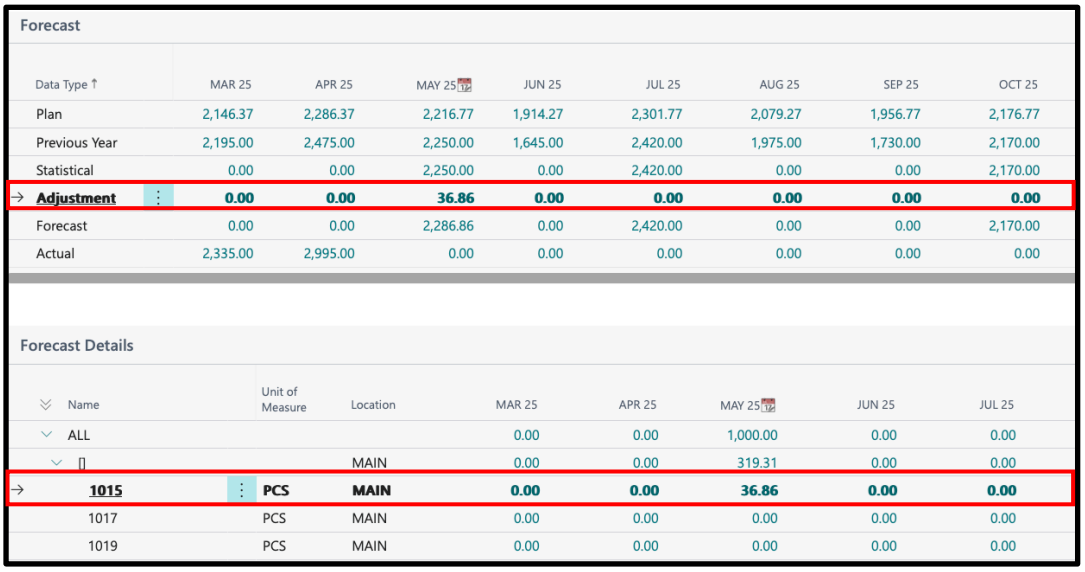


7. Select 'Yes' to delete row.
Note: Any adjustment with the Adjustment Reason deleted will remain, but the reason code will be deleted from the record. It is recommended to update those adjustment records with a new Reason Code at that point.

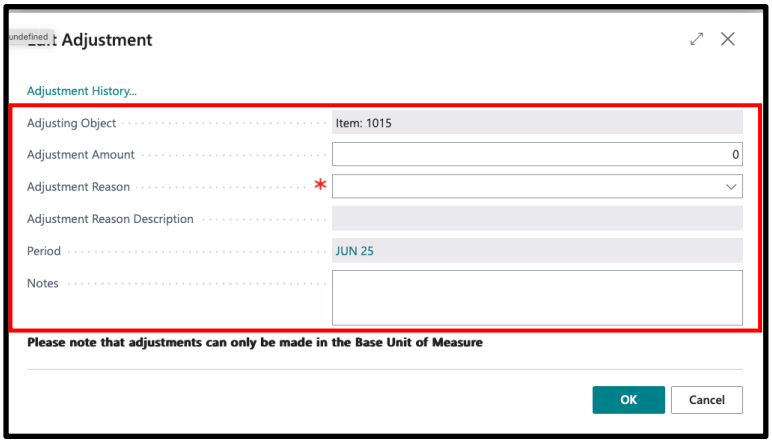
9.2 Adjusting Single Item Forecast Data

Forecast Adjustments are manual changes made to the forecast. They can be added to the current or any future forecasted period. Creating an adjustment for a given period can be accessed in two ways.

1. **Forecast Matrix Selection:** In the Forecast matrix you can select either the Statistical row in the Forecast or Forecast Details Matrix. This will open the Edit Adjustments page where you can enter the adjustment necessary.
   Note: Any selection in a previous period will not open the Edit Adjustments page. You can only enter adjustments for current or future periods.



2. **Edit Adjustment**: In the Edit Adjustments screen you will see the specific item, category or All items that will be adjusted. Also you will see the option to enter an adjustment amount (positive – increasing forecast or negative – decreasing forecast). Also, you select the reason code from the reason code setups page and a Note that can be referenced later showing why the adjustment is made.



3. **Edit Adjustments – Period List:** If needed you can adjust the period you are making the adjustment by clicking the Period Value shown on the Edit Adjustment screen. A pop up will

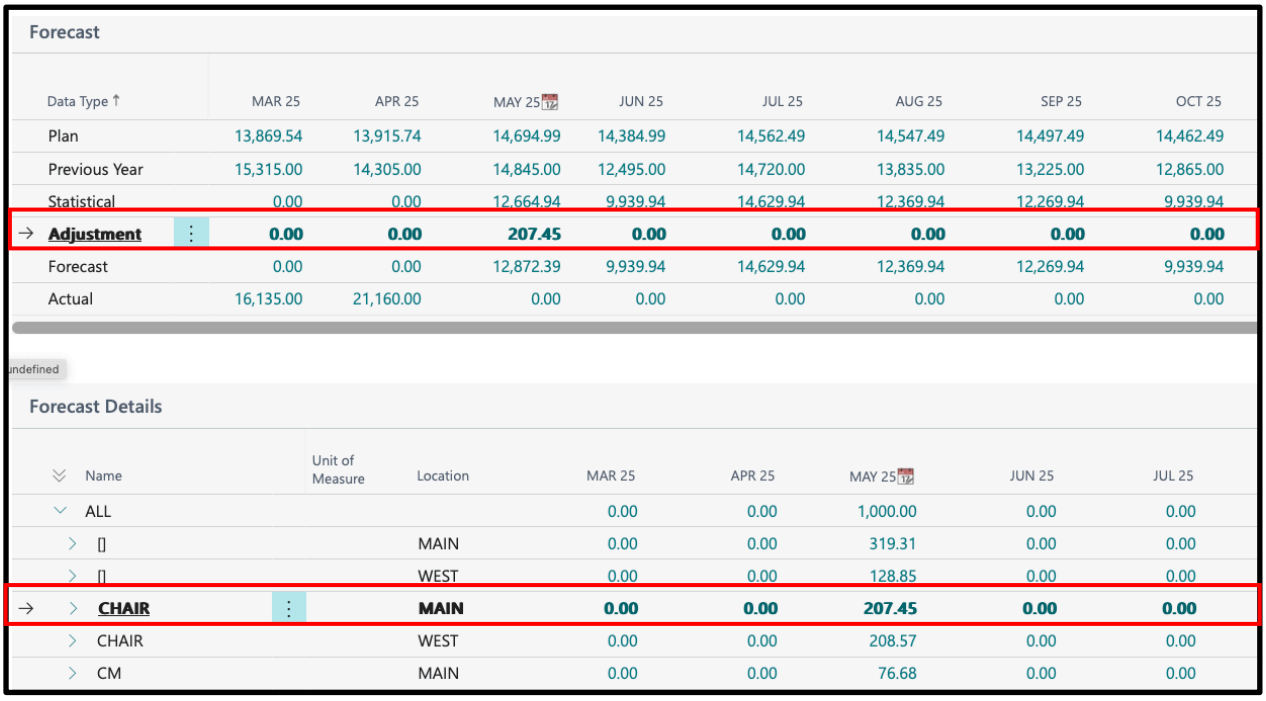
show all period options where you can select an alternative period.
Note: you cannot select more than one period at this time. Only one period can be adjusted at one time.

9.3 Adjusting Group Item Forecast Data

1. **Group Item Adjustments – Category or All Items:** At times it will be necessary to adjust a large group of item forecasts. When needed a utility has been built into Adroit Forecaster to handle this situation. Simply select a Cateogry or All option and select the Adjustment row on either Forecast or Forecast details.

   This will open the same Edit Adjustment Page, but the Adjusting Object value will be different and will state Category with specific Category or All option. When entering an Adjustment amount the value will be distributed across all items in that group by a proportional amount based on their current Statistical Forecast. For example, if you are updating a group of 4 items with 100-unit adjustment and they each have the same statistical forecast each item will receive 25-unit adjustments. However, if 2 of the 4 have 0 statistical forecast the entire amount will be placed on the other 2 parts with forecast. This logic applies to 2 parts to N part groups.

   The only exception is if all parts have 0 forecast. If so, each item will receive an equal proportion of the adjustment.



Forecast

Data Type	MAR 25	APR 25	MAY 25	JUN 25	JUL 25	AUG 25	SEP 25	OCT 25
Plan	13,869.54	13,915.74	14,694.99	14,384.99	14,562.49	14,547.49	14,497.49	14,462.49
Previous Year	15,315.00	14,305.00	14,845.00	12,495.00	14,720.00	13,835.00	13,225.00	12,865.00
Statistical	0.00	0.00	12,664.94	9,939.94	14,629.94	12,369.94	12,269.94	9,939.94
Adjustment	**0.00**	**0.00**	**207.45**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Forecast	0.00	0.00	12,872.39	9,939.94	14,629.94	12,369.94	12,269.94	9,939.94
Actual	16,135.00	21,160.00	0.00	0.00	0.00	0.00	0.00	0.00

undefined

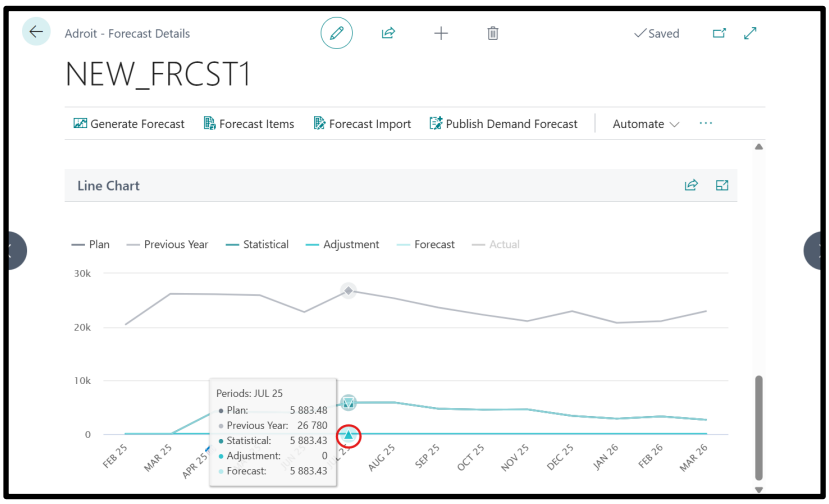
Forecast Details

Name	Unit of Measure	Location	MAR 25	APR 25	MAY 25	JUN 25	JUL 25
ALL			0.00	0.00	1,000.00	0.00	0.00
[]		MAIN	0.00	0.00	319.31	0.00	0.00
[]		WEST	0.00	0.00	128.85	0.00	0.00
CHAIR		**MAIN**	**0.00**	**0.00**	**207.45**	**0.00**	**0.00**
CHAIR		WEST	0.00	0.00	208.57	0.00	0.00
CM		MAIN	0.00	0.00	76.68	0.00	0.00

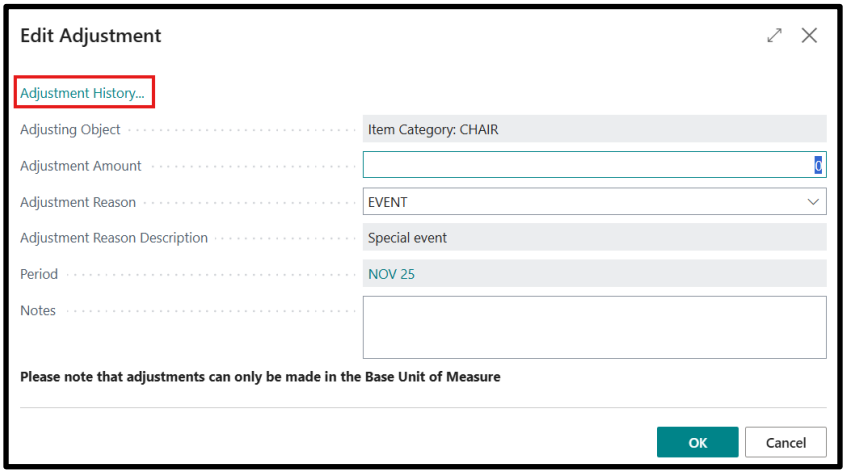
9.4 Adjusting Line Chart Forecast Data

1. **Line Chart Adjustments:** In the Line Chart on the Forecast Details page, click the adjustments line at the period in need of adjustment. Hover over the value to see which period the curser has selected before clicking.

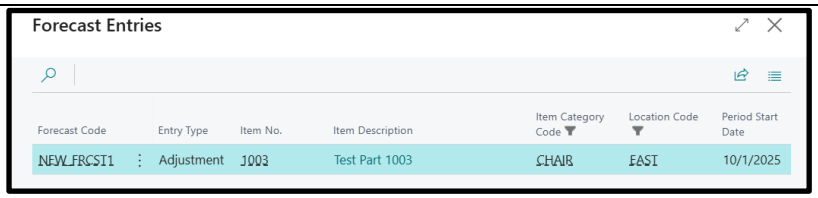
   Note: The adjustment will be applied to the data that is selected in the Forecast Details matrix at the time the graph is clicked. Adjustments can be applied to specified categories, locations, or items, as selected.



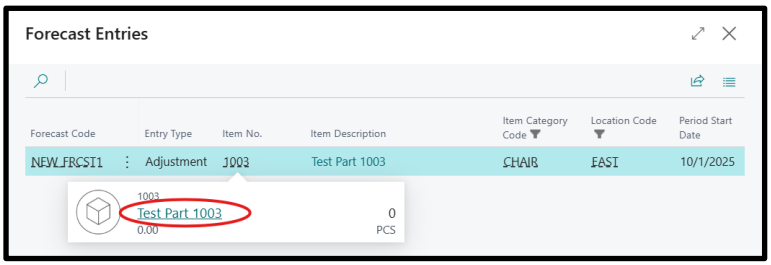
2. To view past adjustments, select 'Adjustment History…' in the Edit Adjustments screen.

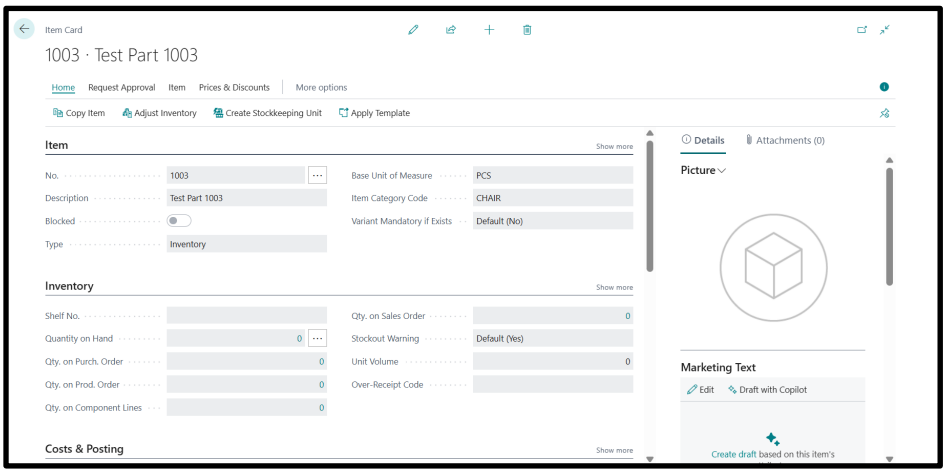


This brings up all edits for the specified item(s) in the Adjusting Object field for the Period selected.



Clicking the item number and then selecting it again from the pop-up will bring up the Item Card with full item information.



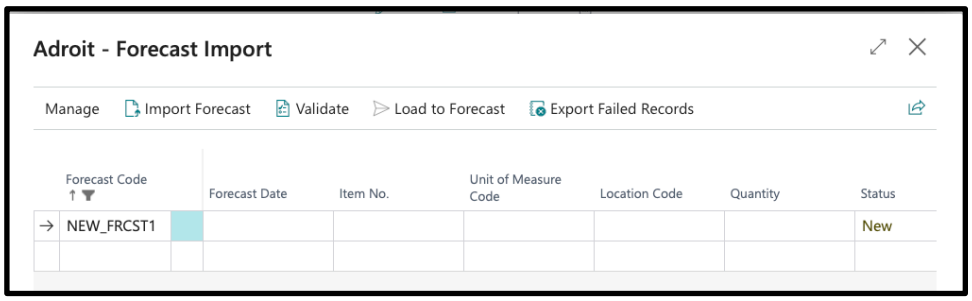


10 FORECAST IMPORT

10.1 Forecast Import Overview

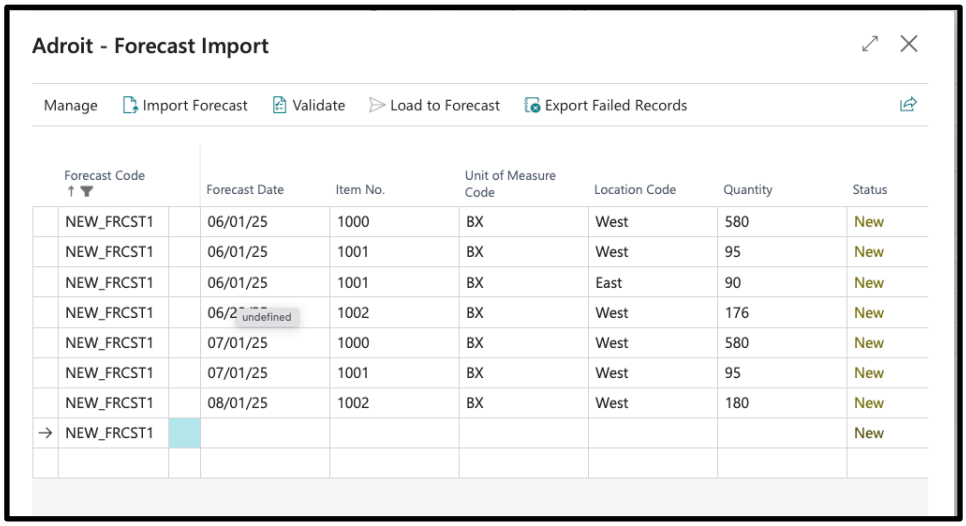
1. **Open Forecast Import:** Forecast import is specific to an already created forecast. This forecast could have no data, but it at least needs to have been previously created and saved. To access the forecast import, select the 'Forecast Import' at the top of the forecast that will have data imported into.

2. **Forecast Import Overview:** After selecting Forecast Import a new page will appear with the capability to import, validate and load forecast information.



3. **Loading Forecast Data to Validate:** The first step is to load Forecast Data that you want loaded which will be validated after. The format for the import validation will be in the Template file provided during Support Handoff. This file can be either CSV or XLS format. The format is simple with 4 fields:

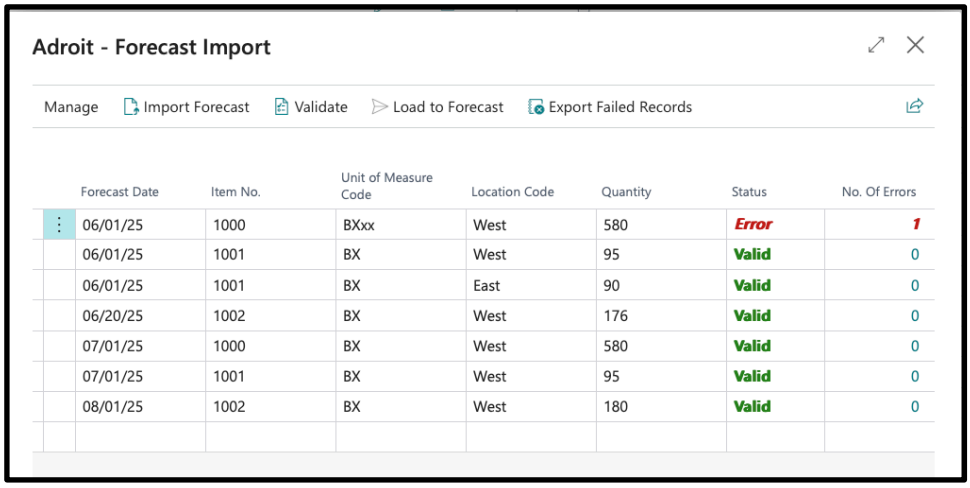
- Forecast Date: Date you want the forecast data applied.
- Item No.: Part # to be used.
- Quantity: Sales Quantity to be forecasted. Must be a positive number.
- Sales Unit of measure: Unit of Measure for the Sales of the Good.
- Location: Location to be associated with this forecast entry.



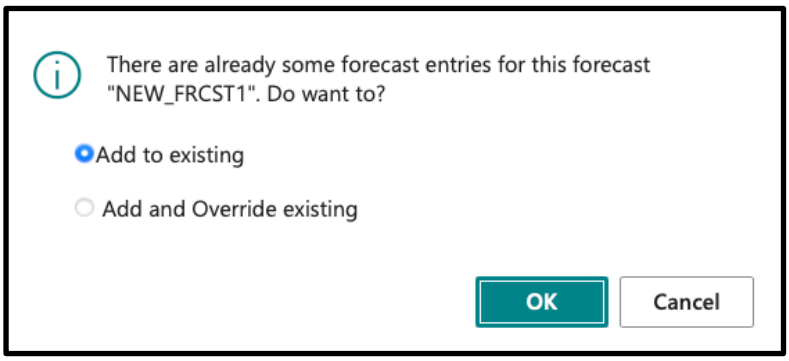
Forecast Code	Forecast Date	Item No.	Unit of Measure Code	Location Code	Quantity	Status
NEW_FRCST1	06/01/25	1000	BX	West	580	New
NEW_FRCST1	06/01/25	1001	BX	West	95	New
NEW_FRCST1	06/01/25	1001	BX	East	90	New
NEW_FRCST1	06/2[illegible]	1002	BX	West	176	New
NEW_FRCST1	07/01/25	1000	BX	West	580	New
NEW_FRCST1	07/01/25	1001	BX	West	95	New
NEW_FRCST1	08/01/25	1002	BX	West	180	New
NEW_FRCST1						New

4. **Validating Forecast Imported:** After your data is uploaded you need to validate your data prior to loading into the forecast. To do this hit the 'Validate' button at the top right. This will kick off a validation process with the outcome of the validation on the right side under the 'Status' field.

   In this example all the records passed except 1. The issue is the Unit of Measure which is incorrect. This can be edited inline directly in the form and revalidated. If the error is not fixed, the record will not be loaded into the forecast. The valid records will load successfully.



Forecast Date	Item No.	Unit of Measure Code	Location Code	Quantity	Status	No. Of Errors
06/01/25	1000	BXxx	West	580	Error	1
06/01/25	1001	BX	West	95	Valid	0
06/01/25	1001	BX	East	90	Valid	0
06/20/25	1002	BX	West	176	Valid	0
07/01/25	1000	BX	West	580	Valid	0
07/01/25	1001	BX	West	95	Valid	0
08/01/25	1002	BX	West	180	Valid	0

5. **Loading Records to Forecast:** Once your records are validated, you can move the data into your forecast. To do this, click the 'Load to Forecast' button on the top row. When selecting this button logic in Forecast runs and confirms the following:
   - **No Existing Forecast Records:** If this is true the forecast will load after confirming you wish to load the data.
   - **Existing Forecast Records**: If this is true the system will ask if you want to:

- A) Add to the existing records meaning it will be additive to the already forecast totals.
- B) Add and Override: This will add the imported records to the forecast. If any existing records for that Part on that Day are present it will override those forecast details.