

FORECAST PRO TRAC DEMO QUICK START GUIDE

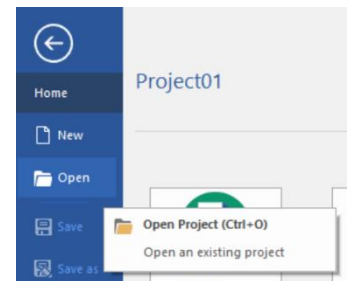
Thanks for your interest in Forecast Pro. This brief document will help you get up and running with a trial version of the software so you can get a head start on experimenting with the functionality and evaluating the tool for your own needs. These are our recommended first steps.

- 1) **Download and install the trial version** using the instructions provided to you via e-mail. The email will also supply you with a code to activate the software as a timed trial. If you have any issues installing the software just give us a call at +1 617 484 5050, or e-mail us at support@forecastpro.com.

- 2) **Open Forecast Pro** from your desktop by double-clicking its icon:

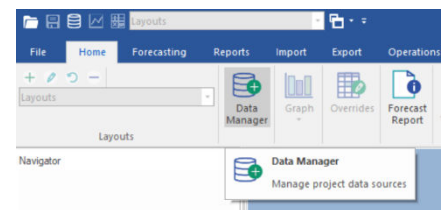


- 3) **Open a pre-existing Forecast Pro “project”** to view some sample data and experiment with the views and functionalities available in Forecast Pro. Select “Open” on the home screen in Forecast Pro, find the file “Tutorial - Basics.FPZip” and click “Open”. This project includes data and forecasts for a commercial bakery. Feel free to explore the other projects that ship with the tool as well.

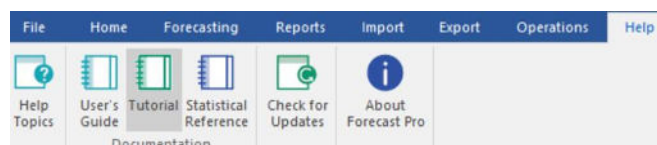


- 4) **Try reading in some of your own data and creating your own forecasts.** See the next page for information on formatting your data. Once your data is formatted, follow these steps:
 - a. Start a new Forecast Pro project by selecting *File* and choosing *New Project*.
 - b. Click the “Data Manager” button on the ribbon menu at the top. This screen lets you manage any data coming into Forecast Pro. The only thing you have to feed Forecast Pro is historical data; the rest is optional.

- c. In the “Historical Data” section at the top, select “Add”, and choose your data format from the dropdown menu (we recommend Excel or CSV for trial purposes). Navigate to and select your data file, and then press the “Read and Forecast” button in the Data Manager. You can then close this window by clicking “Exit”.



Forecast Pro ships with a comprehensive tutorial along with a variety of sample data and projects. You can access the tutorial via the Help menu inside Forecast Pro, or from the Forecast Pro home screen when the software launches. We strongly recommend reviewing at least the first lesson. If you like what you see, we can also give you a guided tour of the tool over Microsoft Teams. Just call +1 617 484 5050, or e-mail sales@forecastpro.com to schedule that session ASAP.



FORMATTING DATA FOR FORECAST PRO

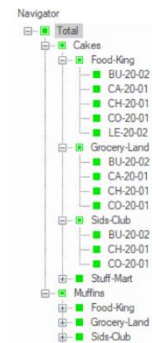
Forecast Pro’s core input is **historical demand data**, often historical sales, orders, shipments, point of sale or similar. This data can be at any level of detail (by customer, location, or other attributes) but must be aggregated into our desired time bucket (months or weeks, usually). This document outlines reading data in **rows** where data runs left to right chronologically, or **transaction-style** with one record per row. Forecast Pro enables you to read in data via files (Excel, CSV, or text file) or directly from a database via ODBC. This document focuses on the former, as it is generally simplest to read from Excel/CSV for trial purposes. If you prefer ODBC, please refer to the Help menu in Forecast Pro (tutorial/reference), or contact us at support@forecastpro.com.

ONE FORECASTED ITEM PER ROW

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Total	Category	Customer	SKU	Description	Starting Year	Starting Period	Periods Per Year	Periods Per Cycle	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-1
1	Total	Cakes	Food-King BU-20-02	CASE - 20 oz. Butter Pound Cake	2015	1	12	12						
2	Total	Cakes	Food-King CA-20-01	CASE - 20 oz. Carrot Layer Cake	2015	1	12	12	20,829	72,576	11,016	0	0	
3	Total	Cakes	Food-King CH-20-01	CASE - 20 oz. Chocolate Layer Cake	2015	1	12	12						
4	Total	Cakes	Food-King CO-20-01	CASE - 20 oz. Coconut Layer Cake	2015	1	12	12	6,763	7,661	9,561	6,076	6,092	7,93
5	Total	Cakes	Food-King LE-20-02	CASE - 20 oz. Lemon Pound Cake	2015	1	12	12						
6	Total	Cakes	Grocery-Land BU-20-02	CASE - 20 oz. Butter Pound Cake	2015	1	12	12						
7	Total	Cakes	Grocery-Land CA-20-01	CASE - 20 oz. Carrot Layer Cake	2015	1	12	12	3,572	4,000	2,808	5,184	2,808	4,37
8	Total	Cakes	Grocery-Land CH-20-01	CASE - 20 oz. Chocolate Layer Cake	2015	1	12	12	15,307	1,866	3,477	6,501	5,292	5,21
9	Total	Cakes	Grocery-Land CO-20-01	CASE - 20 oz. Coconut Layer Cake	2015	1	12	12	25,404	450	906	4,986	7,218	6,34

The key details for formatting data are:

- 1) The **initial columns represent your product hierarchy** (columns A-D in this example), which is a tree-like structure that can include groupings such as category, customer, region, warehouse, or virtually anything else. There are no limits on what these attributes are or how many you have. Use as many columns as you need. The above example looks like this once inside Forecast Pro (right). Notice how the leftmost column is the “top” while the rightmost is the “bottom” .
- 2) The **Description column is required** and should be labeled exactly “Description” as in the above example. This field is not a part of your hierarchy but must appear directly after your last hierarchy field. Most users choose to populate this with a SKU description but it can contain anything or even be blank.
- 3) Start year & start period should refer to your first column of data (in this example, column J— the first month is January 2012 so we have set the fields to 2012 and 1, respectively). Periods per year and periods per cycle should be set to 12 for monthly data or (usually) 52 for weekly data. Technically, you can set this to any periodicity.
- 4) The data then runs from left to right in each row, for each forecasted item.



A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Total	Category	Customer	SKU	Description	Starting Year	Starting Period	Periods Per Year	Periods Per Cycle	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-1
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TRANSACTION-STYLE

This follows the same conventions as the row format, except each transaction is in its own row. The only difference is we now list the historical year & period of the data point instead of the starting year & period. Note that the data are still rolled up into monthly or weekly buckets.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Itemid0	Itemid1	Itemid2	Itemid3	Description	Hist_Year	Hist_Period	PPY	PPC	Hist_Value					
1	Total	Muffins	Stuff-Mart	COR-12-11 CASE - 12 count Corn Muffins	2011	6	12	12	1944					
2	Total	Muffins	Stuff-Mart	COR-12-11 CASE - 12 count Corn Muffins	2011	7	12	12	3888					
3	Total	Muffins	Stuff-Mart	COR-12-11 CASE - 12 count Corn Muffins	2011	8	12	12	5832					
4	Total	Muffins	Stuff-Mart	COR-12-11 CASE - 12 count Corn Muffins	2011	9	12	12	8748					
5	Total	Muffins	Stuff-Mart	COR-12-11 CASE - 12 count Corn Muffins	2011	10	12	12	16524					