
Forecast Manager User guide

Last Updated: March 1, 2023

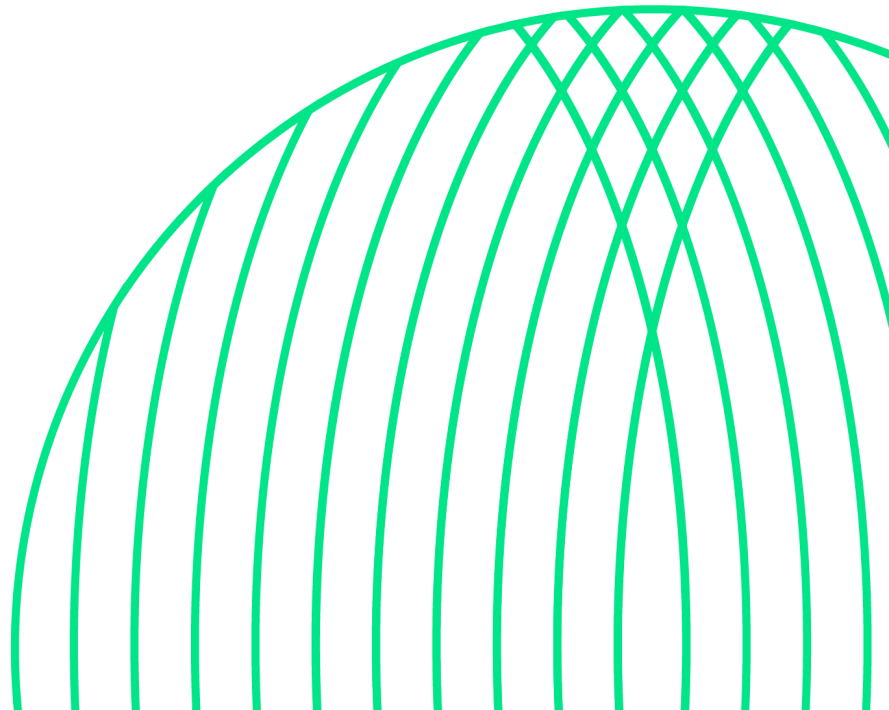


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Introduction

Hub Forecast manager is a dynamic forecasting application that allows clients to aggregate demand across all potential buyers, reducing waste whilst improving efficiency and sustainability.

Hub Forecast Manager is a web-based application offering branded experience and tailored features. Not all features explained in this user guide will be applicable to each specific account.

Glossary

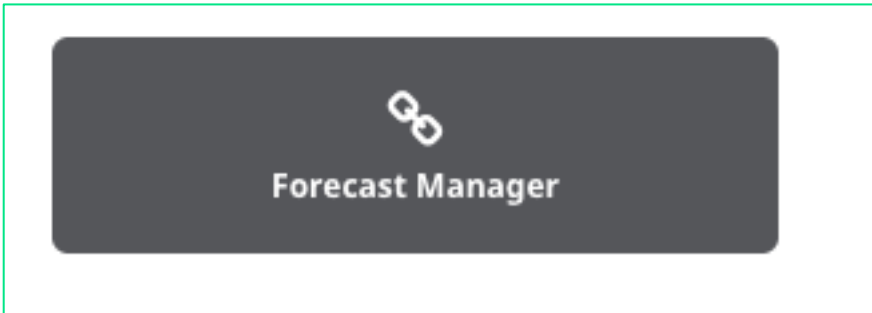
- **BUY WINDOW/CYCLE/CATALOG** = an order time frame usually 1-2 weeks
 - Setup and administered by HH Global
 - Automatically closes at the end of the timeframe or if no checkout occurs.
- **BUY GROUP** = customer defined group of people, products, currencies, time frame (e.g. different start/close due to a time zone)
 - A person can belong to 1 or more Buy Groups
 - A product can either belong to all Buy Groups or only be available to certain ones. A product can have a different pricing per Buy Groups
 - Buy Groups can have different currencies, one Buy Group can have only a single currency, therefore if multiple currencies are required for the same region, there will be multiple Buy Groups per region.
 - Buy Group can be automatically locked for the tolerance review and is only editable by the HHG Admin/Account Teams
- **BUY GROUP LOCATION** = the location where the quantity is forecasted
- **FORECASTER** = a person who places interest for products in the Buy Group.
- **APPROVER** = a person who reviews the individual Buy Groups and confirms the order; approver may review and approve one or more Buy Groups
- **TOLERANCE REVIEW** = review of the overall order with HHG Account Team to issue the final aggregate order

Note: the application is fully localizable, so the wording used in this user guide might not be exactly what you see in your version.

Basic feature walkthrough

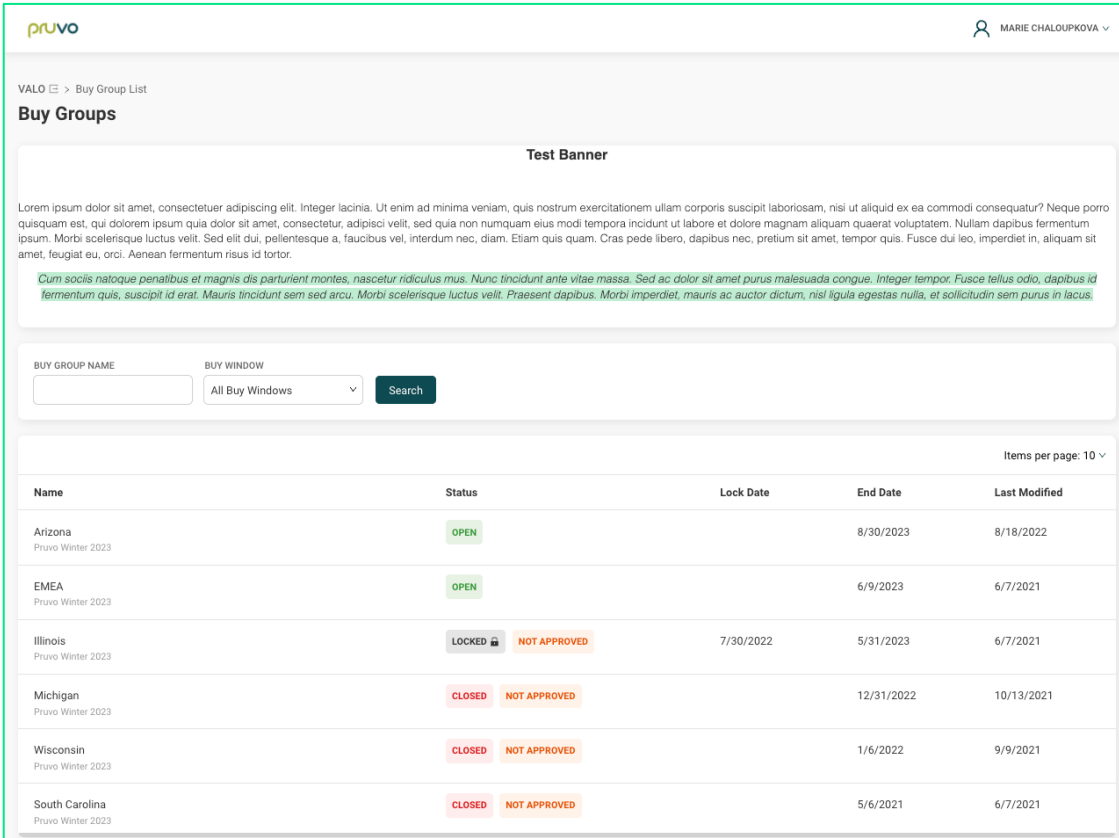
Step 1 – logging in.

In your browser, log in to address similar to <https://client.hhglobal.com/> and click on the Forecasting Manager module or use the direct link for the forecasting manager application (e.g. <https://client-fm.hhglobal.com/Buygroup-client/>).



For first time users, set your starting password by clicking on the “Activate or Reset Password” link, and entering your email on the following screen. You’ll be sent an email with a link to set your starting password. Login using your email address as the username and the password you’ve chosen.

After logging in you will see a landing page, where a welcoming banner will contain important information about buys and the filterable list of your assigned Buy Groups, both past and current.



The screenshot shows the Pruvo Forecasting Manager interface. At the top, the Pruvo logo is on the left, and the user name 'MARIE CHALOUKOVA' is on the right. Below the header, there is a breadcrumb trail 'VALO > Buy Group List' and a section titled 'Buy Groups'. A 'Test Banner' is displayed with placeholder text. Below the banner is a search filter with a 'BUY GROUP NAME' input field, a 'BUY WINDOW' dropdown menu set to 'All Buy Windows', and a 'Search' button. The main content is a table with columns: Name, Status, Lock Date, End Date, and Last Modified. The table lists several buy groups with their respective statuses and dates.

Name	Status	Lock Date	End Date	Last Modified
Arizona Pruvo Winter 2023	OPEN		8/30/2023	8/18/2022
EMEA Pruvo Winter 2023	OPEN		6/9/2023	6/7/2021
Illinois Pruvo Winter 2023	LOCKED NOT APPROVED	7/30/2022	5/31/2023	6/7/2021
Michigan Pruvo Winter 2023	CLOSED NOT APPROVED		12/31/2022	10/13/2021
Wisconsin Pruvo Winter 2023	CLOSED NOT APPROVED		1/6/2022	9/9/2021
South Carolina Pruvo Winter 2023	CLOSED NOT APPROVED		5/6/2021	6/7/2021

Step 2: Select Your Buy Group

You can filter your Buy Groups by name or by a specific Buy Window.

Choose the buy group you are interested in.. Buy groups can mirror Hub Catalog options.

Name	Status	Lock Date	End Date	Last Modified
Arizona Pruvo Winter 2023	OPEN		8/30/2023	8/18/2022
EMEA Pruvo Winter 2023	OPEN		6/9/2023	6/7/2021
Illinois Pruvo Winter 2023	LOCKED NOT APPROVED	7/30/2022	5/31/2023	6/7/2021
Michigan Pruvo Winter 2023	CLOSED NOT APPROVED		12/31/2022	10/13/2021
EuroBG CatalogEUR	CLOSED NOT APPROVED		1/27/2022	3/31/2021
Wisconsin Pruvo Winter 2023	CLOSED ALLOCATED NOT APPROVED		1/6/2022	9/9/2021
Arizona Pruvo 2020	CLOSED NOT APPROVED		8/30/2021	
South Carolina Pruvo Winter 2023	CLOSED NOT APPROVED		5/6/2021	6/7/2021

Basic Buy Group statuses explained:

- OPEN – active Buy Window
- LOCKED – Buy Window under tolerance review (optional feature)
- CLOSED – finished Buy Window

Note: Additional statuses will be explained in the chapter for optional features.

Dates explained:

- End Date – Buy Window closing date, no edits allowed after that date.
- Lock Date – Buy Window closing date for regular users, edits are allowed only for HHG account teams after that date (optional feature)
- Last Modified – date when the Buy Group was last modified.

Step 3: Express interest

All Buy Groups can contain a full catalog, or there may be some variation due to regional specifics. One Buy Group can show pricing in only one currency. If your account is using multiple currencies, you will have multiple Buy Groups assigned to you for your region.

Once inside the Buy Group, enter the quantities required per item and per location. Use filters on the left to reduce the item list or scroll down to see all items. The Subtotal on the far right will track total spend.

All quantities are saved when entered. There is no need to click on anything else (e.g. checkout button) unless you need to change the desired quantity.

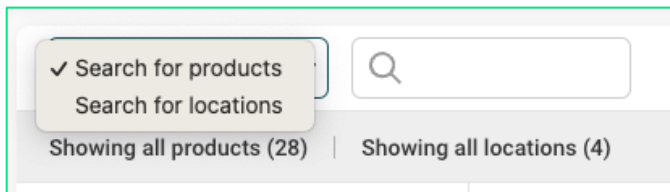
Navigating the Buy Group Page

The screenshot displays the HHG Buy Group interface. On the left, there is a 'Filters' sidebar with categories: THRESHOLD, INTEREST, VIEW ONLY, LOCATION TYPE, BRAND, COLOR, and COUNTRY. The main area shows a search bar and a grid of products with columns for Product, Threshold Status, Location 4, Location 1, Location 2, Location 3, and Product subtotal. A green box highlights the search bar and filter sections, with an arrow pointing to the search bar labeled 'Joined filters for products and locations'.

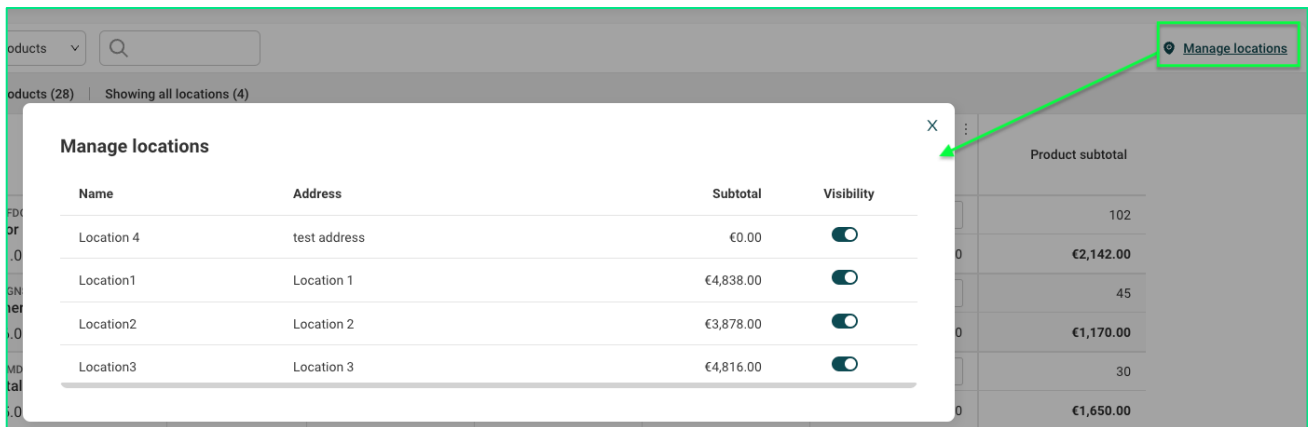
Product	Threshold Status	Location 4	Location 1	Location 2	Location 3	Product subtotal
PRUFDC0014PM Floor Decal €21.00		0	34	34	34	102
PRUGNS0016PM General Stand €26.00	233 Threshold met	0	7	3	35	45
PRUMDD0018PM Metal Display €55.00		0	10	10	10	30
PRUMDS0017PM Metal Display Stand €42.00	64 Threshold met	0	3	6	3	12
PRUODD0023PM Customizable Direct Mai... €2.00	372 628 Threshold not met yet	0	20	20	2	42
PRUOPB0031PM Postcard €2.00	102 898 Threshold not met yet	0	5	2	7	14
PRUOPP0033PM Product Packaging Sell ... €2.00	86 914 Threshold not met yet	0	6	2	6	14
PRUGSD0034PM Ship & Deliver Sell Sheet €2.00	157 Threshold met	0	1	11	14	26
Location subtotal		€0.00	€4,838.00	€3,878.00	€4,816.00	BUY GROUP TOTAL €13,532.00

There are multiple ways to filter the product/location grid:

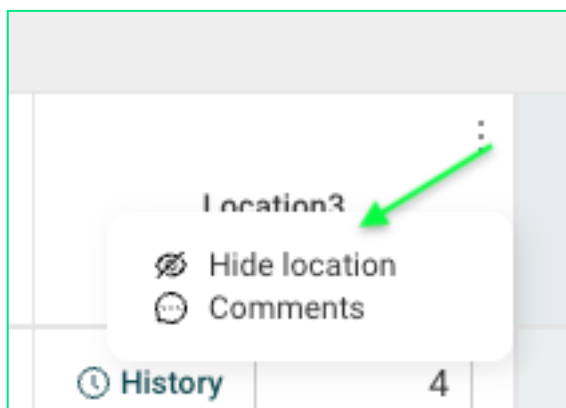
- Filter on the left – this is fully customizable to your account needs, some filters are system ones and are dependent on your Buy Window setup (e.g. the Threshold/MOQ, Canceled items, View Only items, Location Type Interest placed)
- Filter above the Product/Location grid – this filter can be used to search products as well as locations. For products it considers the SKU number, all the filter values and product description. For locations it considers the Location ID, location name.









- “Manage locations” button above the product/location grid opens a pop-up box with specific location subtotal as well as the visibility toggle.







- Clicking the three dots on the location tile allows you to hide the selected location one by one.



Once the Product/location grid is filtered, there is a clear indication on the subtotal columns, that you are previewing only a limited number of products/locations. Also, the bar on top of the grid shows all active filters and indicates the amount of filtered out products/locations.

Filters		Search for products		Manage locations							
THRESHOLD <input type="checkbox"/> Threshold not met <input type="checkbox"/> Threshold met <input type="checkbox"/> No Threshold		INTEREST <input type="checkbox"/> Placed <input type="checkbox"/> Not placed		VIEW ONLY <input type="checkbox"/> View Only <input type="checkbox"/> Not View Only		LOCATION TYPE <input type="checkbox"/> Small <input type="checkbox"/> Medium <input type="checkbox"/> Large <input type="checkbox"/> Location Type Not Set		BRAND <input checked="" type="checkbox"/> Premium <input type="checkbox"/> Standard <input type="checkbox"/> Brand Not Set		COLOR <input type="checkbox"/> Black <input type="checkbox"/> Green <input type="checkbox"/> Grey <input type="checkbox"/> Silver <input type="checkbox"/> White	
ACTIVE FILTERS (Visible products: 6/28): Premium X CLEAR ALL Showing all locations (4)											
Product	Threshold Status	Location 4	Location1	Location2	Location3	Filtered product subtotal					
 PRUJGB0038PM Golf Basics Bag €17.00		<input type="text" value="0"/> History	<input type="text" value="14"/> History	<input type="text" value="6"/> History	<input type="text" value="4"/> History	24	€0.00	€238.00	€102.00	€68.00	€408.00
 PRUJGP0037PM Golf Bottle Pouch €15.00	93 Threshold met	<input type="text" value="0"/> History	<input type="text" value="1"/> History	<input type="text" value="1"/> History	<input type="text" value="1"/> History	3	€0.00	€15.00	€15.00	€15.00	€45.00
 PRUJGJ0003PM Golf Jacket €36.00	49 Threshold not met yet	<input type="text" value="0"/> History	<input type="text" value="3"/> History	<input type="text" value="3"/> History	<input type="text" value="3"/> History	9	€0.00	€108.00	€108.00	€108.00	€324.00
 PRUJGP0001PM Tech Modern Golf Polo €22.00		<input type="text" value="0"/> History	<input type="text" value="35"/> History	<input type="text" value="5"/> History	<input type="text" value="35"/> History	75	€0.00	€770.00	€110.00	€770.00	€1,650.00
 PRUJMF0004PM Mens Fleece €39.00		<input type="text" value="0"/> History	<input type="text" value="19"/> History	<input type="text" value="2"/> History	<input type="text" value="2"/> History	23	€0.00	€741.00	€78.00	€78.00	€897.00
 PRUJVS0009PM Visor €11.00		<input type="text" value="0"/> History	<input type="text" value="4"/> History	<input type="text" value="2"/> History	<input type="text" value="4"/> History	10	€0.00	€44.00	€22.00	€44.00	€110.00
Filtered location subtotal		€0.00	€1,916.00	€435.00	€1,083.00	BUY GROUP FILTERED TOTAL €3,434.00					
Location subtotal		€0.00	€4,838.00	€3,878.00	€4,816.00	BUY GROUP TOTAL €13,532.00					

Products are displayed in rows and locations in columns. The product column contains a thumbnail of the product, respective SKU (unique product ID), product name, pricing, and packaging information. If your account is using a threshold/MOQ setting, there is column for tracking it.

	PRUPTD0039PM SKU Thumbdrive €15.00 Price tier v	Threshold not set
	PRUPUM0041PM Umbrella €22.00 Price per pack	
	PRUPWB0042PM BOX OF 20 Water Bottle €5.00 Packing information	119 Threshold met
	PRUJGJ0003PM Golf Jacket €36.00	49 51 Threshold not met yet

Threshold/MOQ is aggregated from all buy Groups in the given Buy Window.

Some products may have tier pricing set. Each price tier is dependent on the amount of interest placed across all Buy Groups in the current buy. Meaning: the more your peers order, the lower price you all get on the item.

The screenshot shows a product listing for 'Thumbdrive' (SKU: PRUPTD0039PM) priced at €15.00. Below it is an 'Umbrella' (SKU: PRUPUM00) priced at €22.00 with a 'VIEW ONLY' button. A 'Price tier' popup is overlaid on the Umbrella product, showing a table of quantity ranges and their corresponding unit prices.

QUANTITY		UNIT PRICE
FROM	TO	
1	9	€19.00
10		€15.00


You can also click on the product cell and open a product detail with more information. The product popup box has three tabs with information.

- General information and product description:

The screenshot shows a product detail popup for the 'Thumbdrive' (SKU: PRUPTD0039PM). It features a large image of the product on the left and a right-hand panel with the following information:

- SKU: PRUPTD0039PM
- Product Name: Thumbdrive
- UNIT PRICE: €15.00
- Link: [SHOW ALL PRICE TIERS](#)
- Navigation tabs: **DESCRIPTION** (selected), DETAILS, PRICE TIERS
- Description: 2GB Slide Metal USB Flash Drive Keychain.

- Additional product details, incl. dimensions and filter values




PRUPTD0039PM

✕ **Thumbdrive**

UNIT PRICE **€15.00** [SHOW ALL PRICE TIERS](#)

DESCRIPTION	DETAILS	PRICE TIERS
DIMENSIONS	TOTAL DEMAND	
2.875" x 0.9375"	ACROSS BUY GROUPS	
	200	
COLOR	COUNTRY	
Silver	China	
PRODUCT TYPE	REGION	

- Price tier breakdown table if price tiers are set; the active price tier level is highlighted.



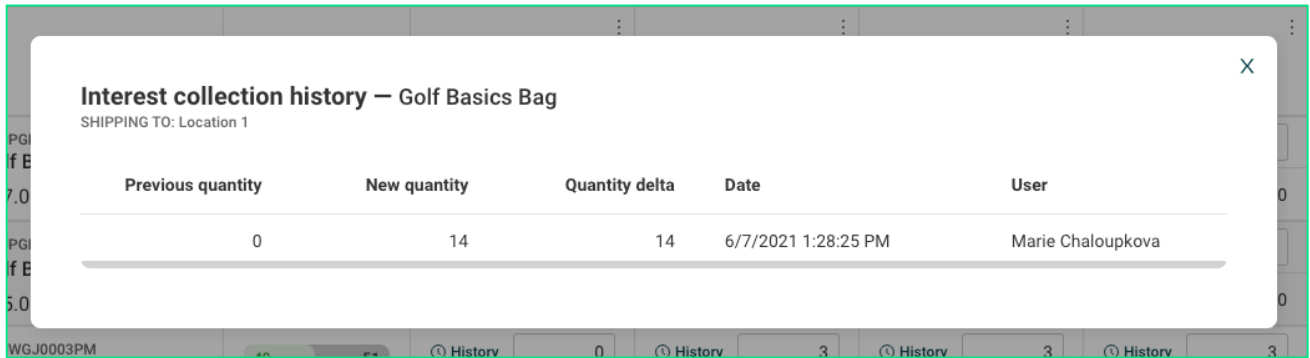
PRUPTD0039PM

✕ **Thumbdrive**

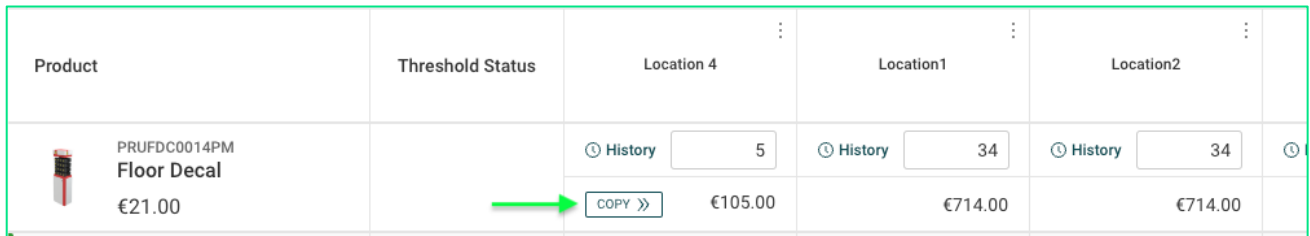
UNIT PRICE **€15.00** [SHOW ALL PRICE TIERS](#)

DESCRIPTION	DETAILS	PRICE TIERS
	QUANTITY	UNIT PRICE
	FROM TO	
	1 9	€19.00
	10	€15.00

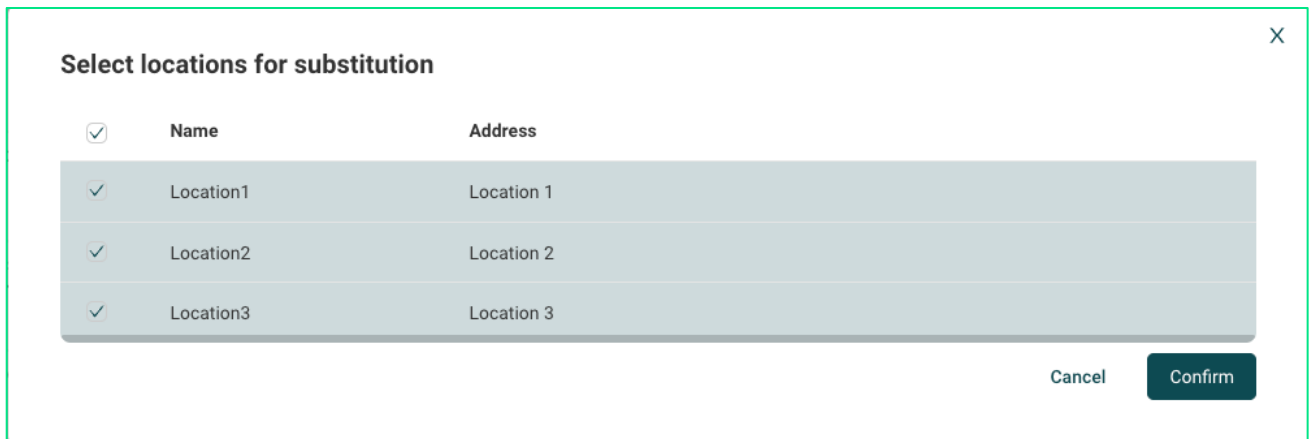
Each edit of quantity is recorded in the system and can be previewed via the History button:



You can also apply the selected quantity to all locations for a given product (e.g. if your account is retail), at the first location, there is the “Copy” button.



You can decide whether to copy it to all or only some in a popup confirmation window. After confirming, the quantity value from the first location is populated to all selected locations.



Location details can be found when hovering over the top cell in a location column or in the “Manage Location” screen. The level of location details depends on your account setting.

