



ADROIT
NORTH AMERICA



Forecast Dashboard 2.0
Adroit NA

Setup and User Guide

8/18/2025

Version 1.0



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1 OVERVIEW

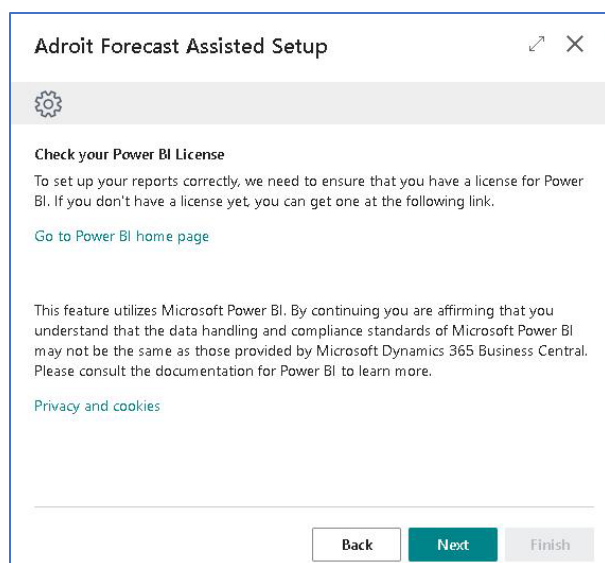
Adroit Forecast Dashboard is an integrated Dashboard Application with Microsoft Dynamics 365 Business Central enabled through the Adroit Forecaster capabilities. Dashboard focuses on Forecasting related Metrics including Forecast Accuracy and Forecast Comparison. Included in the guide is a detailed outline of Setup of the Dashboard and User Guide

2 DASHBOARD SET UP

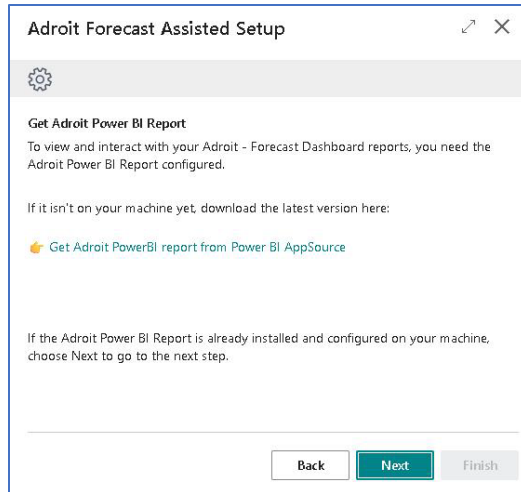
2.1 Installation

The Dashboard is an integrated feature of the Adroit Forecaster. The Adroit Forecaster is a separate App that you need to download from AppSource. During the download of the Adroit Forecaster, it will walk you through the setup of the PowerBI Dashboard including linking to the PowerBI listing on AppSource for download. Below are the key screenshots for the process.:

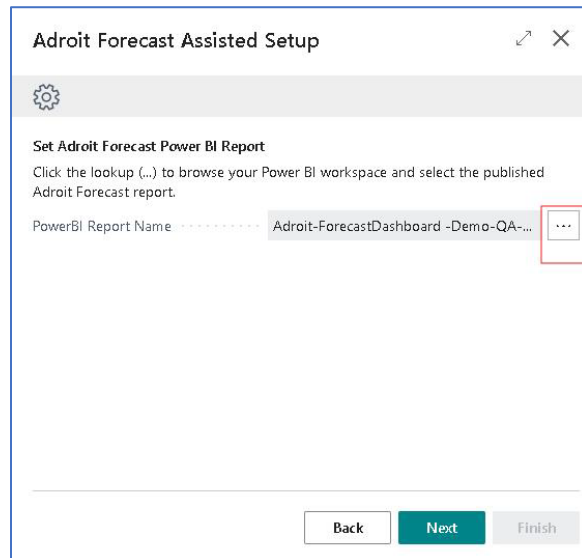
1. Download the Adroit Forecaster from the Microsoft AppSource and progress through the installation. At the end of the setup, it will ask to validate PowerBI License. Ensure the user that is downloading the application as a PowerBI license.
- 2.



3. Install Adroit Forecaster PowerBI. After validation of license a link will appear to download the Forecaster Dashboard.



4. After installation of the PowerBI dashboard you will be prompted to select the dashboard from your workspace. Please select the 3 dots and select 'AdroitForecastDashboardv2' from the list.



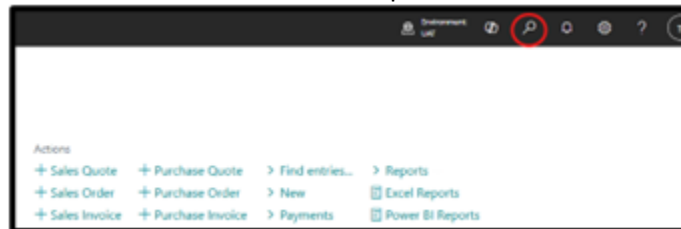
3 DASHBOARD USER GUIDE

3.1 Dashboard Overview

The dashboard is made up of 4 different tabs with analytics that cover Forecast Accuracy, Forecast Comparisons, Forecast Overview and Forecast Details. This represents a comprehensive view of each forecast over its lifecycle. This represents a step forward in Adroit’s Analytics suite that we will be crafting and delivering for each of our new products.

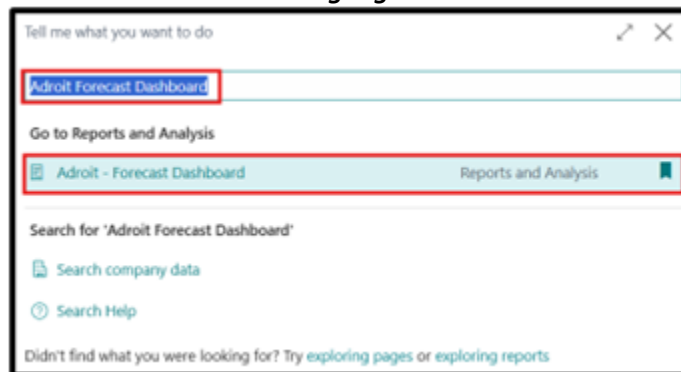
3.2 Forecast Dashboard Navigation

1. Click the search tool from the top menu.

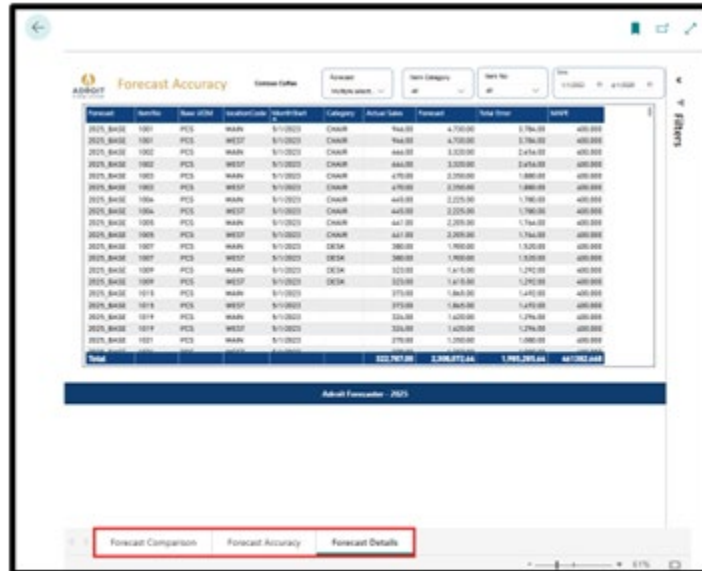


2. Search for “Adroit Forecast Dashboard” and select from list.

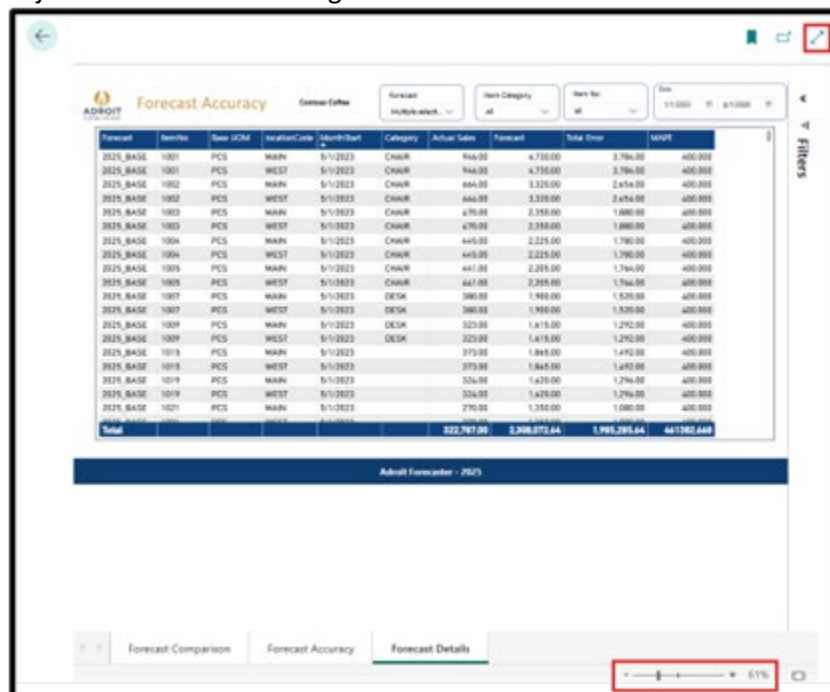
Note: Line will not show highlighted until cursor hovers over the selection.



3. This will bring up the Forecast Dashboard that has four tabs for users to utilize.

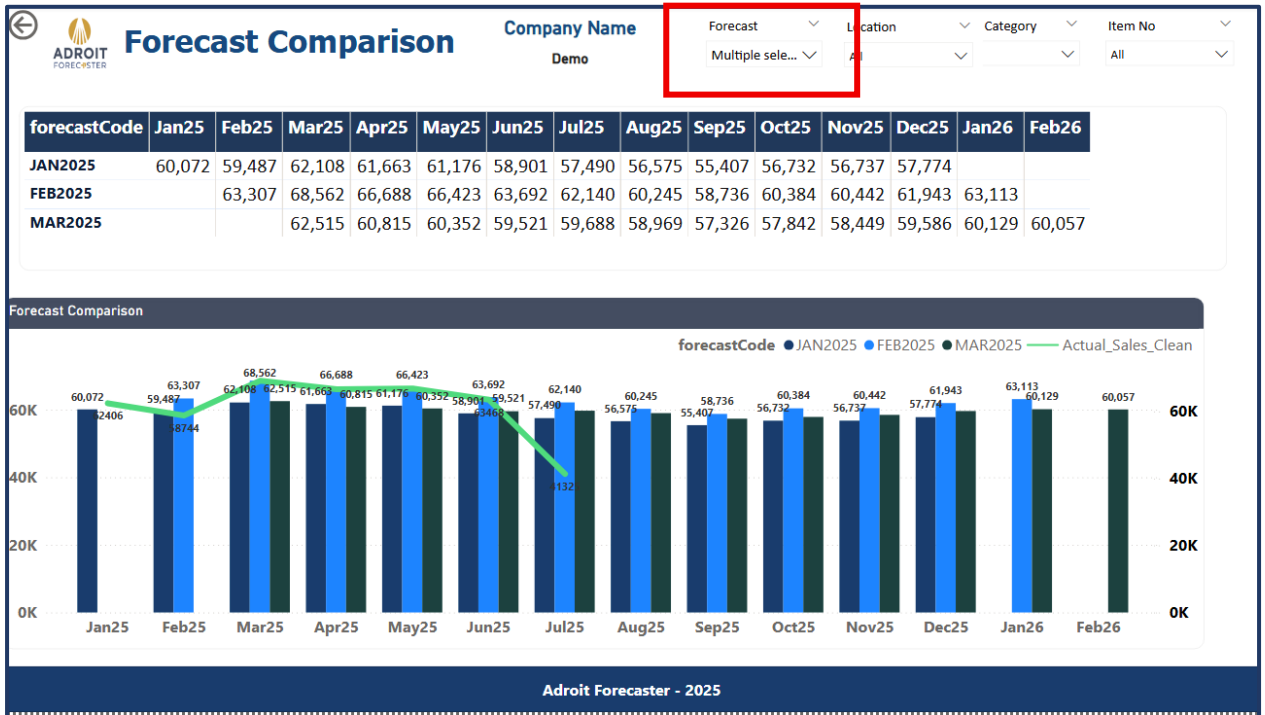


4. Click the arrow in the top right corner to expand the window. Zooms can also be adjusted for ease of viewing.

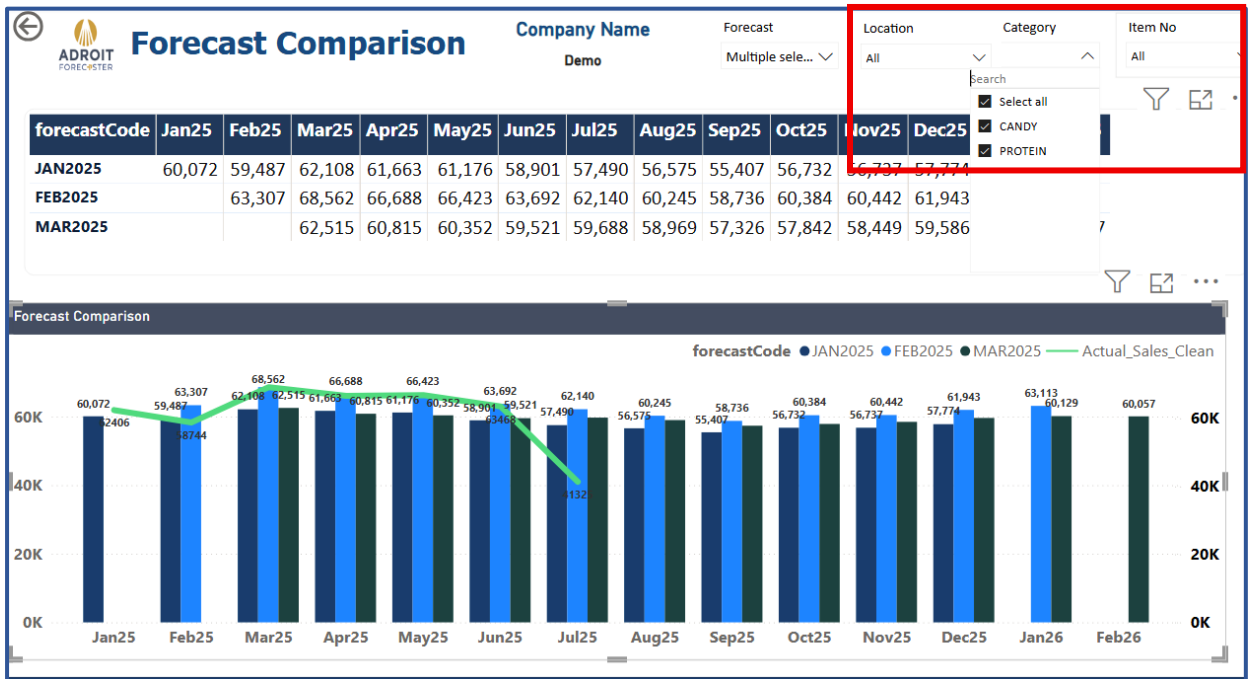


3.3 Forecast Comparison

1. In the Forecast Comparison tab, multiple forecasts can be placed side by side for comparative analysis.
Note: Selections will automatically update the information displayed in the matrix and bar chart.
2. Select which forecast(s) to compare from the 'Forecast' dropdown menu.

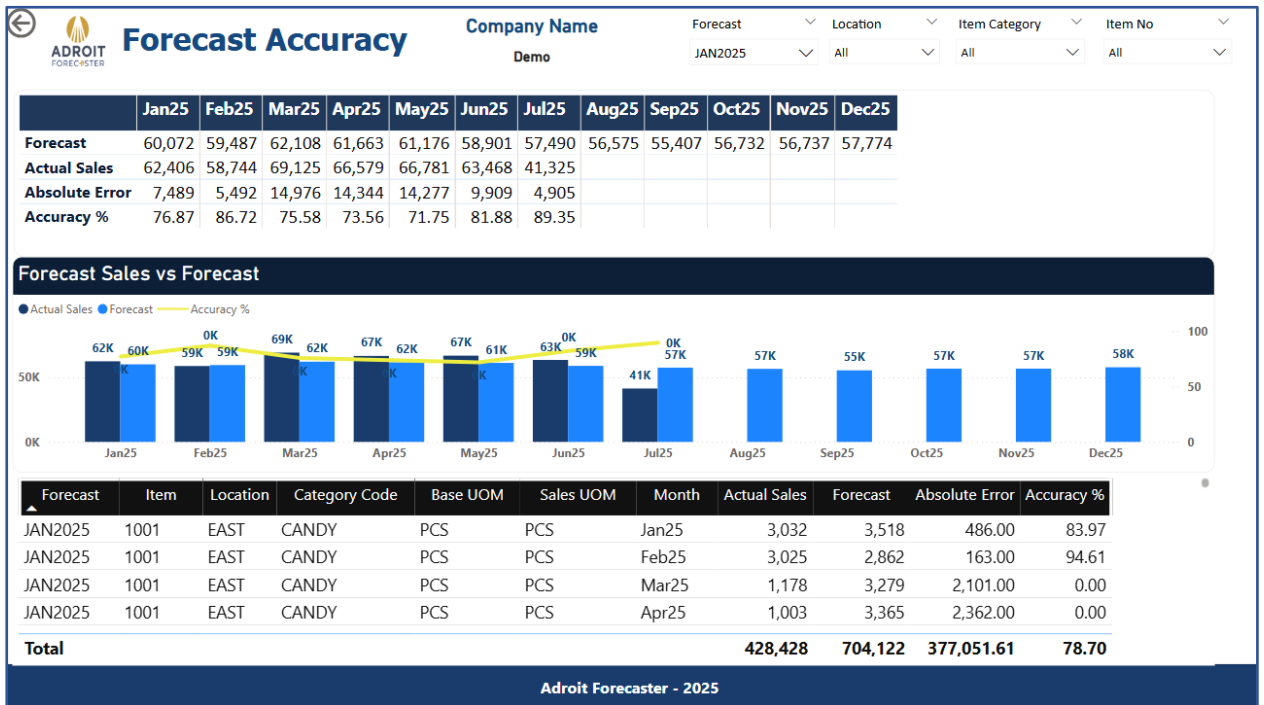


3. **Sales History:** Sales History will be shown on the Chart as the Secondary Axis in Green. The line will show the actual sales compared to the forecasts selected.
4. Choose which **item**, location or **item categories(s)** to view by selecting multiple or all from the 'Item Category' dropdown menu.



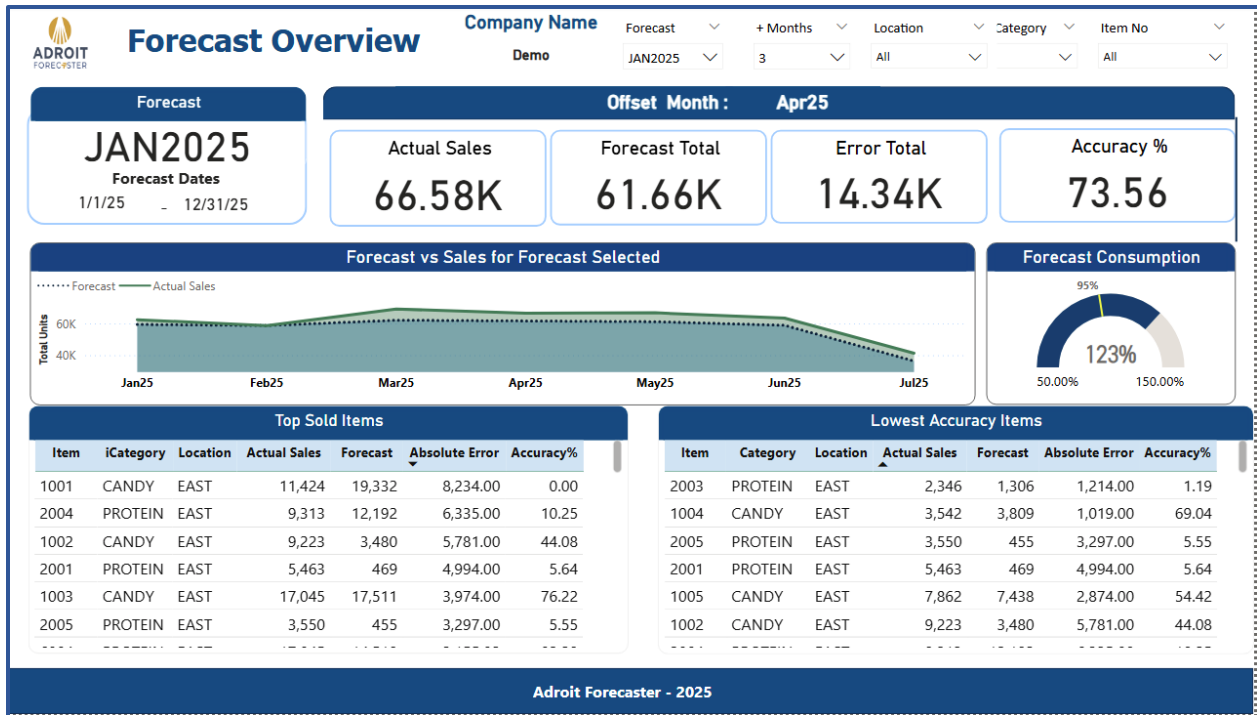
3.4 Forecast Accuracy

1. The Forecast Accuracy tab allows users to review a specific forecast accuracy. The measure is defined by MAPE (Mean Absolute Percentage Error) calculations converted to Percentages. A value of 100% indicates you have 0 error in your forecast.
2. Filter data as desired. With the same filter controls as above, selection is available for multiple different forecasts, locations, item categories and items.
Note: Updating the selections will automatically adjust all visuals.



3.5 Forecast Overview

1. **Forecast Overview** provides a summary for any specific Forecast. With details that range from Forecast Accuracy; Forecast to Sales over time; Offset Month Analysis and top 10 Sales Parts and Top 10 Lowest Accuracy Parts.
2. **Offset Month Analysis:** This feature is controlled by the "+ Months" filter that has numbers from 0-6. This will compare your forecast to actuals that were + Months away from the Forecast Creation Month. This provides users with the ability to measure near term accuracy or Forecasts which are a critical part of Demand Planning.
3. **Forecast Consumption:** Outlines what % of the Forecast has been consumed up to the last sales Month. This tells the demand planner if they are under or over consumed in their forecast.
4. **Sales vs Forecast Over Time:** shows the trends up or down on whether the Forecast vs Sales is Under or Over consumed.



3.6 Forecast Details

1. The Forecast Details tab allows users to view forecasted data showing item level information about variance between actual sales data and forecasted data.


Forecast Details

Company Name: Demo | Forecast: All | Location: EAST | Item Category: All | Item No: 1003

Forecast	ItemNo	Base UOM	Formatted_MonthStart	Category	Actual Sales	Forecast	Absolute Error	Accuracy_Perc
JAN2025	1003	PCS	Jun25	CANDY	2,888	2,309	579.00	79.95
JAN2025	1003	PCS	Jul25	CANDY	2,888	1,713	1,175.00	59.31
FEB2025	1003	PCS	Jun25	CANDY	2,888	2,340	548.01	81.02
FEB2025	1003	PCS	Jul25	CANDY	2,888	2,340	548.01	81.02
MAR2025	1003	PCS	Jun25	CANDY	2,888	2,135	752.99	73.93
MAR2025	1003	PCS	Jul25	CANDY	2,888	2,135	752.99	73.93
MAY2025	1003	PCS	Jun25	CANDY	2,888	2,375	513.03	82.24
MAY2025	1003	PCS	Jul25	CANDY	2,888	2,375	513.03	82.24
JUN2025	1003	PCS	Jun25	CANDY	2,888	2,636	252.01	91.27
JUN2025	1003	PCS	Jul25	CANDY	2,888	2,636	252.01	91.27
JUL2025	1003	PCS	Jul25	CANDY	2,888	2,888	0.01	100.00
JAN2025	1003	PCS	May25	CANDY	2,636	2,908	272.00	89.68
FEB2025	1003	PCS	May25	CANDY	2,636	2,340	296.01	88.77
MAR2025	1003	PCS	May25	CANDY	2,636	2,135	500.99	80.99
MAY2025	1003	PCS	May25	CANDY	2,636	2,375	261.03	90.10
JAN2025	1003	PCS	Apr25	CANDY	2,375	2,823	448.00	81.14
FEB2025	1003	PCS	Apr25	CANDY	2,375	2,340	35.01	98.53
MAR2025	1003	PCS	Apr25	CANDY	2,375	2,135	239.99	89.90
JAN2025	1003	PCS	Jan25	CANDY	2,340	2,689	349.00	85.09
JAN2025	1003	PCS	Feb25	CANDY	2,135	2,448	313.00	85.34

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2. **Filter data** as desired. With the same filter controls as above, selection is available for multiple different forecasts, item categories, items, and date ranges.
Note: Updating the selections will automatically adjust
3. **Export Data:** Exporting data is supported by clicking on the table and selecting the 3 Dots on the top right of the table. This list will have 'Export to Excel' that will grab the data and export to an excel file for further analysis.



Forecast Details

Company Name

Demo

Forecast	Location	Item Category	Item No
All	EAST	All	1003

Forecast	ItemNo	Base UOM	Formatted_MonthStart	Category	Actual Sales	Forecast	Absolute Error	Accuracy_Perc
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