Forecasts

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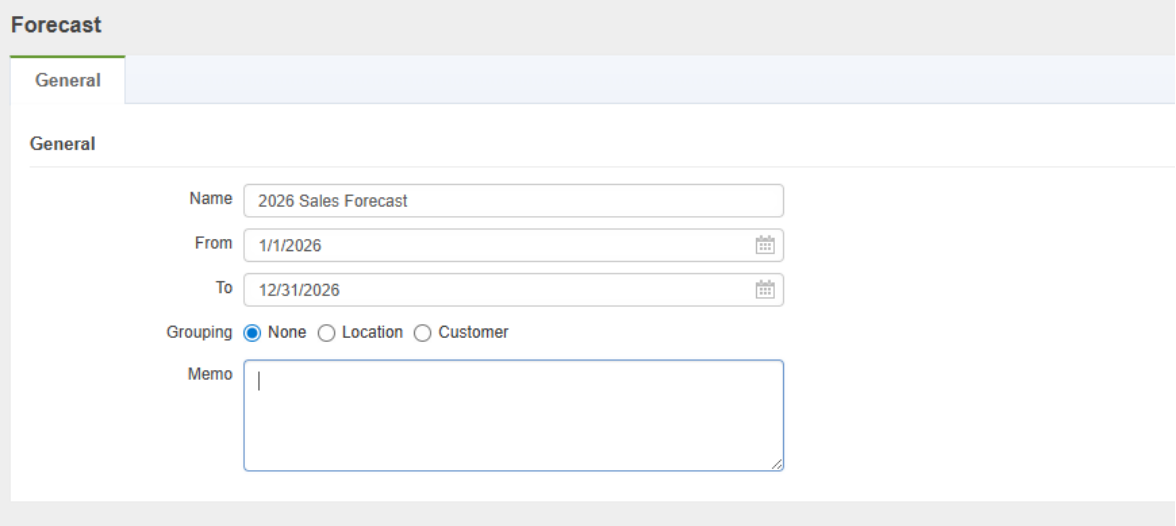
Forecasts

The Forecast feature adds several important management tools into Order Time. Starting by enabling users to generate sales or usage quantity forecasts for future periods. Forecasts then are used to generate production and/or purchasing plans (aka MRP), taking into account lead times, allowing the users to gain visibility into potential inventory shortages.

Creating a Forecast

Access the Forecast list from the Purchasing sub-menu or from the Open Full List side menu. From there click New Forecast.

Enter a name for the forecast the period. Forecasts are always grouped by item, but you can also choose to add location or customer as an additional grouping. Click Save



At this time the forecast interval is monthly. You can create multiple forecasts for the same period.

Now it's time to add item data to the forecast. You can Generate a forecast based on historical data or you can import forecast data.

To generate a forecast based on historical data in Order Time, click the Generate Forecast button. Sales data is based on ship docs net of customer returns. Parts usage is based on the combination of ship docs, work order components and repair order components. optionally you can increase or decrease historical quantities for forecasting purposes.

Importing forecasts is more involved but offers more flexibility. In the following example Location is ignored if the Grouping Type is none. If the Grouping Type was 'Location' then the column would be required. It is best practice to use the end of month for each interval.

	A	B	C	D	E	F	G	H
1	Forecast	Item	Date	Quantity	Location			
2	2026 Sales Forecast	112	1/31/2026	100	HQ			
3	2026 Sales Forecast	112	2/28/2026	100	HQ			
4	2026 Sales Forecast	112	3/31/2026	100	HQ			
5	2026 Sales Forecast	112	4/30/2026	100	HQ			
6	2026 Sales Forecast	112	5/31/2026	100	HQ			
7	2026 Sales Forecast	112	6/30/2026	100	HQ			
8	2026 Sales Forecast	112	7/31/2026	100	HQ			
9	2026 Sales Forecast	112	8/31/2026	100	HQ			
10	2026 Sales Forecast	112	9/30/2026	100	HQ			
11	2026 Sales Forecast	112	10/31/2026	100	HQ			
12	2026 Sales Forecast	112	11/30/2026	100	HQ			
13	2026 Sales Forecast	112	12/31/2026	100	HQ			
14	2026 Sales Forecast	150	1/31/2026	100	HQ			
15	2026 Sales Forecast	150	2/28/2026	100	HQ			
16	2026 Sales Forecast	150	3/31/2026	100	HQ			
17	2026 Sales Forecast	150	4/30/2026	100	HQ			
18	2026 Sales Forecast	150	5/31/2026	100	HQ			
19	2026 Sales Forecast	150	6/30/2026	100	HQ			
20	2026 Sales Forecast	150	7/31/2026	100	HQ			
21	2026 Sales Forecast	150	8/31/2026	100	HQ			
22	2026 Sales Forecast	150	9/30/2026	100	HQ			
23	2026 Sales Forecast	150	10/31/2026	100	HQ			
24	2026 Sales Forecast	150	11/30/2026	100	HQ			
25	2026 Sales Forecast	150	12/31/2026	100	HQ			

The Excel formula for end of month is =EOMONTH(C2,1) where C2 is the previous month and 1 is the number of months that you want to add to the previous month.

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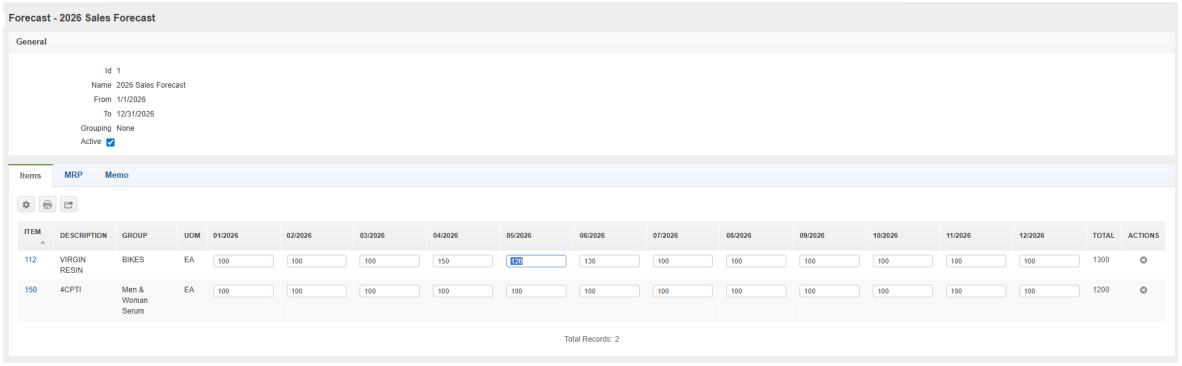
Editing a Forecast

From the list click on the name of the forecast to load the details page.

- On the items tab, you will see some columns like Item. You can use the list gear icon to add or remove columns.
- You will also see columns for each of the date in your forecast where you can edit quantities directly.
- The memo tab allows you to add the notes to the forecast.
- The Active checkbox allows you to toggle the active status of the forecast.
- The MRP tab is where you will see your Plans (discussed below)



You can also update the forecast using the 'Id' method of imports. The Id column should be obtained from the forecast reports not the details page

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How does MRP work?

Running MRP creates Production and/or Purchasing Plans based on the forecast. The following describes how Order Time runs the MRP.

A. Production Plan - Assembly Items

1. Demand Quantity is calculated for forecasted assemblies: The Demand Quantity is the *Make Lead Time* adjusted forecasted quantity. For example, when the forecasted quantity is 100 units in September with a make lead time of 30 days, the demand quantity will be 100 in August.
2. Demand Quantity is calculated for sub-assemblies: The process in step 1 is repeated based using the demand quantities of the top-level assemblies. For each item and interval in step 1, a *Drill Down* is performed to determine the demand quantities for each sub-assembly in its bill of materials structure. Continuing the example from 1 above, assume a sub-assembly with a quantity per of 2 and build time of 30 days resulting in demand quantity of 200 units in July. These quantities are cumulative to account for sub-assemblies used in multiple top-level assemblies.
3. Plan Quantity is calculated: For each item and interval calculated in steps 1 and 2 above, the *Plan Quantity* is set so that the period ending available quantity is greater than or equal to 0. For example, when the beginning available quantity is 50 with demand quantity of 120, the plan quantity will be 70.
4. Existing orders affect demand and plan quantities. When *Required* in a given period based on the *Promise Date* is greater than demand quantity, Required will be the demand quantity.

When *On Order* in a given period based on the *Promise Date* is greater than plan quantity, On Order will be the plan quantity.

B. Purchasing Plan - Part Item

1. Demand Quantity is calculated for forecasted parts: The Demand Quantity is the *Lead Time* adjusted forecasted quantity. For example, when the forecasted quantity is 100 units in September with a lead time of 30 days, the demand quantity will be 100 in August.
2. Demand Quantity is calculated for planned components of the assemblies determined in the Production Plan in A above: For each assembly item and interval, the *Plan Quantities* of the component parts from its bill of materials are multiplied by the Quantity Per and adjusted for Lead Time. For example, when the Plan Quantity is 100 in September and a component's quantity per is 5 with a lead time of 60 days, the demand quantity for that component will be 500 in July. These quantities are cumulative to account for parts sold outright and used in multiple assemblies.
3. Plan Quantity is calculated: For each item and interval calculated in steps 1 and 2 above, the *Plan Quantity* is set so that the period ending available quantity is greater than or equal to 0. For example, when the beginning available quantity is 50 with demand quantity of 120, the plan quantity will be 70.
4. Existing orders affect demand and plan quantities. When *Required* in a given period based on the *Promise Date* is greater than demand quantity, Required will be the demand quantity. When *On Order* in a given period based on the *Promise Date* is greater than plan quantity, On Order will be the plan quantity.

1. When evaluating the components of a bill of materials, the default version is used.
2. The default Item Vendor is used for Lead Time.

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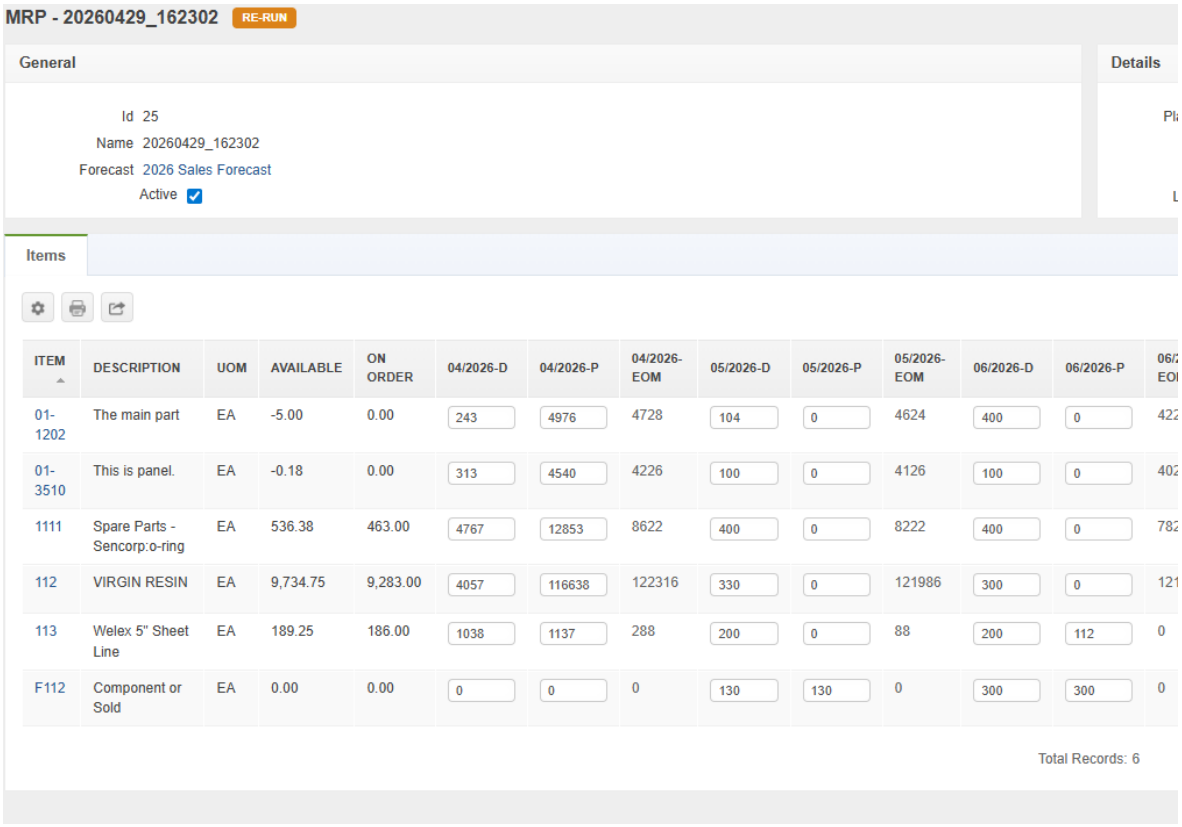
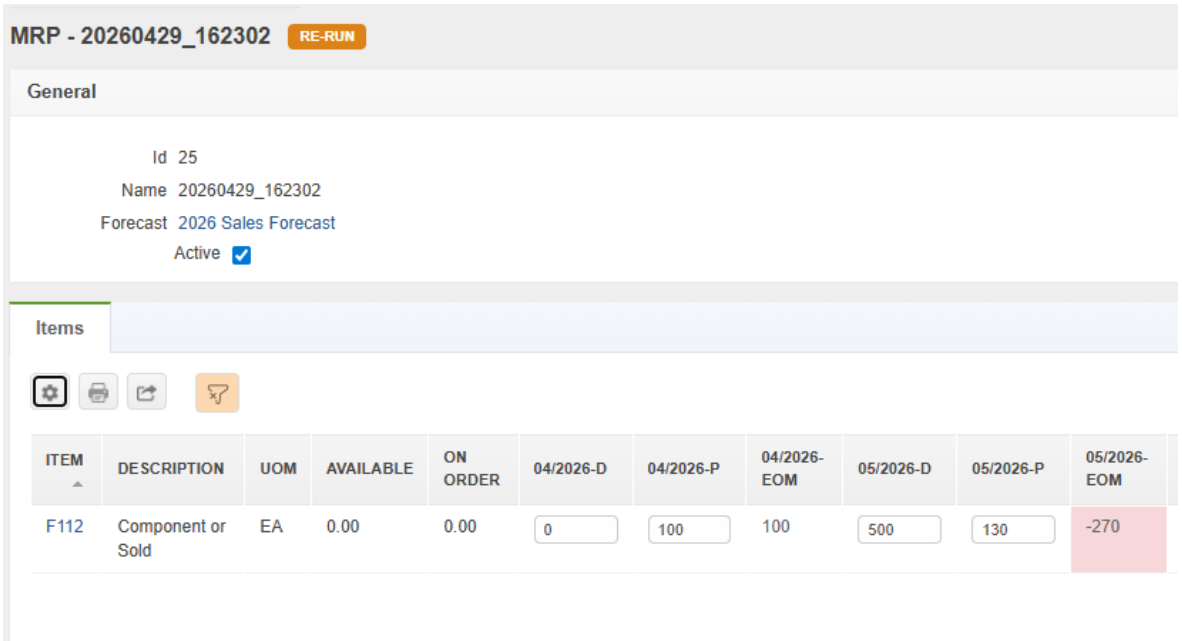
Run and view MRP

Navigate to the MRP tab and click Run MRP. Select the To Date and click Run.

Click on the name of the MRP to show the details page. The first 3 columns are fairly standard. Those can be sorted and filtered like any other columns. The date columns are unique to the MRP. For each interval in the MRP, you will see the interval's date followed by either -D (Demand Quantity), -P (Plan Quantity) or -EOP end of Period.



Let's now focus on the last item F112. After the MRP was run a purchase order was entered for 100 units in April and an approved sales order was entered for 500 units in May. Notice how the 05/2025-EOF is negative and shaded red meaning that unless another PO is entered for at least 270 units a stock-out will occur.



You can use this also for what-if scenarios. For example, what would happen if the demand in May would increases to 700 units.

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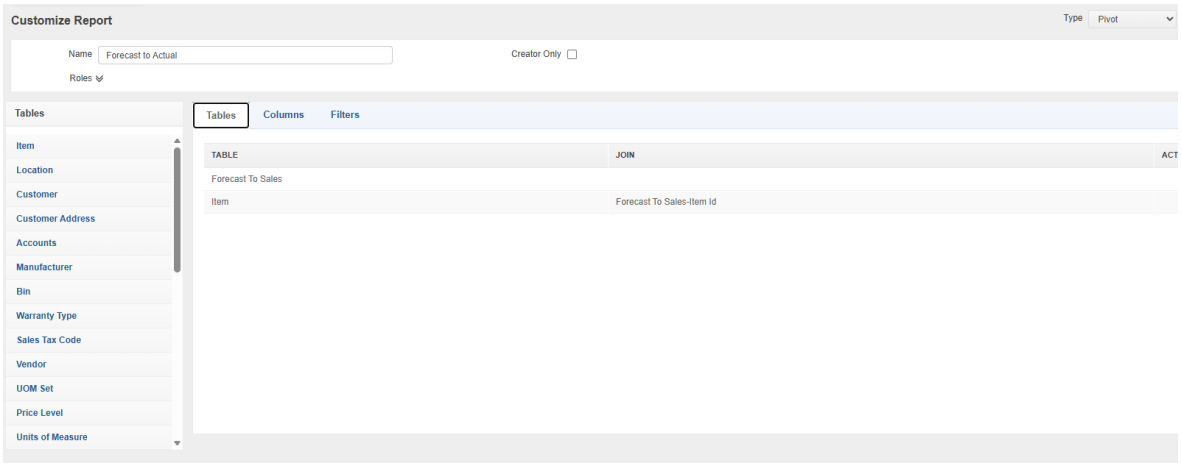
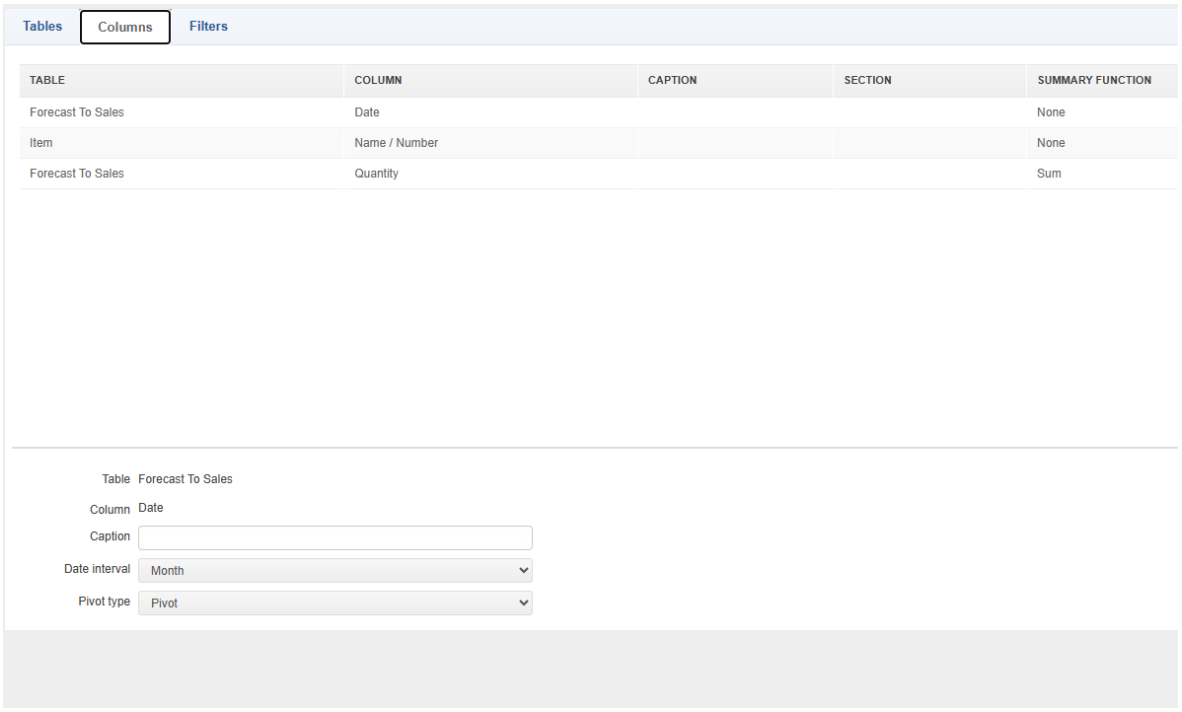
Reports

Forecasts have their own report grouping and in particular a pivot report using the *Forecast to Sales* table one can compare actual to forecast quantities. Here is how the report is put together.

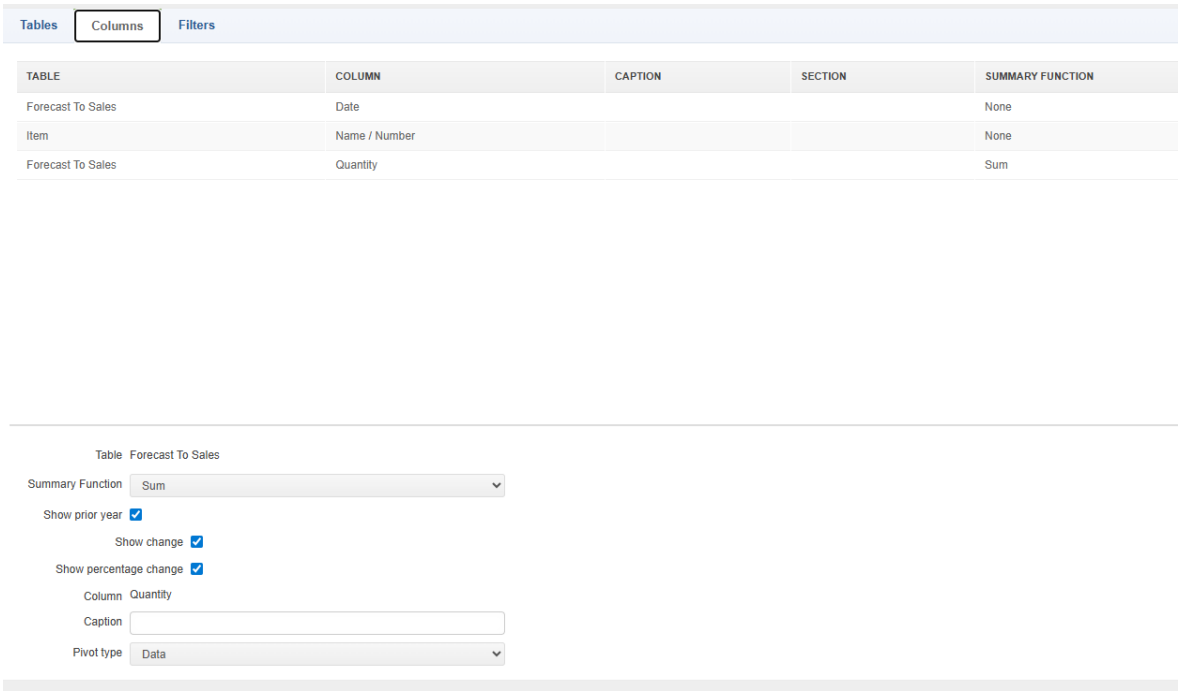
Tables



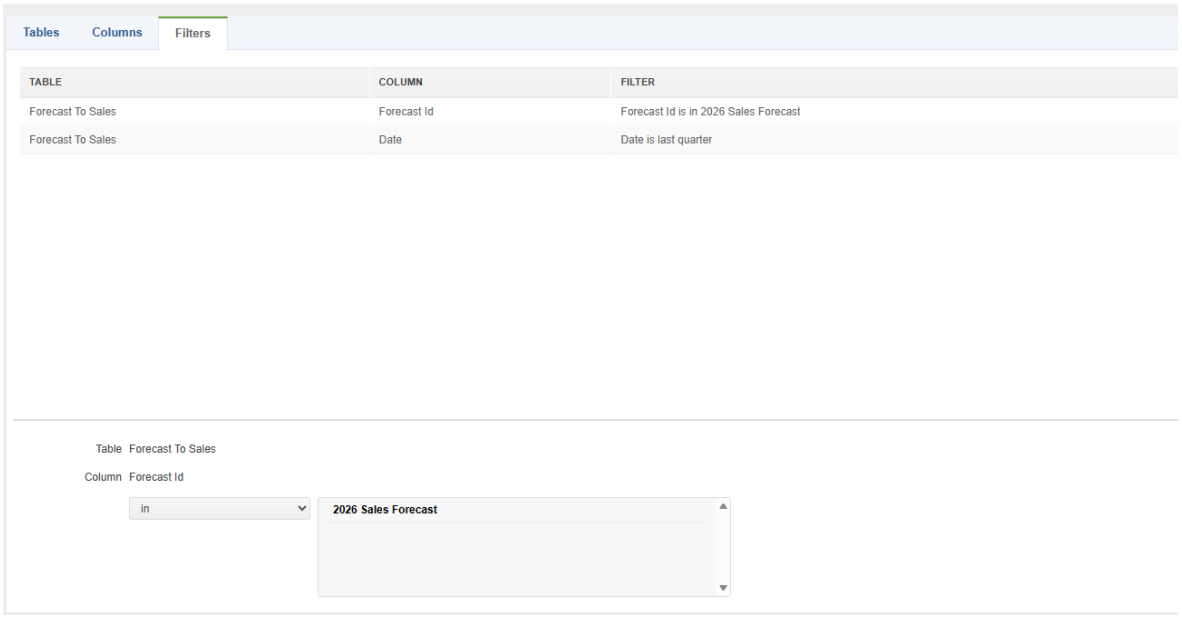
Date Column



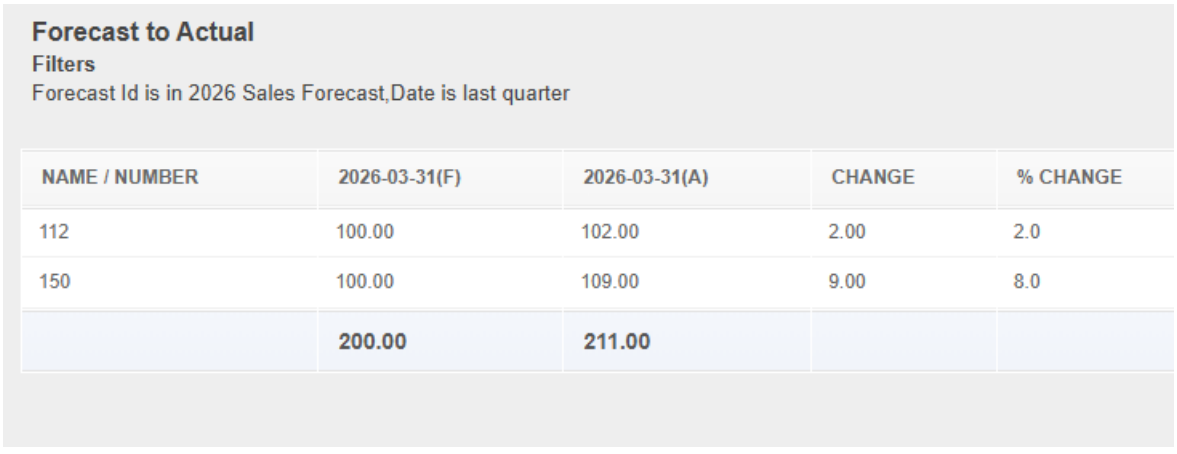
Quantity Column



Filters



View Report



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