

5.5.1. Final Forecast Overrides

Occasionally you may need to make some corrections to the forecasts generated by Streamline. For example, you're planning to conduct a big promotion or a wide clearance sale, or any other campaign. This will definitely impact future sales. However, since this information is not represented in the history, Streamline has no knowledge of it. Thus, generated forecasts should be adjusted manually.

Demand forecast adjustments can be made at every level of the **Tree view**.

To adjust a statistical forecast:

1. Select the node in the **Table view**.
2. Click the yellow cell in the **Final Forecast Overrides** row of the Table view.
3. Enter a new value and press **Enter**.

| | | 2019 | Sep 2019 | Oct 2019 | Nov 2019 | Dec 2019 | Jan 2020 | Feb 2020 | Mar 2020 |
|-----------------------------|-------------------------|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-----------|----------|-----------|
| Expand Collapse | | | | | | | | | |
| ▼ All items | \$4,436,235 \$2,104,224 | Actual sales | 2,310 | 2,945 | 2,340 | 3,193 | | | |
| ▼ Consumer goods | \$209,802 | Statistical forecast | 2,497 | 2,497 | 2,497 | 2,497 | 2,497 | 2,497 | 2,497 |
| ▼ Building materials and eq | | Final forecast overrides | | | | | 1,300 | 1500 | |
| ▼ C1020 — Concrete blo | | Average sales price | 29.49 | 29.49 | 29.49 | 29.49 | 29.49 | 29.49 | 29.49 |
| ▼ WH-001 — WH N | | Revenue | 14 | 68,121.90 | 86,848.05 | 69,006.60 | 94,161.57 | 38,337 | 73,636.53 |
| Direct sale | | On hand | | | | 5,920 | | | |
| Distributors | | Stockout days | 0 | 0 | 0 | 0 | | | |
| > WH-002 — WH Sa | | Projected inventory levels | | | | | 6,706 | 1,712 | 6,545 |
| > WH-003 — WH N | | Ordering plan | | | | | 4,583 | 4,626 | 5,201 |
| > H2510 — Nails [season | | To receive | | | | | | | |
| > Electronics | \$702,780 | To ship | | | | | | | |
| > Furniture | \$116,861 | Ignore actual sales | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | |
| > Sporting goods | \$74,435 | | | | | | | | |
| > Fashion | \$4,164,801 \$812,47 | | | | | | | | |
| > Food/Beverages | \$61,632 \$9 | | | | | | | | |
| > Pharmacies | \$324,031 | | | | | | | | |

Once the value has been entered two things happen: 1) the **Plot view** gets updated; 2) the node in the **Tree view** now is shown in blue (all edited data in the application is displayed in blue). Adjusted cells can be edited again by clicking on the cell and entering new values.

Forecast adjustments will not be removed after you **update** and re-forecast the project.

A summary of all the forecast adjustments can be accessed in the **Forecast overrides** report on the **Reports** tab.

| New filter | | All items | | Settings | | Report | | Forecast overrides | | Final forecast | | Period | | Dec 2019 | | Aggregate by | | None | | Export report | | Import changes | | Show columns | |
|------------|----------------------|------------------|--------------|------------|-------------------|--------|--------------|--------------------|----------|----------------|----------|----------|----------|----------|----------------|--------------|--|------|--|---------------|--|----------------|--|--------------|--|
| Location | Location description | Channel | Supplier | Model type | Model quality | Slope | ABC analysis | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 | May 2020 | Jun 2020 | Jul 2020 | Final forecast | | | | | | | | | | |
| 1 | WH-001 | WH New Jersey | Direct sale | 125689 | Constant level | 85.21% | 0% | C 0.0412% | | | | 3,000 | 2,500 | 2,000 | | | | | | | | | | | |
| 2 | WH-001 | WH New Jersey | Direct sale | 568947 | Constant level | 85.21% | 0% | C 0.0779% | | 2,500 | 2,000 | 2,500 | 2,000 | | | | | | | | | | | | |
| 3 | WH-001 | WH New Jersey | Direct sale | 568947 | Constant level | 85.21% | 0% | C 0.0779% | | | 2,500 | 1,000 | 2,000 | | | | | | | | | | | | |
| 4 | WH-001 | WH New Jersey | Direct sale | 125689 | Constant level | 85.21% | 0% | C 0.122% | 1,300 | 1,500 | | | | | | | | | | | | | | | |
| 5 | WH-001 | WH New Jersey | Direct sale | 56892-P | Seasonal & tre... | 75.05% | 1.76% | C 0.095% | | | | | | | | | | | | | | | | | |
| 6 | WH-001 | WH New Jersey | Distributors | 56892-P | Seasonal & tre... | 75.05% | 1.76% | C 0.095% | | | | | | | | | | | | | | | | | |
| 7 | WH-002 | WH San Francisco | Direct sale | 56892-P | Seasonal & tre... | 75.05% | 1.76% | C 0.095% | | | | | | | | | | | | | | | | | |

The report can be exported to Excel and edited there. Once saved in Excel, these overrides can be loaded back into Streamline using the **Import changes** button.

Adjusting Using a Formula

Forecast adjustment can be added as a formula using the following syntax:

- `<operator>[value]`. For example, `+250`, `*1.2`, or `-150`. If the `<operator>` is `+` or `-`, the `value` must be an integer.
- `<operator1>[value1]<operator2>[value2]`. For instance, `*3.5+100` or `*2-50`. The `<operator1>` must always be `*`, the `[value1]` can be a fraction number or an integer, the `<operator2>` can be whether `+` or `-`, the `[value2]` must be an integer.

The formulas always imply manipulations relative to the corresponding cell value of the **Statistical forecast** row. In other words, a statistical forecast can be increased or decreased according to the given formula.

To adjust a forecast with a formula:

1. Go to **Demand forecasting** tab.
2. Click the yellow cell in the **Final Forecast Overrides** row of the **Table view**.
3. Enter your formula according to the syntax.
4. Press **Enter**.

Here is an example in the screenshot below.

| | Dec 2019 | Jan 2020 |
|--------------------------|----------|----------|
| Actual sales | 3,193 | |
| Statistical forecast | 2,497 | 2,497 |
| Final forecast overrides | | +10 |

| | Dec 2019 | Jan 2020 |
|--------------------------|----------|----------|
| Actual sales | 3,193 | |
| Statistical forecast | 2,497 | 2,497 |
| Final forecast overrides | | 2,507 |

The statistical forecast for Jan 2020 is **2497**. We increase it by entering `+10` in the **Final Forecast Overrides** row. After pressing **Enter** the final result is **2507**.

Adjusting at Category Level

If an adjustment is made at a category level of the **Tree view**, Streamline distributes the adjusted value among the children nodes proportionally, inserting formulas in the adjusted cells at the lower levels. Not all adjustments remain as they are entered because of the distribution algorithm. However, Streamline finds the nearest value to the one that it is the given.

In the example below, we adjust the forecast for January to **16,468** at the item level. Each item here holds two locations and is a kind of category.

| Expand Collapse | | Nov 2019 | Dec 2019 | Jan 2020 |
|--|-------------------------|------------|------------|----------|
| ▼ All items | \$4,429,580 \$2,104,224 | 14,040 | 19,158 | |
| > Consumer goods | \$209,802 \$876,751 | | | |
| > Fashion | \$4,164,801 \$812,473 | | | 14,982 |
| ▼ Food/Beverages | \$54,976 \$90,970 | | | 16,468 |
| ▼ Alcoholic Beverages | \$39,538 \$25,441 | | | |
| ▼ 89654-T — Brut Cava 750ml [linear trend] | | 19.99 | 19.99 | |
| > WH-001 — WH New Jersey | | | | |
| > WH-002 — WH San Francisco | | | | |
| > WH-003 — WH New York | \$39,538 | | | |
| > 562132 — Dark Beer can 473 ml [seasonal] | | | | |
| Actual sales | | 14,040 | 19,158 | |
| Statistical forecast | | | | 14,982 |
| Final forecast overrides | | | | 16,468 |
| Average sales price | | 19.99 | 19.99 | |
| Revenue | | 280,659.60 | 382,968.42 | 319,840 |
| On hand | | | 30,725 | |
| Stockout days | | 0 | 0 | |

To distribute the value between the locations, Streamline changes it to **16,000**.

| Expand Collapse | | Nov 2019 | Dec 2019 | Jan 2020 |
|--|-------------------------|------------|------------|----------|
| ▼ All items | \$4,429,580 \$2,104,224 | 14,040 | 19,158 | |
| > Consumer goods | \$209,802 \$876,751 | | | |
| > Fashion | \$4,164,801 \$812,473 | | | 14,982 |
| ▼ Food/Beverages | \$54,976 \$90,970 | | | 16,000 |
| ▼ Alcoholic Beverages | \$39,538 \$25,441 | | | |
| ▼ 89654-T — Brut Cava 750ml [linear trend] | | 19.99 | 19.99 | |
| > WH-001 — WH New Jersey | | | | |
| > WH-002 — WH San Francisco | | | | |
| > WH-003 — WH New York | \$39,538 | | | |
| > 562132 — Dark Beer can 473 ml [seasonal] | | | | |
| Actual sales | | 14,040 | 19,158 | |
| Statistical forecast | | | | 14,982 |
| Final forecast overrides | | | | 16,000 |
| Average sales price | | 19.99 | 19.99 | |
| Revenue | | 280,659.60 | 382,968.42 | 319,840 |
| On hand | | | 30,725 | |
| Stockout days | | 0 | 0 | |

They are now displayed in blue in the **Tree view**. The planning items under the category get their forecast adjustments as formulas automatically.

| Expand Collapse | | Nov 2019 | Dec 2019 | Jan 2020 |
|--|-------------------------|-----------|------------|------------|
| ▼ All items | \$4,429,580 \$2,104,224 | 4,680 | 6,386 | |
| > Consumer goods | \$209,802 \$876,751 | | | |
| > Fashion | \$4,164,801 \$812,473 | | | 4,994 |
| ▼ Food/Beverages | \$54,976 \$90,970 | | | 5,334 |
| ▼ Alcoholic Beverages | \$39,538 \$25,441 | | | |
| ▼ 89654-T — Brut Cava 750ml [linear trend] | | 19.99 | 19.99 | |
| > WH-001 — WH New Jersey | | | | |
| > WH-002 — WH San Francisco | | | | |
| > WH-003 — WH New York | \$39,538 | | | |
| > 562132 — Dark Beer can 473 ml [seasonal] | | | | |
| Actual sales | | 4,680 | 6,386 | |
| Statistical forecast | | | | 4,994 |
| Final forecast overrides | | | | 5,334 |
| Average sales price | | 19.99 | 19.99 | |
| Revenue | | 93,553.20 | 127,656.14 | 106,626.66 |
| On hand | | | 5,921 | |
| Stockout days | | 0 | 0 | |

Propagating Adjustments

An adjustment can be propagated ahead by adding the symbol > at the end of the formula. For example +250>, *1.5>, -150>, or 200>.

To propagate an adjustment in Streamline, do the following:

1. Click the adjustment cell you want to propagate. The cell is automatically switched to edit mode.
2. Add the > symbol at the end of the formula.
3. Press **Enter**.

The propagation can also be performed using the right-click menu and selecting the **Propagate value** command.

| | | | | | | |
|--------------------------|-----------|------------|----------|-------|-------|-------|
| Actual sales | 4,680 | 6,386 | | | | |
| Statistical forecast | | | 4,994 | 4,994 | 4,994 | 4,994 |
| Final forecast overrides | | | 5,094 | | | |
| Average sales price | 19.99 | 19.99 | | | | |
| Revenue | 93,553.20 | 127,656.14 | 101,829. | | | |
| On hand | | 5,921 | | | | |

- Add note...
- Propagate value**
- Export to XLSX

The propagation command populates empty cells to the right until the first non-empty cell is reached.

| | | | | | | | |
|--------------------------|-------|-------|-------|-------|-------|-------|-------|
| Actual sales | 4,680 | 6,386 | | | | | |
| Statistical forecast | | | 4,994 | 4,994 | 4,994 | 4,994 | 4,994 |
| Final forecast overrides | | | 5,094 | 5,094 | 5,094 | 5,094 | 5,094 |
| Average sales price | 19.99 | 19.99 | | | | | |

If a cell contains a formula, the propagation command populates empty cells with this formula (not the value). The propagated status of a cell can be unchecked in the context (right-click) menu or removed by deleting the symbol > from the cell formula.

[Next: Fine-tuning the Forecasting Models](#)

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