User Manual
Aptean Food and Beverage ERP

Forecasting

Product Documentation



aptean

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Introduction

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Release notes

Article • 6/24/2026 • 1 min read

To view what's new or changed in each release of the Aptean Forecasting extension, select the specific release version.

Date	Release version	Description
June 2026	2601.1.0.0	Minor release
April 2026	2601.0.0.0	Major release
February 2026	2504.3.0.0	Stability release
January 2026	2504.2.0.0	Stability release
November 2025	2504.1.0.0	Stability release
October 2025	2504.0.0.0	Feature release
September 2025	2503.2.0.0	Stability release
August 2025	2503.1.0.0	Stability release
July 2025	2503.0.0.0	Feature release
June 2025	2502.2.0.0	Stability release
May 2025	2502.1.0.0	Stability release
May 2025	2502.0.0.0	Feature release
April 2025	2501.0.0.0	Feature release
March 2025	2401.7.0.0	Stability release
March 2025	2401.6.0.0	Stability release
February 2025	2401.5.0.0	Stability release
September 2024	2401.4.0.0	Stability release
July 2024	2401.3.0.0	Stability release
May 2024	2401.2.0.0	Stability release
March 2024	2401.1.0.0	Stability release



February 2024	2401.0.0.0	Feature release
February 2024	1.5.141773.0	Stability release
July 2023	1.4.108454.0	Stability release
February 2023	1.3.78908.0	Stability release
January 2023	1.2.76299.0	Feature release
December 2022	1.1.72919.0	Feature release
September 2022	1.0.60894.0	Initial release



2601.1.0.0

Release Note • 6/24/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
373390	An issue occurs when creating a production order from the **Daily Forecasting** page, where routing lines do not receive a starting date and ending date, causing the production order to display incorrectly in shop floor.

2601.0.0.0

Release Note • 4/22/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Forecasting extension, you can select the *Order Qty* option in the **Historical Base** field on the **Daily Forecasting Code** page as the source for forecast calculation.When you select this option, the system calculates forecast history using the **Shipment Date** field value from the **Sales Order** page and aggregates quantities based on the following fields:

- Customer No.
- Item No.
- Variant Code
- Unit of Measure
- Location Code

UI/UX changes

- The *Order Qty* option has been added to the **Historical Base** field on the **Daily Forecast Code** page.
- A notification is displayed when **Historical Base** is changed to *Order Qty*.

2504.3.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
352738	The system incorrectly calculates the demand forecast entries on the **Demand Forecast Overview** page when the **Customer Filter** field value is updated and deleted.

2504.2.0.0

Release Note • 1/28/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
340181	The system fails to update date formulas in the **Forecast Date** field on the **Calculate Daily Forecast** page when running the report *71159918* via the **Job Queue Entries** page, causing the date to remain static across recurring runs.

2504.1.0.0

Release Note • 11/26/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Forecasting extension,

- The translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.
- You can select a value in the **Reordering Policy** field when the **Daily Forecasting Code** field on the **Item Card** page contains a value. The system displays a notification message when both fields have values.

Resolved issues

The following issues have been resolved in this release.

ID	Description
330643	An error occurs when executing the **Create Production Order** action on the **Daily Forecast** page for an item whose production BOM contains another BOM.
339139	The system fails to restrict updating the invalid **Daily Forecasting Code** field value when the **Reordering Policy** field value is left blank on the **Item Card** page.

2504.0.0.0

Release Note • 10/22/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
327849	The system fails to process the date formulas entered in the **Forecast Date** field on the **Calculate Daily Forecast** page when the **Object ID to Run** field value is set to *71159918* on the **Job Queue Entry Card** page.
330642	The system incorrectly updates the second calculated line on the **Lines** FastTab after executing the **Calculate Projected Forecast** action on the **Daily Forecast** page.

2503.2.0.0

Release Note • 9/24/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
316316	The system fails to display shortage lines on the **Daily Forecast** page when the **Show Shortage** toggle is turned on. This issue occurs if the forecast is calculated after all previous records have been deleted.

2503.1.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Forecasting extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.

2503.0.0.0

Release Note • 7/2/2025 • 1 min read

Features

With the feature added in this release of the Aptean Forecasting extension, the system includes performance improvements for calculating the projected forecast. You can use the **Forecast Calculation Method** field value on the **Forecast Setup** page to define when the system recalculates the projected forecast. This feature addresses the issue reported in bug ID #296131.

> **Note**
>
> When the **Show Shortage** toggle on the **Daily Forecast** page is turned on, the system automatically recalculates the projected forecast each time a filter is changed.

UI/UX changes

The **Forecast Setup** page has been added.

Resolved issues

The following issue has been resolved in this release.

ID	Description
296131	The performance issues occur when calculating the projected forecast on the **Daily Forecast** page.



2502.2.0.0

Release Note • 6/4/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
288027	The system fails to filter and display entries with shortages when the **Show Shortage** toggle on the **Daily Forecast** page is turned on. This issue occurs when the initially selected forecast date has no entries and the date is then updated that does have entries with shortages.

2502.1.0.0

Release Note • 5/27/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Forecasting extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.

2502.0.0.0

Release Note • 5/7/2025 • 1 min read

Features

With the feature added in this release of the Aptean Forecasting extension, you can configure the number of future days for which sales order quantities are included and displayed on the **Daily Forecast** page, providing greater control and visibility into upcoming demand. For more information, see Daily forecast and View daily forecast

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Future Sales Order Date Formula** field has been added to the **Daily Forecast Codes** page.
- The **Qty. on Future Sales Order** field has been added to the **Daily Forecast** page.



2501.0.0.0

Release Note • 4/23/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Forecasting extension,

- The system updates the **Customer No.** field value on the **Demand Forecast Entries** page based on the value entered in the **Customer Filter** field on the **Demand Forecast Overview** page.
- When you navigate to the **Demand Forecast Overview** page, the system automatically clears any previously entered values in the following filter fields:
  - Location Filter
  - Variant Filter
  - Date Filter
  - Customer Filter
  - Entry Type Filter
- You can edit the lines on the **Demand Forecast Matrix** FastTab of the **Demand Forecast Overview** page only if the **Forecast Type** field value is set to *Component* and the **Customer No.** field value is left blank. This configuration allows the system to automatically update the related fields on the **Demand Forecast Entries** page based on the values you enter on the **Demand Forecast Matrix** FastTab of the **Demand Forecast Overview** page.

2401.7.0.0

Release Note • 3/17/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean Forecasting extension, you can:

- Define whether the projected forecasting should be based on sales value instead of the existing method, which uses the highest value. To know more, see Calculation based on forecast method.
- View the projected forecast for different customers in each line of the **Daily Forecast Entries** page associated with an item.
- Create daily forecast entries for a new customer with no forecast history after a sales line is created for an item with a daily forecasting code, and a shipment date matching the forecast date by executing the **Calculate Projected Forecast** action.
- Directly add an entry to the **Daily Forecast Entries** page when the forecast for an item is already determined prior to creating a sales order using the **Create Daily Forecast Entry** action.
- View a confirmation message if you run the **Calculate Daily Forecast** action, after manually adding an entry on the **Daily Forecast Entries** page using the **Create Daily Forecast Entry** action.

UI/UX changes

The following UI/UX changes have been made to the **Daily Forecast Entries** page in this release.

- The **Create Daily Forecast Entry** action has been added.
- The **Forecast Method Type** field has been added.
- The **Projected Forecast(UoM)** field has been added.

> **Note**
>
> The UoM value is based on the sales unit of measure configured in the respective item card and may differ from the UoM of the displayed daily forecast entries.

- The **Manually Created** checkbox has been added.



2401.6.0.0

Release Note • 3/12/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
274386	The system fails to filter the lines on the **Daily Forecast** page according to the selected field filters.

2401.5.0.0

Release Note • 2/4/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean Forecasting extension,

- You can link the calculated forecast with the **Batch** and **Item Category** fields when calculating the daily forecast for an item. To know more, see Item Categories
- The system displays the user and session ID of all users working with the same batch name.
- When a job queue is used, records are created under the respective batch name. The system first checks the items linked to that batch name, verifies the associated item category code, and filters the items based on the item category code linked to the respective items
- You can select multiple lines on the **Daily Forecast** page and calculate values using the following actions:
  - Calculate Qty. to Produce
  - Empty Qty. to Produce

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Simultaneous Users** FactBox has been added to the **Daily Forecast** page.
- The **Batch Name** field has been added to the **Daily Forecast** and **Item Category** pages.
- The **Item Category Code** field has been added to the **Calculate Daily Forecast** page.
- The **Calculate Daily Forecast** and **Adjust Forecast** actions have been removed from the **Daily Forecast** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
263451	The system does not display an error message when the **Item Category Code** field is linked to the batch name but not linked to the **Item** field.

2401.4.0.0

Release Note • 9/2/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Forecasting extension, modifications have been made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.
- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

> **Note**
>
> The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.



2401.3.0.0

Release Note • 7/22/2024 • 1 min read

Enhancements/Modifications

The translation files for the Swedish (sv-SE) language have been updated with standard texts for better readability.

2401.2.0.0

Release Note • 5/9/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
201459	An error occurs upon selecting **OK** when the **Quantity Calculation** field is set as *Average* on the **Import history into Demand Forecast** card page, preventing the creation of the associated entries on the **Demand Forecast Overview** page.

2401.1.0.0

Release Note • 3/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
184142	When setting a filter on the **Demand Forecast Overview** page through the **Import history into Demand Forecast** page, the filter validation doesn't transfer accurately. The report runs without **Item Filter** criteria applied, leading to incorrect **Demand Forecast Entries** being displayed.

2401.0.0.0

Release Note • 2/21/2024 • 1 min read

Features

With the feature added in this release of the Aptean Forecasting extension, you can set specific Item and Location filters on the **Demand Forecast Overview** page for targeted analysis. For more information, see Demand Forecasts.

UI/UX changes

The **Forecast Location Code** field on the **Apply to Forecast** group is renamed to **Location Filter** and moved to the **Transaction History** group on the **Options** FastTab of the **Import History into Demand Forecast** page.



1.5.141773.0

Release Note • 2/7/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
173329	The Rounding Precision value on the relevant **Item Forecast Variables** page and in the **Import history into Demand Forecast** report is not considered in the calculations for the quantity displayed on the **Demand Forecast Matrix** table.
176109	An error occurs if the item shipped quantity value is in decimal on the **Demand Forecast Matrix** table, which is populated when executing the **Import History** action on the **Demand Forecast Overview** page.

1.4.108454.0

Release Note • 7/12/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
129265	If the user enters a date for a specific item on the **Demand Forecast Matrix** FastTab of the **Demand Forecast Overview** page, the system prevents this and displays an error message. This occurs if the item has already been assigned a date for the future weeks.

1.3.78908.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

The Aptean Forecasting extension is now updated with minimal API to improve extensibility. The extensibility property applies to tables, pages, and other object types of this extension.

> **Note**
>
> Minimal APIs are a simplified approach for building fast HTTP APIs with ASP.NET Core. For more information, see Minimal APIs overview | Microsoft Learn.

1.2.76299.0

Release Note • 4/3/2023 • 1 min read

Features

With the features added in this release of the Aptean Forecasting extension, you can:

- Take opened/released sales orders for the relevant **Forecast Date** and **History Period** into account while calculating the **History** and **Forecast** values using the **Calculate Daily Forecast** and **Calculate Projected Forecast** functions on the **Daily Forecast** page. For more information, see Calculate Daily Forecast and Calculate Projected Forecast, Variance % and Shortage.
- Take posted sales shipments for the relevant **Forecast Date** into account while calculating the **History** and **Forecast** values using the **Calculate Daily Forecast** and **Calculate Projected Forecast** functions on the **Daily Forecast** page. For more information, see Calculate Daily Forecast and Calculate Projected Forecast, Variance % and Shortage.

1.1.72919.0

Release Note • 4/3/2023 • 1 min read

Features

With the features added in this release of the Aptean Forecasting extension,

- A new **Daily Forecast** feature has been added to the **Forecasting** extension.
- A new **Daily Forecast Code** page has been added, in which you can create a Daily Forecast Code to define the calculation method for a Daily Forecast item. For more information, see Create a Daily Forecast Code.
- A new **Daily Forecast Multiplier** page has been added, using which you can multiply the calculated Daily Forecast by linking the multiplier to the item and the customer to consider the increase or decrease in sales in a particular period. For more information, see Daily Forecast Multipliers.
- The new **Calculate Projected Forecast**, **Variance %**, and **Shortage** fields are added to the **Daily Forecast** page, using which you can calculate Projected Forecast, Variance % and Shortage of the items and create production orders for the items to compensate for the shortages. For more information, see Create production orders.



1.0.60894.0

Release Note • 4/3/2023 • 3 min read

Features

With the features added in this release of the Aptean Forecasting extension,

- A new **Customer filter** field is added on the **Demand Forecast Overview** page on the **General** FastTab, and on the **Demand Forecast Entries** page in the production forecast entry table. You can select the relevant customer by selecting the icon in the field. It helps in filtering the demand forecasts based on the customer you choose.
- A new **Entry Type filter** field is added on the **Demand Forecast Overview** page on the **General** FastTab, and on the **Demand Forecast Entries** page under the production forecast entry table. You can select the entry type from *All*, *Manual*, *Sales History*, *Component History*, and *Forecast Copy* by clicking the dropdown option in this field. It helps you in filtering the demand forecasts based on the entry type you choose. This field is filled with the *All* option by default.
- A new **Forecast Variables** action is added on the **Items** and **Item Card** page on the **Related** menu on the action bar, which navigates you to the **Item Forecast Variables** page. For more information, see Item Forecast Variables.
- The Copy Demand Forecast Entries functionality now allows you to use the copied data in the existing demand forecasts. For more information, see Copy Demand Forecast Entries.
- A new **Import History** action is added on the **Demand Forecast Overview** page in the **Actions** > **Functions** menu on the action bar which navigates you to the **Import history into Demand Forecast** page. For more information, see Import history into Demand Forecast.



Introduction

Article • 4/3/2023 • 1 min read

Forecasting helps you plan for the upcoming circumstances and keeps you ready to manage your business efficiently and economically to satisfy the demand.

The Aptean Forecasting (FOR) extension helps you to filter and import the records from the item ledger entries to the demand forecasts and allows you to create production forecast entries. For more information, see Import history into Demand Forecast.

It is possible to copy the data from the existing demand forecasts and use it to create a new one. You can also use the copied data to update the other existing demand forecasts. For more information, see Copy Demand Forecast Entries.



Setup

Article • 12/23/2024 • 1 min read

The following setup is required.

- Manage permission sets
- Set up forecast



Manage permission sets

Article • 12/23/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *FORECASTING70FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

The indirect permission set ID for this extension is *FORECASTBASIC70FDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see Assign permissions to users and groups.

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.
   The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
   The **User Card** page opens.
3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.



The associated fields are automatically updated based on the entered value. The user has the necessary permissions to use the features of the Aptean Forecasting extension, ensuring secure and role-based access.

Set up forecast

Article • 7/2/2025 • 2 min read

The **Forecast Setup** page defines the method used to calculate projected forecasts when filters are modified.

1. Select the Search icon , enter **Forecast Setup**, and then choose the related link.
   The **Forecast Setup** page opens.
2. On the **General** FastTab, in the **Forecast Calculation Method** field, select the option to define the method used to calculate the projected forecast.
   The available options are:
3. *Manual*: The system displays notification when you change filter on the page to recalculate projected forecast.
4. *On Change Filters*: The system displays confirmation message to recalculate projected forecast when you change filter.

You can also access this page through the notification on the **Daily Forecast** page, which appears when you modify filters and the **Forecast Calculation Method** field value is set to *Manual* on the **Forecast Setup** page. Additionally, you can choose to hide the notification.

> **Note**
>
> To view the notification on the **Daily Forecast** page, select or clear the *Recalculation of the Projected Forecast is required* value in the **Enabled** field on the **My Notifications** page.

Item forecast variables

Article • 4/3/2023 • 4 min read

You can raise or lower the quantity and round up the resulting quantity to the nearest multiple by providing values if the record of an item is listed on the **Item Forecast Variables** page. You can create only one record for an item with a blank variant code, and for every item/variant combination.

On the **Item Forecast Variables** page, fill in the fields as described in the following table:

Field	Description
Forecast Multiplier	Specifies the decimal value that you want to use to raise or lower the quantity by a particular factor. The default value of this field is *1.00*.
Rounding Precision	Specifies the decimal value to round up the resulting quantity to the nearest multiple. The default value of this field is *1.00*.

To set the item forecast variables:

1. Select the Search icon , enter **Items**, and then choose the related link.
   The **Items** page opens.
2. Select the item for which you want to set the forecast variables.
3. On the action bar, go to **Related** > **Forecast Variables**.
   The **Item Forecast Variables** page opens.
4. On the action bar, select **Edit List**.
5. In the **Forecast Multiplier** and **Rounding Precision** fields, specify the values.

> **Note**
>
> If the record for the specific item is not listed on the **Item Forecast Variables** page, you can enter the values of the **Forecast Multiplier** and **Rounding Precision** fields on the **Import history into Demand Forecast** page.



Demand forecasts

Article • 4/23/2025 • 2 min read

On the **Demand Forecast Overview** page, on the action bar, select **Actions** > **Functions** > **Import History** to open the **Import history into Demand Forecast** page.

The **Item Filter** and **Location Filter** fields on the **Import History into Demand Forecast** page inherit the values set in the **Item Filter** and **Location Filter** fields on the **General** FastTab of the **Demand Forecast Overview** page. This streamlines the reporting process.

The report data will also be visible on the **Demand Forecast Matrix** FastTab on the **Demand Forecast Overview** page. Click the AssistEdit button against the required value to view the **Item No.** and **Location Code** on the **Options** FastTab of the **Demand Forecast Entries** page.

The system automatically clears any previously entered values in the following filter fields on the **Demand Forecast Overview** page.

- Location Filter
- Variant Filter
- Date Filter
- Customer Filter
- Entry Type Filter

You can edit the lines on the **Demand Forecast Matrix** FastTab of the **Demand Forecast Overview** page only if the **Forecast Type** field value is set to *Component* and the **Customer No.** field value is left blank. This configuration allows the system to automatically update the related fields on the **Demand Forecast Entries** page based on the values you enter on the **Demand Forecast Matrix** FastTab of the **Demand Forecast Overview** page.



Copy demand forecast entries

Article • 4/3/2023 • 2 min read

Using this functionality, you can copy the data from an existing demand forecast and use it to create a new demand forecast or update the existing demand forecasts. When using these copied data in the demand forecasts, it automatically specifies the **Forecast Copy** entry type on the **Demand Forecast Entries** page.

To copy the demand forecast entry:

1. Select the Search icon , enter **Demand Forecasts**, and then choose the related link.
   The **Demand Forecasts** page opens.
2. Select the demand forecast from which you want to copy the data.
3. On the action bar, select the **Edit Demand Forecast** action.
   The **Demand Forecast Overview** page opens.
4. On the action bar, go to **Actions** > **Functions** > **Copy Demand Forecast Entries**.
   The **Copy Demand Forecast Entries** page opens.
5. Fill in all the necessary fields.
6. Select **OK**.
   A dialog appears with the following message:
   Do you want to copy the demand forecast?
7. Choose **Yes**.

Import history into demand forecast

Article • 4/3/2023 • 7 min read

Using this functionality, you can filter the records that you want to analyze from the item ledger entries and import these records into the relevant Demand Forecast. It will also create a new production forecast entry.

> **Note**
>
> The value in the **Entry Type** field should read **Sales History** for the newly created production forecast entries.

Options FastTab

In the **Transaction History** group, fill in the fields as described in the following table:

Field	Description
Analysis Date Filter	Specifies the start date and end date of the period. It helps in filtering the records created between the specified period from the item ledger entries.
Analysis Period Type	Specifies the period type based on how the data to is be separated in the **Demand Forecast Matrix** table. You can choose the period type from *Day*, *Week*, *Month*, *Quarter*, and *Year* by clicking the dropdown option in this field.
Item Unit of Measure To Use	Specifies the unit of measure type from which you want to get the records from the item ledger entries. You can choose either *Base* or *Sales* unit of measure by clicking the dropdown option in this field.
Forecast Type	Specifies the forecast type from which you want to get the records from the item ledger entries. You can choose either the *Sales Item* or *Component* forecast type by clicking the dropdown option in this field.
History Type	Specifies the history type from which you want to get the records from the item ledger entries. This field is editable only when you select the *Component* as the forecast type. Select the *Receipts Only* option to get only the purchase records from the item ledger entries. Select the *Usage Only* option to get only the consumption records from the item ledger entries.
Quantity Calculation	Specifies the calculation type that should be used to calculate the quantities. You can choose the calculation type from *Average*, *Low*, *High*, and *Total* by clicking the dropdown option in this field.

Calculate per Customer	Enables you to get the records from the item ledger entries based on the customer code and import those records into the production forecast entry. You can turn on this toggle only when you select the *Sales Item* as the forecast type. The **Customer No.** field on the **Demand Forecast Entries** page will be blank when this toggle is disabled.
Forecast Multiplier	Specifies the decimal value that you want to use to raise or lower the quantity by a particular factor. The default value of this field is *1.00*. The value in this field is used only when the record for the specific item is not listed on the **Item Forecast Variables** page.
Rounding Precision	Specifies the decimal value to round up the resulting quantity to the nearest multiple. The default value of this field is *1.00*.The value in this field is used only when the record for the specific item is not listed on the **Item Forecast Variables** page.
Spread Quantity Over Forecast Period	Enables you to divide the result of the obtained quantity among the destination forecast periods on the **Demand Forecast Matrix** table. The entire resulting value cannot be used in each destination forecast period.

In the **Apply to Forecast** group, fill in the fields as follows:

- The values in the following fields will be automatically updated based on the value in the relevant fields of the Demand Forecast header:
  - **Production Forecast Name**
  - **Forecast Location Code**
  - **Forecast Date Filter**
  - **Forecast Period**
- **Action Type**: Select the action type you want to perform to get the records from the item ledger entries.
  - *Append of Existing Forecast*: Select this option to get the relevant records from the item ledger entries and add those records to the relevant **Demand Forecast Matrix** table along with the existing records.
  - *Delete Existing Forecast*: Select this option to delete the existing records in the relevant **Demand Forecast Matrix** table and add the new records from the item ledger entries.
  - *Keep Only Manual Entries*: Select this option to maintain only the manually entered records and delete all other existing records in the relevant **Demand Forecast Matrix** table. It also adds new records from the item ledger entries.

To import history into Demand Forecast:



1. Select the Search icon , enter **Demand Forecasts**, and then choose the related link.
   The **Demand Forecasts** page opens.
2. Select the demand forecast which you want to import.
3. On the action bar, select the **Edit Demand Forecast** action.
   The **Demand Forecast Overview** page opens.
4. On the action bar, go to **Actions** > **Functions** > **Import History**.
   The **Import history into Demand Forecast** page opens.
5. Fill in all the necessary fields.
6. Select **OK**.

Daily forecast

Article • 4/22/2026 • 4 min read

The **Daily Forecast** feature helps you to predict the future production details using the past sales data of a particular period.

You can perform the following functions using this feature:

- Calculate a Forecast based on the sales history.
- Calculate a Projected Forecast based on the Forecast or actual sales figures.
- Calculate a shortage based on the projected forecast, inventory, and actual production plan.
- Calculate the quantity to produce, and you can update it.
- Create production orders based on the quantity produced.

To use the above functionality, you need to create Daily Forecast Code and assign it to the items.

Create a daily forecast code

You can create a daily forecast code and history period based on the below procedures:

1. Select the Search icon , enter **Daily Forecast Codes**, and then choose the related link.
   The **Daily Forecast Codes** list page opens.
2. On the action bar, select **New**.
   The **Daily Forecast Codes** page opens.
3. On the **General** FastTab, perform the following steps:
   a. In the **Code** field, enter a code for the Daily Forecast.
   b. In the **Description** field, enter a brief description of the **Daily Forecast Code**.
   c. In the **Rounding Precision** field, enter the number of decimal places you want to round up.
   The values in the **History** and **Forecast** fields are rounded up with respect to the decimal values in the Rounding Precision field.
   The sum of the percentage entered for the **Historical Period** is shown in the **Total Percentage** Field.
   d. In the **Future Sales Order Date Formula** field, enter a day, week, or year value to calculate the **Qty. on Future Sales Order** field value on the **Daily Forecast** page.

> **Note**
>
> The system sets the **Qty. on Future Sales Order** field value to blank if the **Future Sales Order Date Formula** field value is empty.

e. In the **Historical Base** field, select the basis for calculating historical values for the daily forecast. The available options are: The default value is *Shipped Qty*.

- *Order Qty*: The system calculates forecast history using the **Sales Order Lines** page.
- *Shipped Qty*: The system calculates forecast history using the **Posted Sales Shipment Lines** page.

The default value is *Shipped Qty*.

> **Note**
>
> - A notification is displayed when the **Historical Base** field value is changed to *Order Qty*.
> - When using the *Order Qty*, it is recommended not to invoice the order directly from the **Sales Order** page, as this deletes the sales order and results in no reference being available for forecasting calculation. To retain the sales order for forecasting purposes, ensure that invoicing is performed manually.

4. On the **Daily Forecast Calculation** FastTab, perform the following steps:

a. In the **Historical Period** field, enter a negative date formula. For example, **-2W**, which means two weeks before the forecast data. where, **W** denotes **Week**.

b. In the **Percentage** field, enter the percentage of sales occurred in the History Period.

> **Note**
>
> The value of the total percentage can also be more than 100%. If you delete a **Daily Forecast Code** from the **Daily Forecast Codes** page, the associated line entries are deleted.



Create daily forecast multipliers

Article • 4/3/2023 • 3 min read

You can create Daily Forecast Multipliers to change the calculated Forecast value to consider the sales promotions or reductions in a specific period. The below procedures describe how to create Daily Forecast Multipliers:

1. Select the Search icon , enter **Daily Forecast Codes**, and then choose the related link.
   The **Daily Forecast Codes** list page opens.
2. On the action bar, select **New**.
   The **Daily Forecast Codes** page opens.
3. Select **Daily Forecast Multiplier**.
   The **Daily Forecast Multiplier** page opens for the selected **Daily Forecast Code**.
4. In the **Item Type** field, select **Item** if you want to create multipliers for an Item or select **All Items** if you want to create multipliers for all the items.

> **Note**
>
> The **Item No.** field will be disabled if you select **All Items** in the **Item Type** field.

5. In the **Item No.** field, select an item from the lookup table.
6. In the **Customer Type** field, select **Customer** if you want to create multipliers for a customer or select **All Customers** if you want to create multipliers for all the customers.

> **Note**
>
> The **Customer No.** field will be disabled if you select **All Customers** in the **Customer Type** field.

7. In the **Customer No.** field, select a customer from the lookup table.
8. In the **Multiplier** field, enter a decimal number. For example. If you enter the value as 1.5, the **History** and the **Forecast** values are multiplied by 1.5.
9. In the **Starting Date** field, select a date from which the multiplier values are considered for forecast calculation.
10. In the **Ending Date** field, select a date to which the multiplier values are considered for forecast calculation.

> **Note**
>
> You can also leave the **Ending Date** field empty or select a date equal to or after the **Starting Date** field.

Assign a daily forecast code to an item

Article • 11/26/2025 • 3 min read

Follow the below steps to assign the Daily Forecast Code to an Item:

1. Select the Search icon , enter **Items**, and then choose the related link.
   The **Items** list page opens.
2. Select an item for which you want to link the **Daily Forecast Code**.
   The **Item Card** page opens.
3. In the **Daily Forecast Code** field, select a code from the lookup table.

> **Note**
>
> You can select a value in the **Reordering Policy** field when the **Daily Forecasting Code** field on the **Item Card** page contains a value. The system displays a notification message to inform you when both field values are selected.

Manage notification preferences

To hide the notification message, select the **Don't show this again** link when it appears.

To display the notification message again:

1. Select the Search icon , enter **My Notifications**, and then choose the related link.
   The **My Notifications** page opens.
2. Locate the relevant notification entry and configure the settings to enable the notification again.

> **Note**
>
> Once you select the **Don't show this again** link, you must configure the notification settings on the **My Notifications** page to display the message again.



View daily forecast

Article • 5/7/2025 • 4 min read

You can view the calculated Daily Forecast for each **Item**, **Variant**, or **Location** on the **Daily Forecast** page using the following procedure:

1. Select the Search icon , enter **Daily Forecast**, and then choose the related link.
   The **Daily Forecast** page opens.
2. On the **Options** FastTab, perform the following steps:

   - In the **Forecast Date** field, select a date. This field is filled with the work date by default.
   - In the **Forecast Day** field, you can view the day corresponding to the value selected in the **Forecast Date** field.
   - In the **Location Code** field, select a code from the list.
   - In the **Item No.** field, select an item from the list.
   - Turn on the **Show Shortage** toggle to filter and view the daily forecast lines that have a shortage quantity greater than zero.
     After entering the filters, the lines are displayed based on the selected filter criteria.

Field	Description
Forecast Date	Specifies the date on which the forecast is being calculated.
Forecast Day	Specifies the day of the week that follows the selected forecast date.
Location Code	Specifies the location code from which daily forecast is calculated.
Item No.	Specifies the item number for which the daily forecast is being defined.
Variant Code	Specifies the code of the item variant.
Sales Unit of Measure	Specifies the unit of measure code used when you sell the item.
History	Specifies the history from the daily forecast entries.
Forecast	Specifies the total value of the forecast out of the daily forecast entries.
Qty. on Sales Order	Specifies the value of the quantity on sales orders measured in the sales unit of measure.
Shipped Qty.	Specifies the value of the quantity on the posted sales shipments measured in the sales unit of measure.
Projected Forecast	Specifies the total value of the projected forecast from the daily forecast entries.

Variance %	Specifies the ratio of the projected forecast to the forecast.
Inventory	Specifies the quantity of the item in the inventory measured in the sales unit of measure.
Qty. on Production Order	Specifies the total units of the item to produce (production quantity).
Shortage	Specifies the total units of the item that are in demand on the selected forecast date.
Qty. to Produce	Enter the total number of units to produce, to compensate for the shortage.
Qty. on Future Sales Order	Specifies the calculated sales order quantity measured in the sales unit of measure based on the configuration in the **Future Sales Order Date Formula** field on the **Daily Forecast Codes** page.

The **History** and the **Forecast** values are shown based on the Sales Unit of Measure.

3. In the **FactBox**, the **Daily Forecast** records are shown for the next three days if they exist. The values are also shown in the Sales Unit of Measure.
4. Select **Previous Day** to view the forecast information for the day before the specified Daily Forecast date or select **Next Day** to view the forecast information for the day after the specified Daily Forecast date.
5. Select the drill-down button in the **History** or **Forecast** field to view the below forecast entries:

   - Customer No.
   - Customer Name
   - Item No.
   - Variant Code
   - Description
   - Unit of Measure Code
   - Location Code
   - History
   - Forecast
   - Qty. on Sales Order
   - Shipped Qty.

> **Note**
>
> You can also edit the **Forecast** value.

The daily forecast entries are also created for new customers with no forecast history when a sales line is added for an item with a daily forecasting code and the shipment date is set to the forecast date.

On the action bar, select **Actions** > **Create Daily Forecast Entry** to directly add an entry to the **Daily Forecast Entries** page when the forecast for an item is already determined before creating a sales order. The created daily forecast entry will have the **Manually Created** checkbox selected. However, the system displays an error message if a daily forecast already exists for the same combination of the entry. This helps you to keep the inventory on time.

When you run the **Calculate Daily Forecast** action after adding an entry via the **Create Daily Forecast** action, the system displays a confirmation message verifying whether the manually created entries should be deleted or kept.

> **Note**
>
> The **Manually Created** checkbox is hidden, and you can view it through personalization.

Calculate daily forecast

Article • 10/8/2024 • 4 min read

You can calculate the Daily Forecast based on the History and the Multiplier code using the following procedures:

1. Select the Search icon , enter **Daily Forecast**, and then choose the related link.
   The **Daily Forecast** page opens.
2. On the **Options** FastTab, perform the following steps:

   - In the **Forecast Date** field, select a date. This field is filled with the work date by default.
   - In the **Forecast Day** field, you can view the day corresponding to the value selected in the **Forecast Date** field.
   - In the **Location Code** field, select a code from the list.
   - In the **Item No.** field, select an item from the list.
   - Turn on the **Show Shortage** toggle to filter and view the daily forecast lines that have a shortage quantity greater than zero.

   After entering the filters, the lines are filtered based on the selected filters.
3. Select **Forecast**, and then select **Calculate Daily Forecast**.
   The **Calculate Daily Forecast** page opens with the following filters.

   - Forecast Date
   - Item No.
   - Variant Code
   - Location Code
     These fields are filled in from the filter options on the **Daily Forecast** page.
4. In the **Forecast Date** field, select the date on which you want to calculate the forecast.
5. In the **Item No.** field, select an item number from the lookup table.
6. In the **Variant Code** field, select a code from the lookup table.

> **Note**
>
> The **Variant Code** field is not a mandatory field, and you can calculate the **Daily Forecast** with no **Variant Code**.

7. In the **Location Code** field, select a code from the lookup table.
8. Select **OK** to start the calculation.
   Based on the above filters, the below list of fields in the **Daily Forecast** and the **Daily Forecast Entry** table are

updated.
On the **Item Card** page of the selected item, ensure that the **Daily Forecast Code** field is not blank, and that the **Blocked** and the **Sales Blocked** fields are disabled.
For the given **Forecast Date** and the **History Period** linked to the **Daily Forecast Code** of the item, the **History**, and the **Forecast** values are calculated based on the Posted Sales Shipments and opened/released sales orders.
For each entry of the **Item No.**, **Variant**, and **Location Code**, the **Daily Forecast** is created.
The Daily Forecast is calculated through the following steps:

a. Initially, the **History** is calculated for each customer and Unit of Measure based on the posted sales shipment lines, opened/released sales orders, and the given filters, giving the total Daily Forecast.

- History = Quantity from Posted Sales Shipment Line x (Percentage of applicable History Period line /100)
- History (Base) = History in the Base Unit of Measure of the Item.

b. After the History is calculated, the **Forecast** is calculated using the Multiplier linked to the Daily Forecast Code, the Customer, and the Item. The calculation is as follows:

- Forecast = History (Base) x Multiplier
- Forecast (Base) = Forecast in the Base Unit of Measure of the Item

c. In the end, the calculated values are **rounded** with the **Rounding Precision** value that is defined on the **Daily Forecast Code** page.



View the sales demand

Article • 10/8/2024 • 3 min read

You can view the sales demand (Sales Orders and Posted Sales Shipments) for each **Item**, **Variant**, **Location**, and **Forecast Date** using the following procedures:

> **Note**
>
> The **Daily Forecast** is calculated, and the sales orders and posted sales shipments are created with the **Shipment Date** same as the **Daily Forecast Date**.

1. Select the Search icon , enter **Daily Forecast**, and then choose the related link.
   The **Daily Forecast** page opens.
2. On the **Options** FastTab, perform the following steps:
   - In the **Forecast Date** field, select a date. This field is filled with the work date by default.
   - In the **Forecast Day** field, you can view the day corresponding to the value selected in the **Forecast Date** field.
   - In the **Location Code** field, select a location from the list.
   - In the **Item No.** field, select an item from the list.
   - Turn on the **Show Shortage** toggle to filter and view the daily forecast lines that have a shortage quantity greater than zero.

   The lines are filtered based on the selected filters.
   The **Qty. on Sales Order** and the **Shipped Qty** fields, which show the sales demand on the open sales orders and the shipped orders, are shown in the Sales Unit of Measure.
3. Select the drill-down button in the **Qty. on Sales Order** field to view the sales demand on the open sales orders with the filters on the following fields:
   - Item No.
   - Variant Code
   - Location Code
   - Shipment Date
   - Document Type
4. Select the drill-down button in the **Shipped Qty.** field to view the already posted sales orders with the filters on the following fields:
   - Item No.
   - Variant Code

- Location Code
- Shipment Date

5. Select the drill-down button in the **History** or the **Forecast** field to view the **Daily Forecast Entries** page.
   The **Qty. on Sales Order** and the **Shipped Qty** values are shown in the Unit of Measure.
6. Select the drill-down button in the **Qty. on Sales Order** field to view the open sales orders with the filters on the following fields:

   - Customer No.
   - Item No.
   - Variant Code
   - Location Code
   - Unit of Measure Code
   - Shipment Date
   - Document Type

7. Select the drill-down button in the **Shipped Qty.** field to view the already posted sales orders with the filters on the following fields:

   - Customer No.
   - Item No.
   - Variant Code
   - Location Code
   - Unit of Measure Code
   - Shipment Date



View the current production supply

Article • 10/8/2024 • 3 min read

You can view the current production supply for each **Item**, **Variant**, **Location** and **Forecast Date** using the following procedures:

> **Note**
>
> The **Daily Forecast** is calculated, and the production orders (except the Finished Production Orders) are created for an item with the **Due Date** of the production order line, which is the same as the **Daily Forecast Date**.

1. Select the Search icon , enter **Daily Forecast**, and then choose the related link.
   The **Daily Forecast** page opens.
2. On the **Options** FastTab, perform the following steps:

   - In the **Forecast Date** field, select a date. This field is filled with the work date by default.
   - In the **Forecast Day** field, you can view the day corresponding to the value selected in the **Forecast Date** field.
   - In the **Location Code** field, select a code from the list.
   - In the **Item No.** field, select an item from the list.
   - Turn on the **Show Shortage** toggle to filter and view the daily forecast lines that have a shortage quantity greater than zero.

   After entering the filters, the lines are filtered based on the selected filters.
   The value of the **Qty. on Production Order** field is shown in the Sales Unit of Measure.
3. Select the drill-down button in the **Qty. on Production Order** field to view the actual production supply on the production order lines where all production documents are considered except the finished production orders with the filters on the following fields:

   - Item No.
   - Variant Code
   - Location Code
   - Due Date
   - Status

View inventory

Article • 10/8/2024 • 2 min read

You can view the current **Inventory** in the Sales Unit of Measure Code using the following steps:

1. Select the Search icon , enter **Daily Forecast** and choose the related link.
   The **Daily Forecast** page opens.
2. On the **Filters** FastTab, perform the following steps:

   - In the **Forecast Date** field, select a date. This field is filled with the work date by default.
   - In the **Forecast Day** field, you can view the day corresponding to the value selected in the **Forecast Date** field.
   - In the **Location Code** field, select a code from the list.
   - In the **Item No.** field, select an item from the list.
   - Turn on the **Show Shortage** toggle to filter and view the daily forecast lines that have a shortage quantity greater than zero.

   The Inventory value is calculated based on the below formula:

   - Inventory = Inventory (Base) / Base Unit of Measure of the item

3. Select the **Inventory** drill-down field to view actual Inventory on the sales order lines with the filter in the following fields:

   - Item No.
   - Variant Code
   - Location Code



Calculate projected forecast, variance and shortage

Article • 3/17/2025 • 4 min read

You can calculate the **Projected Forecast**, **Variance %** and **Shortage** field values of the items using the following steps:

> **Note**
>
> The daily forecast should be calculated for an item.

1. Select the Search icon , enter **Daily Forecast**, and then choose the related link.
   The **Daily Forecast** page opens.
2. On the **Options** FastTab, perform the following steps:

   - In the **Forecast Date** field, select a date. This field is filled with the work date by default.
   - In the **Forecast Day** field, you can view the day corresponding to the value selected in the **Forecast Date** field.
   - In the **Location Code** field, select a code from the list.
   - In the **Item No.** field, select an item from the list.
   - Turn on the **Show Shortage** toggle to filter and view the daily forecast lines that have a shortage quantity greater than zero.

   The **Projected Forecast**, **Variance %**, and **Shortage** field values are calculated automatically once the **Daily Forecast** page opens.
3. On the action bar, select **Forecast**, and then select **Calculate Projected Forecast** if you want to calculate the projected forecast manually by modifying the filters.

   - The **Projected Forecast** field value is calculated for each daily forecast entry. The total value of all the daily forecast entries is displayed on the **Daily Forecast** page. To know more, see Calculation based on forecast method.
   - The **Variance %** field value is calculated after the projected forecast is calculated for the daily forecast based on the below formula:
     - Variance % = Projected Forecast / Forecast x 100
   - The **Shortage** field value is calculated after the variance % is calculated for the daily forecast based on the below formula:
     - Shortage = Projected Forecast – Inventory - Qty. on Production.
4. Select the **Forecast** field to view the **Daily Forecast Entries** page.

5. Change the **Forecast** field value on the **Daily Forecast Entries** page.
6. Close the **Daily Forecast Entry** page.
   The **Projected Forecast** field value on the **Daily Forecast** page is updated automatically.

Calculation based on forecast method

The projected forecast is calculated based on the type selected in the **Forecast Method Type** field on the **Daily Forecast Codes** page. The available options are *Highest Value* and *Sales Value*. The *Highest Value* option is set as default.

Highest value means that the projected forecast is calculated using the higher value between the forecast quantity and the sales order quantity for each daily forecast entry, based on the applied filter settings.

Sales value means the projected forecast is calculated using the forecast quantity if the sum of the sales order quantity and shipped quantity in the associated daily forecast entry is zero. If the sum is not zero, the sales order quantity is used to calculate the projected forecast for that entry.



Adjust forecast

Article • 10/8/2024 • 3 min read

You can adjust the **Daily Forecast** for all the Daily Forecast lines with a factor using the following steps:

To adjust Daily Forecast

1. Select the Search icon , enter **Daily Forecast** and choose the related link.
   The **Daily Forecast** page opens.
2. On the **Filters** FastTab, perform the following steps:
   a. In the **Forecast Date** field, select a date. This field is filled with the work date by default.
   b. In the **Forecast Day** field, you can view the day corresponding to the value selected in the **Forecast Date** field.
   c. In the **Location Code** field, select a code from the list.
   d. In the **Item No.** field, select an item from the list.
   e. Turn on the **Show Shortage** toggle to filter and view the daily forecast lines that have a shortage quantity greater than zero.
3. On the action bar, select **Adjust Forecast**.
   The **Adjust Forecast** dialog box opens.
4. On the **Factor** field, enter a number.

> **Note**
>
> You can enter up to three decimal places as Factor. An error appears if you leave the **Factor** field blank.

5. On the **Filter** FastTab, perform the following steps:
   a. In the **Item No.** field, select an item number from the list.
   b. In the **Customer No.** field, select a customer number from the list.
6. Select **Yes**.
   The **Daily Forecast Entries** are filtered based on the above selected filters.
   The **Forecast** value of the selected **Daily Forecast Entry** lines are multiplied and updated automatically with the **Factor** value and rounded with the **Rounding Precision** of the **Daily Forecast Code**.
   The **Projected Forecast** value is recalculated using the content of the updated Daily Forecast Entries.



Create a production order for shortages

Article • 10/8/2024 • 3 min read

After calculating the **Shortage** for a Daily Forecast, it is possible to create production orders to compensate for the Shortage quantity. Follow the below steps to calculate the **Qty. to Produce** and to create the required production orders.

1. Select the Search icon , enter **Daily Forecast** and choose the related link.
   The **Daily Forecast** page opens.
2. On the **Options** FastTab, perform the following steps:
   - In the **Forecast Date** field, select a date. This field is filled with the work date by default.
   - In the **Forecast Day** field, you can view the day corresponding to the value selected in the **Forecast Date** field.
   - In the **Location Code** field, select a code from the list.
   - In the **Item No.** field, select an item from the list.
   - Turn on the **Show Shortage** toggle to filter and view the daily forecast lines that have a shortage quantity greater than zero.
3. Select **Calculate Qty to. Produce**.
   The Qty to. Produce is calculated based on the following condition:
   - The **Qty. to Produce** is the Shortage quantity if the Shortage quantity is more than 0.
   - The **Qty. to Produce** is 0 if the Shortage quantity is equal to or less than 0.
     You can also change the **Qty. to Produce** value manually.
4. Select **Empty Qty. to Produce** to change the **Qty. to Produce** values in all the Daily Forecast Lines to **Zero**.
5. Select the Daily Forecast line for which you want to create a production order.

> **Note**
>
> The **Qty. to Produce** value on the selected Daily Forecast line should be more than 0 for creating the production order.

6. On the action bar, select **Create Production Order**.
   A dialog box appears and displays the following information:
   Do you want to create production orders for this daily forecast?
7. Under the **Group** section, select **Released** on the **Prod. Order Status** field.
8. Under the **Filters** section, perform the following steps and select **Yes**.

- On the **Item No.** field, select a **Item No.** from the list.
- On the **Variant Code** field, select a **Variant Code** from the list.
  The quantity of the items in the **Created Production Order** is calculated based on the below formula:
  - Quantity = Qty. to Produce x Qty. per Sales Unit of Measure
    The **Qty. to Produce** value in the Daily Forecast line becomes 0 once the production orders are created for the line.



Delete daily forecast

Article • 4/3/2023 • 2 min read

You can delete the Daily Forecast records on the **Daily Forecast** and the **Daily Forecast Entries** pages using the following steps:

1. Select the Search icon , enter **Delete Daily Forecast**, and then choose the related link.
   The **Delete Daily Forecast** page opens.
2. In the **Forecast Date** Field, select the date until which you want to delete the **Daily Forecast**.

> **Note**
>
> By default, a date is entered such that it is two weeks prior to the **Work Date** in the **Forecast Date** field.

3. Select **OK**.
   All the Daily Forecast and the Daily Forecast Entries are deleted until the entered Forecast Date.



Item categories

Article • 2/3/2025 • 2 min read

You can select the item category using the following steps:

1. Select the Search icon , enter **Item Categories**, and then choose the related link.
   The **Item Categories** page opens.
2. Select an existing item category for which the batch name should be set up.
3. In the **Batch Name** field, select a batch name. The selected batch name is associated with the item category in the **Item Categories Card** page.

> **Note**
>
> - The batch name defined for the parent item category is automatically applied to all child items. However, you can edit the batch name for individual child items.
> - Defining an item category with an associated **Batch Name** field value is mandatory, as only forecast items assigned to an item category with a batch name appear on the **Daily Forecast** page.



Create a new batch name

Article • 2/5/2025 • 3 min read

You can create a new batch name using the following steps:

1. Select the Search icon , enter **Daily Forecast**, and then choose the related link.
   The **Daily Forecast** page opens.
2. On the **Daily Forecast** page, select *New* in the **Batch Name** dropdown field.
   A dialog appears.
3. Enter the required information in the following fields:

   - **Name**: Enter the name for the batch. This is a mandatory field.
   - **Description**: Enter the batch description. This field is optional.

The new **Batch Name** field value is saved in the **Daily Forecast Batch** table. The **Batch Name** field on the **Daily Forecast** page is updated with the newly created value.

Select an existing batch name from the Daily Forecast page

You can select an existing batch name from the **Daily Forecast** page using the following steps:

1. Select the Search icon , enter **Daily Forecast**, and then choose the related link.
   The **Daily Forecast** page opens.
2. In the **Batch Name** field, select a value.
   A dropdown appears with all the available batch names. You can either select an existing batch name or create a new batch name.

> **Note**
>
> - If the system identifies existing daily forecast entries without a batch name, a notification is triggered, prompting you to initiate an assisted setup. The assisted setup automatically assigns the default batch name to all such entries.
> - The **Calculate Qty. to Produce**, **Empty Qty. to Produce**, and **Create Production Order** actions can only be applied to the daily forecast lines that are linked to a batch name.
> - The **Simultaneous Users** FactBox will display the **User** and **Session ID** field value for all users working with the same batch name.
> - Deletion or editing of the item category code from the **Item Card** and **Item Categories** pages is not allowed once entries have been created on the **Daily Forecast** page.

