Excel Forecast Dashboard - Guide

Welcome & Purpose

This Excel Forecast Dashboard is designed to aid in Sales & Operations Planning (S&OP) by allowing **Demand Planners, Sales Analysts, and Management Teams to** input sales data, analyse demand, and generate reliable forecasts.

Purpose: - Streamline forecast updates - Improve decision-making with data-driven insights - Empower teams with accessible, intuitive reporting.

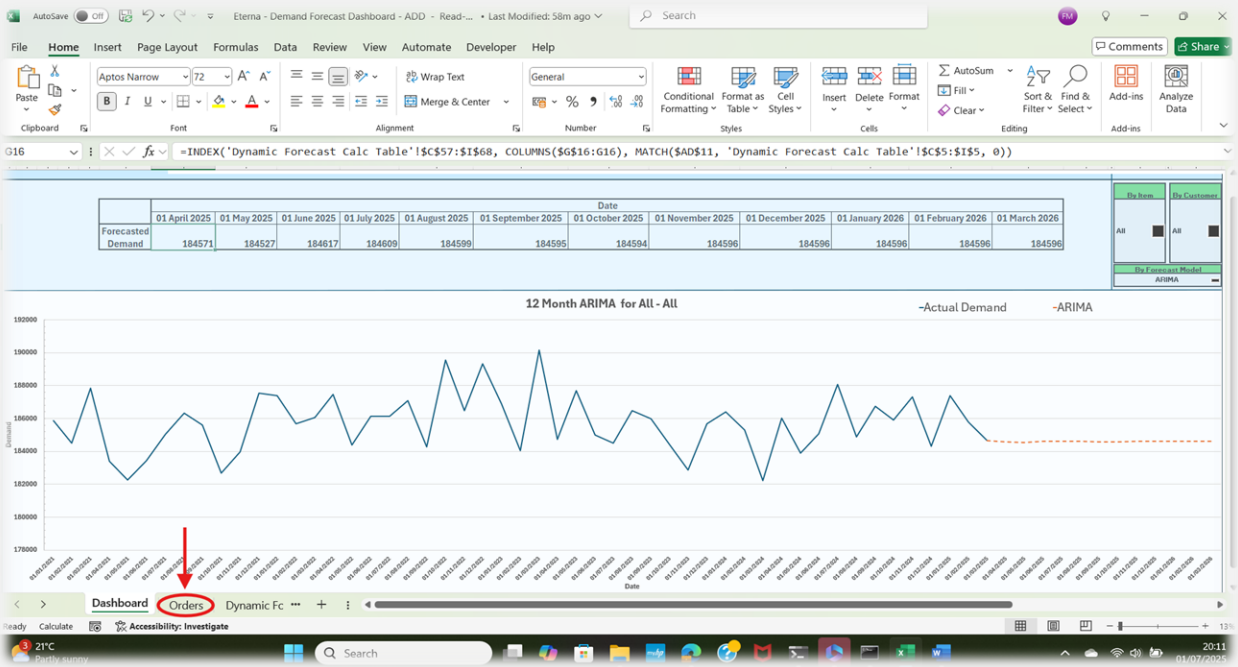
Helpful Links: - **Click to Watch the Video Tutorial** - Contact Support: support@scmdojo.com

Dashboard Workbook Layout Overview

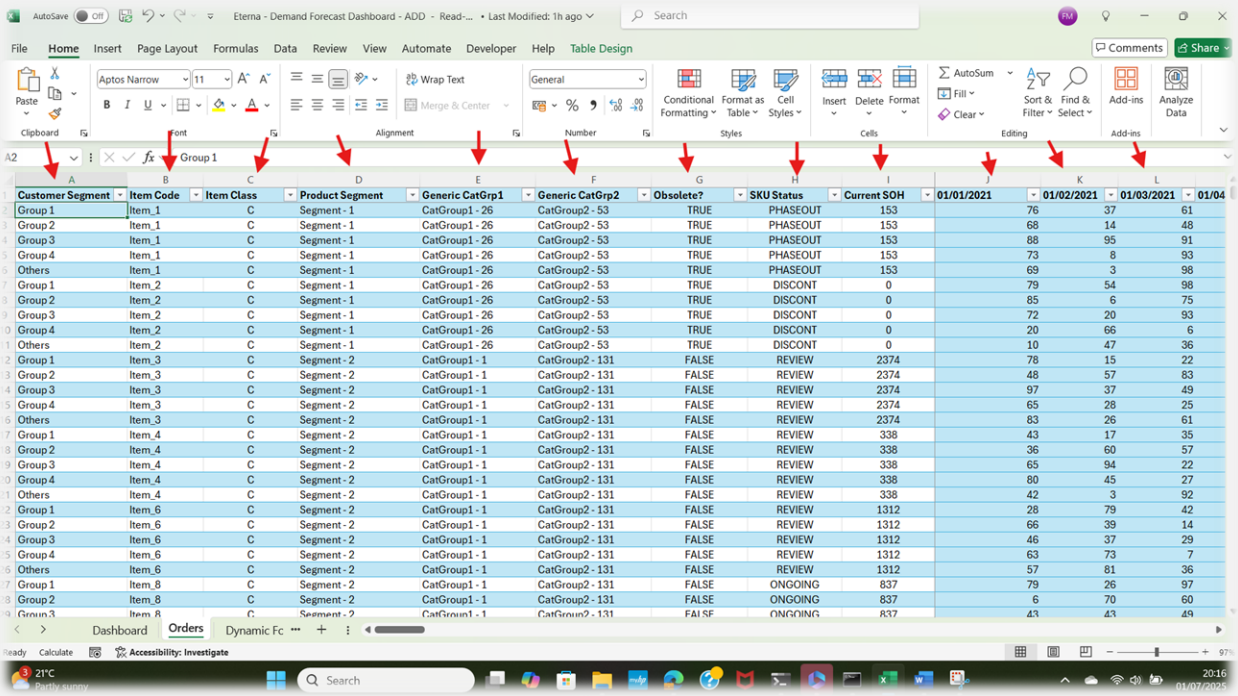
Section		Description
Input	Historical Orders	Paste customer orders data
Processing	Forecast Model	Automated calculations and logic
Output	Dashboard	Visualisations, filters and Forecast Accuracy

How to Use the Dashboard

1. **Paste Data:**
    - Go to the `Orders` Sheet

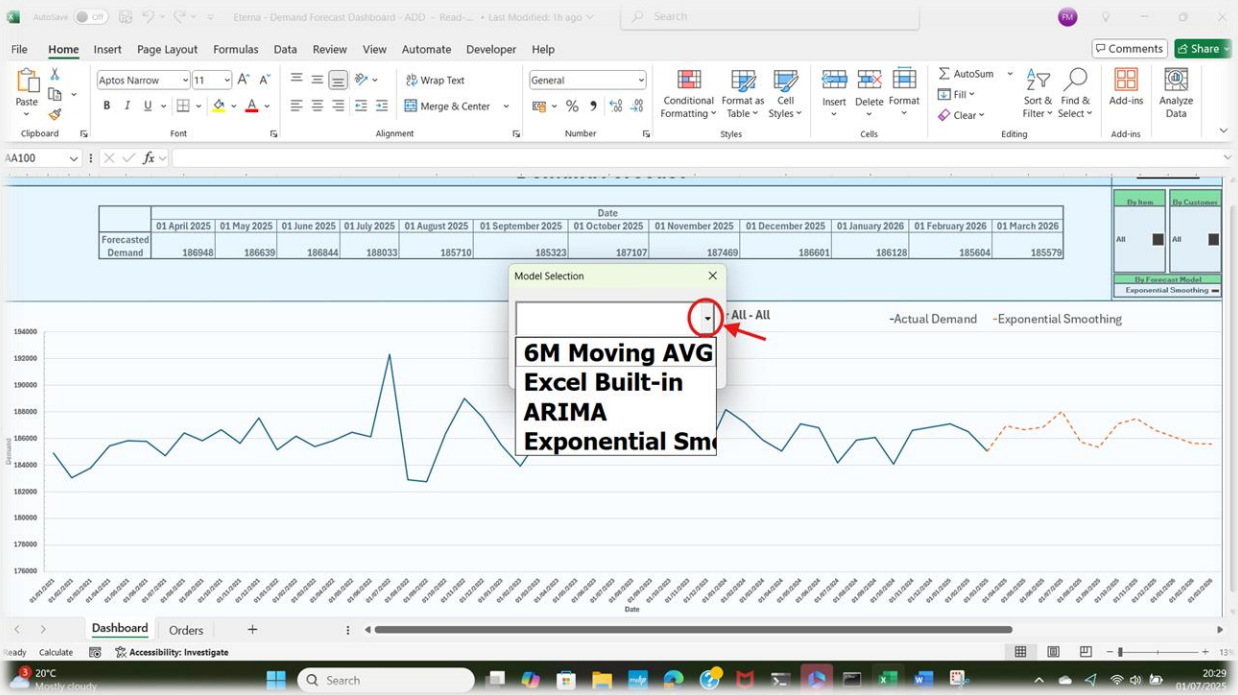


- Paste your historical orders data in the designated columns along with all relevant information including item and customer information.
- Ensure date format is `DD/MM/YYYY` and columns match headers

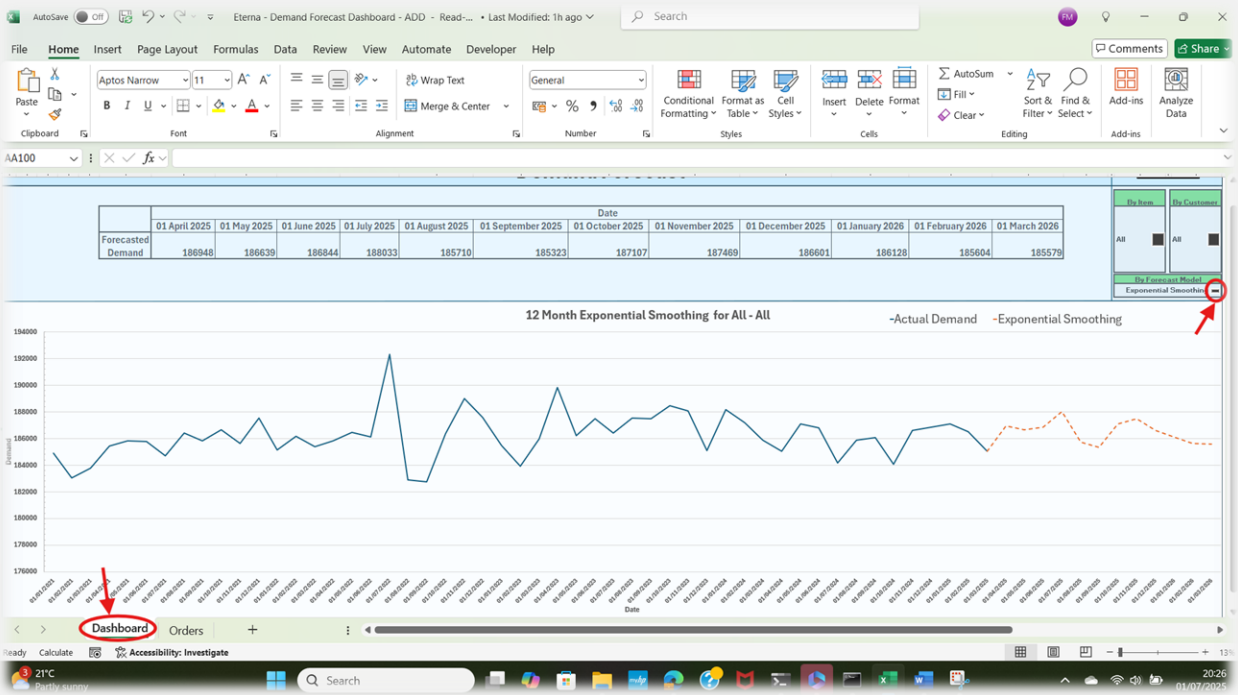


Customer Segment	Item Code	Item Class	Product Segment	Generic CatGrp1	Generic CatGrp2	Obsolete?	SKU Status	Current SOH	01/01/2021	01/02/2021	01/03/2021	01/04
Group 1	Item_1	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	PHASEOUT	153	76	37	61	
Group 2	Item_1	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	PHASEOUT	153	68	14	48	
Group 3	Item_1	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	PHASEOUT	153	88	95	91	
Group 4	Item_1	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	PHASEOUT	153	73	8	93	
Others	Item_1	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	PHASEOUT	153	69	3	98	
Group 1	Item_2	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	DISCONT	0	79	54	98	
Group 2	Item_2	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	DISCONT	0	85	6	75	
Group 3	Item_2	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	DISCONT	0	72	20	93	
Group 4	Item_2	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	DISCONT	0	20	66	6	
Others	Item_2	C	Segment - 1	CatGroup1 - 26	CatGroup2 - 53	TRUE	DISCONT	0	10	47	36	
Group 1	Item_3	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	2374	78	15	22	
Group 2	Item_3	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	2374	48	57	83	
Group 3	Item_3	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	2374	97	37	49	
Group 4	Item_3	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	2374	65	28	25	
Others	Item_3	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	2374	83	26	61	
Group 1	Item_4	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	338	43	17	35	
Group 2	Item_4	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	338	36	60	57	
Group 3	Item_4	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	338	65	94	22	
Group 4	Item_4	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	338	80	45	27	
Others	Item_4	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	338	42	3	92	
Group 1	Item_6	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	1312	28	79	42	
Group 2	Item_6	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	1312	66	39	14	
Group 3	Item_6	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	1312	46	37	29	
Group 4	Item_6	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	1312	63	73	7	
Others	Item_6	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	REVIEW	1312	57	81	36	
Group 1	Item_8	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	ONGOING	837	79	26	97	
Group 2	Item_8	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	ONGOING	837	6	70	60	
Group 3	Item_8	C	Segment - 2	CatGroup1 - 1	CatGroup2 - 131	FALSE	ONGOING	837	43	43	49	

2. **Model Selection and Forecast Updates:**

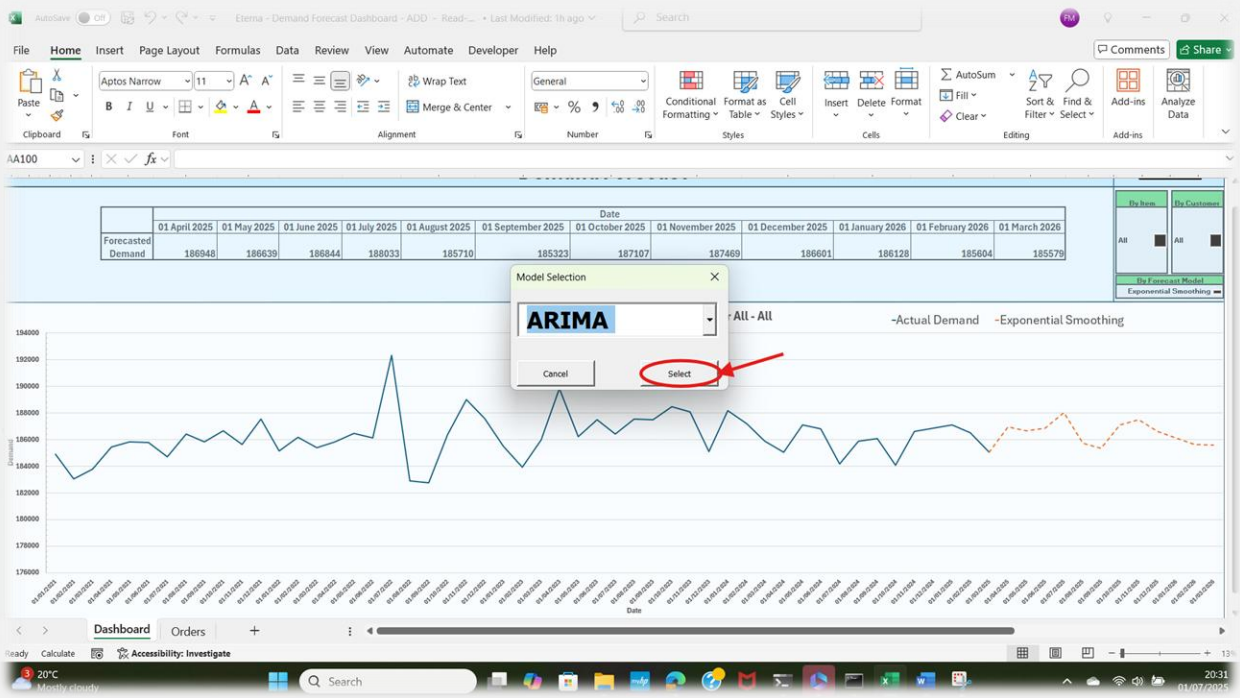


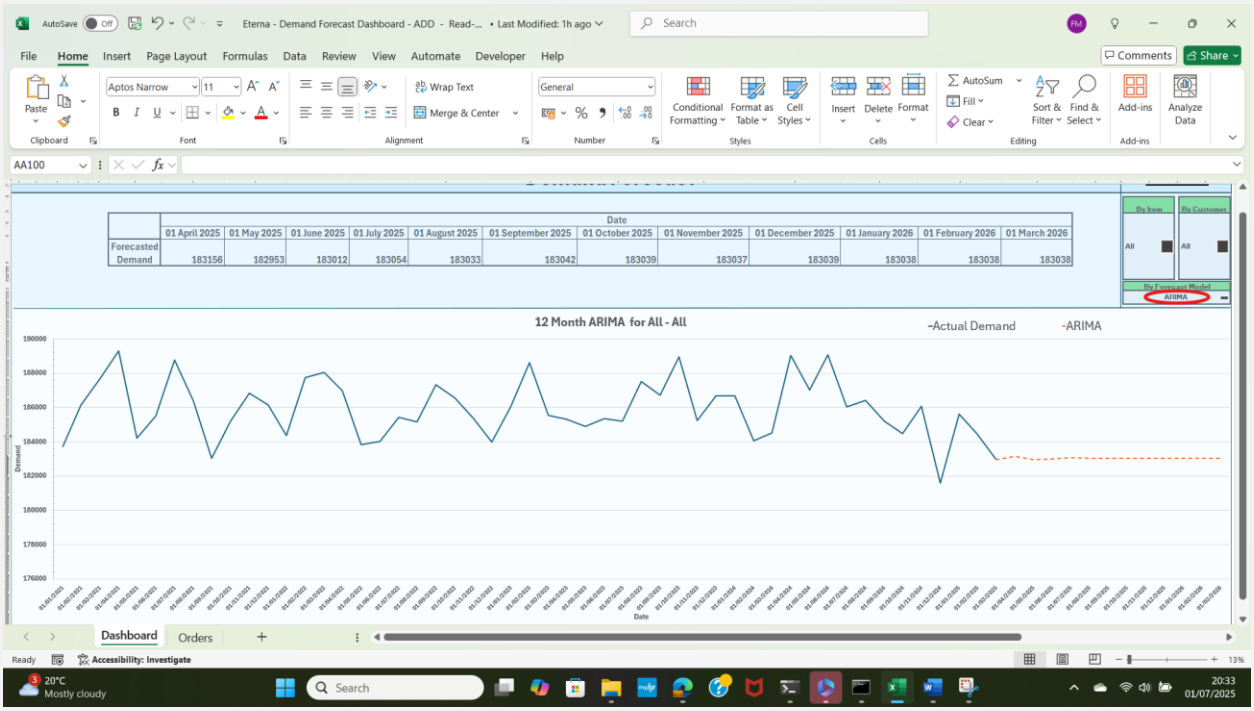
- Go to the Dashboard Sheet (1) and then click on the Forecast Model selector button (2).



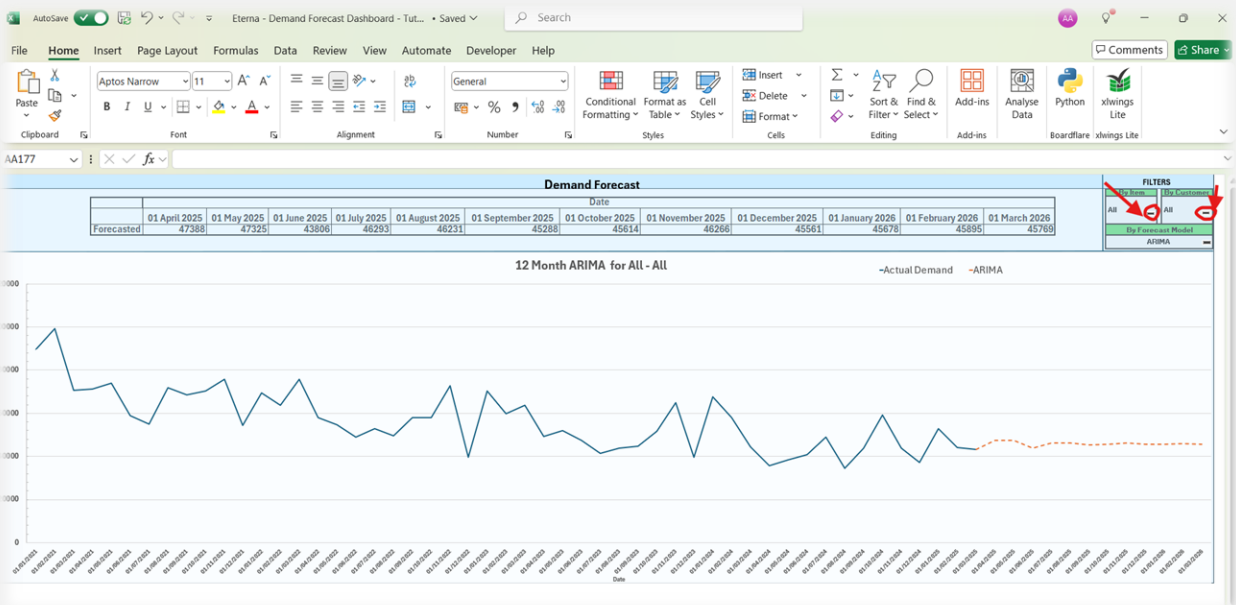
- The Following Forecast Models can be chosen to produce the 12 Month Forecasted Demand Values:
  1. 6 Month Moving Average (6M Moving AVG) Model
  2. Excel Built-In Model
  3. Autoregressive Integrated Moving Average (ARIMA) Model
  4. Holt-Winters Exponential Smoothing with automatic Trend and Seasonality detection (Exponential Smoothing) Model
- Models powered by Python (ARIMA and Exponential Smoothing) may take 2 – 5 seconds to process, whereas remaining model outputs are processed instantaneously.
- The dashboard automatically updates with new forecast values after historical demand data is entered or updated.

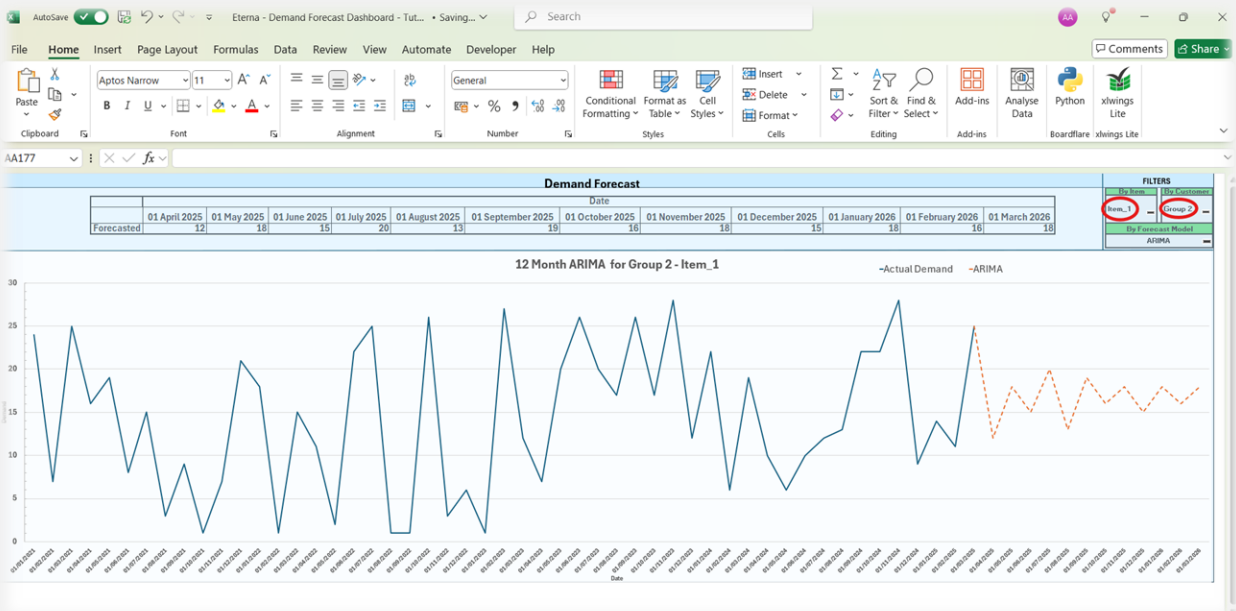
- Simply wait for the dashboard to update the visualisations.





3. **Using Filters:**
   - Use By Item and By Customer dropdown filters to view forecasts by single or all Item Code and/or Customer Segments or any combined combination.

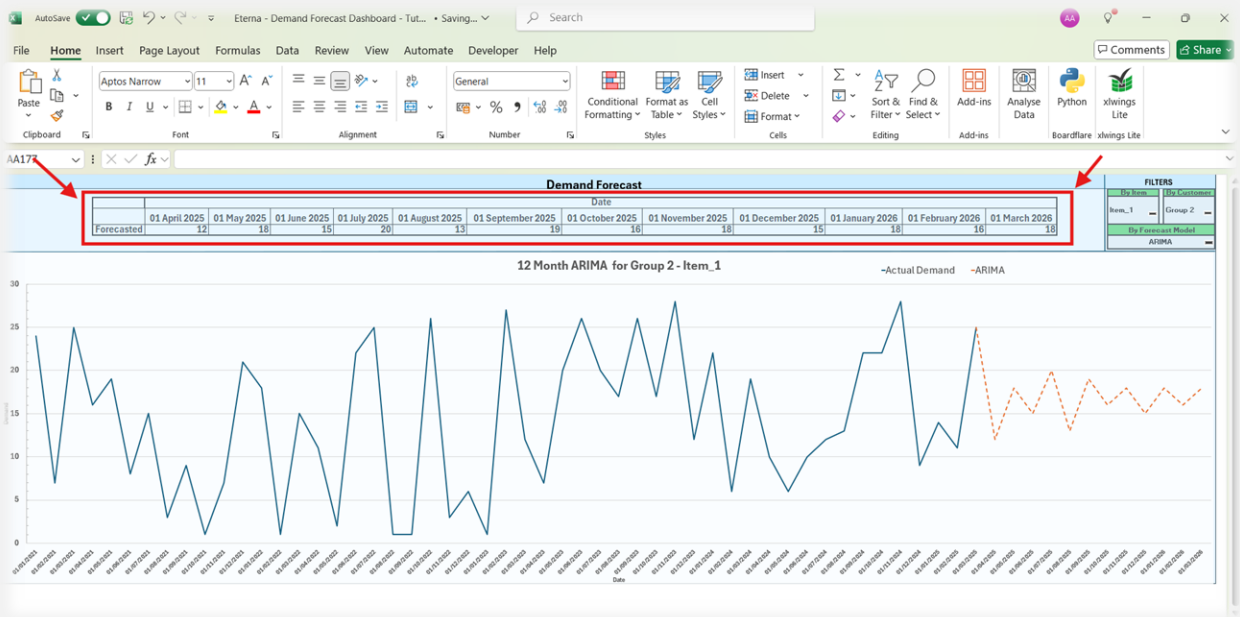




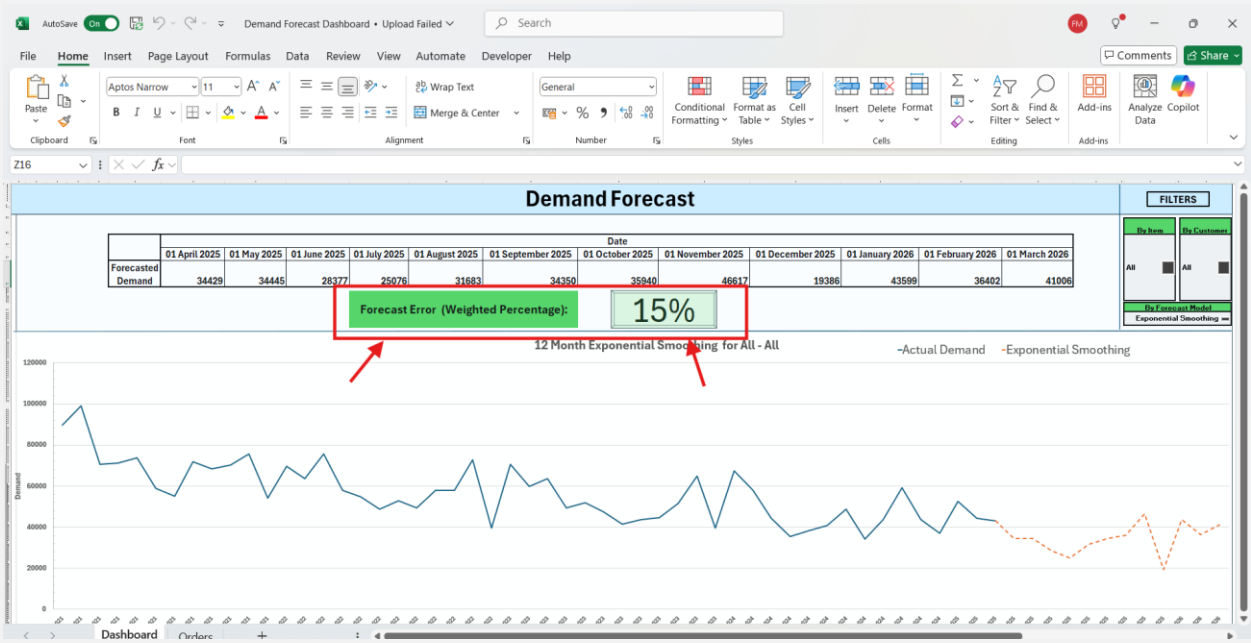
4. **Navigate Safely:**
   - Use the navigation buttons or sheet tabs to move across sections
   - To activate the minimum zoom (13%) enforcement feature within the dashboard, click anywhere in the sheet when zoomed out less than 13%.

Understanding the Output

- **Forecast Table:**
  - A 12-month forward-looking table displays the forecasted values per selected combination (e.g., Item Code, Customer Segment)
  - Automatically updates based on filters applied and data entered.

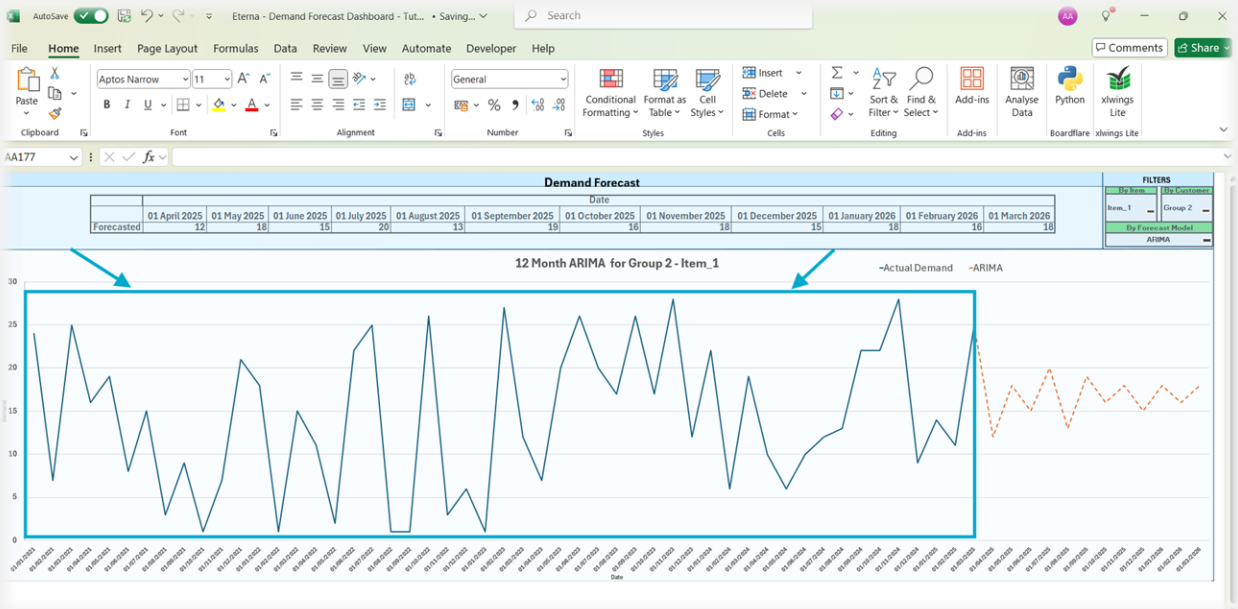


- **Forecast Model KPI**
  - The **Weighted Average Percentage Error (WAPE)** shows the forecast error

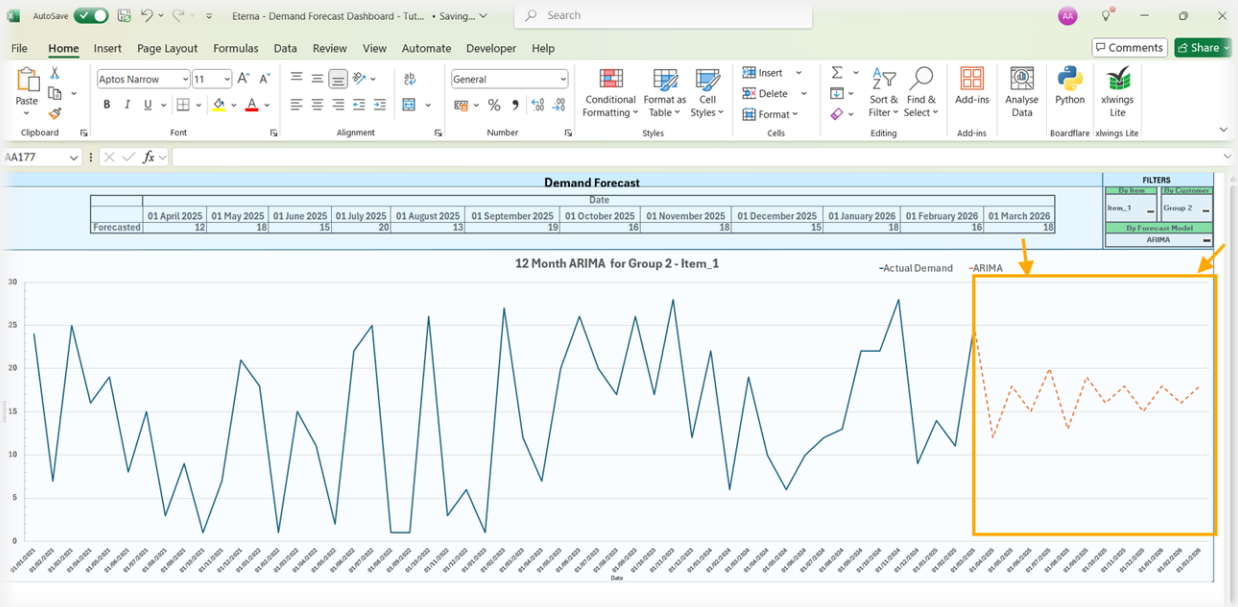


- It measures a model's average error in proportion to the actual values, giving more weight to items and/or customer groups with higher demand volumes.

- **Forecast Line Chart:**
  - A dynamic line graph appears below the forecast table
  - **Solid blue line** represents historical demand



  - **Dashed orange line** shows the forecasted demand for the next 12 months



❓ FAQ Section

Question	Answer
How can I access the Dashboard File?	Open the dashboard file using Microsoft Excel and make sure macros are enabled when prompted.
Why are charts blank?	Check if dates and values are valid and in correct columns.
Can I add new products?	Yes, but ensure their Item Codes are unique.
Forecast is not updating?	Try saving, closing, and reopening the file, then click Refresh All again.
How do I share the dashboard?	Share as a macro-enabled workbook.

⚠ Tips & Troubleshooting

Common Mistakes: Date format errors, Item Code or Customer Segment mismatch

To Reset or Undo: Press `Ctrl + Z` or re-paste from backup file.

Need Help? support@scmdojo.com

📅 Version Info & Contact

- **Dashboard Version:** v1.0
- **Last Updated:** 17 June 2025
- **Support Contact:** support@scmdojo.com
- **Video Tutorial: Click to watch walkthrough video**