TRACELINK UNIVERSITY

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# Forecast plans

Forecast plans allow buyers (e.g. pharmaceutical manufacturer) to communicate with their suppliers (e.g. CMOs and raw material vendors) about quantities and the schedule of products they plan to purchase in the future.

## Create and submit forecast plans

Perform this task to create and submit new forecast plans. Additionally, suppliers can begin work on a forecast plans and save it for completion at a later time.

### Create and submit a forecast plans

Perform this task to create and submit new forecast plans.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select one of the following menu items depending on the orchestration used:
    - Select

      Manufacturing - Customer

      from the left menu.
    - Select

Commerce - Customer

from the left menu.

Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   Forecast Plans

   .
5. Select the New button.
6. On the New Forecast Plan screen, fill in the following fields:
   a. Schedule Number field – A unique identifier assigned to a forecast plan schedule.
   b. Schedule Version field – The version number of the forecast plan schedule.
   c. Schedule Type field – The type of the forecast plan schedule.
   d. Date Created field – The date when forecast plan transaction is created.
7. Select the Save button.

   The screen refreshes with the saved forecast plan in the draft state and with the required sections populated.
8. Select the Edit button.
9. In the Transaction Information section, select Submitted from the Process Status drop drown.
10. On the Forecast Plan Information section, fill in the following fields:
    a. Schedule Number field – A unique identifier assigned to a forecast plan schedule. This field auto populates the value entered on the New Forecast Plan screen.

b. Schedule Version field – The version number of the forecast plan schedule.
c. Schedule Type field – The type of the forecast plan schedule.
d. Date Created field – The date that the forecast plan is created on.
e. Delivery Scheduled Date field – The scheduled delivery date for the inventory requested by the customer.
f. Scheduled Quantity Type field – The type of quantities in a scheduled forecast plan.
g. Action drop-down – A brief description stating the purpose of the transaction.

11. In the

    Customer and Supplier

    section, fill in the following fields under

    Customer

    group:

    a. Company type-ahead field – The name of the company or location receiving the forecast. This field pulls from the Owner's company and location master data.

       The remaining Customer fields are auto populated with the values from the company or location's master data entry. If the name of the company is not present in the Owners master data, the company name must be entered manually.

    b. Address 1 field – The address of the particular location.
    c. Address 2 field – Any additional address information.
    d. Country drop-down – The two-letter country code with country name for this location.

e. State field – The state or region for this location.
f. City field – The city for this location.
g. Postal Code field – The postal code for this location's main address.
h. Contact Telephone Number field – The company or location's phone number.
i. Contact Fax Number field – The company or location's fax number
j. Party ID Type drop-down – The identifier type used for this company or location.
k. Party ID Value field – The value associated with the identifier type.

12. In the

    Customer and Supplier

    section, fill in the following fields under

    Supplier

    group:

    a. Company type-ahead field – The name of the company or location supplying the forecast. This field pulls from the Owner's company and location master data.

       The remaining customer fields are auto populated with the values from the company or location's master data entry. If the name of the company is not present in the Owners master data, the company name must be entered manually.

    b. Address 1 field – The address of the particular location.
    c. Address 2 field – Any additional address information.
    d. Country drop-down – The two-letter country code with country name for this location.
    e. State field – The state or region for this location.

  f. City field – The city for this location.
  g. Postal Code field – The postal code for this location's main address.
  h. Contact Telephone Number field – The company or location's phone number.
  i. Contact Fax Number field – The company or location's fax number
  j. Party ID Type drop-down – The identifier type used for this company or location.
  k. Party ID Value field – The value associated with the identifier type.

13. In the Ship to Location and Ship From Location section, in the Ship to Location group fill in the following fields:
    a. Company type-ahead field – The name of the company location where actual goods will be shipped by supplier. This field pulls from the Owner's company and location master data.

       The remaining Ship to Location fields in the section are auto populated with the values from the company or location's master data entry. If the company name is not present in the Owners master data, the company's name must be entered manually.
    b. Address 1 field – The address of the particular location.
    c. Address 2 field – Any additional address information.
    d. Country drop-down – The two-letter country code with country name for this location.
    e. State field – The state or region for this location.
    f. City field – The city for this location.
    g. Postal Code field – The postal code for this location's main address.
    h. Contact Telephone Number field – The company or location's phone number.
    i. Contact Fax Number field – The company or location's fax number
    j. Party ID Type drop-down – The identifier type used for this company or location.
    k. Party ID Value field – The value associated with the identifier type.

14. In the Ship to Location and Ship From Location section, in the Ship From Location group fill in the following fields:
    a. Company type-ahead field – The name of the company location where actual goods will be shipped from by the supplier. This field pulls from the Owner's company and location master data.
       The remaining Ship From Location fields in the section are auto populated with the values from the company or location's master data entry. If the company name is not present in the Owners master data, the company's name must be entered manually.
    b. Address 1 field – The address of the particular location.
    c. Address 2 field – Any additional address information.
    d. Country drop-down – The two-letter country code with country name for this location.
    e. State field – The state or region for this location.
    f. City field – The city for this location.
    g. Postal Code field – The postal code for this location's main address.
    h. Contact Telephone Number field – The company or location's phone number.
    i. Contact Fax Number field – The company or location's fax number
    j. Party ID Type drop-down – The identifier type used for this company or location.
    k. Party ID Value field – The value associated with the identifier type.
15. In the **Line Items** section:
    a. Select the Add + icon. At least one line item is required to submit a purchase order.
    b. In the New Line Items panel, fill in the following fields under Line Item Information:
       i. Line field – The number to identify the line item by (e.g. 50).
       ii. Item field – The name of the product. If the user enters an item code instead, the field automatically displays the corresponding item

name.

The Item Code Type, Item Code Value and Description fields are auto populated with the values from the Owner's product master data entry for the product. If the product name is not present in the Owner's product master data then the product name must be entered manually.

iii. Item Code Type drop-down – The product code type (e.g. IN-Product Code).
iv. Item Code Value field – The product code.
v. Description field – A brief description of the product. If the description is not present in the Owners product master data then the description must be entered manually.
vi. Unit Price field – The price that each unit of the product sells for.
vii. Net Price field – The total cost of the line item.
viii. Quantity field – The quantity of item selected or provided.
ix. Unit of Measure drop-down – The unit in which the line item is measured.
x. Lot Number field - The lot number of the line number.
xi. Unloading Point field - The preferred location for unloading the inventory.
xii. Consumption Point field – The designated location for inventory consumption.
xiii. Plant Identifier field – The unique identifier Plant number for the consumption point location.
xiv. Purchase Order Date field – The date when the purchase order was initiated.
xv. Estimated Delivery Date field – The date when the delivery is expected.
xvi. Ship Not Before Date field - The date that the delivery can not be shipped before.

xvii. Ship Not After Date field - The date that the delivery can not be shipped after.
xviii. Line Notes field – Additional information about the line item being added.

c. Select Apply.

The new line item is added to the purchase order.

d. Select a item line row and then select the branch icon and fill in the following fields under Schedule Information:
   i. Contract Number field – The contract number on Line Item.
   ii. Shelf Life Value field – The shelf life value of the entered product on Line Item.
   iii. Forecast Qualifier field – The forecast qualifier (confidence level) on Line Item
   iv. Forecast Period field – The forecast period on Line Item.
   v. Reason for Order field – The reason for ordering on Line Item
   vi. Transport Description field – The transport description of the Line Item.
   vii. Unit of Measure drop-down – The unit in which the line item is measured.
e. Select Apply.

The schedule information is added to line item.

f. Select the line item row drop down to view the schedule information in a table.
g. Select a schedule information row and then select the branch icon and fill in the following fields under Location Quantity Information:
   i. Start Date field – The start date for the Shipment / Delivery Activity requested by the customer.

ii. End date drop-down – The end date for the activity defined by the shipment or delivery activity requested by the customer.
iii. Destination Location Type field – The company or location identifier type.
iv. Destination Location Value field – The location identifier.
v. Location Quantity Value field – The quantity of product reported for the location.
vi. Unit of Measure drop-down – The unit or basis for measurement code.
vii. Purchase Order Date field – The date when the purchase order was initiated.
viii. Estimated Delivery Date field – The date when the delivery is expected.
ix. Ship Not Before Date field - The date that the delivery can not be shipped before.
x. Ship Not After Date field - The date that the delivery can not be shipped after.

h. Select Apply.

   The destination location quantity information is added to delivery information table.

i. Select the schedule information row drop down to view the destination location quantity information in a table.

16. In the Notes section, enter any additional comments or instructions.
17. To submit the forecast plan:

    To save the forecast plan in a Draft state and finish it later, ensure the Move To button is not selected and then select the Save 

 button in the draft state.

    a. Select the Move To button at the top of the screen.

The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

b. Select the Save button.

The forecast plan is submitted.

**Tips**

- Select the Add + icon, to add a new line item, where available.
- Select the Delete − icon, to remove an individual line item, where available.
- Select the branch icon, to add a new line item in the inserted table, where available.
- New forecast plans can also be created by selecting the New + New button on the Forecast Plans Details screen for an existing forecast plan.

### Submit a draft forecast plan

Complete and submit a saved forecast plan in the draft state.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select one of the following menu items depending on the orchestration used:
   - Select

     Manufacturing - Customer

     from the left menu.

- Select

  Commerce - Customer

  from the left menu.
  Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   Forecast Plans

   .
5. Select the Filter Filter button to find forecast plans in Draft state.
6. Select the Schedule Number link in the results table.
7. Select the Edit Edit button.
8. In the Transaction Information section, select Submitted from the Process Status drop drown.
9. Confirm the price sales catalog details and select the Edit icon associated with that line item to modify the fields if required.
10. Select the Move To button at the top of the screen.

    The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

11. Select the Save button.

    The forecast plan is submitted.

**Tips**

- Select the schedule number row and then select the Delete icon on the top of the Search Forecast Plans screen, to delete a forecast plan in draft state.

A deleted transaction cannot be retrieved.

## Search and view forecast plans

### Search for and view forecast plans

Perform this task to search for and view the details of the forecast plans sent or received by customers or suppliers. Viewing the details of a forecast plans enables customers or suppliers to quickly access order information (e.g. the quantity for each line item in an order) in TraceLink without having to search through the actual B2B message.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select one of the following menu items depending on the orchestration used:
    - Select Manufacturing - Customer or Manufacturing - Supplier from the left menu.
    - Select Commerce - Customer or Commerce - Supplier from the left menu.

    Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
4. Select

    Forecast Plans

    .

5. Select the Filter 

 button.
6. In the Filters panel, fill in one or more of the following fields to filter the results:
    - State drop-down – The state of the forecast plan:
        - Draft – The transaction is in the draft state.
        - Submit – The transaction has been created.
        - Processing – The application is getting ready to handle incoming transactions by doing some initial tasks, such as copying the files it receives.
        - Processed – The application changes the standard information into a format that is easy to use and specific to your transaction.
        - Preparing to Send – The application is getting ready to send out a transaction and is doing some initial tasks, like copying the necessary information for the process.
        - Sending –The application sends out business transactions to the buyer or supplier.
        - Sent – The transaction is successfully completed and shared with the receiving party.
    - Schedule Number field – A unique identifier assigned to a scheduled forecast plan.
    - Schedule Version field – The version number of the scheduled forecast plan.
    - Schedule Type field – The type of the scheduled forecast plan.
    - Receiver type-ahead – Displays only if the menu item is

      Sent Forecast Plans

      . for Manufacturing. The name of the company the forecast plans was sent to.
      If the name of the company is not present in the Owners master data

then the company's name must be entered manually.

- Sender type-ahead – Displays only if the menu item is

  Received Forecast Plans

  . for Manufacturing. The name of the company the forecast plan was received from.
  If the name of the company is not present in the Owner's master data then the company's name must be entered manually.
- Customer type-ahead – Displays only if the menu item is

  Sent Forecast Plans

  . for Commerce. The name of the company the forecast plans was sent to.
  If the name of the company is not present in the Owners master data then the company's name must be entered manually.
- Supplier type-ahead – Displays only if the menu item is

  Received Forecast Plans

  . for Commerce. The name of the company the forecast plan was received from.
  If the name of the company is not present in the Owner's master data then the company's name must be entered manually.
- Last Modified field – The period of time in which the forecast plan was last updated:
  - Today – The transaction was modified within the last few hours.
  - Yesterday – The transaction was updated within the past 24 hours.
  - Last Week – The transaction was modified in the last 7 days.
  - Last Month – The transaction was modified in the last 30 days.
  - Last 3 Months – The transaction was modified in the last 90 days.
  - Last 6 Months – The transaction was modified in the last 180 days.

- Custom Range – Select a specific period of time that the transaction was modified in from the calendar.

7. Select Apply.

   A list of forecast plans displays based on the filter results.

8. Select the link for the forecast plan from the results table.

   The View Forecast Plans screen displays.

9. To view all fields for each line item, select the View icon on the

   Advance Shipment Notices

   Details screen.

# Reprocess and resubmit forecast plans

### Reprocess forecast plan

After the forecast plans is submitted, the user might encounter an error and the processed status will be set to Paused With Error. Use the following procedure to resolve any error messages encountered while submitting a forecast plans.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select one of the following menu items depending on the orchestration used:
   - Select

     Manufacturing - Customer

from the left menu.

- Select

  Commerce - Customer

  from the left menu.

  Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   Forecast Plans

   .
5. Select the Filter Filter button to find the forecast plans in Processing, Processed, Preparing to Send, or Sending state.
6. Select Schedule Number link in the results table.
7. View the following fields for error in the Transaction Information section:
   - Process Status - Displays the status of the submitted transaction.
   - Last Transaction Error - Displays the error message.
8. Select the Edit Edit button..
9. In the Transaction Information section, select Submitted from the Process Status drop drown.
10. Select the Save button.

    The forecast plan request is moved from Processing state to Sending state indicating that the forecast plan is submitted successfully.

⚠ Do not select the Move To button, as it will cause the transaction to skip a workflow state, preventing successful delivery.

### Resubmit forecast plans

If a transaction is successfully sent to a partner but an issue occurs on the partner's side (e.g. in their ERP system), the sender can avoid re-entering all the details by rolling back to a previous workflow state and resending the transaction, thus saving time and effort for both parties.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select one of the following menu items depending on the orchestration used:
    - Select

      Manufacturing - Customer

      from the left menu.
    - Select

      Commerce - Customer

      from the left menu.

      Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
4. Select

   Forecast Plans

   .
5. Select a Schedule Number in Sent state.
6. Select the Edit 

button.

   The state of the forecast plan is automatically moved to Sending state.
7. Select the Move To button at the top of the screen.

The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

8. Select the Save button.

   The forecast plan is submitted.

The statues of the forecast plan moves to Sent state.