

Level Three Instructor/Facilitator Guide

XYZ Computers
Sales Planning System Training

Sales Rep Forecasts

Introduction Slide	<p>INTRODUCE the module.</p> <p>In this module, you will use the Sales Planning System (SPS) to create and update a Sales Rep Forecast.</p> <p>Sales Rep Forecasts identify particular products or services that a customer may purchase, and the amount of revenue that this sale is expected to generate for the company. Sales Rep Forecasts also a probability factor of whether or not a purchase is imminent within the fiscal quarter.</p> <p>As a sale becomes more likely, the probability of the forecast indicates that the likelihood of a sale has increased.</p> <p>When this probability reaches 100%, the sale is considered final, and Manufacturing responds by creating a Customer Order to assemble the specified products.</p>
Objectives Slide	<p>Upon completing the learning exercises provided in this module, you will be able to:</p> <ul style="list-style-type: none">✓ Create a Sales Rep Forecast that reflects all known details about a possible product sale.✓ Update a Sales Rep Forecast so it reflects all the latest information about a customer.
Learning Exercise Slide	<p>DESCRIBE the Learning Exercises.</p> <p>This module contains two learning exercises to help you use the Sales Planning System to create and update a Sales Rep Forecast. In the first exercise, you'll create a Sales Rep Forecast for a customer account.</p> <p>In the second exercise, you'll update the forecast you just created with new customer information. When you have completed both of these learning exercises, you will have created a Sales Rep Forecast and updated this forecast with new customer information.</p>

Instructor Demonstration

Introduction Slide

INTRODUCE the Sales Rep Forecast Demonstration. I'm going to demonstrate how to create a Sales Rep Forecast for a simple equipment purchase. This demonstration is similar to the learning exercise shown in your participant guide.

Figure 2-2. Sales Rep's Forecast Screen

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FORECAST SPS                Sales Rep's Forecast                1.0 19 Feb 92
15:54:51
Command: _____

Sales Rep #: 5152 Name: Edmonds   Mike
Customer #:      1   Name: APPLIED COMMUNICATIONS INC (ACE)
Project: 2        Forecast #: 2B   Last Update: 14 FEB 92

*Quarter:      Q J 92   *Ship Month:           Week Num:

*Split: ND      Dependencies:                               MSS: N
                    *Prob %      Net      List Disc%   *Currency:
Revenue Totals: 100      100      110      9      AUSTRALIAN DOLLA
Products:
CYCLONE                QTY
CYCLONE/R LIBRTY      2
CLK/BDD
CLK/R TDD
CLK/R 800
CLK/R LIBRTY
CLK 6/700

                    FDEL                UP      CDLX FLDM HELP EXIT
F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12 F13 F14 F15 F16
ACT NEXT ADD UPDT QDEL PPG MPG      SCAN DOWN CUST DIR CLR PRNT RETN
Inquiry completed successfully.
    
```

Instructor Demo: Sales Rep Forecast

- At the TACL prompt, type “**SPS**” and press the **RETURN** key (the system will display the logon screen).

At the User ID field, type an “**E**” followed by your employee number into this field, then press the **TAB** key, and type your Password, then press the **F1 [ACT]**.

If you did this correctly, the system will log you on to SPS, and display the Sales Rep's Menu screen.
- With the cursor at the *Sales Rep Forecast* menu option (FORECAST), press the **F1 [ACT]** key (the system will display the *Sales Rep Forecast* screen).

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3. Press the **F14** [CLR] key to clear the information from the screen.
 4. To select a customer, **Tab** to the *Customer Name* field, type at least the *first three letters of the customer's name* (or leave blank), then press the **F10** [SCAN] key.

For the purpose of this demonstration, we'll use the customer name "_____".

5. **Tab** to the *name of the customer* you want to forecast, then press the **F12** [SLCT] key to select this customer.
6. To enter a project description, **Tab** to the *Project* field and type the *name of this project* into this field.

For this demonstration, we'll use the project name, "_____".

INSTRUCTOR NOTE: *The Project Name must be unique to the employee and customer.*

7. To select the desired *quarter/year*, **Tab** to the *Quarter/ Year* field, and press the **F11** [DOWN] or **SF11** [UP] keys until the *desired quarter and year* appears in this field.

For this demo, we'll use the current quarter: _____

INSTRUCTOR NOTE: *The default is the current fiscal quarter. The Quarter/Year field will only allow you to forecast in the current or future fiscal quarters, and not past quarters.*
