

Starting with the CDL Forecast Creation Wizard

Learning Objectives

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

- Understand about Country Detail Level and Forecast & Actual Records
- Understand what the Forecast Wizard is used for
- Start the CDL Forecast Wizard from different places

Introduction

A **Country Detail Level** (CDL) record is a cross-functional record created for each country in scope of a selection, holding the country specific information such as regulatory and launch dates. Portfolio teams are responsible for creation of the CDL records for the selection process. Each record will be linked to the Portfolio Project record post-selection decision and also to the related records later on (BD, PLM, etc.).

The Country Detail Level **Forecast Creation Wizard** is a tool that helps you create a new Forecast record or start from an existing one to replace it with an update. It guides you screen by screen - providing you with the option to choose if it is to be a new record or which existing records to replace and also the option to provide the figures for sales, volumes and supply cost of the product, add comments and also if needed, sent for approval.

Where to find CDL Records?

There are several ways to navigate to a Country Detail Level record. Depending on your scope of work, one way might be more appropriate for you than others.

Starting from a Portfolio Project record

Navigate to the **Portfolio Project record** in question. You can easily find all the CDL records related to a project by clicking on the tab "**Country Detail**" (1) to see the related list. Click on the blue hyperlink **CDL Full Name (2) to open the record** you wish to work on, it will open in a new browser window.



Country Detail Level records are created either at Selection, within a BD Deal or if a country submits a forecast for a running project even if they are not included in the project. If there is also a link to PM & LM record, the Country is officially included in the project. Check the column on project status as well for more details.

The screenshot shows a navigation bar with tabs: Discontinued, Under consideration, On Hold, and Active. The Active tab is highlighted in blue. Below the navigation bar, there are several tabs: Details, BD Deals, PM & Launch, **Country Detail** (which is highlighted with a yellow box and has a '1' icon), Forecasts, and More. A main content area displays a table titled "Countries Detail Level (10+)" with 10+ items updated a few seconds ago. The table has columns: CDL Full Name, Country, Product Ri..., Project Status ..., and Latest Mile... . Two rows are visible: Row 1 shows "Semaglutide" in the CDL Full Name column, "US" in the Country column, and "United States" in the Project Status column; Row 2 shows "Semaglutide" in the CDL Full Name column, "JP" in the Country column, and "Japan" in the Project Status column. A large orange circle with the number '2' is drawn around the "Country Detail" tab in the navigation bar, and another orange circle with the number '2' is drawn around the "Country Detail" entry in the table.

CDL Full Name	Country	Project Status ...
Semaglutide	US	United States
Semaglutide	JP	Japan

You just learned one way to find the CDL Records.

Wait! There is more to it, there are other ways you can access the CDL Records, let's learn that as well.

Starting from a Project & Launch Management (PLM) record

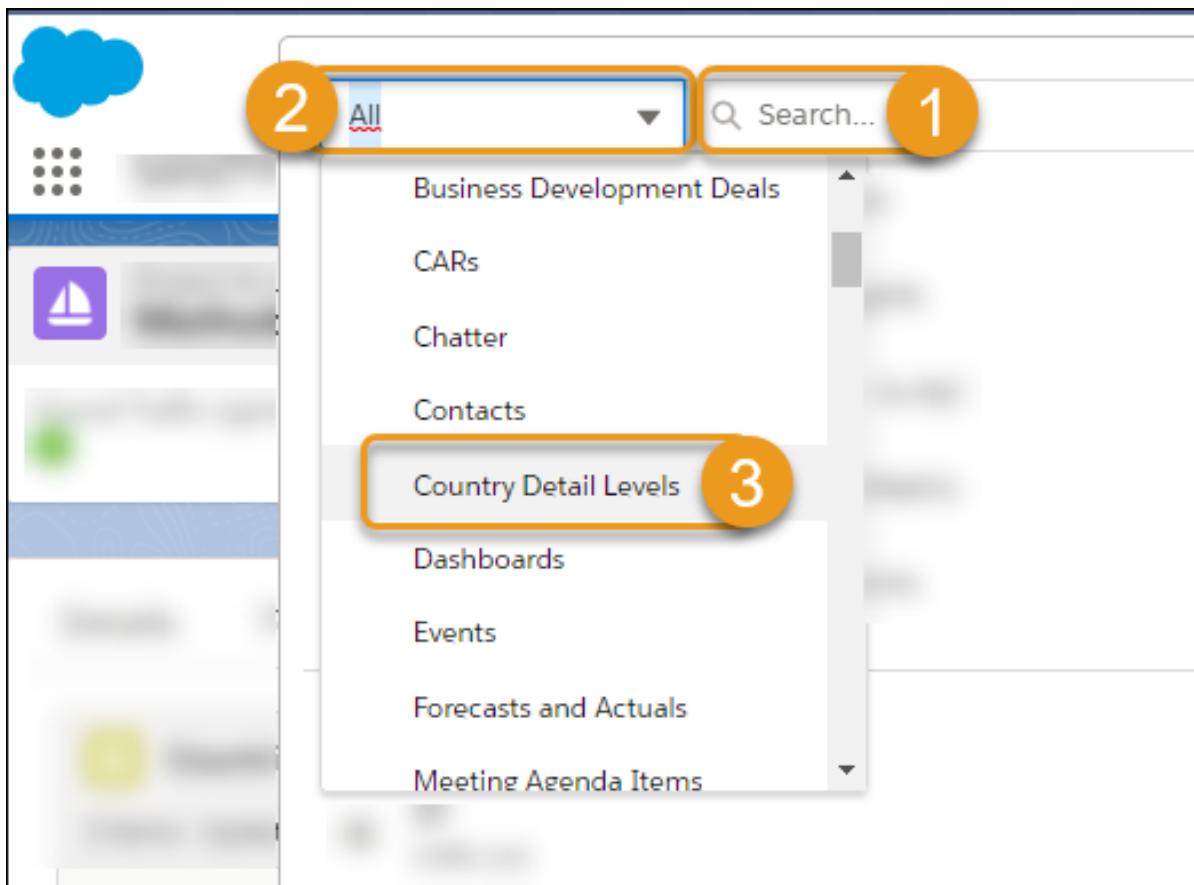
If you are looking to access CDL records from a **Project & Launch Management (1)** record, here is how to do it.

Navigate to the PLM record in question, e.g. via the Navigation bar tab and the List view. To access the CDL, go to the "**Countries & Forecasts**" tab **(2)** and click on the link to the relevant CDL record **(3)** to open it.

The screenshot shows a software interface for 'Project & Launch Management' for the project 'Methotrexate'. At the top, there's a navigation bar with tabs: 'Details', 'Team & Sites', 'Deal Related', 'Status & SPC', 'Countries & Forecasts' (which is highlighted with a yellow box and the number '2'), and 'More...'. Below this, a section titled 'Countries Detail Level (2)' displays two items. The first item, row 1, has a checkbox next to 'Methotrexate' (highlighted with a yellow box and the number '3') and is listed under 'DE'. The second item, row 2, also has a checkbox next to 'Methotrexate' and is listed under 'CA'. There are dropdown menus for 'Country ISO', 'Project Status', 'Forecast Sales', 'Product Rig...', and 'Current plan...'. A 'View All' button is at the bottom.

Finding a CDL record using Global Search

You can use the “**Global Search**” to find a specific CDL Record. Click in the “**Search**” box (1) first and then on “**All**” (2) just left to the search box, start typing “Country” and select “**Country Detail Levels**” (3) from the drop down. Your search results will now be restricted to CDL records. As search term, use for example the Project number (SPIRIT PJ ID) or the molecule name and the ISO code for the country. From the list of results, follow the link to the record to easily access the CDL you wish to work on, i.e. create a Forecast (FC) record or update a FC record.



Obviously, you can also access your CDL from the tab "Country Detail Levels" on the navigation bar, and choose a List View with meaningful filters set. The same is true for Reports and Dashboards on Country Detail Level records. For more on how to use Reports and Dashboards, please check out the relevant myTrailhead modules [Reports - Analyze Your Data with SANITY](https://sanity.my.trailhead.com/en/content/sanity/modules/szsanitym0006rs) (<https://sanity.my.trailhead.com/en/content/sanity/modules/szsanitym0006rs>) and [Dashboards - Analyze Your Data with SANITY](https://sanity.my.trailhead.com/en/content/sanity/modules/szsanitym0007rs) (<https://sanity.my.trailhead.com/en/content/sanity/modules/szsanitym0007rs>). If you do not see the Country Detail Level Tab, you can add it to your navigation bar - please check the module [Personalise, Navigate and Search in SANITY](https://sanity.my.trailhead.com/en/content/sanity/modules/szsanitym0001af) (<https://sanity.my.trailhead.com/en/content/sanity/modules/szsanitym0001af>) on how to do it.

Isn't it great that there are so many ways to open a CDL Record?

Where and How to start the FC Creation Wizard

On the Country Detail Level record

Maybe the most obvious starting point is the Country Detail Level record. Here is one place you can start the FC Wizard by using the "New Forecast" button.

On a CDL Record (1) you can find the “New Forecast” button by navigating to the tab “Forecasts” (2) to find the related list of Forecast records. The “New Forecast” button (3) is just on the top right of the list.

The screenshot shows a Salesforce page for a "Country Detail Level" record named "Semaglutide". At the top, there's a navigation bar with tabs: "Details", "Team & Sites", "Forecasts" (which is highlighted with a yellow circle labeled 2), "Status & SPC", "Regulatory", and "More". A large orange circle labeled 1 is positioned over the "CA" button in the top right corner. Below the tabs, there's a section titled "Forecasts and Actuals (1)" with a sub-section "1 item · Updated a few seconds ago". The table contains one row with a checkbox, a link "FA-2019-20", and a value "2 MG/1.5 ML, (1)". On the far right of the table, there's a "New Forecast" button, which is also highlighted with a yellow circle labeled 3.

Starting from List Views

If you first want to understand more about how to leverage List Views, check out the myTrailhead module on [List Views in SANITY](#) (<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0005rl>).

You remember that when clicking on a tab in your Navigation bar, you open the pinned list view for that object. If you have created a private list view, maybe you have added more fields to the table? Is the “Manage FC” on Country Detail level or the “Update FC” for Forecasts & Actuals also in?

The screenshot shows a list view for "Forecasts and Actuals" with a filter "Fcst Checker (p)". The table has columns: "Forecasts an...", "Update FC" (which is highlighted with a yellow box), "Primary pack size", "Secondary Pack Size", "Strength & pack volume", "Forecast Coun...", "Lates...", "Total Net Sales...", and "Forecast...". There are four rows, each with a "Update FC" button in the second column. The rows are numbered 1 through 4.

Let us discuss other ways to start the Forecast creation wizard!

Starting from a Report or a Dashboard

Another way for you to start the Forecast Creation Wizard is to access it from a report or dashboard.



You can start the Forecast Wizard on (Lightning) Dashboards and Reports where the CDL record field “Manage FC” or Forecast record field “Update FC” is shown as a column.

1. Navigate to the Dashboard or Report you want to start from
2. Find the “Manage FC” column
3. Click on the “Manage FC” hyperlink in the line of the CDL you wish to start from. This will launch the CDL Forecast Wizard for the respective country and you can select any current forecasts to update (replace) or create a new one

Manage FC	CDL Full Name	Strength & pack volume ↑	Total Net Sales L+5yr	Update FC	Forecast name
Manage FC	Abiraterone acetate	10		Update FC	Abiraterone acetate
Manage FC	Abiraterone acetate	10		Update FC	Abiraterone acetate
Manage FC	Sitagliptin hydrochloride	10		Update FC	Sitagliptin hydrochloride
Manage FC	Sitagliptin hydrochloride	25		Update FC	Sitagliptin hydrochloride
Manage FC	Abiraterone acetate	50		Update FC	Abiraterone acetate
Manage FC	Abiraterone acetate	50		Update FC	Abiraterone acetate
Manage FC	Sitagliptin hydrochloride	50		Update FC	Sitagliptin hydrochloride
Manage FC	Sitagliptin hydrochloride	50		Update FC	Sitagliptin hydrochloride
Manage FC	Sitagliptin hydrochloride	50		Update FC	Sitagliptin hydrochloride
Manage FC	Sitagliptin hydrochloride	50		Update FC	Sitagliptin hydrochloride
Manage FC	Sitagliptin hydrochloride	50		Update FC	Sitagliptin hydrochloride

Report: CDL w/wo F&A (Custom)
Example Report CDL FC Wizard

Total Records Total Total Net Sales L+5yr
11

CDL Full Name ↑	Manage FC ↑ ↓	Strength & pack volume ↓	Total Net Sales L+5yr ↓	Update FC ↓	Forecast name
Abiraterone a (4)	Manage FC (4)	500 MG, 56 X 1 (56)	USD	Update FC	Abiraterone + Initial Bottor
		500 MG, 56 X 1 (56)	USD	Update FC	Abiraterone + Initial Bottor
		1000 MG, 10 X 3 (30)	USD	Update FC	Abiraterone + Initial Bottor
		1000 MG, 10 X 3 (30)	USD	Update FC	Abiraterone + Initial Bottor
Sitagliptin hydrochloride + Metformin hydrochloride (4)	Manage FC (4)	50 MG + 850 MG, 14 X 4 (56)	USD	Update FC	Sitagliptin hy AT Austria III
		50 MG + 1000 MG, 14 X 4 (56)	USD	Update FC	Sitagliptin hy AT Austria III
		50 MG + 850 MG, 14 X 4 (56)	USD	Update FC	Sitagliptin hy AT Austria III
		50 MG + 1000 MG, 14 X 4 (56)	USD	Update FC	Sitagliptin hy AT Austria III



In this example, we have grouped by "Country Detail Level" and "Manage FC", and the number in the round brackets gives the count of Forecast records linked to that particular CDL.

Nice that you can access the Wizard from a Report or Dashboard page as well - don't you think?

Wait there is more to it.....you can do similar with "Update FC" - to start the Wizard for one specific Forecast record:

1. Navigate to the Dashboard or Report you want to start from
2. This time look for the "Update FC" column in the report which includes Forecasts per Country
3. Click on the "Update FC" hyperlink for the Forecast you wish to work on

Example Report CDL FC Wizard

Manage FC	CDL Full Name	Strength & pack volume ↑	Total Net Sales L+5yr	Update FC	Forecast name
Manage FC	Abiraterone acetate	10		Update FC	Abiraterone acetate
Manage FC	Abiraterone acetate	10		Update FC	Abiraterone acetate
Manage FC	Sitagliptin hydrochloride + Metformin hydrochloride	10		Update FC	Sitagliptin hydrochloride + Metformin hydrochloride
Manage FC	Sitagliptin hydrochloride + Metformin hydrochloride	25		Update FC	Sitagliptin hydrochloride + Metformin hydrochloride

Report: CDL w/wo F&A (Custom)
Example Report CDL FC Wizard

Total Records	Total Total Net Sales L+5yr	Manage FC ↑	Strength & pack volume ↑	Total Net Sales L+5yr ↑	Update FC	Forecast name
11					Update FC	Abiraterone acetate
					Update FC	Initial Bottom Up
			500 MG, 56 X 1 (56)	USD:	Update FC	Abiraterone acetate
			500 MG, 56 X 1 (56)	USD:	Update FC	Initial Bottom Up
			1000 MG, 10 X 3 (30)	USD:	Update FC	Abiraterone acetate
			1000 MG, 10 X 3 (30)	USD:	Update FC	Initial Bottom Up
			50 MG + 850 MG, 14 X 4 (56)	USD:	Update FC	Sitagliptin hydrochloride + Metformin hydrochloride
			50 MG + 1000 MG, 14 X 4 (56)	USD:	Update FC	Initial Bottom Up
			50 MG + 850 MG, 14 X 4 (56)	USD:	Update FC	Sitagliptin hydrochloride + Metformin hydrochloride
			50 MG + 1000 MG, 14 X 4 (56)	USD:	Update FC	Initial Bottom Up

4. This will launch the FC Creation Wizard and take you directly to the “Basic Forecast Details” screen where you can start updating the Forecast (i.e. replacing the existing one with an updated record). The info from the legacy record are copied and pre-populated - it is now on you to update the respective fields with the new values!

Close

 **Forecast Wizard**
 CDL Name : Meropenem PSOIJ (414237) AT Market formation date : 8/17/2004

4 Basic Forecast Details

- Basic Forecast Details
- Forecast Net Sales
- Forecast Volume
- Forecast Supply Costs
- Forecast Comments

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"

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"

Forecast Region : Europe
 Forecast Country : AT Austria
 Forecast Type: Investment Forecast
 Want to replace the above Forecast type ? i

Launch Date
 i

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

Strengths

* Forecast Risks i
... None ... ▼

Please enter the Probability of success for this Forecast i

Primary pack size i

Secondary pack size i

Total # players at launch



With the "Update FC" button you can only update (replace) the particular Forecast record you have clicked.

For the case where you need to add a new Forecast for a country, use the "Manage FC" button on Country level.

Being able to access the Forecast Wizard from so many different places is quite convenient, right!

In the next unit, we will guide you through all screens of the CDL Forecast Wizard.

Resources

Other relevant modules:

- Personalise, Navigate and Search in SANITY
[\(<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0001af>\).](https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0001af)

- List Views in SANITY
(<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0005rl>).
- Basic Introduction to Reports & Dashboards in SANITY
(<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0002rs>).