



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.

The screenshot shows the 'Account Integrations' configuration page. It features two integration sections. The first section, 'Enable Magento Integration', is active and includes the Magento logo and three input fields: 'Magento Username' (filled with 'username 1'), 'Magento Password' (masked with dots), and 'Magento EndPoint Address' (filled with 'n/index.php/api/v2_soap/index/'). The second section, 'Enable Lokad Integration', is also active and includes the salesCast logo and three input fields: 'Lokad Username' (filled with 'john@myemail.com'), 'Lokad Password' (masked with dots), and 'Lokad file folder' (filled with 'file folder 1'). At the bottom of the form, there are 'Save' and 'Cancel' buttons.

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 *Salecast Analysis* option in the *On-Hand Inventory and Alerts* module.

On-Hand Inventory and Alerts 

Search Products

You can search by SKU, Description, Version or Category

Show all products
 Show only products that need to be ordered 

 Search

Select Inventory Locations

Click to expand 

3 can be displayed simultaneously

Select Supplier

Click to expand 

 New Goods Inbound
 New Goods Outbound
 Import


 Salescast Analysis
 Pin



Drag a column header here to group by that column

	SKU	Product Description	Product Version	Total Inventory	Detailed inventory	Total Stock Alert Level	Detailed Stock Alert Levels	Sub Location
	start typing to filter	start typing to fil	start typin	start typing		start typ		
	0001	Description 0001	Red	5	Lon 5 0 0 10	0	Lon 0	Lon
	0002	Description 0002	Blue	0	Lon 0 0 0 0	0	Lon 0	Lon
	0003	Description 0003	Green	0	Lon 0 0 0 0	0	Lon 0	Lon

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].

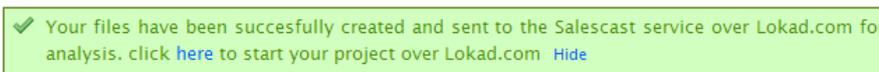


Figure 3-Success notification message when invoking the Salescast service



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.

LOKAD Salescast Files Users Subscription Kostis Log Out

My Files /

[Upload files](#) Max file size 200MB [Create folder](#)

Lokad_Items.txt	2 KB	2013-10-22 04:00:00	Delete
Lokad_Orders.txt	1 KB	2013-10-22 04:00:00	Delete

You can also use FTP to push files toward Lokad.
 For files larger than 200MB, please use FTP.
 hostname: files.lokad.com
 username: john@example.com (same as your Lokad login)
 password: same as your Lokad password
 We recommend [WinSCP](#) as a free FTP client.

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1.0.0.37

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

The Salecast project is located at [HTTPS://SALESCAST2.LOKAD.COM](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.

LOKAD Salescast Files Users Subscription Kostis Log Out

Megaventory Corporation Megaventory In order to create additional projects, you need an Enterprise Plan

Current Status

Ready! 48s ago

Run completed successfully. [view run details](#)

[Start Run](#) [Upload files](#)

Latest Run - 23 October 2013

[Download Excel Report \(7.29 KB\) or view details](#) 6s ago

Archive (2)

[Download Excel Report \(6.76 KB\) or view details](#) 13 Aug

[Download Excel Report \(7.51 KB\) or view details](#) 08 Aug

Configuration settings project

3724

Setting	Value
Forecasting Mode	classic or quantile (auto)
Forecasting Horizon and Period	not specified
Lead Time & Service Level	no default & 95% default
Data Source	files.lokad.com

[Configure Project](#) [Rest API](#)

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Figure 6-Salecast 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](http://www.lokad.com/salecast-sample-report)].

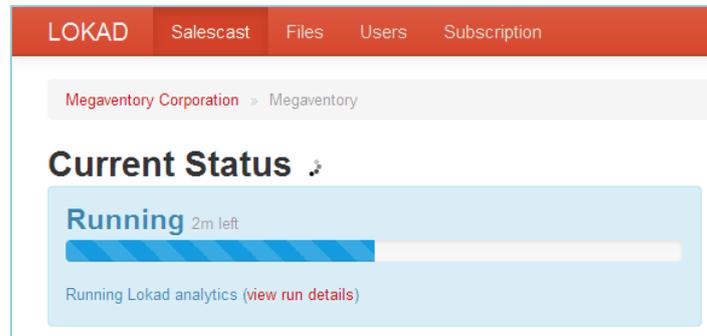


Figure 7-Running the Salescast project

The screenshot shows an Excel spreadsheet titled 'Sample Report' with the following data table:

Item	Name	Service Level	Lead Time	On Hand	On Order	Lot Multiplier	Reorder Point	Order Quantity	Lead Demand	Stock Cover	2013-06-13	2013-06-15	2013-06-14	2013-06-15	2013-06-16	2013-06-17	2013-06-18	2013-06-19	2013-06-20	2013-06-21
1	Shiraberry Candy canes 200g	0.95	3	351	95	30	952	400	482	2	54	0	354	294	281	295	225	78	181	
2	Orange track candy 200g	0.95	3	400	300	30	954	500	214	3	98	0	209	209	221	188	171	47	120	
3	Lennon Raf-9 Popz 200g	0.95	3	222	300	30	954	300	181	2	26	0	181	292	286	856	289	86	185	
4	Lennon Caramel Squares 200g	0.95	3	221	50	30	971	250	378	1	32	0	155	279	275	303	224	87	181	
5	Orange Sweetswerts 100g	0.9	7	149	600	30	2228	40	251	6	31	0	405	224	214	341	275	508	181	
6	Grape Smarties 200g	0.97	1	0	30	30	151	170	31	0	28	0	286	155	251	219	134	67	134	
7	Raspberry Big Think 200g	0.9	7	1304	400	30	1371	300	1289	7	58	0	337	267	288	293	224	78	154	
8	Shiraberry Candy canes 200g	0.97	3	0	90	30	137	300	34	0	42	0	258	214	228	218	281	40	131	
9	Watermelon Slice Parwh Straws 300g	0.9	7	973	900	30	2027	300	1579	3	38	0	339	292	285	298	239	88	173	
10	Orange Locol 100g	0.9	7	433	200	30	2020	130	1281	1	29	0	382	289	279	292	219	72	185	
11	Lennon Tootsie Roll 200g	0.95	3	306	300	30	954	350	403	1	98	0	480	298	276	294	284	32	172	
12	Grape Big-o-Honey 200g	0.9	7	0	130	30	2056	300	2038	0	26	0	271	208	221	172	241	73	181	
13	Lennon Toxic Waste 100g	0.9	7	637	210	30	2277	140	1586	3	44	0	379	288	312	312	256	99	172	
14	Shiraberry Peach Blossoms 300g	0.95	3	438	200	30	954	200	486	3	31	0	367	302	308	318	225	92	150	
15	Watermelon Candy Straws 300g	0.9	7	37	350	30	1120	340	3084	1	17	0	237	178	236	185	243	71	140	
16	Shiraberry Jawbreaker 300g	0.95	3	344	80	30	3097	300	453	2	47	0	440	361	371	341	381	88	200	

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.

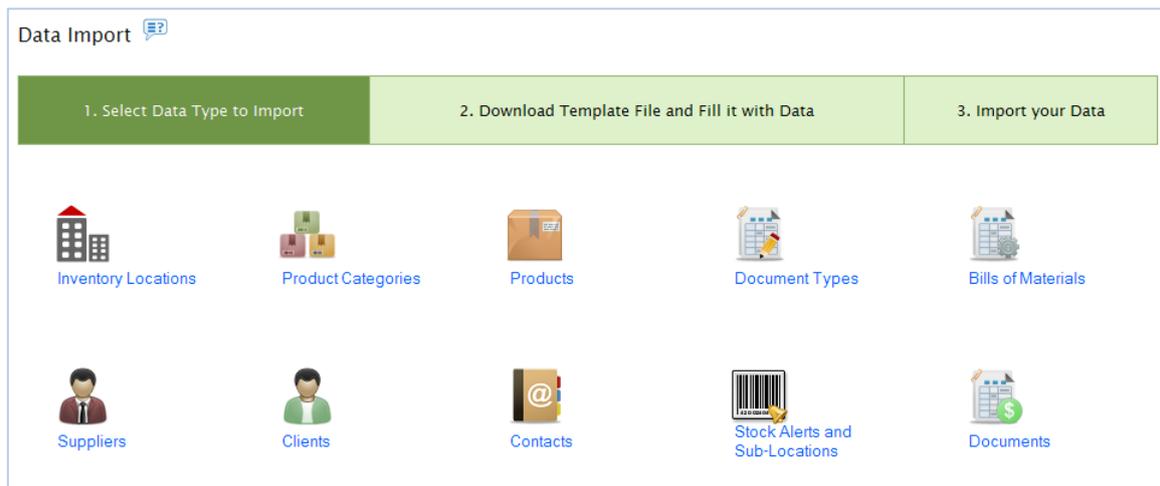


Figure 9-Step 1 of the Data Import module (choosing Data Type to import)

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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