

Creating a new Forecast using the Wizard

Learning Objectives

After completing this unit, you'll be able to:

- Create a new Forecast record starting from the Country Detail Level record using the Wizard
- Identify the steps to create or update a CDL Forecast

In the previous Unit you learned how to access the Wizard from different places. Now let's learn how to create a new Forecast using the Wizard.

Creating a New CDL Forecast

Starting the CDL Forecast Wizard

First, we will show you how to use the Country Detail Level (CDL) Forecast Wizard to create a new Forecast focusing on where there is no legacy FC to be replaced. In [Unit 3 \(https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0023kb/szsanitym0023u03kb\)](https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0023kb/szsanitym0023u03kb), we will provide you with additional steps on what is different if you want to replace an existing FC.

Let's get started.

In the following example we start the CDL Forecast Wizard from a CDL Record, but there are other ways to start the Wizard as mentioned in the previous unit.

1. Open the "Country Detail Level" record you want to work on
2. Click on the "Forecasts" tab
3. Click on the "New Forecast" button
4. It will launch the wizard
5. From the dropdown list select the forecast you intend to replace or select "None" if you are creating a new forecast
6. Click on "Next"

Country Detail Level

Semaglutide LI

US

+ Follow

Project Status & Interest

Overall Project Status

Parent Links

On Hold ||| Interest ||| Update Forecast

Product Target || C

MS 0

MS 1

MS 2

MS 3

MS 4

MS 5

MS 6

Details

Team & Sites

Forecasts

Status & SPC

More

Forecasts and Actuals (7)

7 items • Updated a minute ago

New Forecast

	Forecasts and Actuals Num...	Latest Plan...	Forecast Date	Str
1	FA-2021-4	No	09/03/2021	Str

Close

4

Forecast Wizard

CDL Name : Semaglutide LICA

US Market formation date :

The below list shows all forecasts related to the current CDL record, which are set as "Latest Planning Fcst" as "Yes"

If you are replacing any of these forecasts with a new one to be created here, please select that forecast from the list below and certain values will be copied over. Also the one which you select will be set to "No".

* Select the Below Forecast Name to change the Latest System FC for Planning to "No"

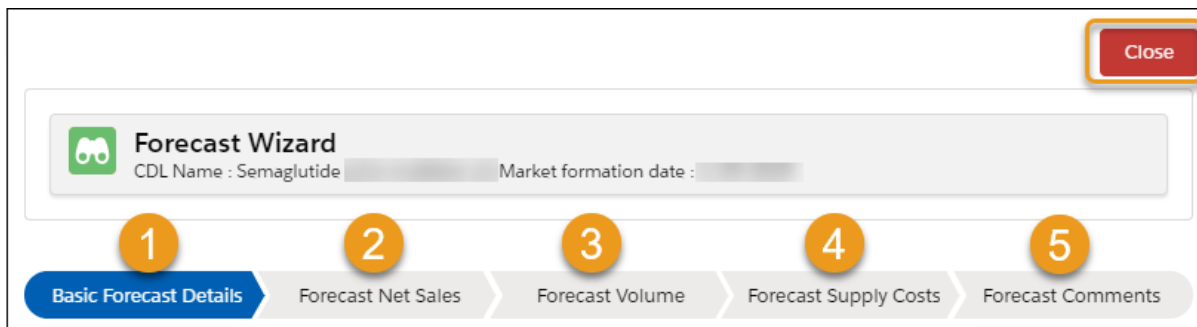
--- None ---

6

Next

In the next steps, the Wizard will ask you to provide relevant dates, figures, and information to populate the Forecast record.

Following along the Wizard to create a new forecast record



There are five main steps on the CDL Forecast Wizard. On the first step, **“Basic Forecast Details” (1)**, you will be requested basic information including the launch date/year, strengths, pack configuration, and more. Depending on the information available at this time during development or launch phase, please fill in the details.

In steps **“Forecast Net Sales” (2)**, **“Forecast Volume” (3)**, and **“Forecast Supply Costs” (4)**, you will be asked to provide the figures, first the sales, then volume and finally supply costs. In the last screen **“Forecast Comments” (5)** you have the option to provide info on competitors and leave a general comment.



Before the “Success!” screen, you can always click “Close” to escape the Wizard with no changes made.

Now let’s have a look into each of those steps!

Basic Forecast Details

On top, you see two comments - please follow the advice if you need to change something on the CDL before you proceed:

(1) Forecasts for this project & country ADD to pipeline value. If this is incorrect, update the field on Country Detail Level named “Pipeline Additive” to “No”

(2) The project for this country is NOT a backup. If this is incorrect, update the field on Country Detail Level named “Primary Project” to “No”

(3) The following fields which are populated by default based on the CDL: Forecast Region, Forecast Country, and Forecast Type.



If the Project Country Status is set as "Active", the default Forecast Type will be "Investment Forecast" **(3)**, If the Project Country Status is set as "In-Registration", the default Forecast Type will be "Launch Forecast".

Forecast Wizard
CDL Name : Semaglutide LICA (418664) US Market formation date : 1/29/2029

Basic Forecast Details | Forecast Net Sales | Forecast Volume | Forecast Supply C

1 Forecasts for this project & country ADD to pipeline value. If this is incorrect, update the field on Country Detail Level named "Pipeline Additive" to "No"

2 The project for this country is NOT a backup. If this is incorrect, update the field on Country Detail Level named "Primary Project" to "No"

3 Forecast Region : Namer
Forecast Country : US United States
Forecast Type: Investment Forecast

4 ☐ Want to replace the above Forecast type ? ⓘ

5 Launch Date Forecast Launch year ⓘ

**If the launch date is not entered then please proceed by entering the launch year.

(4) The Forecast Type is chosen by default based on the project stage. If you want to make any changes to the "Forecast Type" tick the "Want to replace the above Forecast type ?" and then, from the dropdown list that is shown, select the right Forecast Type.

☒ Want to replace the above Forecast type ? ⓘ 4

Forecast Type ⓘ

Selection Forecast

Selection Forecast


Investment Forecast

Submission Forecast

Launch Forecast

(5) You have the option to provide the exact launch date, or in case details are not known yet, you need to provide at least the year of the expected launch. If you miss filling that in, the Wizard will throw an error asking you to fill in this information. Click "Previous" on the Error page to continue filling the "Launch Date" or the "Forecast Launch Year".

Close

**Forecast Wizard**
CDL Name : Semaglutide LICA US Market formation date :

☹️☹️

Launch year or Launch date must be entered in order to proceed further.

Please click on '**Previous**' button and enter either the launch year or launch date.

Previous



If you start the Wizard and the launch date is not filled, exit the flow and fill in the "Current planned launch date" on the CDL record. This way when you run the wizard again, you will have the Launch Date pre-populated!

(6) If, for some reason, you do not want the forecast you are entering to be the latest one, change "Do you want to set this new Forecast as the latest for planning" from "Yes" to "No". That will exclude it from being part of the Pipeline even if it is for an active project.

(7) "Strengths" are copied from the CDL record, and you can modify it to the one you need. (We are working on a more convenient set-up for the strengths - stay tuned for more functionality to come this year!).

(8) If there are no risks leave the "Forecast Risks" field as "None". In case there are any risks you can select the appropriate option from the drop-down menu.

(9) You can select the appropriate "Primary Pack Type" from the options available in the drop-down menu.

(10) "Please enter the Probability of success for this Forecast" - Keeping in mind the Category of complexity and Product development stage you have to fill this field with the probability of success for the Forecast.

(11), (12) and (13) These fields cover packaging configuration and basic competitive assumptions.

The screenshot shows a web form for creating a forecast. It includes the following fields and callouts:

- 6:** A dropdown menu with the text "Do you want to set this new Forecast as the latest for planning" and the selected option "Yes".
- 7:** A text input field labeled "Strengths".
- 8:** A dropdown menu labeled "Forecast Risks" with the selected option "--- None ---".
- 9:** A dropdown menu labeled "Primary pack type" with the selected option "--- None ---".
- 10:** A text input field with the label "Please enter the Probability of success for this Forecast".
- 11:** A text input field labeled "Primary pack size".
- 12:** A text input field labeled "Total # players at launch".
- 13:** A text input field labeled "Secondary pack size".
- 14:** A text input field labeled "Target Price percent of brand at launch (%)".
- 15:** A text input field labeled "Target Market share at launch".

Let's take an example to see how to provide info on Strengths and Pack Configuration:

Let's assume you have a product which is a liquid with a concentration of 10 mg/ml and it comes in two presentations, one is a 30 ml bottle and the other is a 180 ml bottle, and we assume also only 1 bottle per box or no box.

For each you will have to create a Forecast:

1. 1st Forecast

Strengths - 10 mg/ml 30ml

Primary Pack size - 1

Secondary Pack Size - 1

2. 2nd Forecast

Strengths - 10 mg/ml 180ml

Primary Pack size - 1

Secondary Pack Size - 1

Now let's take a look where we have an oral solid product and different primary and secondary pack sizes.

Let's assume you have a product with dosage form tablets which comes in blisters, with a strength of 250 mg. Each blister contains 10 tablets and those are packed in a box of 5 blisters:

Strength: 250 mg

Primary Pack size: 10

Secondary Pack Size: 5

Here '10' in the "Primary Pack Size" field is 10 tablets per blister and '5' in the Secondary Pack Size is '5' blisters per box.

i.e. 50 tablets per box.

If you have additional strengths, e.g. 500 mg per tablet, do the same for that and create a forecast record as well.

Phew! After these calculation we hope you do not need some of that product yourself. Haha!! But now you know how to fill the Forecast in case of different presentations.

Clicking on "**Next**" will take you to the "**Forecast Net Sales**" screen where you will be asked to provide the details on the sales figures.

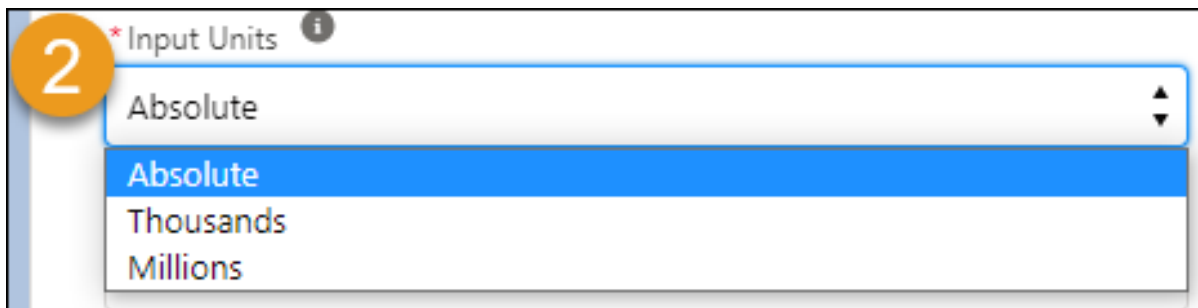
Forecast Net Sales

(1) You have the option to change the currency by ticking the "Want to replace the above currency value ?" checkbox. If you are not replacing it with any other currency, "USD" is the default.

The screenshot shows the 'Forecast Net Sales' form with a progress bar at the top containing five steps: 'Forecast Net Sales' (active), 'Forecast Volume', 'Forecast Supply Costs', and 'Forecast Comments'. The form includes the following fields and callouts:

- Callout 1:** A box containing 'Currency : USD' and a checkbox labeled 'Want to replace the above currency value ?'.
- Callout 2:** A dropdown menu for '*Input Units' with 'Absolute' selected.
- Callout 3:** A dropdown menu for '*Select Input Type' with 'Copy Forecast Net Sales from Excel' selected.
- A text input field for 'Forecast Net Sales (1st 12 months)' containing the value '0'.
- A large text area for 'Copy / paste (horizontally) Net Sales values from excel cell(s) here (without any formatting i.e., no '\$' signs)'.
- At the bottom right, there are 'Previous' and 'Next' buttons.

(2) You can choose the format of "Input Units" you are going to use when copying the figures - either Absolute, Thousands, or Millions



2 *Input Units

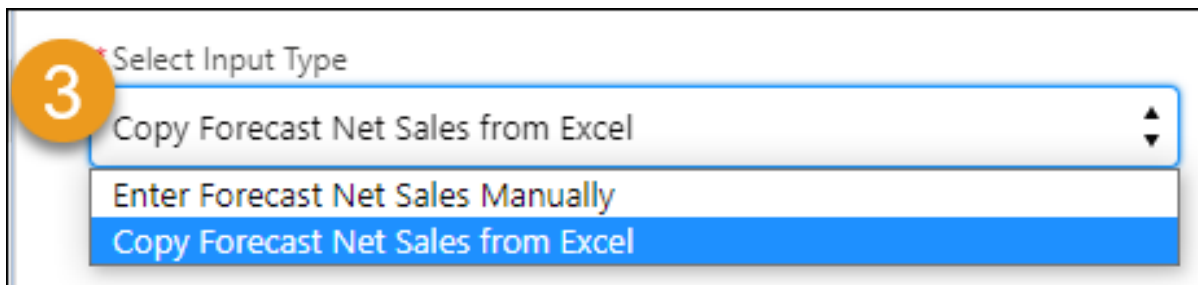
Absolute

Absolute

Thousands

Millions

(3) With the drop-down choose if you are going to fill in the sales per year as field by field manually or if you will copy from a spreadsheet.



3 *Select Input Type

Copy Forecast Net Sales from Excel

Enter Forecast Net Sales Manually

Copy Forecast Net Sales from Excel

Before copying the sales figures let's take a look at how to clear formatting from the Excel sheet to ensure the system can read your values.



In case your figures are formatted as currency or anything else, make sure to remove the formatting before copy & paste to avoid an error being thrown out of the wizard.

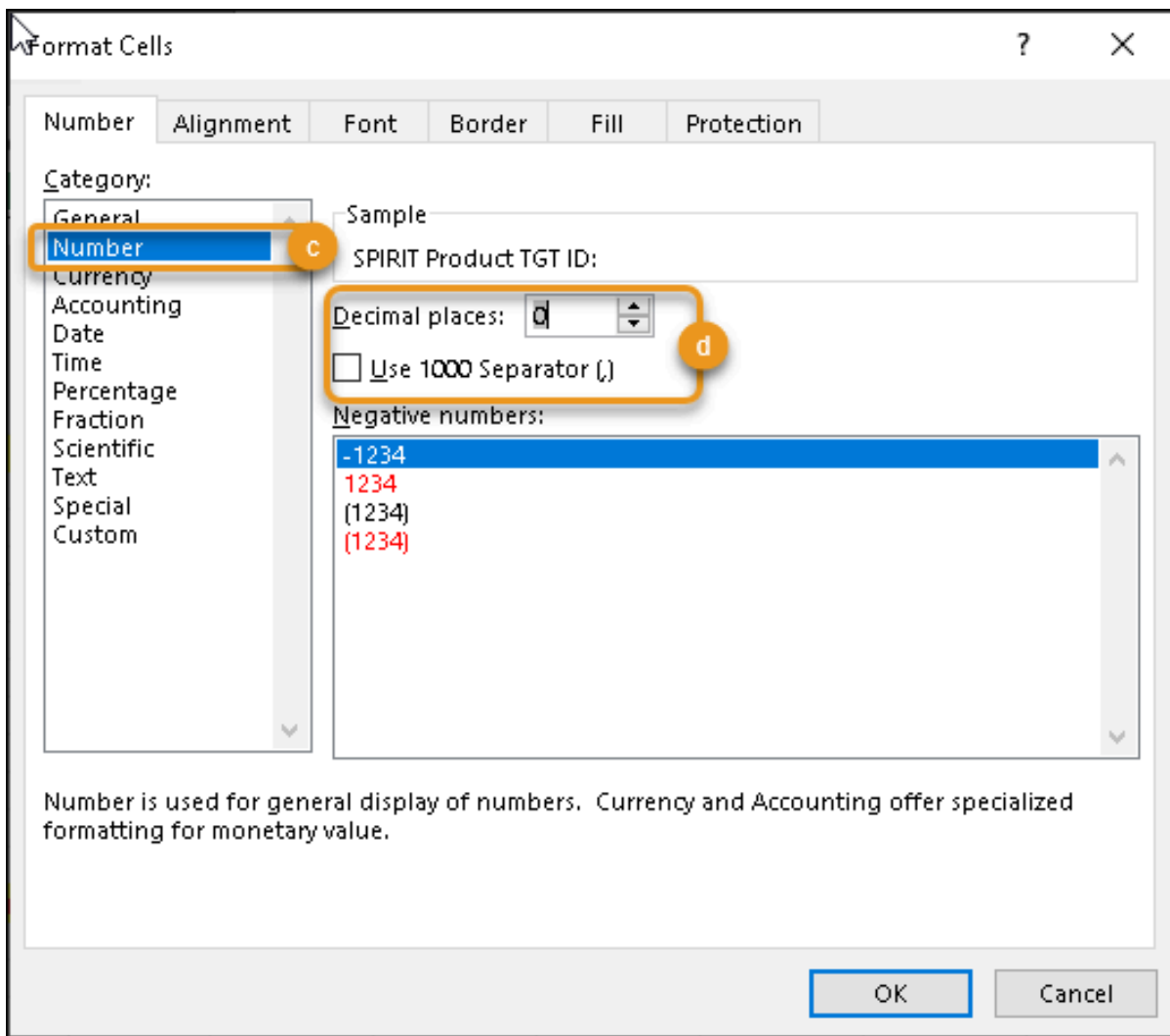
Forecast Net Sales should be in the below order:

Forecast Net Sales (Launch Yr) Forecast Net Sales (1st Yr) Forecast Net Sales (2nd Yr) Forecast Net Sales (3rd Yr) Forecast Net Sales (4th Yr) Forecast Net Sales (5th Yr)
..... and so on.

In Excel

- (a)** Click the top corner to select the sheet.
- (b)** Right-click in the sheet to open the menu and select "Format Cells"
- (c)** Choose the category "Numbers"
- (d)** Make sure to set "Decimal places:" as "0" and "Use 1000 Separator (.)" checkbox is not checked, and click "OK"

The screenshot shows an Excel spreadsheet with a right-click context menu open for cell A7. The menu options are: Cut, Copy, Paste Options, Paste Special..., Insert, Delete, Clear Contents, Format Cells..., Row Height..., Hide, and Unhide. The 'Format Cells...' option is highlighted with a red box and labeled 'b'. The spreadsheet columns are labeled with product attributes: SPIRIT Product TGT ID, SPIRIT Project ID, Active Substance, Dosage Form, Strength(s), Forecasting unit, Country, Sales in mUSD, and Volume in mio Standard. The rows show data for US, EU, BR, CA, CN, JP, RU, RoW, and SUM across years 2028 and 2029.



If you want to "Copy forecast Net Sales from Excel" you will have to follow the below step (4)
(4) Copy the line from a spreadsheet, here in the example the highlighted cells from line 11...

7	Sales in mUSD							
8	Country	2026	2027	2028	2029	2030	2031	2032
9	US					19.67	18.14	14.45
10	EU						0.88	14.66
11	BR		0.11	0.51	0.89	1.42	1.70	2.07
12	CA		0.50	1.25	1.35	1.63	1.70	1.48
13	CN		0.10	2.82	3.13	0.99	1.02	0.57
14	JP						1.19	2.39
15	RU							0.01
16	RoW		0.56	1.25	1.22	1.13	1.11	1.08
17	SUM	-	1.28	5.83	6.60	24.85	25.86	36.70
18								

... and paste it into the text field on the Wizard - **WITHOUT ANY FORMATTING** applied and with a dot (no commas) as a decimal separator:

Copy / paste (horizontally) Net Sales values from excel cell(s) here (without any formatting i.e., no '\$' signs) ⓘ

4 0.11 0.51 0.89 1.42 1.70 2.07

Previous Next

If you want to “Enter Forecast Net Sales Manually” then select that option and start entering the values for Forecast Net Sales (Launch Year), Forecast Net Sales (1st Year), Forecast Net Sales (2nd Year), and so on

After entering all the relevant information click “**Next**” to follow to the next screen.

Forecast Volumes

The Wizard works the same for adding Volumes as for Net Sales in terms of your input options. You will have to add your inputs again for Volumes. If you don’t have Volumes, Click “**Next**” to follow to the next screen.

✓ ✓ ✓ Forecast Supply Costs Forecast Comments

* Input Units ⓘ
Absolute

Forecast Supply Cost (1st 12 months) ⓘ
0


* Select input type
Copy supply costs from excel

Copy / paste (horizontally) forecast supply costs from excel cell(s) here (without any formatting i.e., no '\$' signs) ⓘ

Previous Next

Forecast Comments

At the end of the Wizard, you have the option to provide information on the forecast assumptions on competitors **(1)**, and add a general comment on the forecast **(2)**.

**Forecast Wizard**
CDL Name : Semaglutide) US Market formation date :

✓

✓

✓

✓

Forecast Comments

Before you finish your Forecast, you can also add details on competitors and any overall comments

Anticipated Competitors ⓘ

1

Overall Forecast Comments ⓘ

2


Previous


Next

Click on “**Next**” to complete the last stage of the Wizard.

Forecast is Complete

Well Done! Congratulations on successfully creating a Forecast!

**Forecast Wizard**
CDL Name : Semaglutide LICA) US Market formation date :


Congratulations
New Forecast is created Successfully.

Please click ' **Next** ' to attach the related files on Opp. D&D / CDL / Portfolio Project

Next


Now you can either click on "Close" and you will end on the source (e.g. CDL record) from where you had opened the Wizard or you click "Next" to have the option to upload your source file. And once you have gone through the next screens, the new record will open.

Upload your File

If you wish to archive your FC file in SANITY, you can either drag & drop or use the "Upload Files" button to upload files in the format .csv, .xlsx, and .pdf only.




If you upload files other than the above-mentioned format, the application will not allow you to upload that file and will throw an error.

**Forecast Wizard**
CDL Name : Semaglutide US Market formation date :

If you would like to upload your FC spreadsheet for archiving on the Semaglutide US you can do so below :

File Upload

 Upload Files Or drop files

****Only .csv, .xlsx, .pdf formats are supported**

Please click ' **Next** ' to Submit the Forecast for approval

Next

Also in this step, you can click "Close" and the new Forecast Record will open.

If you need to send the Forecast record for approval choose "Yes" and click "Next", You will again be asked to review the forecast before you submit it for approval.



The record will be locked for any edits until the approval is done.

Yay! You have successfully created a new Forecast, Click on "Finish" to view your newly created Forecast.

Close

Click on '**Finish**' button to view your newly created Forecast record.

Finish

Great job! You have mastered creating a new Forecast record using the Wizard.