Locad (Salescast) Integration Manual (Version 1.0 - 10/23/2013)

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Introduction

Megaventory Overview

Megaventory™ from Megaventory Corporation is web-based software that manages the flow of products, logs purchase and sales orders, creates invoices, manages work orders (to manufacture finished goods from raw materials) and creates sophisticated inventory reports. Megaventory can be set-up and running in minutes even by users who do not have significant experience in working with sales software, managing inventory or deal with complicated business operations. Megaventory is a cloud-based application and is accessible from any location and by any device, desktop (PC or MAC), laptop, mobile or tablet. This can significantly improve the way remote personnel interact with the products, the Inventory Locations, and the business operations. Moreover, no software installation is necessary: everything runs on a web browser.

Salescast Overview

Salescast™ from Lokad SAS - R.C.S. is a webapp that delivers complete inventory optimization by providing reorder points (“when to order?”) and order quantity (“how much to order?”) information. Optimization is based on the Lokad's advanced demand forecasting technology. Salescast has been built to produce sales forecasts for any company that needs to anticipate demand in order to optimize inventory and other resources

Salescast is best suited for retailers, wholesalers and e-Commerce and requires no statistical skills. As such, it is also suitable for very large to small companies. Salescast uses the historical sales data of Megaventory and generates Excel reports and flat file exports which can then be used to update the Stock Alert levels of Megaventory and add optimized replenishment quantities in Purchase Orders.

If a company stores inventory, then someone, is already producing forecasts, because inventory is nothing but anticipated demand. The level of inventory optimization that a company is able to achieve is directly related to the accuracy of those forecasts.

Integration Specifics

Step 1 - Account Integrations (Megaventory)

To use the Salescast optimization, the appropriate flag has to be set in the *Account Integrations* module of megaventory. This module lies under the *Admin* menu tab and handles the settings involved in integrating Megaventory to any 3rd party software. Extra help while filling out the form can be obtained by hovering with the mouse over the bubble (💬) icon next to each specific field.

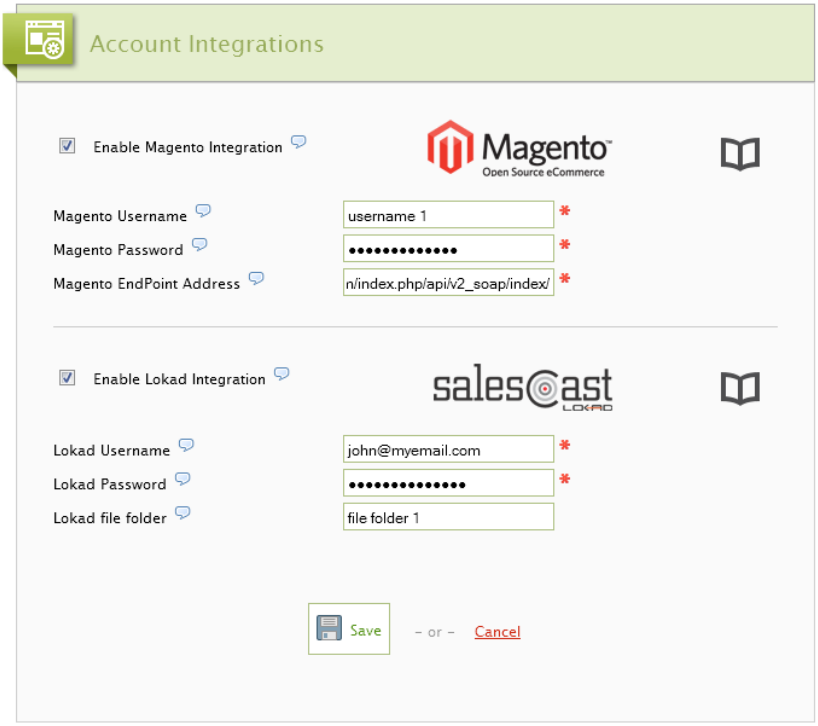

Figure 1-Account Integrations

By setting the *Enable Lokad Integration* flag, the user should also set the *Lokad Username* (mandatory field), *Lokad Password* (mandatory field) and *Lokad file folder* fields. The two former fields can be obtained by subscribing to the lokad.com website. The *Lokad file folder* field sets the folder location in which the files generated by Megaventory will be stored in

the lokad.com website. The folder field is not mandatory: if no folder name is specified then, the files generated by Megaventory will be stored in the root folder of your Lokad account. If the folder name is specified then, a same folder name must exist in your Lokad.com account. If no such folder name exists in your Lokad.com account, the user will receive an error notification message [SEE FIGURE 4-ERROR NOTIFICATION MESSAGE WHEN INVOKING THE SALESCAST SERVICE].

When all the relevant information is completed, the user should save the form by clicking on the *Save* button.

Step 2 - On-Hand Inventory and Alerts (Megaventory)

To invoke the Salecast service and generate the files that contain the historical sales data needed by the Salecast service, one has to select the products using the checkboxes in the respective rows and click the *Salescast Analysis* option in the *On-Hand Inventory and Alerts* module.

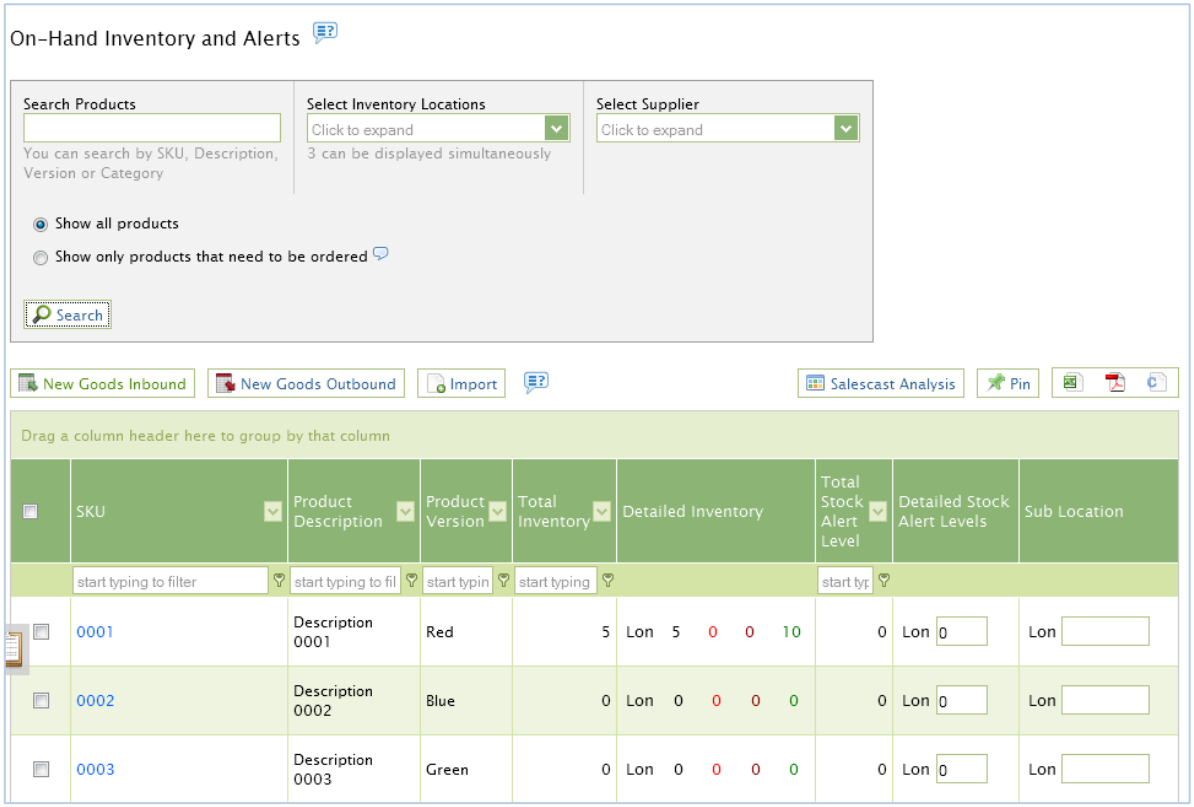

Figure 2-OnHand Inventory and Alerts

To populate the *Detailed Stock Alert Levels* and the *Sub Location* columns, the user should select one or more inventory locations from the *Select Inventory Locations* drop-down option and then click *Search*. In case only one inventory location exists in the account, the *Detailed Stock Alert Levels* and *Sub Location* columns are by default pre-populated to display only information related to this inventory location.

The *Show All Products* selection will populate the whole list of products which can then be sent to Salescast for analysis. A user may also use the *Show only products that need to be ordered* option to populate only those products that are currently low on stock and need to be ordered (purchased) by their supplier. In such a case, the list is populated only with those products that fulfill the following condition per Inventory Location: inventory quantity plus the non-received quantity in Purchase Orders plus the non-received quantity in Work Orders (if the Works Module is enabled) minus the non-shipped quantity in Sales Orders is less than the Stock Alert level.

Products may be selected by checking the checkbox in the respective product row. Then, these products can be exclusively sent for Salescast analysis by clicking the Salescast button.

After clicking the Salescast button a notification message appears. The notification message [SEE FIGURE 3-SUCCESS NOTIFICATION MESSAGE WHEN INVOKING THE SALESCAST SERVICE] includes the link to the Lokad.com website where the Salescast project is located. In case of an error, the user will see an error notification message [SEE FIGURE 4-ERROR NOTIFICATION MESSAGE WHEN INVOKING THE SALESCAST SERVICE].

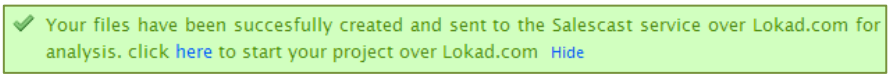

Figure 3-Success notification message when invoking the Salescast service

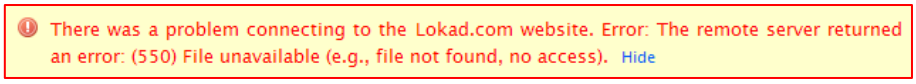

Figure 4-Error notification message when invoking the Salescast service

Step 3 - Generate the Salescast report (Lokad)

After successfully sending sales and inventory information to the Lokad.com servers [SEE FIGURE 5-INVENTORY AND SALES INFORMATION IN THE LOKAD.COM SERVERS] for the specified products of step 2 above [SEE STEP 2 - ON-HAND INVENTORY AND ALERTS (MEGAVENTORY)], the user can start the project and generate the Salescast report.

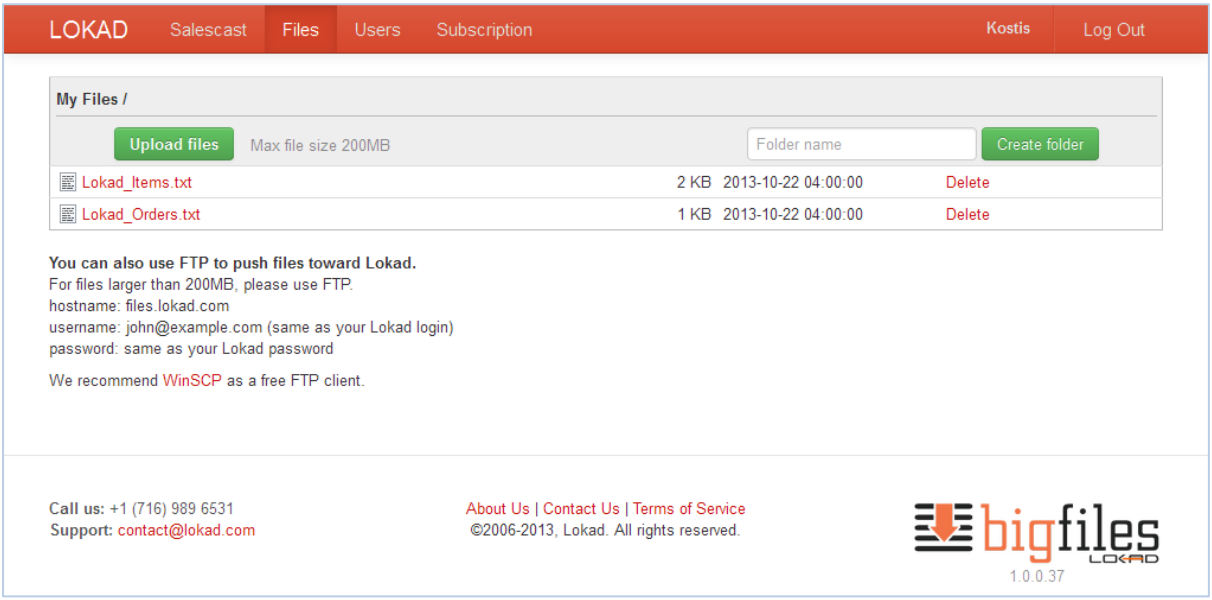

Figure 5-Inventory and sales information in the Lokad.com servers

The Salecast project is located at HTTPS://SALESCAST2.LOKAD.COM and can be started by clicking the *Start Run* button [SEE FIGURE 6-SALESCAST MODULE AND OPTIONS]. Extra configuration settings can be set by clicking the *Configure Project* button. Tweaking the settings under the *Configure Project* module allows for different optimization results. For the effect of each setting on your forecast, consult the Lokad.com website.

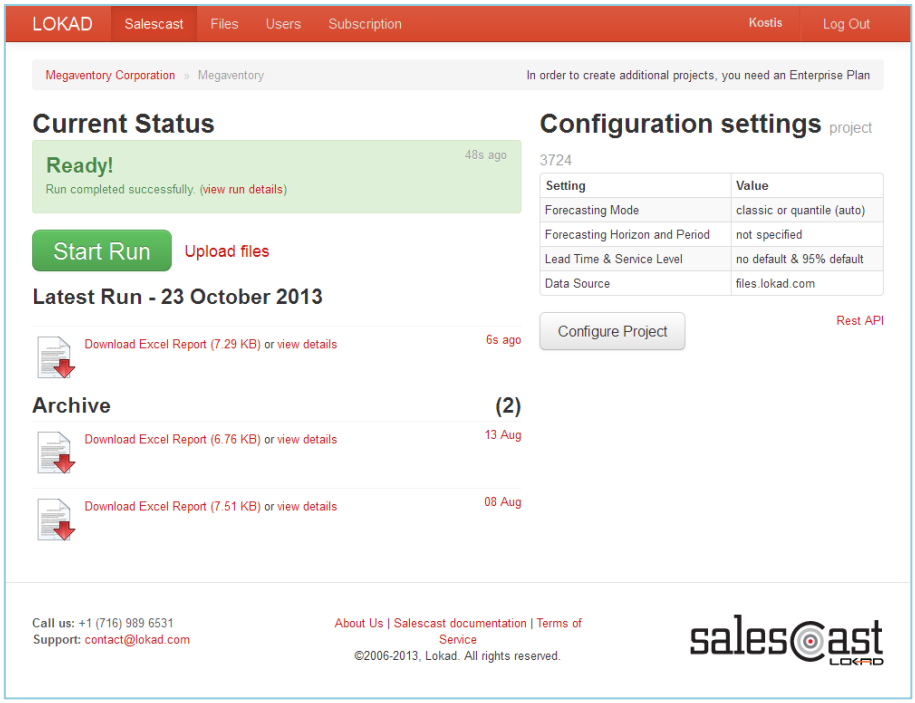

Figure 6-Salescast module and options

Once the Start Run button is clicked, Salescast will start analyzing the data [SEE FIGURE 7-RUNNING THE SALESCAST PROJECT] and produce a consolidated Excel report gathering key inventory optimization metrics [SEE HTTP://WWW.LOKAD.COM/SALESCAST-SAMPLE-REPORT].

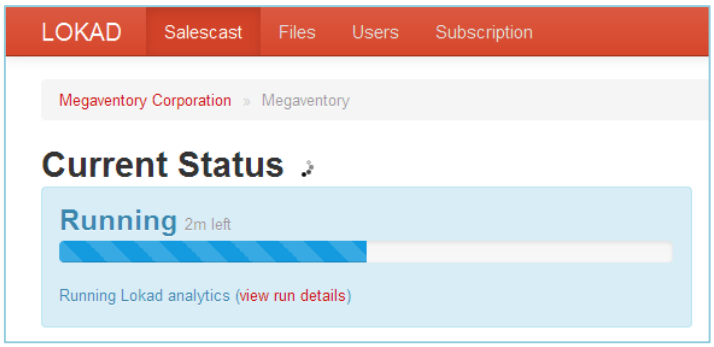

Figure 7-Running the Salescast project

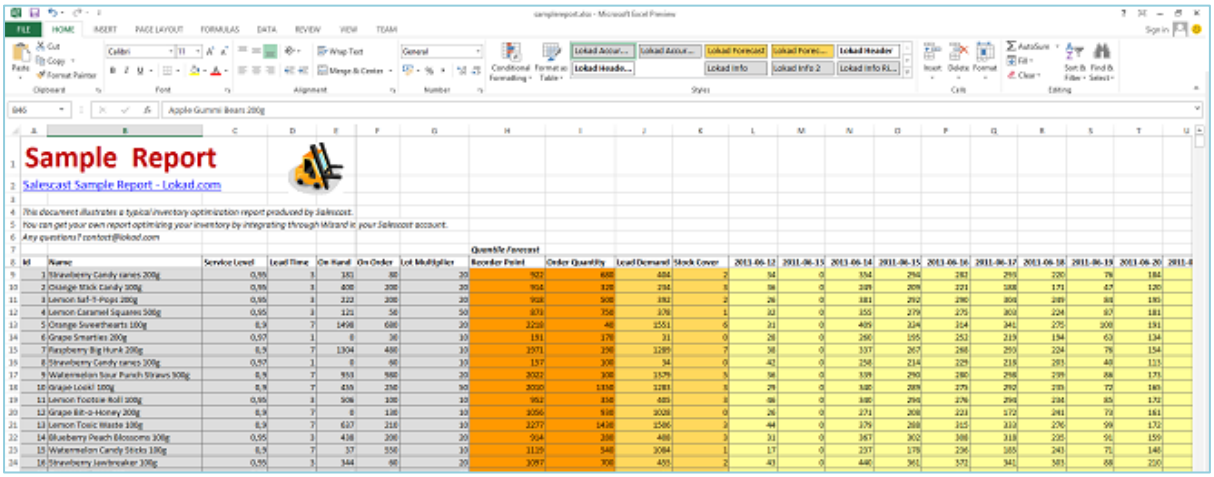

Figure 8-Sample Salecast report

Step 4 - Import Reorder Levels in Megaventory

The final step is to import the Salescast analysis back to Megaventory. This is handled by the *Data Import* module of Megaventory which uses a CSV (or a text file) to add data to the account. The data import procedure is a three step procedure that includes: 1) choosing the data type to import, 2) downloading of an excel template and filling the excel template with data according to the template specifications and 3) saving the file as CSV (or Unicode TXT) and importing to Megaventory.

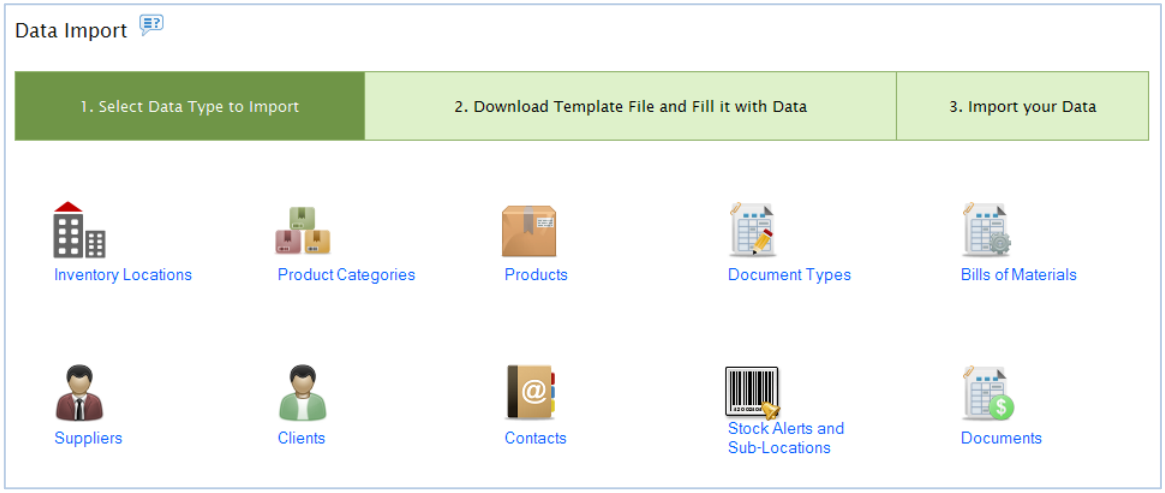

Figure 9-Step 1 of the Data Import module (choosing Data Type to import)

In this case, the *Stock Alerts and Sub-Locations* option should be clicked. By clicking on the Excel icon, the user will download an empty excel template which should be filled in and imported to Megaventory. The data/column structure will be similar to that of FIGURE 10-IMPORTING STOCK ALERT FIGURES USING AN EXCEL TEMPLATE.

	A	B	C	D
1	SKU	Inventory Location Abbreviation	Stock Alert Value	Sub-Location
2	001	LON	10	Shelf 1 - Corridor 2
3	001	BRI	2	Drawer A1
4	002	LON	0	Shelf 6 - Corridor 2
5	002	BRI	5	Drawer A2
6				

In this example, the stock alert values and the sublocation values are set for two SKUs (001 and 002)

Figure 10-Importing stock alert figures using an Excel template

In the Excel template, column A includes the *SKU* code, column B includes the *Inventory Location Abbreviation* and column C includes the *Stock Alert Value*. The values under column C should include the stock alert values that were generated from the Salecast analysis. The fields under the *Sub-Location* column can be left blank.

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