

## INTEGRATED BUSINESS PLANNING WITH IDU-CONCEPT

Fast, effective, easy to use, real-time supply chain management solution.

## SALES PLANNING

To date, sales budgets are still being prepared centrally, with little to no input from the end user. This can be time consuming, and results in a lack of accuracy and efficiency.

The idu-Concept Sales Planning Module is specially designed to streamline the sales budgeting, forecasting and reporting process. Using a highly accessible web-based toolset, users are able to capture sales budgets at a customer and product level with real-time aggregation and management.



### Key Features:

- idu-Concept Sales Planning Module improves users' budgeting experience, resulting in a drastically reduced budget timeframe.
- The item-spread capture screen provides users with a monthly analysis of the previous year's revenue units, linked budgets and forecasts for selected products and customers. These can be used as a comparative when capturing the current budget through a selected weighting factor or a calculated spread on historical trends.
- Each product item is linked to various components that are driven as a result of the unit budget being captured. The revenue, cost of sales and overhead accounts are linked by either a fixed amount per item or fixed percentage relationships. The system will compute and update the related general ledger accounts.
- If security allows, a user is able to change the component values or percentages per customer and product while capturing the budget. The system allows for individual customer discount percentages and product pricing.
- Depending on a user's security profile, the system allows them to add additional customers in the user module by cloning selected customers. The new customer will inherit the same product relationships.
- Budgets can be reviewed in real-time via the summary reporting module. This enables sales or regional managers to analyse the budgets and forecasts through a selected customer or product hierarchical structure. In so doing, users have the ability to drill down to the underlying detail, without the need for data aggregation.
- The system administrator is able to define multiple user-specific screen layouts, such as the data displayed, the calculations that are performed and the reports that are available.
- The user's experience of the system can be personalised according to their specific requirements.
- All fields throughout the system hold an alternate label. Using this feature allows the administrator to customise the system as per your organisation's unique naming conventions.
- The system allows for the flexibility of creating multiple versions of a budget, and the ability to define the status of the current budget. E.g. progress, review, not complete and complete.