

Maintaining Forecast Grouping (W5)

[This version is superseded. Click here to view the latest guide.](#)

PURPOSE

This is a detailed procedure on how to maintain forecast grouping.

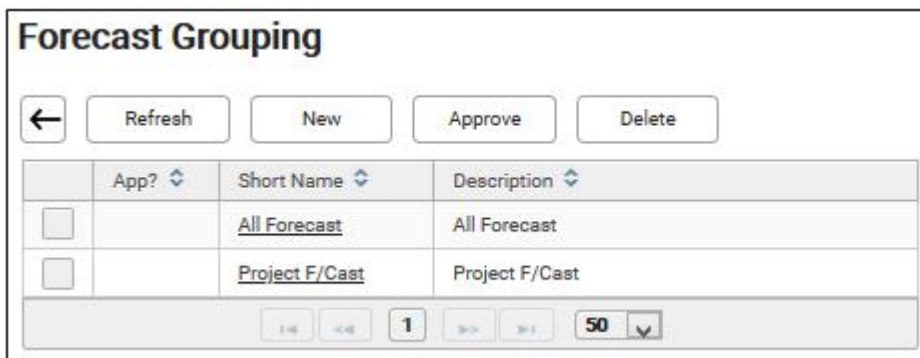
WHY IS THIS IMPORTANT?

Forecast grouping maintenance allows user to classify individual forecast sections and categories into groups.

PROCEDURE



1. In the Forecast Section / Category Maintenance screen, click on Grouping. The Forecast Grouping screen will be displayed.

A screenshot of a web application interface titled "Forecast Grouping". At the top, there are five buttons: a back arrow, "Refresh", "New", "Approve", and "Delete". Below these is a table with three columns: "App?" with a dropdown arrow, "Short Name" with a dropdown arrow, and "Description" with a dropdown arrow. The table contains two rows: the first row has a checkbox, "All Forecast", and "All Forecast"; the second row has a checkbox, "Project F/Cast", and "Project F/Cast". At the bottom of the table, there is a pagination bar with buttons for "1 of 1", "<< 1", "1", "2 >>", and "50" with a dropdown arrow.

2. To add a new forecast group, click on New. The screen below is displayed.

Maintain Forecast Grouping

dev01

←

Save

History

Shortname*

Longname

<input type="checkbox"/>	Section	Category	Add
<input type="checkbox"/>	Revenue	Rental Income	Remove
<input type="checkbox"/>	Revenue	Sales	
<input type="checkbox"/>	Expenses	Rent	
<input type="checkbox"/>	Expenses	Tax	
<input type="checkbox"/>	Expenses	Utilities	
<input type="checkbox"/>	AP	AP	
<input type="checkbox"/>	AR	AR	

<input type="checkbox"/>	Section	Category
No records found.		

3. Type in the preferred short name; it must be unique. Longname field is optional.

4. Next, select the forecast items to include in this group by ticking the boxes beside it.

Maintain Forecast Grouping

dev01

←

Save

History

Shortname*

TSS-SG

Longname

<input type="checkbox"/>	Section	Category	Add
<input checked="" type="checkbox"/>	Revenue	Rental Income	Remove
<input checked="" type="checkbox"/>	Revenue	Sales	
<input checked="" type="checkbox"/>	Expenses	Rent	
<input checked="" type="checkbox"/>	Expenses	Tax	
<input checked="" type="checkbox"/>	Expenses	Utilities	
<input type="checkbox"/>	AP	AP	
<input type="checkbox"/>	AR	AR	

<input type="checkbox"/>	Section	Category
No records found.		

5. Click on Add. All lines selected will be on the right.

Maintain Forecast Grouping

dev01

←

Save

History

Shortname*

TSS-SG

Longname

<input type="checkbox"/>	Section	Category	Add
<input type="checkbox"/>	Revenue	Rental Income	Remove
<input type="checkbox"/>	Revenue	Sales	
<input type="checkbox"/>	Expenses	Rent	
<input type="checkbox"/>	Expenses	Tax	
<input type="checkbox"/>	Expenses	Utilities	
<input type="checkbox"/>	AP	AP	
<input type="checkbox"/>	AR	AR	

<input type="checkbox"/>	Section	Category
<input type="checkbox"/>	Expenses	Utilities
<input type="checkbox"/>	Revenue	Sales
<input type="checkbox"/>	Expenses	Tax
<input type="checkbox"/>	Revenue	Rental Income
<input type="checkbox"/>	Expenses	Rent

6. Click the Save button. A message prompt saying “Forecast grouping saved successfully” will be on the screen.

7. Click on Back Button to go back to the Forecast Grouping screen.

8. The created forecast group needs to be approved before it can be used. To do that, tick the checkbox before the letter N in the same line as the new forecast group.

Forecast Grouping

←
Refresh
New
Approve
Delete

	App? ▾	Short Name ▾	Description ▾
<input checked="" type="checkbox"/>	N	<u>TSS-SG</u>	TSS-SG
<input type="checkbox"/>		<u>All Forecast</u>	All Forecast
<input type="checkbox"/>		<u>Project F/Cast</u>	Project F/Cast

1
50 ▾

9. Click Approve.

RELATED INFORMATION

[Viewing and Creating Forecast Section Category](#)

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created
8-Jan-2015	Clarissa	Reformatted. Rewritten.
7-Jun-16	Richard	Proofread
20-Nov-2019	Lyra	Updated Screenshots.