How to create a new Forecast View

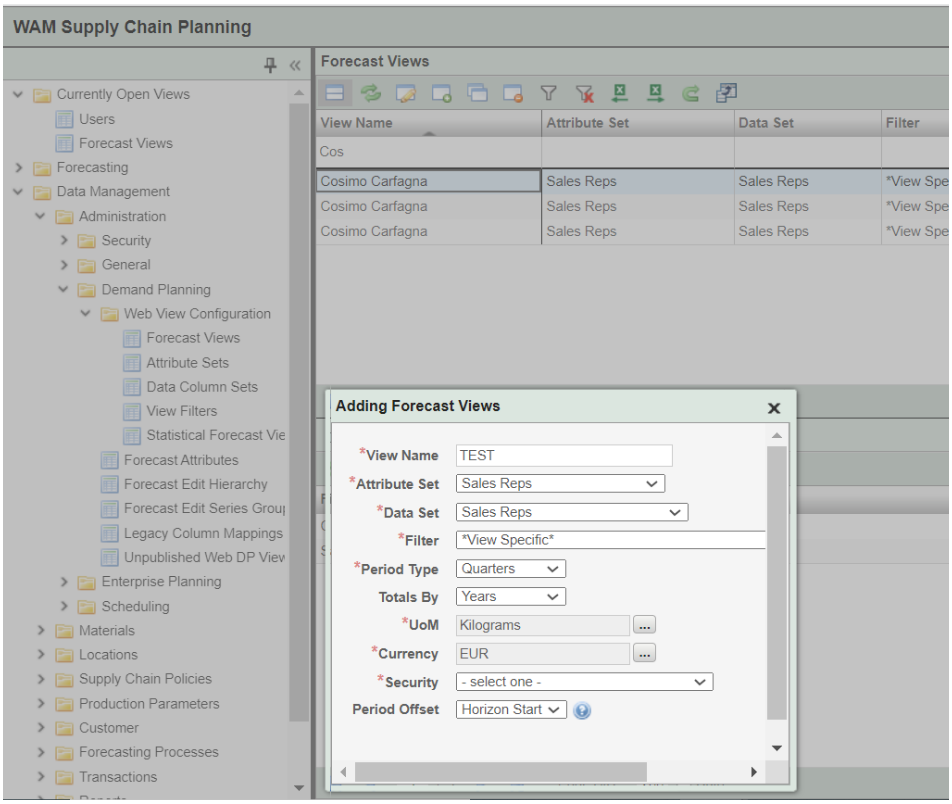
IMPORTANT
User must be created and assigned to a group before we create a view for them.

Click on the following route :
-Data Management > Administration > Demand Planning > Web View Configuration > Click on Forecast Views

This menu is the library of all of our forecast views that have been created.

To create a new view:
1. click the add new row button at the top
2. Set the view name as whatever you need. (Typically if its for an individual person, just set the view name as their name)
3. Set the Attribute set to Sales Rep
4. Set the Data set to Sales Rep
5. Set the Filter to View Specific
6. Set Period Type to Months
7. Set Totals to Years
8. Set Unit of Measure to Kilograms
9. Set currency to whatever region is preferred (most users prefer Euros but it depends on region)
10. Set Security to the new user's name
11. Set Period offset to Horizon Start
12. Hit Save

(Use picture for reference)



Now that we have the view set up, we need to set the parameters for the filter to get the view filtered to only accounts that the new users is assigned to.

1. After the new forecast view is populated, click on the cell in the upper menu.
2. Toggle the menu panel (1st icon)
3. Click on Filter Details tab to set new filters for the view
4. The ones we are adding are CPG_TEXT4 and Sales Rep Name. The CPG_TEXT4 is a unique code that filters to only accounts that are set as Active

and the sales reps name will filter it only to accounts that are assigned to the user name.