Maintaining Forecast Grouping

See previous W5 version guide

PURPOSE

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

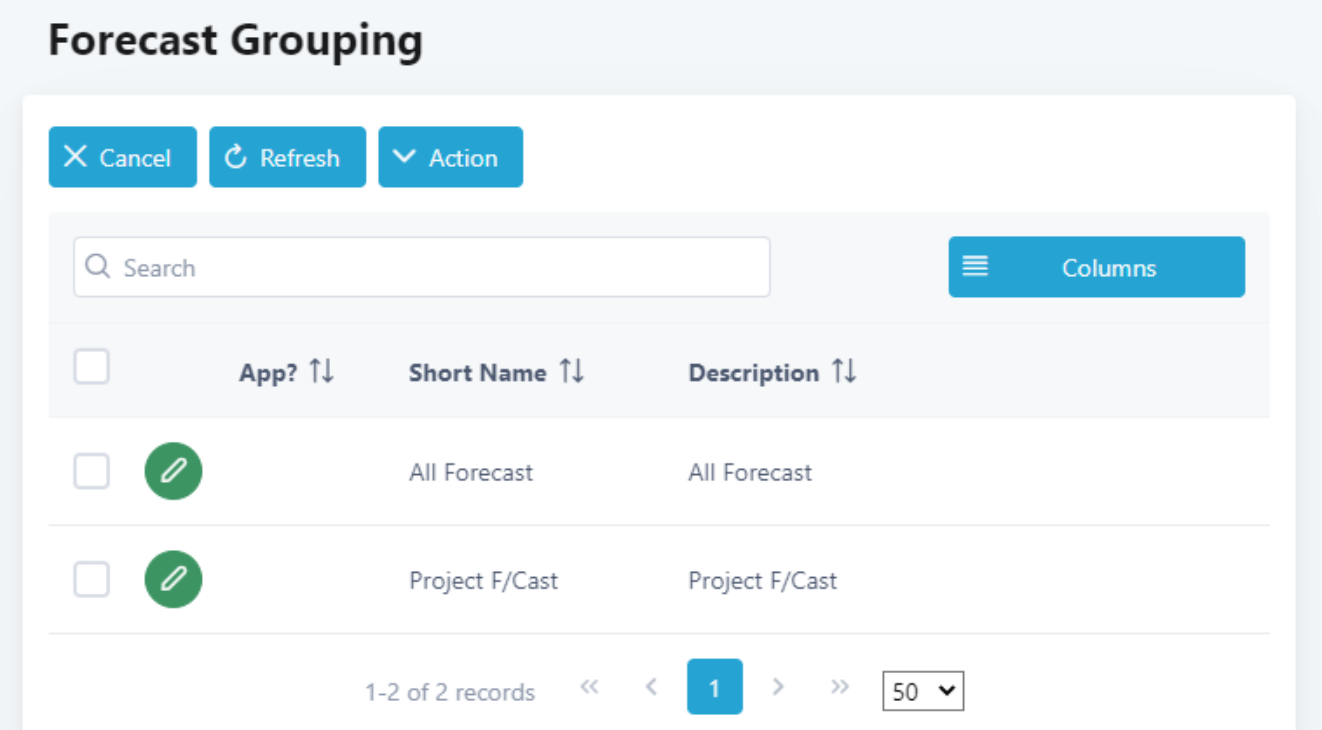
WHY IS THIS IMPORTANT?

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

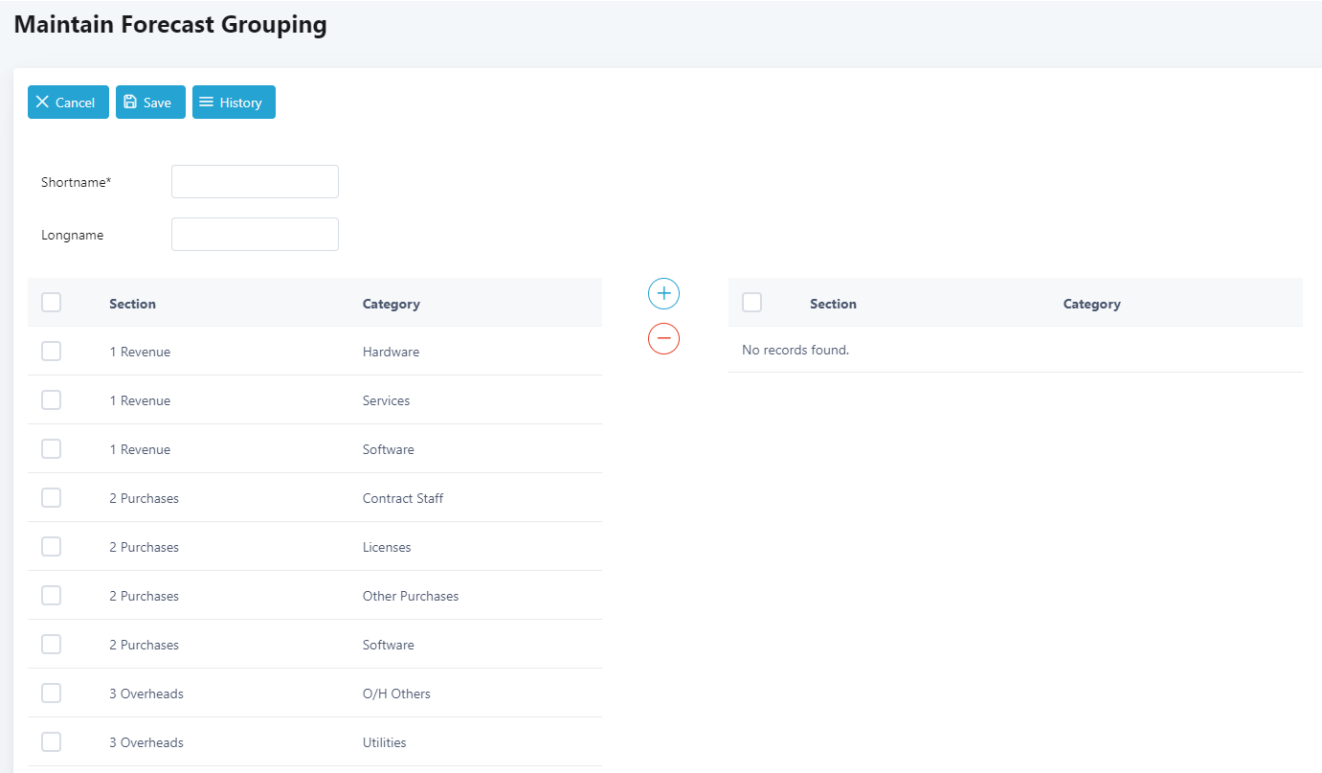
PROCEDURE



1. In the Forecast Section / Category Maintenance screen (Cash Management > Forecasting > Maintenance > Section/Category), click on Grouping. The Forecast Grouping screen will be displayed.

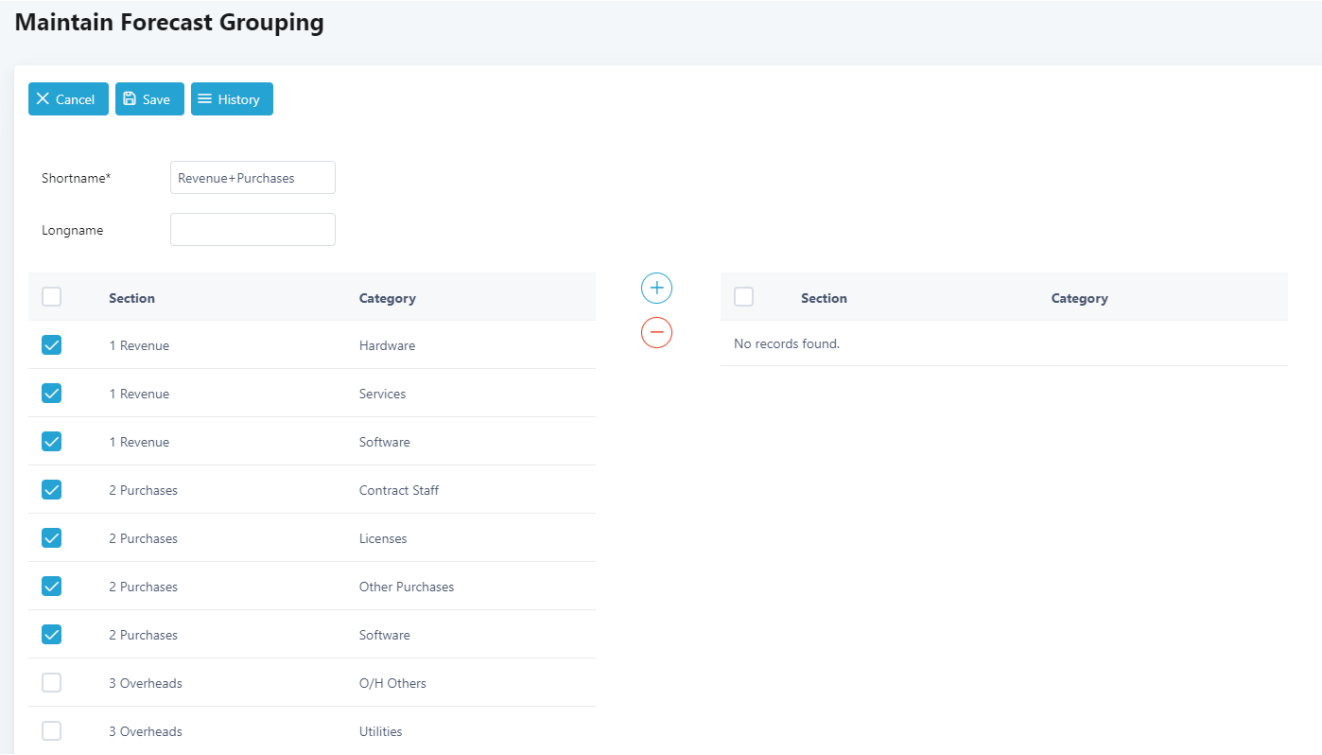


2. To add a new forecast group, click on Action and select New. The screen below is displayed.

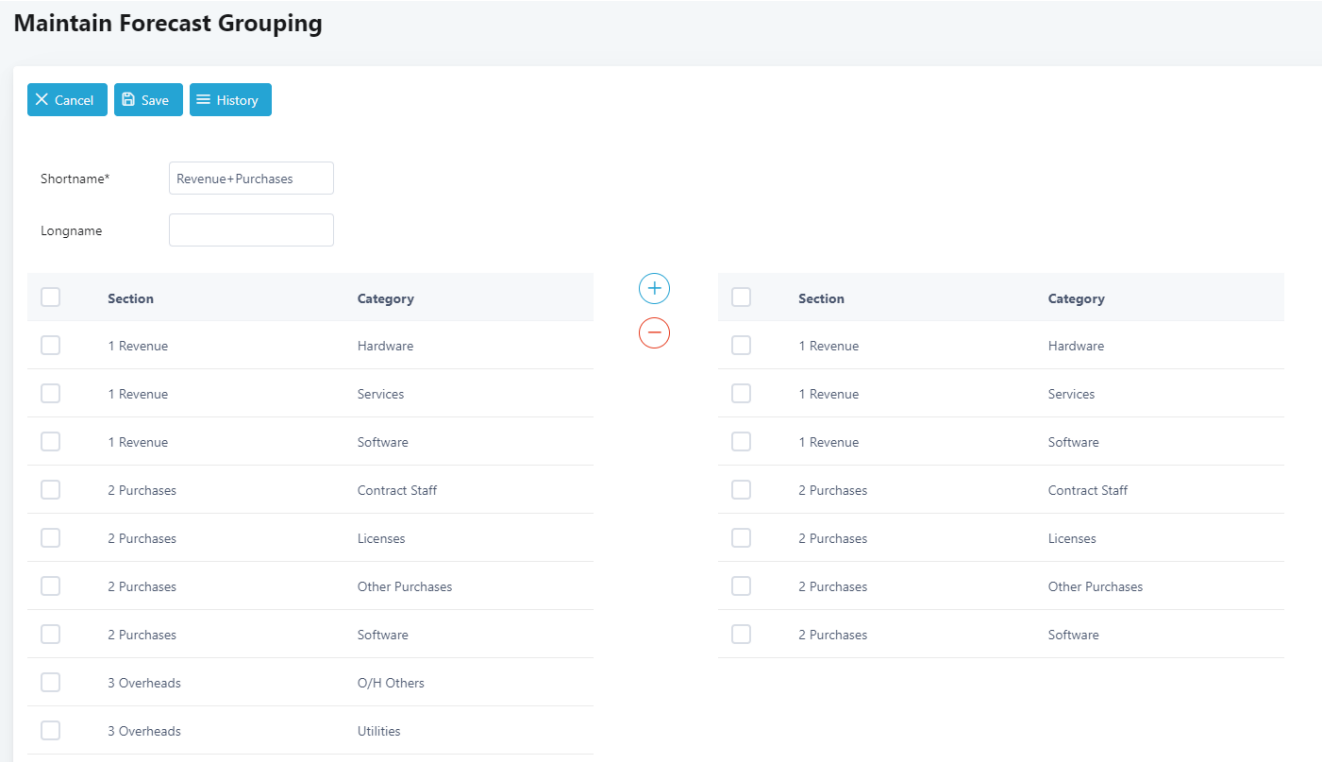


3. Type in the preferred short name; it must be unique. Longname field is optional.

4. Next, tick on the checkbox of the forecast item to add to the group.



5. Click on Add (+). The line items selected will be added on the right.

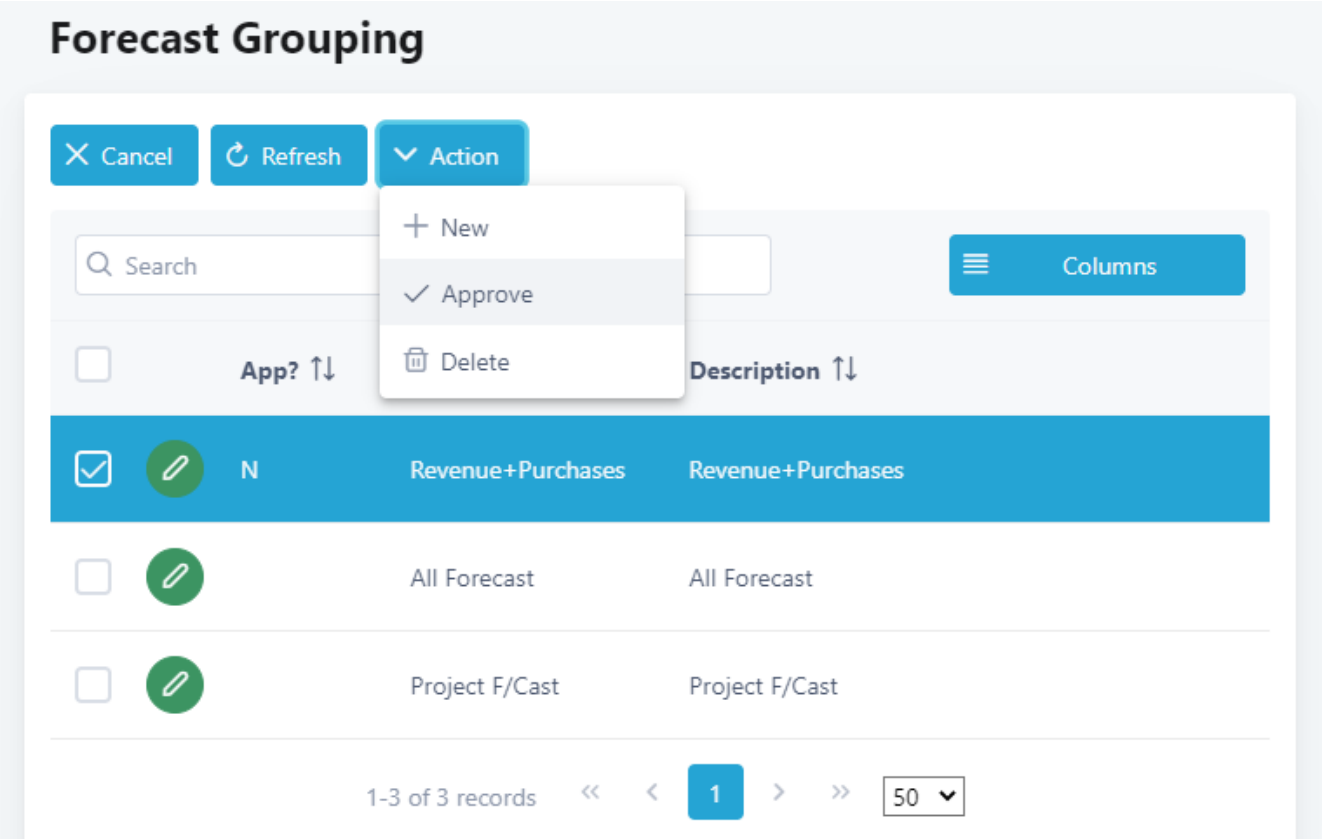


6. Click the Save button. A message prompt saying “Forecast grouping saved successfully” will be displayed on the screen.

7. Click on Cancel 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 of the forecast group and click Action and Approve.



9. Click Approve.

RELATED INFORMATION

Viewing and Creating Forecast Section Category

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created.
8-Jan-2015	Clarissa	Rewritten. Reformatted.
7-Jun-2016	Richard	Proofread.
20-Nov-2019	Lyra	Updated screenshots.
5-Jun-2023	TS	Updated to W6 instructions and screenshots.