

TOOL USER GUIDE

FORECAST MANAGER



CONTENTS

1.	INITIAL SETUP	3
1.1.	CREATING A FORECAST TEMPLATE.....	3
2.	SENDING FORECASTS	4
2.1.	ADDING PRODUCTS IN BULK/UPDATING FORECAST.....	4
2.2.	ADDING PRODUCTS FROM YEILD TREES.....	7
2.3.	ADDING SINGLE PRODUCTS.....	8
2.4.	SHARING VIEW ONLY FORECASTS.....	9
2.5.	SHARING CONFIRMATION FORECASTS.....	10
2.6.	SHARING COLLABORATIVE FORECASTS.....	11
2.7.	BULK REQUESTING COLLABRATIVE FORECASTS.....	12
3.	SHARED FORECASTS	13
3.1.	SHARED CONFIRMATION FORECASTS.....	13
3.1.1	RESPONDING TO A SHARED FORECAST.....	13
3.1.2.	EXPORTING SHARED FORECASTS/IMPORTING ACHEIVABLE QUANTITIES.....	14
3.1.3.	RESPONDING TO FURTHER INFO REQUESTED.....	15
3.2.	SHARED COLLABORATIVE FORECASTS.....	16
3.2.1.	BULK UPDATING A SHARED COLLABORATIVE FORECAST.....	16
3.2.2.	UPDATING SINGLE PRODUCTS IN A SHARED COLLABORATIVE FORECAST.....	17
3.3.	VEIWING RECEIVED FORECAST.....	18
4.	REVIEWING SUBMITTED CONFIRMATION FORECASTS	19
4.1.	REQUESTING FUTHER INFO.....	19
4.2.	ACCEPTING A FORECAST.....	20
4.3.	REJECTING A FORECAST.....	21
5.	UPDATING SHARED CONFIRMATION FORECASTS	22
5.1.	UPDATING A FORECAST/EXTENDING A FORECAST.....	22
6.	REVIEWING FORECASTS	24
6.1.	VIEWING FORECASTS.....	24
6.2.	EXPORTING SNAPSHOTS.....	25
6.3.	EXPORTING FORECASTS.....	27
7.	SENDING VOLUMES TO NEGOTIATION TEMPLATES	27

1. INITIAL SETUP

These steps are required for the initial forecast template set up. They will not be required to be repeated.

1.1. CREATING A FORECAST TEMPLATE

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

The screenshot shows the top navigation bar of the Foods Connected application. The 'Trading & Planning' menu is open, and the 'Forecasts' option is highlighted with a red box. The navigation bar includes 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'Steve'. The main content area shows a sidebar with 'Home | Overall Compliance | More' and a 'Latest News' section with three articles. The 'Forecasts' option is located under the 'Planning Tool' sub-menu.

Step 2: Generate a new forecast by selecting **Add New**.

The screenshot shows the 'Planning Tool' interface. The 'Forecasts' sub-menu is selected, and the 'Add New' button is highlighted with a red box. The interface includes a navigation bar with 'News & Statistics', 'Supplier Approval', 'Quality Management', 'Trading & Planning', 'More', and 'Steve'. Below the navigation bar, there are several filter options: 'Between Dates', 'Site', 'User', 'Product Category / Type', and 'Forecast Type'. The 'Forecast Type' is set to 'Purchasing'. There are 'Filter' and 'Clear Filters' buttons. Below the filters, there are buttons for 'Add New', 'Delete Selected', 'Update Dates', 'Request Data', and 'Export Selected'. A search bar is also present. The main content area shows a table of forecasts.

	Site	Forecast Name	Forecast Type	Product Category / Type	User	Date Range	Last Modified		
<input type="checkbox"/>	Group	Pork Raw Material Forecast	Purchasing	Meat & Poultry - Pork	Steve Jones	20/05/2020 - 10/06/2020	20/05/2020 08:29:50	Share (1)	View / Edit

Step 3: Complete Forecast Template Details and select Save

Forecast Information

Forecast Type Purchasing Sales Production Production Demand

Forecast Name

Product Category / Type

Start Date

Set End Date? None Select Date

Display

Group Products By

Include Weekends Yes No

Show Assigned Volume Yes No

Show Remaining Volume Yes No

Suppliers All Suppliers Selected Suppliers

Type of Forecast Required
This links the forecast to the selected tool in Foods Connected

Date which forecast starts

Number of Periods shown
This can be updated when required

Forecasting Period
This can be updated when required

Option to include / exclude weekends from forecast

Assigned volumes will automatically update for the forecast time frame.
E.g. if linked to purchasing any volumes purchased within selected time frame will appear in assigned

Shows any outstanding volume which has not been assigned

Set Forecast to Specific Supplier
Only volumes assigned against the select supplier/s will populate in the forecast

2. SENDING FORECASTS

2.1. ADDING PRODUCTS IN BULK/UPDATING FORECAST

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Update the Forecast by selecting **View/Edit**

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

Planning Tool

Forecasts ▾ Production Models ▾ Stock Manager ▾ Price Files ▾ Costs ▾ Action Logs ▾ Admin ▾

Between Dates: [] [] Site: All ▾ User: All ▾ Product Category / Type: All ▾ Forecast Type: Purchasing ▾ Filter Clear Filters

Add New Delete Selected Update Dates Request Data Export Selected Search Forecasts...

Site	Forecast Name	Forecast Type	Product Category / Type	User	Date Range	Last Modified		
Group	Pork Raw Material Forecast	Purchasing	Meat & Poultry - Pork	Steve Jones	20/05/2020 - 10/06/2020	20/05/2020 08:29:50	Share (1) ▾	View / Edit
Group	Chicken purchasing forecast (How many chickens can we buy for production from suppliers?) Testing we input what we need first	Purchasing	Meat & Poultry - Chicken	Steve Jones	21/11/2019 -		Share (2) ▾	View / Edit

Step 3: Adjust the **Display From** and **Display To** dates to the date range you wish to upload the forecast for. In the **Display** dropdown select the increments you would like to upload the forecast in, then select **Update** (The system will automatically translate the increments used to an average daily amount).

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

Planning Tool - Pork Raw Material Forecast Back

Step 1: Forecast Information Update Forecast Information

Site: [] Group: [] Forecast Type: Purchasing

Product Category / Type: Meat & Poultry - Pork

Suppliers: All Suppliers

Step 2: Start Date / Display

Display From: 20/05/2020 [] Display: Weekly ▾ Update

Display To (optional): 10/06/2020 [] Group Products By: None ▾

Step 4: Download the blank import sheet by selecting **Import Forecasts** and **Select From Import Sheet**.

Planning Tool - Pork Raw Material Forecast

Step 1: Forecast Information Update Forecast Information

Site: _____ Group: _____ Forecast Type: Purchasing

Product Category / Type: Meat & Poultry - Pork

Suppliers: All Suppliers

Step 2: Start Date / Display

Display From: 20/05/2020 Display: _____

Display To (optional): 10/06/2020 Group Products By: _____

Step 3: Product Forecasts

Add New Delete Selected Send Volumes to Template Export Forecasts Import Forecasts

From Exported Forecast
From Import Sheet

Import Product Forecasts

When entering data into the Excel template, please:

- Enter product codes vertically below 'Product Code' in the first column
- Enter dates horizontally after 'Product Code', in the format of dd/mm/yyyy
- Do not rename the worksheet
- Do not insert additional sheets into the workbook

Select File: Choose file No file chosen Download Import Template

Overwrite Data: No

If selected, volumes of products which are not contained in the import sheet will be removed, i.e. they will return to 0 volume...

Close Import

Step 5: In the exported spreadsheet input the article code in the first column, then on the date headed columns add in the forecasted kg.

	A	B	C	D
1	Product Code	22/06/2020	29/06/2020	06/07/2020
2	52	1000	500	
3	76	3000		

Step 6: Once the forecast spreadsheet is complete, select import forecast the From Import Sheet. Select **Choose File** to select excel file and select **Import**.

Step 3: Product Forecasts

Add New Delete Selected Send Volumes to Template Export Forecasts Import Forecasts Toggle Products

From Exported Forecast
From Import Sheet

Product	Required	Assigned
052 - Pork Knuckle	2,000	
076 - Pork HAM	3,000	
Totals	5,000	

Import Product Forecasts

When entering data into the Excel template, please:

- Enter product codes vertically below 'Product Code' in the first column
- Enter dates horizontally after 'Product Code', in the format of dd/mm/yyyy
- Do not rename the worksheet
- Do not insert additional sheets into the workbook

Select File: Choose file No file chosen Download Import Template

Overwrite Data: No

If selected, volumes of products which are not contained in the import sheet will be removed, i.e. they will return to 0 volume...

Re-Open Forecast Confirmations: No

If selected, forecast confirmations sent to suppliers on this forecast will be re-opened.

Close Import

2.2. ADDING PRODUCTS FROM YEILD TREES

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Update the Forecast by selecting **View/Edit**

Step 3: Select **Add New** then select **Yield Tree(s)**. Select yield tree(s) required to be added and select **Add Products**.

The screenshot shows the 'Step 3: Product Forecasts' section of the Foods Connected interface. A modal dialog box titled 'Add Products From Yield Trees' is open. The dialog box contains the following text:

Automatically populates the forecast with products from the selected yield trees.
If a product already exists in the forecast, it will remain unchanged.
Simply select the yield trees you wish to add products from, and click 'Add Products'.

The dialog box lists the following product yield trees:

- 0001 - Stier (Young Bull) - European Young Bull 460kg+
- 053 - Salmon Fish - Average weight 4.1kg
- Car 603 - Lamb Carcass - 22.4kg cw Carcass
- Car 604 - Pig Carcass - 68kg cw Carcass
- Car 605 - Beef Carcass Steer/Heifer R4L 325kg - 299kg cw Carcass
- Car 606 - Beef Carcass Standard - Beef Yield Tree 300kg Cold CW
- Car 606 - Beef Carcass Standard - 311kg cw Carcass

The 'Add Products' button is highlighted with a red box. The background interface shows the 'Step 3: Product Forecasts' section with a table of products and a 'Required' column. The 'Yield Tree(s)' option is selected in the 'Forecast Entry' dropdown menu.

Step 4: To add volume for each product, click on the **0** for each item in the **Required** column. Enter the required volume and select **Save**

Step 3: Product Forecasts

[Add New](#)
[Delete Selected](#)
[Send Volumes to Template](#)
[Export Forecasts](#)
[Import Forecasts](#)
[Toggle Products](#)

Product	20/05/2020 - 26/05/2020	27/05/2020 - 02/06/2020
<input type="checkbox"/>	Required	Assigned
<input type="checkbox"/>	202 - Pork Shoulder & Leg Rind	0

Edit Product Forecasts

Dates: 20/05/2020 - 26/05/2020

Current Product: 202 - Pork Shoulder & Leg Rind

Forecasts	Date	Required Volume	Supplier
<input type="checkbox"/>	20/05/2020	0.00	Internal

[Cancel](#)
[Save](#)

2.3. ADDING SINGLE PRODUCTS

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Update the Forecast by selecting **View/Edit**

Step 3: Select **Add New** then select **Products**. Select Products required to be added and select **Add Selected Products** (multiple products can be selected).

Step 1: Forecast Information [Update Forecast Information](#)

Site	Group	Forecast Type	Purchasing

Product Category / Type: Meat & Poultry - Pork

Suppliers: All Suppliers

Step 2: Start Date / Display

Display From: 20/05/2020

Display To (optional): 10/06/2020

Step 3: Product Forecasts

[Add New](#)
[Delete Selected](#)
[Send Volumes to Template](#)
[Export Forecasts](#)

Forecast Entry

Product(s)

Yield Tree(s)

Select Product(s)

Adding product(s) to this forecast will only add them for each date within the selected range...

Product Category: Meat & Poultry

Search your products...

Product Code	Product Name
<input type="checkbox"/>	0001 Slier (Young Bull)
<input type="checkbox"/>	011C Chicken Breast
<input type="checkbox"/>	012C Chicken Thigh
<input type="checkbox"/>	013C Chicken Drumsticks
<input type="checkbox"/>	014C Chicken Wings
<input type="checkbox"/>	015 Chicken Neck
<input type="checkbox"/>	016 Chicken Tail Back
<input type="checkbox"/>	017 Chicken Rib Back
<input type="checkbox"/>	018 Chicken Heart
<input type="checkbox"/>	019 Chicken Liver
<input type="checkbox"/>	020 Chicken Gizzard
<input type="checkbox"/>	021 Chicken Bones
<input type="checkbox"/>	022 Chicken Skin

[Manage Company Products](#)
[Cancel](#)
[Add Selected Products](#)

Step 4: To add volume for each product, click on the *0* for each item in the *Required* column. Enter the required volume and select **Save**

The screenshot shows the 'Step 3: Product Forecasts' interface. At the top, there are buttons for 'Add New', 'Delete Selected', 'Send Volumes to Template', 'Export Forecasts', 'Import Forecasts', and 'Toggle Products'. Below this is a table with columns for 'Product', 'Required', and 'Assigned'. The 'Required' column for '202 - Pork Shoulder & Leg Rind' contains the value '0'. An 'Edit Product Forecasts' modal is open, showing the 'Required Volume' field set to '0.00' and the 'Save' button highlighted.

2.4. SHARING VIEW ONLY FORECASTS

View Only forecasts provide the supplier with visibility of shared forecasts but they do not have the ability to update or respond.

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Share the Forecast by selecting **Share**. Select the **Supplier** and **User**. Select **View Only** for the share type and select **Share**

The screenshot shows the 'Planning Tool' interface. At the top, there are tabs for 'Forecasts', 'Production Models', 'Stock Manager', 'Price Files', 'Costs', 'Action Logs', and 'Admin'. Below this is a filter section with 'Between Dates', 'Site', 'User', 'Product Category / Type', and 'Forecast Type'. A table shows a forecast for 'Pork Raw Material Forecast' with a 'Share (1)' button. A 'Share Forecast' modal is open, showing the 'Share Setup' section with 'Supplier' set to 'Abattoir 2', 'User' set to 'User 1 Abattoir 2', and 'Share Type' set to 'View Only'. The 'Share' button is highlighted.

2.5. SHARING CONFIRMATION FORECASTS

Confirmation forecasts provides the supplier with the ability to confirm/amend forecasted quantities. The submitted forecast data must be reviewed and accepted to update the shared forecast.

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Share the Forecast by selecting **Share**. Select the **Supplier** and **User** then select **Confirmation** for the share type. *Further options for sharing a forecast will appear.*

The screenshot shows the 'Planning Tool' interface with a table of forecasts. A 'Share Forecast' dialog box is open, showing the 'Share Setup' section with the following details:

- Supplier: Fresh Food Supplies
- User: Rob Phelps
- Share Type: Confirmation (selected from a dropdown menu)

The dialog box also shows a 'Quick Links' section with 'Products' and 'All' options.

Site	Forecast Name	Forecast Type	Product Category / Type	User	Date Range	Last Modified	Share (1)	View / Edit
<input type="checkbox"/>	Group	Pork Raw Material Forecast	Purchasing	Meat & Poultry - Pork	Steve Jones	20/05/2020 - 10/05/2020	<input type="button" value="Share (1)"/>	<input type="button" value="View / Edit"/>
<input type="checkbox"/>	Group	Chicken purchasing forecast (How many chickens can we buy for production from suppliers?) Testing we input what we need first	Purchasing	M				

Step 3: Enter the **Start Date** and **End Date** (*this should correspond with the select display range within the forecast*). Select the date the supplier should respond by in the **Respond By Date** and select **Share**.

The 'Share Forecast' dialog box is shown with the 'Create Forecast Share Request' section expanded, displaying the following details:

- Start Date: 15/06/2020
- End Date: 22/06/2020
- Respond By Date: 22/06/2020 09:00

The 'Share' button is highlighted with a red box.

2.6. SHARING COLLABORATIVE FORECASTS

Collaborative forecasts provide the supplier with the ability to update forecasts. The shared forecast will automatically update when supplier submits forecast data.

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Share the Forecast by selecting **Share**. Select the **Supplier** and **User** then select **Collaborative** for the share type. *Further options for sharing a forecast will appear.*

Planning Tool

Forecasts Production Models Stock Manager Price Files Costs Action Logs Admin

Between Dates Site User Product Category / Type Forecast Type

Add New Delete Selected Update Dates Request Data Export Selected Search Forecasts...

Site	Forecast Name	Forecast Type	Product Category / Type	User	Date Range	Last Modified		
Group	Pork Raw Material Forecast	Purchasing	Meat & Poultry - Pork	Steve Jones	20/05/2020 - 10/06/2020	23/06/2020 14:06:29	Share (1)	View / Edit
Group	Chicken purchasing forecast (How many chickens can we buy for production from suppliers?) Testing we input what we need first	Purchasing	Me					

Share Forecast

Share Setup

Supplier: - Select -

User: - Select -

Share Type: View Only (selected), Collaborative, Confirmation

Cancel Share

Step 3: Enter the **Start Date** and **End Date** (*this should correspond with the select display range within the forecast*) and select the date the supplier should respond by in the **Respond By Date**. If required to be shared on a reoccurring basis select the frequency in the **Reoccurs** dropdown then select **Share**.

Share Forecast

Share Setup

Supplier: - Select -

User: - Select -

Share Type: Collaborative

Create Forecast Share Request

Start Date: 25/05/2020

End Date: 31/05/2020

Respond By Date: 31/05/2020 09:00

Reoccurs: -- Select Period -- (selected), Weekly, Two Weeks, Three Weeks, Four Weeks

Cancel Share

2.7. BULK REQUESTING COLLABRATIVE FORECASTS

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Select forecasts which you would like to export and select **Update Dates**. Enter the new **Start Date** and **End Date** and select **Update Details**.

The screenshot shows the 'Planning Tool' interface. At the top, there are navigation tabs: Forecasts, Production Models, Stock Manager, Price Files, Costs, Action Logs, and Admin. Below this is a filter section with 'Between Dates', 'Site' (All), 'User' (All), 'Product Category / Type' (All), and 'Forecast Type' (Purchasing). There are 'Filter' and 'Clear Filters' buttons. Below the filters are buttons for 'Add New', 'Delete Selected', 'Update Dates', 'Request Data', and 'Export Selected'. A search bar is also present. The main table has columns: Site, Forecast Name, Forecast Type, Product Category / Type, User, Date Range, and Last Modified. Two rows are visible: 'Pork Raw Material Forecast' and 'Chicken purchasing forecast (How many chickens can we buy for production from suppliers?) Testing we input what we need first'. The 'Update Forecast Dates' dialog box is open, showing a 'Start Date' field, a 'Set End Date?' dropdown menu set to 'Leave as current', and 'Cancel' and 'Update Dates' buttons.

Step 3: Select forecasts which you would like to update and select **Request Data**. Enter the **Start Date** and **End Date** (*this should correspond with the select display range within the forecast*) and select the date the supplier should respond by in the **Respond By Date**. If required to be shared on a reoccurring basis select the frequency in the **Reoccurs** dropdown then select **Share**.

The screenshot shows the 'Planning Tool' interface. At the top, there are navigation tabs: Forecasts, Production Models, Stock Manager, Price Files, Costs, Action Logs, and Admin. Below this is a filter section with fields for 'Between Dates', 'Site' (set to 'All'), 'User' (set to 'All'), 'Product Category / Type' (set to 'All'), and 'Forecast Type' (set to 'Purchasing'). There are 'Filter' and 'Clear Filters' buttons. Below the filters are action buttons: 'Add New', 'Delete Selected', 'Update Dates', 'Request Data', and 'Export Selected'. A search bar labeled 'Search Forecasts...' is on the right. The main area is a table with columns: Site, Forecast Name, Forecast Type, Product Category / Type, User, Date Range, and Last Modified. Three rows are visible, with checkboxes in the 'Site' column highlighted by a red box. A modal window titled 'Request Forecast Data' is open over the table. It contains a message: 'Using the below form you can request data from multiple collaborative forecasts. Requests will be sent to the user the forecast was shared with'. The form has fields for 'Start Date' (24/06/2020), 'End Date' (01/07/2020), and 'Respond By Date' (01/07/2020, 09:00). There is a 'Reoccurs' dropdown menu with options: '-- Select Period --', 'Weekly', and 'Two Weeks'. A 'Request Data' button is highlighted with a red box.

3. SHARED FORECASTS

When a Forecast has been shared an email notification will be received. A task is created in the task bar when a response is required.

3.1. SHARED CONFIRMATION FORECASTS

3.1.1 RESPONDING TO A SHARED FORECAST

Step 1: Sign into Foods Connected and select the task stating **A forecast confirmation has been sent for completion**

Home Interactive Dashboards

Latest News

Foodservice back to normal by 2025
New report tips foodservice revenues to fall by half next year, with pre-coronavirus revenues not being achieved until 2025 at the latest.

More food businesses expected to follow Adelle Foods failure
More businesses are set to follow in the footsteps of failed food-to-go supplier Adelle Foods, a leading law firm has claimed.

Asia offers opportunities for UK red meat exports
Coronavirus has significantly impacted global trade but there remains a myriad of opportunities for UK red meat exports in the Asian marketplace, according to the Agriculture and Horticulture Development Board's (AHDB) first export webinar.

My Tasks 108 outstanding

- A forecast confirmation has been sent for completion: 15/06/2020 - 22/06/2020
- Your Remote Audit Response Has Been Reviewed (HFG Seafood Standard)
- A non-conformance has been raised against a remote audit clause
- Admin Admin sent you a traceability check to complete
- Admin Admin sent you a traceability check to complete

View All Tasks

Step 2: Confirm forecasted volumes or enter Achievable Quantities for each date range and select Save & Submit Confirmation. Enter any comments if required and select **Save & Submit Confirmation**.

Planning Tool - Forecast Confirmation - Purchasing Forecast - 15/06/2020 - 22/06/2020 ← Back

Use the following form to confirm whether you can fulfil the requested quantities of the products on each date.
If you cannot fulfill the quantity, leave the 'Confirm' checkbox unchecked, and fill in your achievable quantity in the textbox provided instead.

Product Quantities Excel Export/Import

15/06/2020 - 21/06/2020 - In Progress

Product	Requested Quantity	Confirm?	Achievable Quantity
052 - Pork Knuckle	1,000	<input checked="" type="checkbox"/>	1000
076 - Pork HAM	2,000	<input checked="" type="checkbox"/>	2000

22/06/2020 - 28/06/2020 - In Progress

Product	Requested Quantity	Confirm?	Achievable Quantity
052 - Pork Knuckle	2,000	<input type="checkbox"/>	<input type="text" value="1000"/>
076 - Pork HAM	3,000	<input type="checkbox"/>	<input type="text" value="800"/>

Activity Overview

Date	User	Comment
15/06/20 22:33	Adm	

Save & Submit Confirmation

Comment:

3.1.2. EXPORTING SHARED FORECASTS/IMPORTING ACHIEVABLE QUANTITIES

Step 1: Sign into Foods Connected and select the task stating **A forecast confirmation has been sent for completion**

Step 2: Select **Excel Export/Import** then select **Export to Excel**. Enter Achievable quantities for each date range in the exported excel file.

Planning Tool - Forecast Confirmation - Purchasing Forecast - 15/06/2020 - 22/06/2020

Use the following form to confirm whether you can fulfil the requested quantities of the products on each date.
If you cannot fulfil the quantity, leave the 'Confirm' checkbox unchecked, and fill in your achievable quantity in the textbox provided instead.

Product Quantities

15/06/2020 - 21/06/2020 - In Progress

Excel Export/Import

- Export to Excel
- Import from Excel

Product	Requested Quantity	Confirm?	Achievable Quantity
052 - Pork Knuckle	1,000	<input type="checkbox"/>	
076 - Pork HAM	2,000	<input type="checkbox"/>	

Step 3: Select Excel Export/Import then select Import from Excel. Select Choose File to select forecast and select Import.

Planning Tool - Forecast Confirmation - Purchasing Forecast - 15/06/2020 - 22/06/2020

Use the following form to confirm whether you can fulfil the requested quantities of the products on each date.
If you cannot fulfil the quantity, leave the 'Confirm' checkbox unchecked, and fill in your achievable quantity in the textbox provided instead.

Product Quantities

15/06/2020 - 21/06/2020 - In Progress

Excel Export/Import

- Export to Excel
- Import from Excel

Product	Requested Quantity	Confirm?	Achievable Quantity
052 - Pork Knuckle	1,000	<input type="checkbox"/>	
076 - Pork HAM	2,000	<input type="checkbox"/>	

Import from Excel

Choose File Forecast_...020.xlsx

3.1.3. RESPONDING TO FURTHER INFO REQUESTED

Step 1: Sign into Foods Connected and select the task stating More Information requested for a forecast.

Home

Interactive Dashboards

Latest News

- Foodservice back to normal by 2025**
New report tips foodservice revenues to fall by half next year, with pre-coronavirus revenues not being achieved until 2025 at the latest.
- More food businesses expected to follow Adelle Foods failure**
More businesses are set to follow in the footsteps of failed food-to-go supplier Adelle Foods, a leading law firm has claimed.
- Asia offers opportunities for UK red meat exports**
Coronavirus has significantly impacted global trade but there remains a myriad of opportunities for UK red meat exports in the Asian marketplace, according to the Agriculture and Horticulture Development Board's (AHDB) first export webinar.

My Tasks 108 outstanding

- More information requested for a forecast confirmation: 15/06/2020 - 22/06/2020**
- A forecast confirmation has been sent for completion: 15/06/2020 - 22/06/2020
- Your Remote Audit Response Has Been Reviewed (HFG Seafood Standard)
- A non-conformance has been raised against a remote audit clause
- Admin Admin sent you a traceability check to complete

View All Tasks

Step 2: Review requested information in the activity overview and update as required. Once updated select **Save & Submit Confirmation**. Enter any comments if required and select **Save & Submit Confirmation**.

Planning Tool - Forecast Confirmation - Purchasing Forecast - 15/06/2020 - 22/06/2020 ← Back

Use the following form to confirm whether you can fulfil the requested quantities of the products on each date.
If you cannot fulfil the quantity, leave the 'Confirm' checkbox unchecked, and fill in your achievable quantity in the textbox provided instead.

Product Quantities Excel Export/Import

15/06/2020 - 21/06/2020 - In Progress

Product	Requested Quantity	Confirm?	Achievable Quantity
052 - Pork Knuckle	1,000	<input type="checkbox"/>	<input type="text" value="300"/>
076 - Pork HAM	2,000	<input type="checkbox"/>	<input type="text" value="500"/>

22/06/2020 - 28/06/2020 - In Progress

Product	Requested Quantity	Confirm?	Achievable Quantity
052 - Pork Knuckle	2,000	<input checked="" type="checkbox"/>	<input type="text" value="2000"/>
076 - Pork HAM	3,000	<input checked="" type="checkbox"/>	<input type="text" value="3000"/>

Activity Overview

Date	User	Action	Comment
15/06/20 22:58	Admin Admin	Requested more info for the forecast confirmation	More info required
15/06/20 22:41	Rob Phelps	Submitted the forecast confirmation for review	
15/06/20 22:33	Admin Admin	Sent the forecast confirmation for completion	

Save & Submit Confirmation

Comment

3.2. Shared Collaborative Forecasts

3.2.1. BULK UPDATING A SHARED COLLABORATIVE FORECAST

Step 1: Sign into Foods Connected and select the task stating **You have been asked to provide data for a forecast**

Home Interactive Dashboards

Latest News « Previous Next »

Are food manufacturers being neglected by British government?
New report says further support from the UK and devolved governments is vital to sustain manufacturers supplying the hospitality and food service market.

Report says African Swine Fever has bigger impact on global pork market than Covid-19
While the effects of Covid-19 on the global pork supply chain are prominent, a report by financial services company Rabobank says African Swine fever (ASF) remains the dominant issue in global animal protein.

Potato growers on high alert for blight
Blightwatch alert system is showing highest level of blight threat at crucial stage in potato growth.

My Tasks 85 outstanding

- ⊙ You have been asked to provide data for a forecast: 23/06/2020 - 25/06/2020
- ⊙ You have been asked to provide data for a forecast: 25/05/2020 - 31/05/2020
- ⊙ Rob Phelps set a Specification to Approval Required
- ⊙ Rob Phelps set a Specification to Approval Required
- ⊙ A forecast confirmation has been sent for completion: 04/06/2020 - 08/06/2020

View All Tasks

Step 2: Download the blank import sheet by selecting **Import Forecasts** and **Select From Import Sheet**.

Step 3: In the exported spreadsheet input the article code in the first column, then on the date headed columns add in the forecasted kg.

	A	B	C	D
1	Product Code	22/06/2020	29/06/2020	06/07/2020
2	52	1000	500	
3	76	3000		
4				

Step 4: Once the forecast spreadsheet is complete, select **import forecast** the **From Import Sheet**. Select **Choose File** to select excel file and select **Import**

3.2.2. UPDATING SINGLE PRODUCTS IN A SHARED COLLABORATIVE FORECAST

Step 1: Sign into Foods Connected and select the task stating **You have been asked to provide data for a forecast**

Step 2: To add volume for each product, click on the **0** for each item in the **Required** column. Enter the required volume and select **Add**

Step 3: Product Forecasts

Buttons: Add New, Delete Selected, Send Volumes to Template, Export Forecasts, Import Forecasts, Toggle Products

Product	20/05/2020 - 26/05/2020	27/05/2020 - 02/06/2020
<input type="checkbox"/>	Required	Assigned
<input type="checkbox"/>	202 - Pork Shoulder & Leg Rind	0

Edit Product Forecasts

Dates: 20/05/2020 - 26/05/2020

Current Product: 202 - Pork Shoulder & Leg Rind

Add New Forecast: 25/05/2020 [Calendar Icon] Qty [Input] **Add** [Cancel] [Save]

3.3. Viewing Received Forecast

Step 1: Sign into Foods Connected and select Trading & Planning then select Received Forecasts.

Navigation: News & Statistics, Supplier Approval, Quality Management, Trading & Planning, More, Rob

Trading & Planning Dropdown:

- Purchasing Tool
- Purchasing Templates
- Sent Negotiations
- Sent Costings
- Received Sales Offers
- Activity Overview
- Reports
- Sales Tool
- Received Purchasing Enquiries
- Activity Overview
- Order Tool
- Received Orders
- Activity Overview
- Planning Tool
- Received Forecasts**
- Received Production Models
- Market Data Tool
- Received Data Models

Interactive Dashboards: 239 outstanding

Latest News: Beef strong during lockdown, but... Pig meat sales in April up as more consumers cook from scratch during lockdown

Step 2: Select the Arrow icon beside the forecast and select View/Edit.

Planning Tool

Received Forecasts | Received Production Models | Intake Data | Action Logs | Admin

Viewing 2 results | Page 1 of 1

Received Date	Received From	Shared With	Title	Date(s) Requested	
15/06/2020 12:33:04	Admin Admin	Rob Phelps	Purchasing Forecast	1 Date(s) requested	
Date Range Requested		Requested From	Occurs	Due Date	Status
15/06/2020 - 22/06/2020		Rob Phelps	N/A	22/06/2020	Awaiting Review View/Edit
01/06/2020 07:08:40	Admin Admin	Rob Phelps	Example Forecast	1 Date(s) requested	

4. Reviewing Submitted Confirmation Forecasts

When a Forecast has been shared an email notification will be received. The submitted confirmation forecast must be reviewed and accepted for shared forecast to update.

4.1. Requesting Further Info

Step 1: Sign into Foods Connected and select the task stating **A forecast confirmation has been submitted for review**

The screenshot shows the 'Home' page of the Foods Connected dashboard. On the left, there is a 'Latest News' section with three articles: 'Foodservice back to normal by 2025', 'More food businesses expected to follow Adelle Foods failure', and 'Asia offers opportunities for UK red meat exports'. On the right, there is a 'My Tasks' panel with a header '99 outstanding'. The first task is highlighted with a red box: 'A forecast confirmation has been submitted for review: 15/06/2020 - 22/06/2020'. Below it are three other tasks related to remote audit standards for review, each with a 'You have received a remote audit standard for review' notification. At the bottom of the 'My Tasks' panel is a 'View All Tasks' button.

Step 2: Review the submitted forecast and select **Request More Info**. Enter any comments if required then select **Request More Info**.

Planning Tool - Forecast Confirmation - Purchasing Forecast - 15/06/2020 - 22/06/2020 ← Back

Product Quantities

15/06/2020 - 21/06/2020 - In Progress

Product	Requested Quantity	Achievable Quantity
052 - Pork Knuckle	1,000	<input type="text" value="300"/>
076 - Pork HAM	2,000	<input type="text" value="500"/>

22/06/2020 - 28/06/2020 - In Progress

Product	Requested Quantity	Achievable Quantity
052 - Pork Knuckle	2,000	<input type="text" value="2000"/>
076 - Pork HAM	3,000	<input type="text" value="3000"/>

Activity Overview

Date	User	Action	Comment
15/06/20 13:41	Rob Phelps	Submitted the forecast confirmation for review	
15/06/20 13:33			

Request More Info

Comment

4.2. Accepting A Forecast

Step 1: Sign into Foods Connected and select the task stating **A forecast confirmation has been submitted for review**

Home

Latest News

Foodservice back to normal by 2025
New report tips foodservice revenues to fall by half next year, with pre-coronavirus revenues not being achieved until 2025 at the latest.

More food businesses expected to follow Adelle Foods failure
More businesses are set to follow in the footsteps of failed food-to-go supplier Adelle Foods, a leading law firm has claimed.

Asia offers opportunities for UK red meat exports
Coronavirus has significantly impacted global trade but there remains a myriad of opportunities for UK red meat exports in the Asian marketplace, according to the Agriculture and Horticulture Development Board's (AHDB) first export webinar.

My Tasks 99 outstanding

- A forecast confirmation has been submitted for review: 15/06/2020 - 22/06/2020
- You have received a remote audit standard for review (OBA - Notification Alerts for Lead Technical)
- You have received a remote audit standard for review (Add document delete options to remote-audit-templates-UI)
- You have received a remote audit standard for review (Add document delete options to remote-audit-templates-UI)
- You have received a remote audit standard for review (HFG Seafood Standard - Wild fish)

[View All Tasks](#)

Step 2: Review the submitted forecast and select **Accept & Import Quantities to Forecast**. Enter any comments if required then select **Accept & Import Quantities to Forecast**.

Product Quantities

15/06/2020 - 21/06/2020 - In Progress

Product	Requested Quantity	Achievable Quantity
052 - Pork Knuckle	1,000	<input type="text" value="300"/>
076 - Pork HAM	2,000	<input type="text" value="500"/>

22/06/2020 - 28/06/2020 - In Progress

Product	Requested Quantity	Achievable Quantity
052 - Pork Knuckle	2,000	<input type="text" value="2000"/>
076 - Pork HAM	3,000	<input type="text" value="3000"/>

Activity Overview

Date	User	Action	Comment
15/06/20 13:41	Rob Phelps	Submitted the forecast confirmation for review	
15/06/20 13:33			

Reject Confirmation

Accept & Import Quantities to Forecast

Comment:

4.3. Rejecting A Forecast

Step 1: Sign into Foods Connected and select the task stating **A forecast confirmation has been sent for completion**

Step 2: Review the submitted forecast and select **Reject Confirmation**. *The shared forecast will be removed.*

Product Quantities

15/06/2020 - 21/06/2020 - In Progress

Product	Requested Quantity	Achievable Quantity
052 - Pork Knuckle	1,000	300
076 - Pork HAM	2,000	500

22/06/2020 - 28/06/2020 - In Progress

Product	Requested Quantity	Achievable Quantity
052 - Pork Knuckle	2,000	2000
076 - Pork HAM	3,000	3000

Activity Overview

Date	User	Action	Comment
15/06/20 13:41	Rob Phelps	Submitted the forecast confirmation for review	
15/06/20 13:33	Admin Admin	Sent the forecast confirmation for completion	

Reject Confirmation

Cancel Request More Info Accept & Import Quantities to Forecast

5. Updating Shared Confirmation Forecasts

5.1. Updating A Forecast/Extending A Forecast

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Update the Forecast by selecting **View/Edit**

The screenshot shows the 'Planning Tool' interface. At the top, there are navigation tabs: News & Statistics, Supplier Approval, Quality Management, Trading & Planning (selected), More, and Steve. Below the tabs, there are several sub-menus: Forecasts, Production Models, Stock Manager, Price Files, Costs, Action Logs, and Admin. The main area contains a filter section with 'Between Dates', 'Site' (All), 'User' (All), 'Product Category / Type' (All), and 'Forecast Type' (Purchasing). Below the filters are buttons for 'Add New', 'Delete Selected', 'Update Dates', 'Request Data', and 'Export Selected'. A search bar is also present. The main table lists forecasts with columns for Site, Forecast Name, Forecast Type, Product Category / Type, User, Date Range, Last Modified, and a 'View / Edit' button. The 'View / Edit' button for the first forecast is highlighted with a red box.

Site	Forecast Name	Forecast Type	Product Category / Type	User	Date Range	Last Modified	View / Edit
Group	Pork Raw Material Forecast	Purchasing	Meat & Poultry - Pork	Steve Jones	20/05/2020 - 10/06/2020	20/05/2020 08:29:50	View / Edit
Group	Chicken purchasing forecast (How many chickens can we buy for production from suppliers?) Testing we input what we need first	Purchasing	Meat & Poultry - Chicken	Steve Jones	21/11/2019 -		View / Edit

Step 3: Adjust the **Display From** and **Display To** dates to the date range you wish to upload the forecast for. In the **Display** dropdown select the increments you would like to upload the forecast in, then select **Update**.

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

Planning Tool - Pork Raw Material Forecast ← Back

Step 1: Forecast Information Update Forecast Information

Site	Group	Forecast Type	Purchasing
Product Category / Type	Meat & Poultry - Pork		
Suppliers	All Suppliers		

Step 2: Start Date / Display

Display From	20/05/2020	Display	Weekly	Update
Display To (optional)	10/06/2020	Group Products By	None	

Step 4: Download the blank import sheet by selecting **Import Forecasts** and **Select From Import Sheet**.

Planning Tool - Pork Raw Material Forecast ← Back

Step 1: Forecast Information Update Forecast Information

Site	Group	Forecast Type	Purchasing
Product Category / Type	Meat & Poultry - Pork		
Suppliers	All Suppliers		

Step 2: Start Date / Display

Display From	20/05/2020	Display	
Display To (optional)	10/06/2020	Group Products By	

Step 3: Product Forecasts

Import Product Forecasts

When entering data into the Excel template, please:

- Enter product codes vertically below 'Product Code' in the first column
- Enter dates horizontally after 'Product Code', in the format of dd/mm/yyyy
- Do not rename the worksheet
- Do not insert additional sheets into the workbook

Select File: No file chosen

Overwrite Data:

If selected, volumes of products which are not contained in the import sheet will be removed, i.e. they will return to 0 volume...

Step 5: In the exported spreadsheet input the article code in the first column, then on the date headed columns add in the forecasted kg.

	A	B	C	D
1	Product Code	22/06/2020	29/06/2020	06/07/2020
2	52	1000	500	
3	76	3000		

Step 6: Once the forecast spreadsheet is complete, select **import forecast** the **From Import Sheet**. Select **Choose File** to select excel file. Update **Re-Open Forecast Confirmations** toggle to **Yes**, this will notify suppliers that the forecast has been updated. For the **Due Date** select the date which suppliers are required to respond to the forecast by and select **Import**.

Import Product Forecasts

- Do not insert additional sheets into the workbook

Select File No file chosen

Overwrite Data No

Re-Open Forecast Confirmations Yes

Due Date 22/06/2020 09:00

6. Reviewing Forecasts

6.1. Viewing Forecasts

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Update the Forecast by selecting **View/Edit**

News & Statistics ▾ Supplier Approval ▾ Quality Management ▾ Trading & Planning ▾ More ▾ Steve ▾

Planning Tool

Forecasts ▾ Production Models ▾ Stock Manager ▾ Price Files ▾ Costs ▾ Action Logs ▾ Admin ▾

Between Dates: [] [] Site: All ▾ User: All ▾ Product Category / Type: All ▾ Forecast Type: Purchasing ▾ Filter Clear Filters

Add New Delete Selected Update Dates Request Data Export Selected Search Forecasts...

Site	Forecast Name	Forecast Type	Product Category / Type	User	Date Range	Last Modified		
Group	Pork Raw Material Forecast	Purchasing	Meat & Poultry - Pork	Steve Jones	20/05/2020 - 10/06/2020	20/05/2020 08:29:50	Share (1) ▾	View / Edit
Group	Chicken purchasing forecast (How many chickens can we buy for production from suppliers?) Testing we input what we need first	Purchasing	Meat & Poultry - Chicken	Steve Jones	21/11/2019 -		Share (2) ▾	View / Edit

You will be redirected to forecast.

Planning Tool - Purchasing Forecast ← Back

Step 1: Forecast Information Update Forecast Information

Site: [] Group: [] Forecast Type: Purchasing

Product Category / Type: Meat & Poultry

Suppliers: All Suppliers

Step 2: Start Date / Display Update

Display From: 22/06/2020 [] Display: Weekly ▾

Display To (optional): 10/07/2020 [] Group Products By: None ▾

Step 3: Product Forecasts

Add New Delete Selected Send Volumes to Template Export Forecasts Import Forecasts Toggle Products

This is the volume which has already been assigned in through long term contracts / negotiations / cost models

Total required minus any assigned volumes

This is the volume which has been forecasted

Product	22/06/2020 - 28/06/2020			29/06/2020 - 05/07/2020		
	Required	Assigned	Required Remaining	Required	Assigned	Required Remaining
052 - Pork Knuckle	2,000	0	2,000	500	0	1,500
076 - Pork HAM	3,000	0	3,000	1,000	0	2,000
Totals	5,000	0	5,000	1,500	0	3,500

Clicking on the assigned volume will show details in a pop out window of where the volume has been assigned.

6.2. Exporting Snapshots

This provides the ability track changes to forecasted volumes over a selected timeframe

Step 1: Sign in to Foods Connected and select Trading & Planning then select Forecasts.

Step 2: Update the Forecast by selecting View/Edit

The screenshot shows the 'Planning Tool' interface. At the top, there are navigation tabs: News & Statistics, Supplier Approval, Quality Management, Trading & Planning, More, and Steve. Below these are various tool icons: Forecasts, Production Models, Stock Manager, Price Files, Costs, Action Logs, and Admin. A filter bar includes 'Between Dates', 'Site' (All), 'User' (All), 'Product Category / Type' (All), and 'Forecast Type' (Purchasing). Below the filter bar are buttons for 'Add New', 'Delete Selected', 'Update Dates', 'Request Data', and 'Export Selected'. A search bar is labeled 'Search Forecasts...'. The main table lists forecasts with columns for Site, Forecast Name, Forecast Type, Product Category / Type, User, Date Range, Last Modified, and actions like 'Share' and 'View / Edit'. The 'View / Edit' button for the 'Pork Raw Material Forecast' is highlighted with a red box.

Step 3: Select Export Forecast and Select Export Snapshot. Select Snapshot Date and the period which you would like to track changes and select Export.

The screenshot shows the 'Export Forecast Snapshot' dialog box. It has a title bar 'Export Forecast Snapshot' and a close button. The main content area contains instructions: 'Choose a Snapshot Date, and a history of changes to the required volumes of each product/period on or before the snapshot date will be exported. You may also choose a period of the forecast that you wish to export.' Below this are three fields: 'Snapshot Date' (15/06/2020), 'Start Period' (22/06/2020), and 'Last Period' (13/07/2020). At the bottom are 'Cancel' and 'Export' buttons. Two callouts are present: one pointing to the 'Snapshot Date' field with the text 'start date from which the change is tracked', and another pointing to the 'Start Period' and 'Last Period' dropdowns with the text 'forecast date range for which changes are tracked'. The 'Export' button is highlighted with a red box.

6.3. Exporting Forecasts

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Select forecasts which you would like to export and select **Export Selected**

The screenshot shows the 'Planning Tool' interface. At the top, there are navigation tabs: Forecasts, Production Models, Stock Manager, Price Files, Costs, Action Logs, and Admin. Below this is a filter section with 'Between Dates', 'Site' (All), 'User' (All), 'Product Category / Type' (All), and 'Forecast Type' (Purchasing). There are 'Filter' and 'Clear Filters' buttons. Below the filter section is a toolbar with buttons: Add New, Delete Selected, Update Dates, Request Data, and Export Selected. The 'Export Selected' button is highlighted with a red box. Below the toolbar is a table of forecasts.

<input type="checkbox"/>	Site	Forecast Name	Forecast Type	Product Category / Type	User	Date Range	Last Modified		
<input type="checkbox"/>	Group	Pork Raw Material Forecast	Purchasing	Meat & Poultry - Pork	Steve Jones	20/05/2020 - 10/06/2020	23/06/2020 14:06:29	Share (1)	View / Edit
<input type="checkbox"/>	Group	Chicken purchasing forecast (How many chickens can we buy for production from suppliers?) Testing we input what we need first	Purchasing	Meat & Poultry - Chicken	Steve Jones	21/11/2019 -		Share (2)	View / Edit

7. Sending Volumes To Negotiation Templates

Step 1: Sign into Foods Connected and select **Trading & Planning** then select **Forecasts**.

Step 2: Update the Forecast by selecting **View/Edit**

The screenshot shows the 'Planning Tool' interface, similar to the previous one. The 'View / Edit' button for the first forecast row is highlighted with a red box. The table data is as follows:

<input type="checkbox"/>	Site	Forecast Name	Forecast Type	Product Category / Type	User	Date Range	Last Modified		
<input type="checkbox"/>	Group	Pork Raw Material Forecast	Purchasing	Meat & Poultry - Pork	Steve Jones	20/05/2020 - 10/06/2020	20/05/2020 08:29:50	Share (1)	View / Edit
<input type="checkbox"/>	Group	Chicken purchasing forecast (How many chickens can we buy for production from suppliers?) Testing we input what we need first	Purchasing	Meat & Poultry - Chicken	Steve Jones	21/11/2019 -		Share (2)	View / Edit

Step 3: Select Volumes to Template

Planning Tool - Purchasing Forecast ← Back

Step 1: Forecast Information Update Forecast Information

Site	Group	Forecast Type	Purchasing
Product Category / Type	Meat & Poultry		
Suppliers	All Suppliers		

Step 2: Start Date / Display Update

Display From	22/06/2020	Display	Weekly
Display To (optional)	10/07/2020	Group Products By	None

Step 3: Product Forecasts

Add New Delete Selected **Send Volumes to Template** Export Forecasts Import Forecasts Toggle Products

Step 4: Enter Negotiation template details and select Send

Send Remaining Volume to Template

Send to: Existing template New template

Template Type: Purchasing Template

Select Template: Template Name

Volumes: Send full required volumes

Products: Automatically add new products to template Existing products only (Already in template)

Send Totals/Date Ranges: Overall Total Date Ranges

Close **Send**

Volumes can be sent to an existing template or a new template can be created

There is the option to send the total forecast volumes or send only the required remaining

Select to add products which aren't in current negotiation template

Send total volume for displayed forecast period or select a specific date range