

# Forecasted Solutions Implementation Checklist

## Registration

- \_\_\_ Go to [www.forecastedsolutions.com](http://www.forecastedsolutions.com) and select "Register" at top right of home page.
- \_\_\_ Fill out registration form. If referred by someone, please enter their code in referral, then select "Register" button.
- \_\_\_ Check your email at the address you provided during registration and verify by following link in email.
- \_\_\_ You will receive a non-disclosure agreement via email. This is our legal promise to protect your data.
- \_\_\_ Within about 10 minutes of registering, you will receive an email with username and pw for website and FTP server.

## Data Preparation

- \_\_\_ Go to [forecastedsolutions.com](http://forecastedsolutions.com) and choose the "Data Transfer" option at top right of page.
- \_\_\_ Select the download link at bottom of page for "Client Data Workbook". Select "Save" when prompted.
- \_\_\_ Watch the "Data Preparation" video. The video is about 10 minutes.  
Note: All FS videos are HD 1080p. If not clear, you can change the youtube video settings at bottom right corner.
- \_\_\_ Open the "Client Data Workbook" downloaded earlier and read the instructions in the first tab.
- \_\_\_ Review the rest of the workbook to see the structure required for each tab (Note: several tabs are optional).
- \_\_\_ You will need to query your systems to extract data so that each column lines up correctly in the FS workbook.

## Load Your Data Into FS Workbook

	Desired Functionality		
	Forecasting	Planned Orders	Optional
___ Set Your Calendar: Follow instructions in Column J and/or hyperlink at cell A1	X		
___ Period: Review period tab to make sure dates and periods look correct	X		
___ Item Master: Follow instructions in hyperlink at cell D1	X		
___ Customer Master: Follow instructions in hyperlink at cell C1	X		
___ Order Data: Follow instructions in hyperlink at cell A1	X		
___ Base Levels: Follow instructions in hyperlink at cell A1	X		
___ Open Orders: Follow instructions in hyperlink at cell A1 (Optional)			X
___ POS / External Data: Follow instructions in hyperlink at cell A1 (Optional)			X
___ SKU Pricing: Follow instructions in hyperlink at cell A1 (Optional)			X
___ Inventory: Follow instructions in hyperlink at cell A1		X	
___ Replenishment: Follow instructions in hyperlink at cell A1		X	
___ Replenishment Parameters: Follow instructions in hyperlink at cell A1		X	
___ Item Master (UOM): Follow instructions in hyperlink at cell A1 (Optional)			X

## Validate, Export and Copy to FTP Server

- \_\_\_ Go to "Export" tab at far right. Select "Browse" button and choose location for exported files.
- \_\_\_ Select "Validate Workbook" button. This may take some time to run.
- \_\_\_ If there are errors after validation, make corrections as needed. This is covered near end of Data Preparation video.
- \_\_\_ Select "Export Data for Upload Files" button. This will copy your files to location identified during "Browse" step above.
- \_\_\_ Navigate to folder identified during "Browse" step above.
- \_\_\_ Select all of your exported data files and right-click and choose 'Send to', then choose "Compressed (zipped) folder".
- \_\_\_ Open **Windows** Explorer (not internet explorer) and navigate to <ftp://forecastedsolutions.com>.
- \_\_\_ Enter **FTP** user name and password provided in the email you received.
- \_\_\_ Drag the compressed file containing your data to the FTP folder you just opened. Data will be processed automatically.
- \_\_\_ Wait for email notification that the processing is complete. Usually < 1 hour.

## Begin Using the App

- \_\_\_ Go to [forecastedsolutions.com](http://forecastedsolutions.com).
- \_\_\_ If you have not already watched the "Features Overview" video, please watch it. It is about 16 minutes.
- \_\_\_ Select the "Login" button at top right of home page. Enter **Application** username and pw you chose during registration.

The Features Overview video will show you all the basic functionality and navigation for the application.