
DSO950 PSI Sales Transfer to Forecast

Overview

This program provides the facility to transfer either Actual sales, PSI sales or whichever is greater (for current month only).

This function updates the Forecast or Budget, depending on menu selection, from PSI with selections of Title hierarchy and factors for increase/decrease by percentage. The transfer is always C9I1 Total by Title.

Explanation

The Forecast is updated from PSI when the field *Sales* is entered. It allows the user to generate a Forecast and Suggested Order from the Sales Decision Support Module.

Any cost/price changes affects projected sales and stock costs. When a change occurs, you are only required to make the initial change via the PSI maintenance option. All the other relevant values and forecasts are automatically updated when selecting the PSI transfer sale and cost forward function.

The Buying price and Landed cost values are defaulted based on the definitions of a system **TMSDS/FCST-CTL**.

The forecast value and cost for titles transferred uses the PSM title definition and if no price is found use the normal title price if the Control File has been setup to calculate the Cost.

This process is subject to User Access Restrictions. Refer to **User Access/Restrictions** documentation for more information.

Examples

This section illustrates examples concerning:

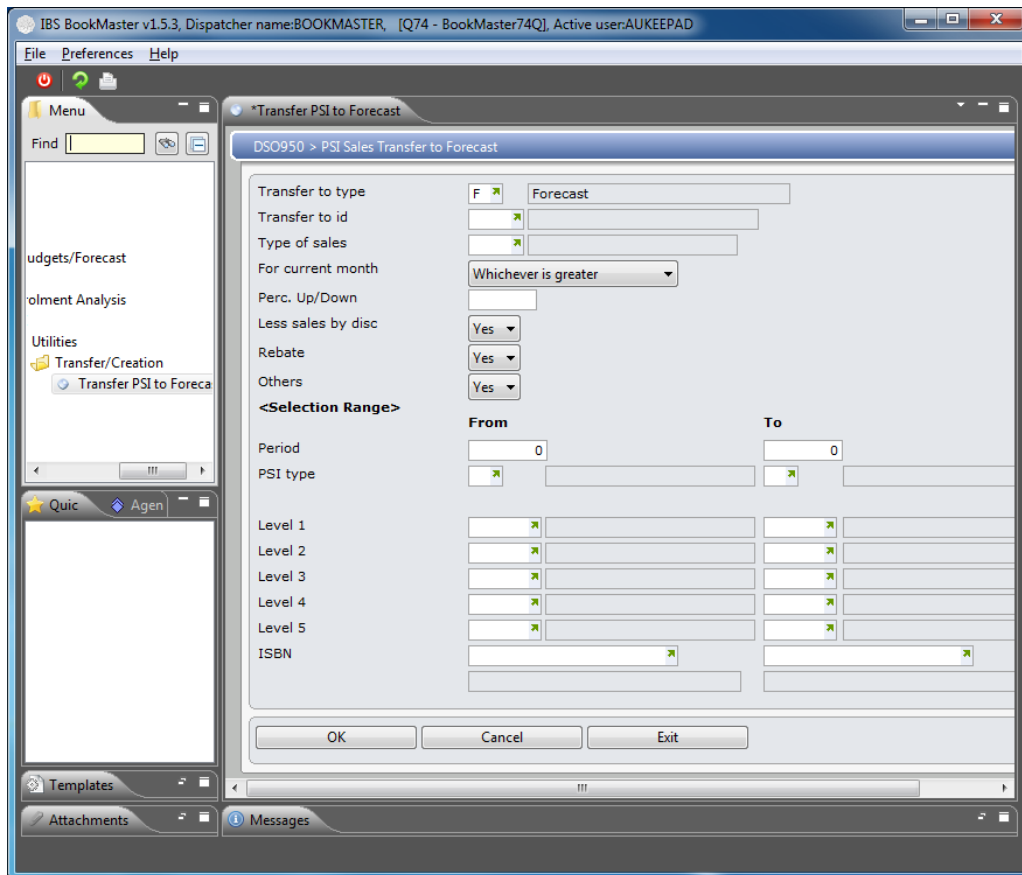
[Example 1: PSI Sales Transfer to Forecast](#)

Example 1: PSI Sales Transfer to Forecast

This example describes how to transfer PSI sales to forecast. This screen is used to define, for a product or group of products where the forecasted sales are to be transferred.

1. Select option **Transfer PSI to Forecast** from Base Modules> Distribution> Other> DRP> Other> PSI> Utilities> Transfer/Creation menu.

DSO950 PSI Sales Transfer to Forecast main panel is displayed.



Relevant Fields

Transfer to type

Select whether this transfer is to be allocated against the forecast or the budget. In Order Demand Transfer to Forecast/Budget, the PSI type to which the transfer is being made is selected.

Transfer to ID

In PSI Sales Transfer to Forecast, the PSI Sales ID which is to be transferred to the forecast is a mandatory entry.

Type of sales

Indicate which types of sale are to be included in the transfer.

For current month

For current month.

In PSI Sales Transfer to Forecast, there is a facility to transfer either Actual sales, PSI sales or Whichever is greater (for current month only). Note that for Forecast Transfer to PSI sales, the Forecast ID must be first setup in the forecast definition file and then added to TMSDS/PSI-TRF.

This field is also used in the PSI Sales Transfer to Budget menu option.

Forecast ID

In Order Demand Transfer to Forecast/Budget, select the Forecast ID to which the transfer is to be made.

	In Plan Order Report, the Forecast ID to be used in the calculation must be entered.
Perc. up/down	<p>This is used to multiply the forecast/budget by a percentage. Enter the negative sign next to the percentage figure if it has to be a negative. For example 250.25-</p> <p>The PSI sales to be transferred can be increased or decreased by this percentage. For example, if you want to increase the sales by 15% when transferred to forecast, enter 15.00 in this field. If you want to reduce the sales by the same percentage, enter 15.00-</p>
Less sales by disc	<p>This defaults to Yes but can be overridden. Determine whether or not to transfer the sales amount minus any discount percentages, or transfer only the sales amount. Yes include sales amount minus discount percentages, or No include sales amount only.</p> <p>If the sales allocation is taken into account (1=Yes on the Cal sales alloc field). This prompt will determine if the discount % in the sales allocation will be included in computing the projected sales.</p>
Less sales by Rebate	<p>This defaults to Yes but can be overridden. Determine whether or not to transfer the sales amount minus any rebate percentages, or transfer only the sales amount. Yes include sales amount minus rebate percentages, or No include sales amount only.</p> <p>If the sales allocation is taken into account (1=Yes on the Cal sales alloc field). This prompt will determine if the discount % in the sales allocation will be included in computing the projected sales.</p>
Less sales by Other	<p>This defaults to Yes but can be overridden. Determine whether or not to transfer the sales amount minus any other percentages, or transfer only the sales amount. Yes include sales amount minus other percentages, or No include sales amount only.</p> <p>If the sales allocation is taken into account (1=Yes on the cal sales alloc field). This prompt will determine if the discount % in the sales allocation will be included in computing the projected sales.</p>
Period	Transactions for a range of Periods can be selected.
PSI type	A range of PSI Types can be selected for inclusion in this transfer.
Level 1 – 5	A range of Level One to Five codes can be selected.
ISBN	A range of items can be selected for inclusion in this transfer.

2. Key in required fields and click **OK** until the message Job completed appears.

You are able to view the transferred forecast sales quantity within the Sales Forecast Module.