

P3- Sales Forecasting, Production Planning, Purchase Plan, Procurement



MATRIX
WEB TECHNOLOGIES

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I EXECUTIVE SUMMARY

1.1 Objectives

Sales forecasting for an established business is easier than sales forecasting for a new business; the established business already has a sales forecast baseline of past sales.

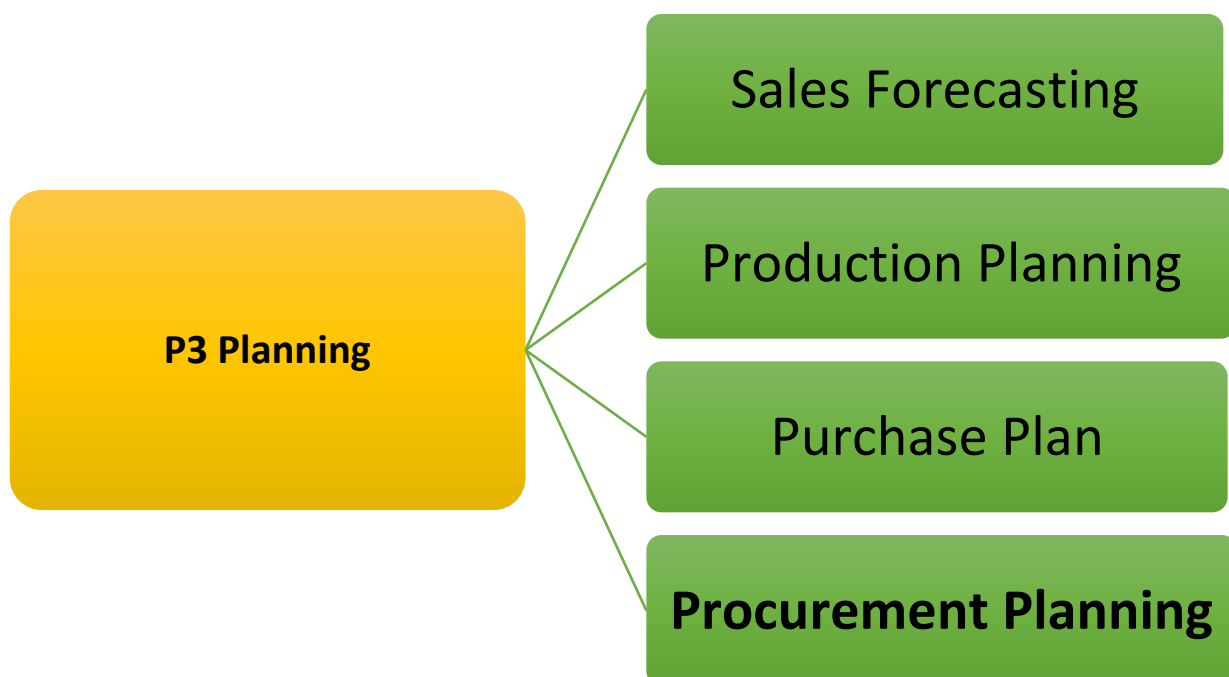
A business's sales revenues from the same month in a previous year, combined with knowledge of general economic and industry trends, work well for predicting a business's sales in a particular future month.

If your business has repeat customers, you can check with them to see if their purchase levels are likely to continue in future. If you don't wish to contact them directly you can infer future activity based on the health of the customer industry.

1.2 Project Goals

Sales Projection is the base of everything for any manufacturing unit. If we do not predict our future, then we will not able to plan for it.

A sales projection is the amount of revenue a company expects to earn at some point in the future. It's a prediction that is synonymous with a sales forecast. Both help determine the health of a company and whether sales will trend upward or downward. Small companies use various input to determine sales projections.



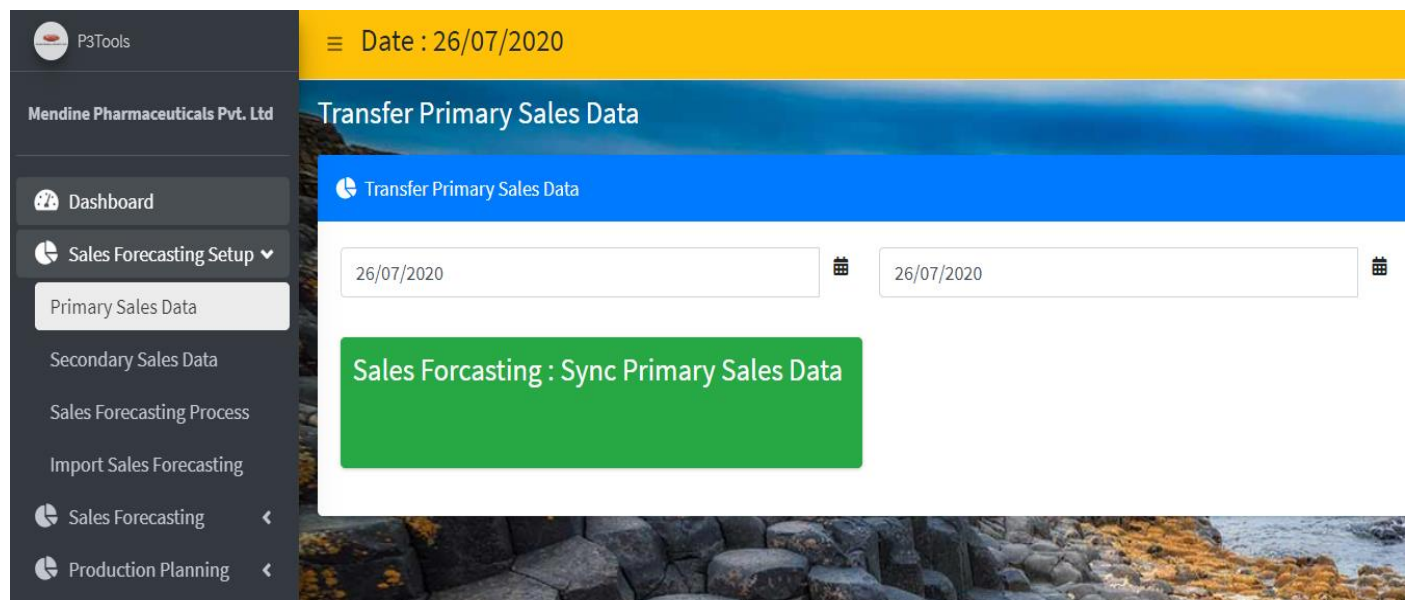
2 PHASE I- SALES FORECASTING

Sales Projection is the base of everything for any manufacturing unit. If we do not predict our future, then we will not be able to plan for it. A sales projection is the amount of revenue a company expects to earn at some point in the future. It's a prediction that is synonymous with a sales forecast. Both help determine the health of a company and whether sales will trend upward or downward. Small companies use various input to determine sales projections.

2.1 Sales Forecasting Setup

2.1.1 Primary Sales Data

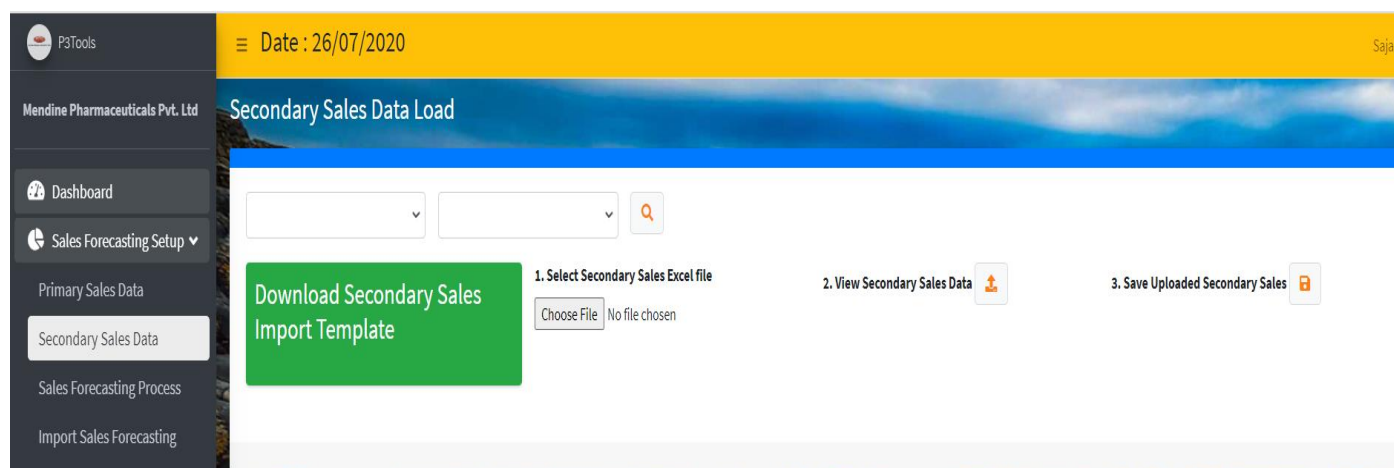
Menu	Primary Sales Data			Page Name	data-transfer.html	
Purpose	1. Sync Primary Sales: Fetch Primary Sales Data from [103.253.125.131,5000].[MendineMaster]. [Transactionbilltaxableamtautomation] (Linked) database and Load into P3 Database. Data fetch Date wise. SP: usp_01_LoadPrimary_SalesTransactionData					
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory	



The screenshot shows the P3Tools web application interface. On the left is a sidebar menu with the following items: P3Tools, Mendine Pharmaceuticals Pvt. Ltd, Dashboard, Sales Forecasting Setup (expanded), Primary Sales Data (selected), Secondary Sales Data, Sales Forecasting Process, Import Sales Forecasting, Sales Forecasting, and Production Planning. The main content area has a yellow header bar with a hamburger menu icon and the text 'Date : 26/07/2020'. Below this is a blue banner with the title 'Transfer Primary Sales Data'. Under the banner is a blue bar with a pie chart icon and the text 'Transfer Primary Sales Data'. Below this are two date input fields, both containing '26/07/2020'. At the bottom is a large green button with the text 'Sales Forecasting : Sync Primary Sales Data'.

2.1.2 Secondary Sales Data

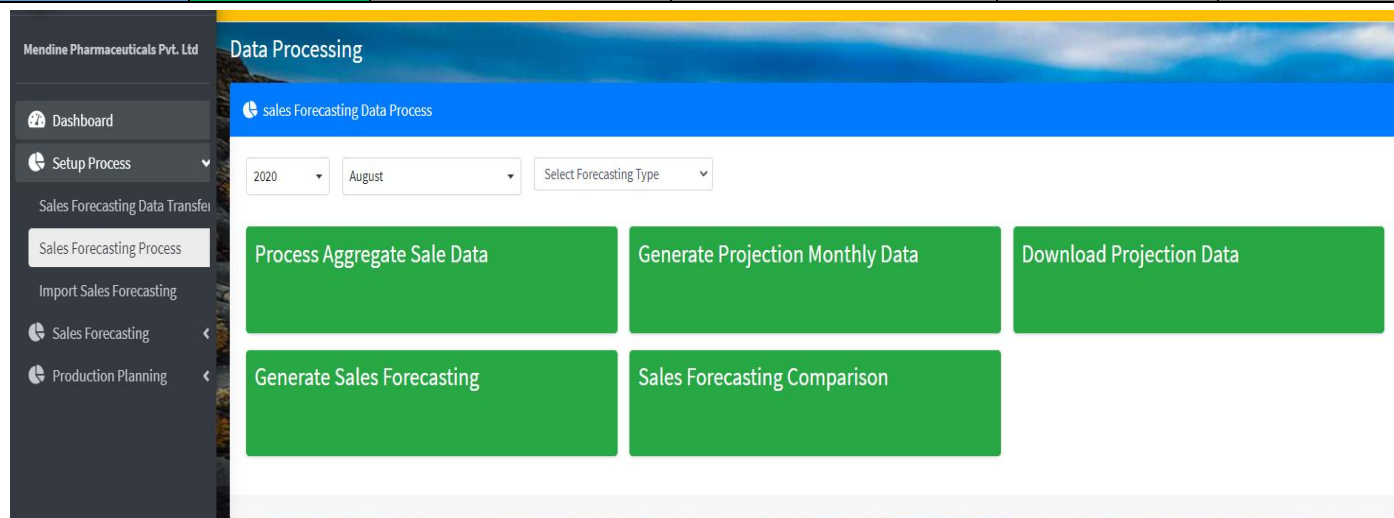
Menu	Secondary Sales Data		Page Name	secondary_sales.html	
Purpose	<div><div><div><div><div><div></div><div>1. Download Secondary Sales Data Excel Template from “Download Secondary Sales Import Template”</div></div></div><div><div><div></div><div>2. Select Secondary Sales Excel file -Browse the source Excel file</div></div></div><div><div><div></div><div>3. View Secondary Sales Excel Data - Once Selected the file, click upload Icon to upload and view the uploaded data in the grid.</div></div></div><div><div><div></div><div>4. Save Secondary Sales Data – Once view the uploaded data in Grid now you save data to finally import into P3 System.</div></div></div></div><div>Here the bellow screen for operation based on role.</div></div></div>				
	1. Table: tbl_P3_SecondarySaleTransDetails_Uploaded				
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory



The screenshot shows the P3Tools interface for 'Mendine Pharmaceuticals Pvt. Ltd.' on the date 26/07/2020. The left sidebar contains a menu with 'Secondary Sales Data' selected. The main content area is titled 'Secondary Sales Data Load' and features a search bar at the top. Below the search bar, there are three main steps: 1. Select Secondary Sales Excel file (with a 'Choose File' button and 'No file chosen' text), 2. View Secondary Sales Data (with an upload icon), and 3. Save Uploaded Secondary Sales (with a save icon). A green button labeled 'Download Secondary Sales Import Template' is prominently displayed on the left side of the main content area.

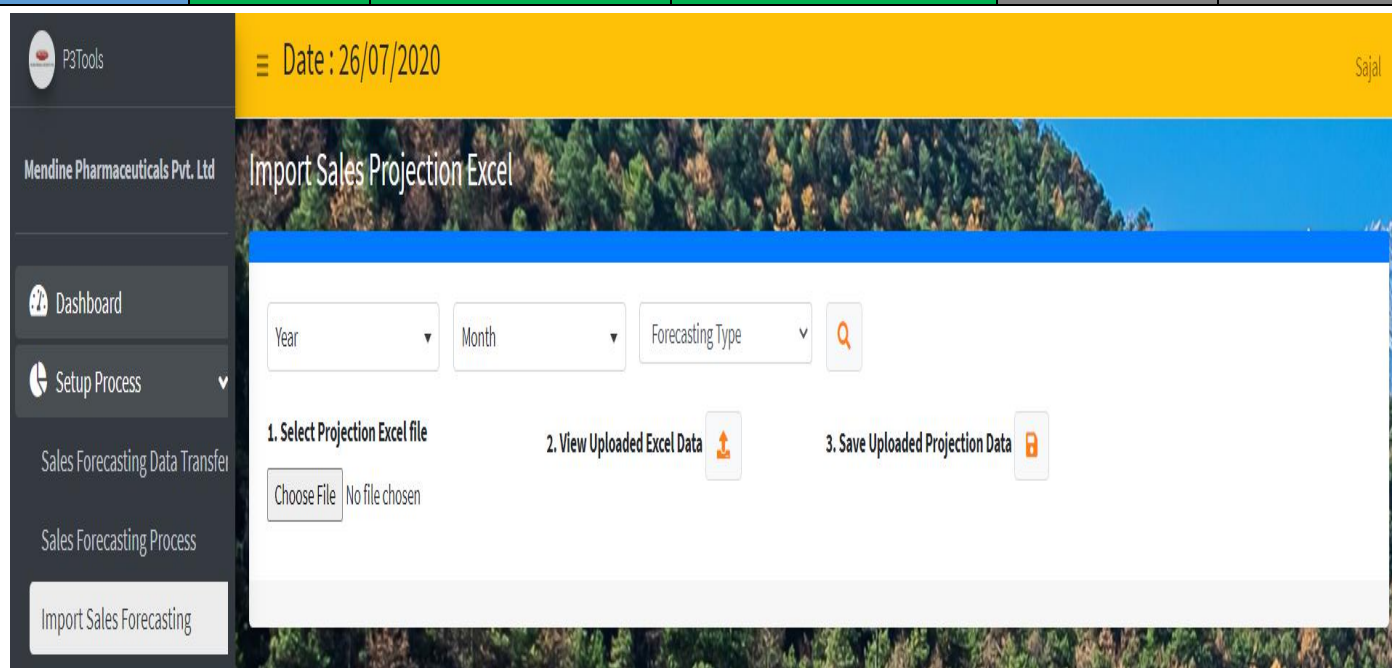
2.1.3 Sales Forecasting Process

Menu	Sales Forecasting Process	Page	data-processing.html
Purpose	Process Aggregate Sale Data	Aggregate Monthly Primary Sales data. Once Transfer or Sync Sales data, this process needs to invoke. Used SP: usp_02_Process_AggregateSaleData Table: tbl_P3_AGG_SaleTransaction	
	Generate Projection Monthly Data	Based on Last Year QTY this current month Projection will be calculated for the Forecasting Type (Logistics/ Marketing) Used SP: usp_03_GenerateProjectionMonthlyData Table: tbl_P3_SaleProjection_Uploaded	
	Download Projection Data	Download Excel Template with Data for the Upload the Edited Projection Value for Logistics/ Marketing Used SP: usp_04_DownloadExcelProjectionMonthlyData Table: tbl_P3_SaleProjection_Uploaded	
	Generate Sales Forecasting	Generate Sales Forecasting Data for the Next Month. Once uploaded Logistics/ Marketing then only generate Forecasting. Used SP: usp_05_GenerateSalesForecasting Table: tbl_P3_SaleForecasting	
	Sales Forecasting Comparison	Edit the Forecasting Data if Market and Logistics projection are varying more than 10% then only user will get a chance to Edit value from Forecasting Comparison Menu. Once all changes are Done then only prepare Sales Forecasting Comparison Used SP: usp_06_GenerateSalesForecastingComparison Table: tbl_P3_SaleForecastingComparison	
Access By	Admin	Outbound Logistics	Inbound Logistics
			Marketing
			Factory



2.1.4 Import Sales Forecasting

Menu	Import Sales Forecasting		Page	import_salesprojection.html	
Purpose	Once Download Projection (Download Projection Data) Excel file for Logistics/ Marketing. Once fill and edited by user Import the Excel into P3 System and followed the bellow Step				
	<div>1. Select Projection Excel file -Browse the source Excel file</div> <div>2. View Uploaded Excel Data - Once Selected the file, click upload Icon to upload and view the uploaded data in the grid.</div> <div>3. Save Uploaded Projection Data – Once view the uploaded data in Grid now you save data to finally import into P3 System.</div> <div>Here the bellow screen for operation based on role.</div>				
	Table: tbl_P3_PrimarySaleTransDetails_Uploaded				
	Table: tbl_P3_SecondarySaleTransDetails_Uploaded				
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory



The screenshot shows the P3Tools web application interface. The top navigation bar includes the P3Tools logo, a date filter set to 26/07/2020, and a user profile for Sajal. The left sidebar contains a menu with options: Dashboard, Setup Process (expanded), Sales Forecasting Data Transfer, Sales Forecasting Process, and Import Sales Forecasting (selected). The main content area is titled 'Import Sales Projection Excel' and features a form with three steps: 1. Select Projection Excel file (with a 'Choose File' button and 'No file chosen' text), 2. View Uploaded Excel Data (with an upload icon), and 3. Save Uploaded Projection Data (with a save icon). Above the steps are dropdown menus for Year, Month, and Forecasting Type, followed by a search icon.

2.2 Sales Forecasting

2.2.1 Sales Projection

Menu	Sales Projection			Page	sales-projection.html
Purpose	Sales Projection List by Forecasting Type (Logistics/ Marketing). Data will be filter by Year and month basic. Table: tbl_P3_SaleProjection_Uploaded				
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory

P3Tools

Mendine Pharmaceuticals Pvt. Ltd

Dashboard

Sales Forecasting Setup <

Sales Forecasting >

Sales Projection

Forecasting Details

Forecasting Comparison

Forecasting Summary

Production Planning <

≡ Date : 26/07/2020

Sajal

Sales Projection

Download Sales Projection

Year

Month

Forecasting Type

2020

May

Logistics

Q

Search:

Show


100

entries

Type	HQ	Depot	Division	Product Code	Product Name	Pack Unit	Projected QTY For
Logistics	AGARTALA_2	AGTL	PHOENIX	C005	CARMOZYME	200	52376.5
Logistics	AGARTALA_2	AGTL	PHOENIX	C005	CARMOZYME	200	52376.5
Logistics	AIZWAL	GHY	PHOENIX	C006	CARMOZYME	450	51704.8
Logistics	AIZWAL	GHY	PHOENIX	C006	CARMOZYME	450	51704.8
Logistics	CONTAL_2	BNGL	PHOENIX	C006	CARMOZYME	450	42952.17
Logistics	BARPETA ROAD	GHY	PHOENIX	C005	CARMOZYME	200	41901.2
Logistics	BARPETA ROAD	GHY	PHOENIX	C005	CARMOZYME	200	41901.2
Logistics	SILCHAR	GHY	PHOENIX	C005	CARMOZYME	200	41901.2
Logistics	SILCHAR	GHY	PHOENIX	C005	CARMOZYME	200	41901.2

2.3 Forecasting Details

Menu	Forecasting Details		Page	sales_forecasting.html	
Purpose	Sales Forecasting List for the month. Report can be filter by following <ul style="list-style-type: none">ProductDivisionLocation Table: tbl_P3_SaleForecasting				
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory

 P3Tools
 Mendline Pharmaceuticals Pvt. Ltd.
 Dashboard
 Sales Forecasting Setup
 Sales Forecasting
 Sales Projection
 Forecasting Details
 Forecasting Comparison
 Forecasting Summary
 Production Planning

Date : 26/07/2020
 Sajal

Sales Forecasting

2020 May Select Product Select Division Select Location


Search:

Show 100 entries

HQ	Depot	Division	Product Code	Product Name	Pack Unit	Projected QTY
AIZWAL	GHY	PHOENIX	C006	CARMOZYME	450	37529.92
SILCHAR	GHY	PHOENIX	C005	CARMOZYME	200	26777.48
AGARTALA_2	AGTL	PHOENIX	C005	CARMOZYME	200	24919.6
BARPETA ROAD	GHY	PHOENIX	C005	CARMOZYME	200	18272.48
GANGARAMPUR	BNGL	PHOENIX	C006	CARMOZYME	450	17550.04
MEDINIPUR_1	BNGL	PHOENIX	C006	CARMOZYME	450	17400.14
GUWAHATI_1 (POOL)	GHY	PHOENIX	C005	CARMOZYME	200	15940.24
MOYNA	BNGL	PHOENIX	C005	CARMOZYME	200	13982.07
AGARTALA_2	AGTL	PHOENIX	C006	CARMOZYME	450	13649.28
BHUPATINAGAR	BNGL	PHOENIX	C006	CARMOZYME	450	12795.9

2.4 Forecasting Comparison

Menu	Forecasting Comparison		Page	sales_ForecastingComparison.html	
Purpose	Forecasting will manually fill by Marketing & Final Projection will be higher of both the factor. Then User can able to fill or edit Final Forecasting value and able to save the Final Forecasting value. Forecasting Comparison able view month wise value to filter the bellow fields <ul style="list-style-type: none">ProductDivisionLocation Table: tbl_P3_SaleForecastingComparison				
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory

 P3Tools
 Mendine Pharmaceuticals Pvt. Ltd
 Dashboard
 Sales Forecasting Setup
 Sales Forecasting
 Sales Projection
 Forecasting Details
 Forecasting Comparison
 Forecasting Summary
 Production Planning

Date : 26/07/2020

Sales Forecasting Comparison

Export Sale Forecasting Comparison

2020 May Select Product: Select Division Select Location


Search:

Show 100 entries

HQ	Depot	Division	Product Code	Product Name	Pack Unit	Logistics	Marketing	Difference(%)	Forecasting	Final Forecasting
AGARTALA_1	AGTL	EVA	A007	AMIRID (TABLET)	10	0	0	0%	0	0
AGARTALA_1	AGTL	EVA	C004	CARMOZYME DROPS	15	0	0	0%	0	0
AGARTALA_1	AGTL	EVA	C019	CARMOZYME NXG	200	43.2	21.6	100%	0	0
AGARTALA_1	AGTL	EVA	C017	CATAREX LS	100	36	18	100%	0	0
AGARTALA_1	AGTL	EVA	C013	CATAREX-AT	100	0	0	0%	0	0
AGARTALA_1	AGTL	EVA	C023	CHEW LMF	10	0	0	0%	0	0
AGARTALA_1	AGTL	EVA	D001	DOPY 10 (TABLET)	10	0	0	0%	0	0
AGARTALA_1	AGTL	EVA	G003	GROW-LY	200	72	36	100%	0	0
AGARTALA_1	AGTL	EVA	L001	LOK AR	60	0	0	0%	0	0
AGARTALA_1	AGTL	EVA	L002	LOK AR MDT (TABLET)	10	634.35	591.15	7%	612	612

2.5 Forecasting Summary

Menu	Forecasting Summary			Page	sales-forecast-summary.html	
Purpose	View Month wise Sales Forecasting Summary report for Next Month Sales by Logistics/ Marketing data. Table: tbl_P3_SaleForecastingComparison					
Access By	Admin	Outbound Logistics	Inbound Logistics		Marketing	Factory

 P3Tools
 Mendine Pharmaceuticals Pvt. Ltd.
 Dashboard
 Sales Forecasting Setup
 Sales Forecasting
 Sales Projection
 Forecasting Details
 Forecasting Comparison
Forecasting Summary
 Production Planning

Date : 26/07/2020

Sajal

Sales Forecast Summary

Export Sales Forecast Summary

2020

May

Q

Search:

Show

10

entries


ProductName	ProductCode	PackUnit	ProjectionSalesQTY
AMIRID (TABLET)	A007	10	13330.2
AMIRID-O (TABLET)	A009	10	2637
CARMOLAX ROOTS (POWDER)	C015	100	10030
CARMOZYME	C003	100	52024
CARMOZYME	C005	200	33727
CARMOZYME	C006	450	51583
CARMOZYME	C026	114	0
CARMOZYME DROPS	C004	15	1079
CARMOZYME NEO	C022	200	43637
CARMOZYME NXG	C019	200	20067

3 PRODUCTION PLANNING

3.1 Production Planning

3.1.1 Import Factory Production

Menu	Import Factory Production	Page	import_factoryproductiontarget.html
Purpose	<p>Import Factory Production Data sheet from Predefined Excel Template file "Production Plan - Factory Production Target Template.xls" with bellow fields: -</p> <ul style="list-style-type: none"> ProductCode, ProductName, PackUnit, UnitsQTY{Month}-{Year} <p>Import Process of Excel into P3 System and followed the bellow Step</p> <ol style="list-style-type: none"> Select File: Production Plan - Factory Production Target Template.xlsx Select Factory Production Excel file -Browse the source Excel file View Uploaded Factory Production Excel Data - Once Selected the file, click upload Icon to upload and view the uploaded data in the grid. <p>Save Factory Production Data – Once view the uploaded data in Grid now you save data to finally import into P3 System.</p> <p>To View Data select Year and Month then search the imported data.</p>		
Access By	Admin	Outbound Logistics	Inbound Logistics
		Marketing	Factory

 P3Tools
Mendine Pharmaceuticals Pvt. Ltd.
Dashboard
Sales Forecasting Setup
Sales Forecasting
Production Planning
Import Factory Production
Import Physician Sample Plan
Process Production Planning
Production Forecasting

Date : 26/07/2020

Sajal

Import Factory Production Target Excel

Download Factory Production Target

2020 June

1. Select Factory Production Target Excel file
Choose File No file chosen

2. View Uploaded Excel Data

3. Save Factory Production Target Data

Search:

Show 20 entries

For Month	Product Code	Product Name	Pack Unit	Units
Jun-2020	A007	AMIRID (TABLET)	10	0
Jun-2020	A009	AMIRID-O (TABLET)	10	0
Jun-2020	C015	CARMOLAX ROOTS (POWDER)	100	0
Jun-2020	C003	CARMOZYME	100	0
Jun-2020	C026	CARMOZYME	114	83585.83
Jun-2020	C005	CARMOZYME	200	122454.94
Jun-2020	C006	CARMOZYME	450	128240.5
Jun-2020	C004	CARMOZYME DROPS	15	0

3.1.2 Import Physician Sample Plan

Menu	Import Physician Sample Plan	Page	import_PhysicianSamplePlan.html		
Purpose	<p>Import Physician Sample Plan Data sheet from Predefined Excel Template file “Production Plan - Physician Sample Plan Template.xlsx” with bellow fields: -</p> <ul style="list-style-type: none">• ProductName, PackUnit, UnitsQTY{Month}-{Year} <p>Import Process of Excel into P3 System and followed the bellow Step</p> <ol style="list-style-type: none">4. Select File: Physician Sample - Production Plan - Physician Sample Plan Template.xlsx5. Select Physician Sample Excel file -Browse the source Excel file6. View Uploaded Physician Sample Excel Data - Once Selected the file, click upload Icon to upload and view the uploaded data in the grid. <p>Save Physician Sample Data – Once view the uploaded data in Grid now you save data to finally import into P3 System.</p> <p>To View Data select Year and Month then search the imported data.</p>				
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory

Mendine Pharmaceuticals Pvt. Ltd

Dashboard
Sales Forecasting Setup
Sales Forecasting
Production Planning
Import Factory Production
Import Physician Sample Plan
Process Production Planning
Production Forecasting

Import Physician Sample Plan Excel

Download Physician Sample Plan

2020
June

1. Select Physician Sample Plan Excel file
2. View Uploaded Excel Data
3. Save Physician Sample Plan Data

Choose File
No file chosen

Search:

Show
20
entries

For Month	Product Name	Pack Unit	Units
Jun-2020	AMIRID (TABLET)	2	603
Jun-2020	AMIRID-O (TABLET)	2	2500
Jun-2020	CARMOLAX ROOTS (POWDER)	50	2060
Jun-2020	CARMOZYME	60	15598
Jun-2020	CARMOZYME DROPS	15	1632
Jun-2020	CARMOZYME NEO	100	3158
Jun-2020	CARMOZYME NXG	50	1047
Jun-2020	CARMOZYME ROOTS	50	4119
Jun-2020	CATAREX LS	60	2690

3.1.3 Process Production Planning

Menu	Process Production Planning		Page	process_productionplaning.html	
	This is Control Page of the Product Plan System.				
Purpose	Sync SQL Depot SKU Stock		SKU Stock Data Transfer from Easy Report to P3 Database from Closingstock table by executing EXEC [P3].[dbo].[getclosingstock] SP: usp_Production_01_TransferDepotStockFromEasyReport Table: tbl_P3_Production_DepotStock_Raw		
	Sync SQL WIP Stock		EasyReports3.6].dbo.TD_Mst_StockItem Data Transfer from Tally DB to P3 Database for Company=2, StockGroup like 'ready to fill' and GodownName like 'Un Approved Store' SP: usp_Production_03_TransferWIPStockFromEasyReport Table: tbl_P3_Production_WIPStock_Raw		
	Process Aggregate Depot Stock		Aggregate Depot Stock Raw data for the Month. SP: usp_Production_02_Process_AggregateDepotStock Table: tbl_P3_Production_DepotStock_AGG		
	Process Aggregate WIP Stock		Aggregate Factory WIP Stock for the month for further calculation. SP: usp_Production_04_Process_AggregateWIPStock Table: tbl_P3_Production_WIPStock_AGG		
	Finial Step: Generate Production Planning		Calculate Finial Production Plan for the Month. On calculation the finial QTY for Product wise and SKU wise. SP: usp_Production_05_ProcessProductionPlanning Table: tbl_P3_Production_Forecasting_Product tbl_P3_Production_Forecasting_SKU		
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory

Mendine Pharmaceuticals Pvt. Ltd

Dashboard
Sales Forecasting Setup
Sales Forecasting
Production Planning
Import Factory Production
Import Physician Sample Plan
Process Production Planning
Production Forecasting

Production Planing Data Processing

Production Planing Data Process

Year
Month

Sync SQL Data

1. Sync SQL Depot SKU Stock
Data Transfer from Easy Report to P3 Database

2. Sync SQL WIP Stock
Data Transfer from Tally DB to P3 Database

Data Process for Production Processing

Step 1: Process Aggregate Depot Stock
Process Stock Raw for the Month

Step 2: Process Aggregate WIP Stock
Process Factory WIP Stock

Finial Step: Generate Production Planning
Process Production Plan for the Month

3.1.4 Production Forecasting

Menu	Production Forecasting		Page	Productionforecasting.html	
Purpose	In Production Forecasting shows 3 Tab for shows data product and SKU data <ul style="list-style-type: none">Volume Conversion, Volume Charge, Final Charge Unit You Can able to download in a single Excel file. Table: tbl_P3_Production_Forecasting_Product Table: tbl_P3_Production_Forecasting_SKU				
Access By	Admin	Outbound Logistics	Inbound Logistics	Marketing	Factory

Mendine Pharmaceuticals Pvt. Ltd

Dashboard
Sales Forecasting Setup
Sales Forecasting
Production Planning
Import Factory Production
Import Physician Sample Plan
Process Production Planning
Production Forecasting

Production Planing Forecsating

Export Production Planing Forecsating

2020
June
Select Product

Volume Conversion
Volume Charge
Final Charge Unit

Search:
Show
10
entries

Month	Product Type	Category	Product Name	Pack Unit	Forecast QTY	Factor	Factor Projection QTY	Volume (In Ltrs)
June-2020	BOP	FG	AMIRID (TABLET)	2	1206	3	3618	24.12
June-2020	BOP	FG	AMIRID (TABLET)	10	53268	3	159804	0
June-2020	BOP	FG	AMIRID-O (TABLET)	2	5000	3	15000	100
June-2020	BOP	FG	AMIRID-O (TABLET)	10	10548	3	31644	0
June-2020	BOP	FG	CARMOLAX ROOTS (POWDER)	50	4120	3	12360	2060
June-2020	BOP	FG	CARMOLAX ROOTS (POWDER)	100	40120	3	120360	0
June-2020	IP	FG	CARMOZYME	60	31196	1.2	37435.2	18717.6
June-2020	IP	FG	CARMOZYME	100	340224	1.2	408268.8	34022.4