

# Entering Projected Sales

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Teamwork makes it incredibly easy to input sales projections. When sales projections are populated, you will get a clear picture of your forecasted labor costs based on the schedules you build. We provide four methods of getting these projections in.

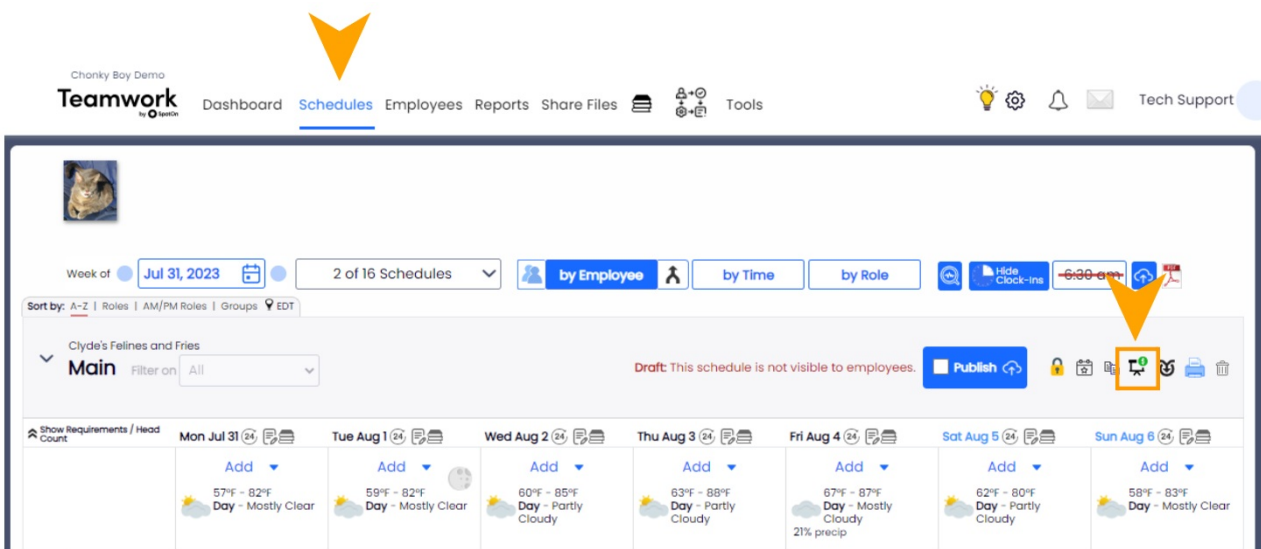
## The Setup

Designate one schedule per location as the point of entry for projections. Other schedules can be mapped to the same sales projection and actual numbers in General Settings > Schedule Settings. Please reach out to Teamwork Support if you need assistance with mapping sales.

This article shows four methods to input projection (or sales) data.

### 1. Daily Sales Projections Per Week

The newest method to add sales projections for the week is highly efficient, and presents comprehensive optionality for your sales forecast calculation. From the schedule view, click on the sales forecast icon.



From here, Teamwork gives you the ability to add a week's worth of sales projections with **one click**. The three columns correspond with three separate calculations.

Day		Use 4 Week Trend vs Prior Year	Use 4 Week Average Jul 2, 2023 to Jul 30, 2023	Use Prior Week Actuals Jul 23, 2023
Monday	Jul 31, 2023	\$8,478	\$8,663	\$6,677
Tuesday	Aug 1, 2023	\$8,938	\$10,222	\$10,109
Wednesday	Aug 2, 2023	\$9,212	\$9,575	\$6,874
Thursday	Aug 3, 2023	\$10,375	\$13,527	\$25,222
Friday	Aug 4, 2023	\$17,256	\$17,351	\$17,820
<b>Saturday</b>	<b>Aug 5, 2023</b>	\$25,122	\$21,776	\$21,393
<b>Sunday</b>	<b>Aug 6, 2023</b>	\$7,534	\$7,853	\$9,376
<b>Totals</b>		<b>\$86,915</b>	<b>\$88,965</b>	<b>\$97,471</b>

Click one of the three buttons to populate projections based on the following:

1. **Use 4 Week Trend vs Prior Year** applies Teamwork's algorithm. We observe year-over-year data and apply the trend (+/-) to your projections
2. **Use 4 Week Average** is a straight average of the previous four weeks of sales.
3. **Use Prior Week Actuals** will take the previous weeks sales figures as this week's projection.

Now your projections are in place for the entirety of the week!

	Sched	Act	Sched	Act	Sched	Act	Sched	Act	Sched	Act	Sched	Act
Hours	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sales	8,663	0	10,222	0	9,575	0	13,527	0	17,351	0	21,776	0
% Hourly	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tips	(\$0)	Note	(\$0)	Note	(\$0)	Note	(\$0)	Note	(\$0)	Note	(\$0)	Note

NOTE: If you hold down **SHIFT** on your keyboard, before clicking the icon, it presents you the figures from the previous weeks that are included in the calculation!

Use 4 Week Average Dec 26, 2021 to Jan 23, 2022	
\$745	(Mon May 10 2021 \$745)
	(Tue Dec 14 2021 \$4,084
\$4,332	Tue Dec 21 2021 \$2,472
	Tue Dec 28 2021 \$5,581
	Tue Jan 4 2022 \$5,191)
	(Wed Dec 15 2021 \$9,531
\$8,854	Wed Dec 22 2021 \$5,988
	Wed Dec 29 2021 \$12,608
	Wed Jan 5 2022 \$7,291)

## 2. Manual Entry of Projections by Day

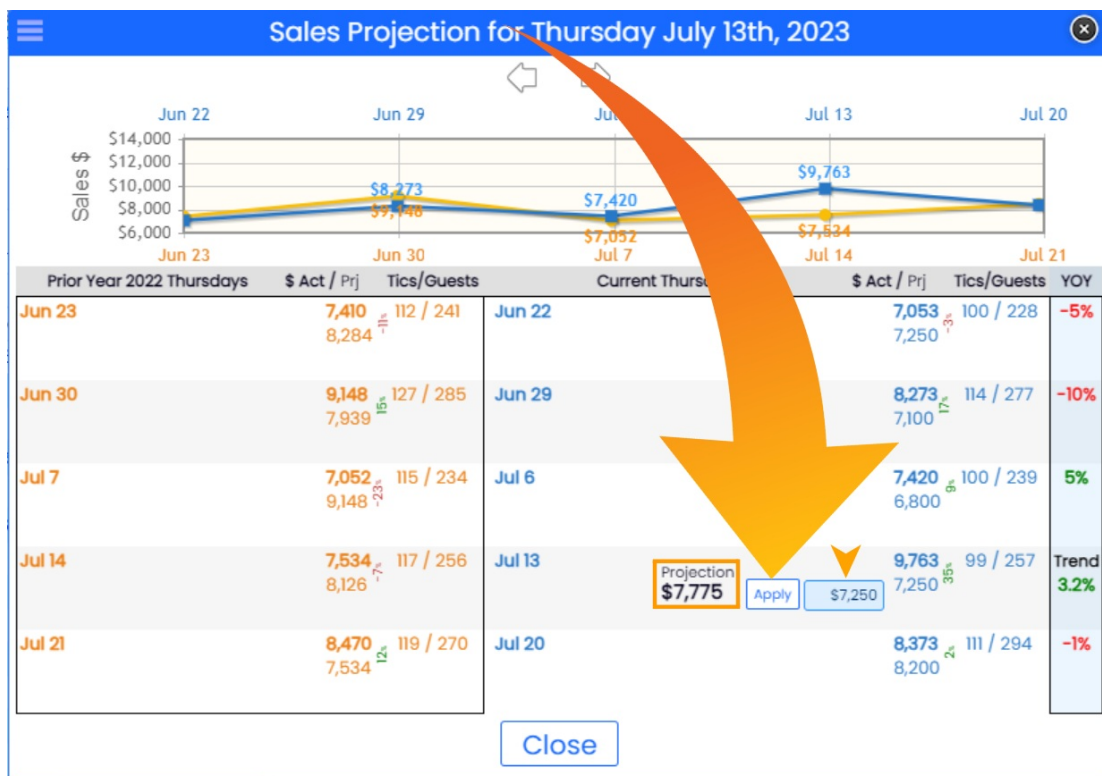
At the bottom of a schedule, enter a sales projection in the field indicated below. Actual sales can be synced to your cloud-based POS, or entered manually.

	Sched	Act	
Hours	149.0	147.9	
\$ Hourly	\$910	\$840	↗
Salary	\$0	\$0	↗
Sales	7,250	9,763	35% 11 Hrs ↗
% Hourly	12.6%	8.6%	
Tips	(\$1,971)		↗ <b>Note</b>
Sales per Lbr Hr	\$48.66	\$66.03	
Trans: 99 Guests: 257			
Resync Sales/Tips			
Resync Punches			

To view sales history and trend data, click the arrow in the cell to the right of the actual sales in the *Sales* column, as shown below:

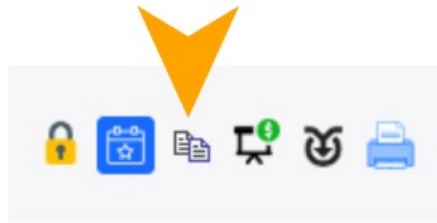
	Sched	Act	
Hours	149.0	147.9	
\$ Hourly	\$910	\$840	↗
Salary	\$0	\$0	↗
Sales	7,250	9,763	35% ↑
% Hourly	12.6%	8.6%	
Tips	(\$1,971)		↗ Note
Sales per Lbr Hr	\$48.66	\$66.03	
Trans: 99 Guests: 257			
Resync Sales/Tips			
Resync Punches			

You will see prior days, for instance the prior five Thursdays, and their same-day year-over-year comparisons. Click **Apply** to use the software's projection based on trend data, or type in a sales projection into the field shown below



### 3. Bulk entry of projections based on prior year or prior periods.

From the source schedule, click the copy icon (same icon that is used to copy schedules forward).



In the example shown below, sales projections based on prior year actual sales +5% will be copied forward for 52 weeks. Note that we have selected "None" for schedule-copy (left arrow)

To the week of **Thursday Sep 14, 2023** and repeat for  week(s)

From the week of:

From template

**Shifts**

Copy Schedule

- None
- Original (as Published, no M shifts)
- Current (Including Modifications)

Assign all Shifts to 'Unassigned'

Copy Events

Shift End Times

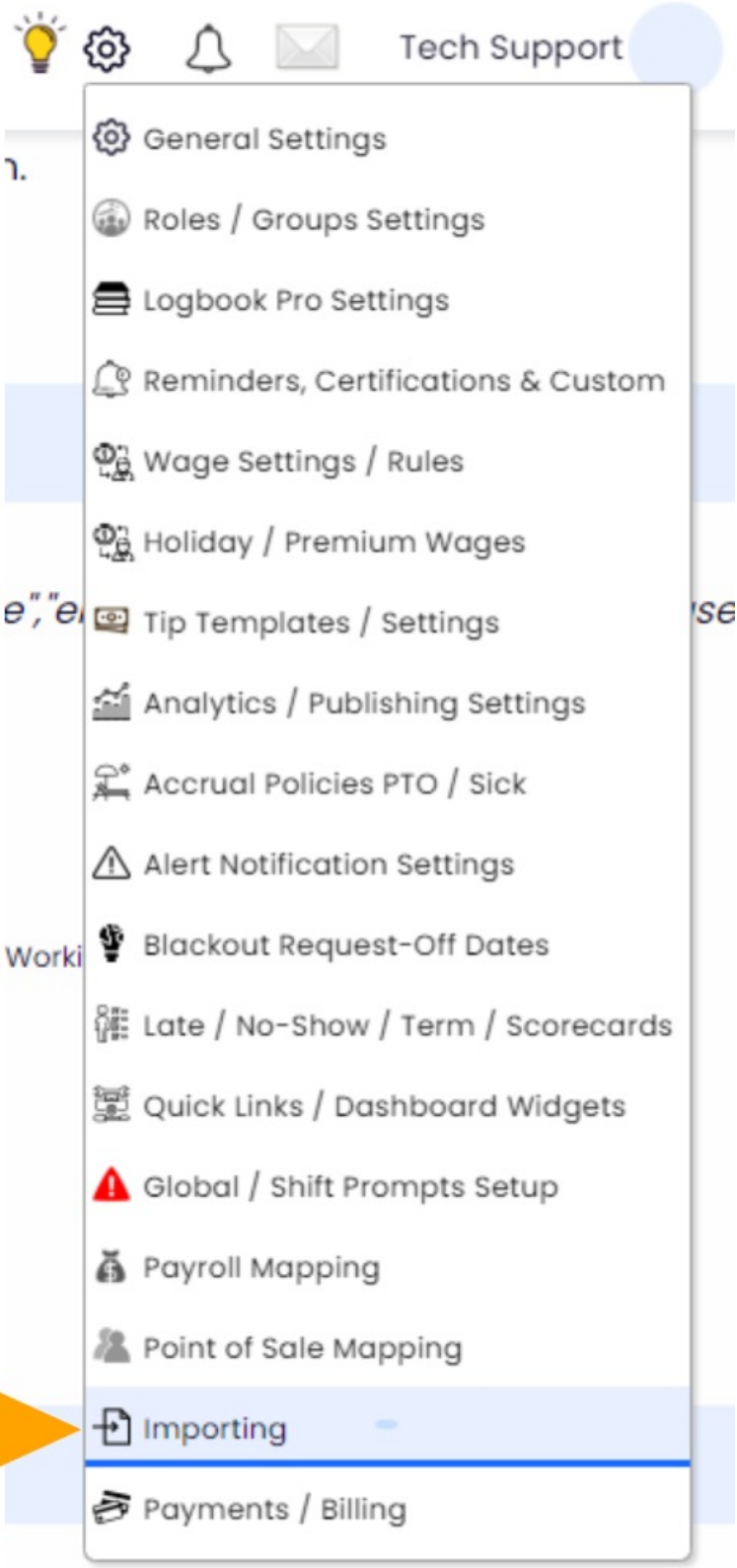
- No Change
- Show All End Times to Employees
- Hide All End Times to Employees

**Projections** Apply Trend %

- None
- Use Sales Projections from Copy Source
- Use Actuals from Copy Source
- Use Prior Year Actuals for Sales Projections starting Thursday Sep 15, 2022
- Use Average of Actual Sales over prior  weeks

## 4. Import Sales Projections

From the Gearwheel Menu > Importing



Scroll to **Import Sales Data**

Import a CSV file with a column for both Date and Amount . See settings in the example below.

## Import Sales Data

### CSV File Format:

```
"Date","Amount"[,"Comment"][,"Schedule"][,"<Schedule Name>"...]  
10/1/2014,$3344.11,"Test Comment here"  
10/2/14,"$1,000","  
10/9/14,"10%","
```

Location:

Data Type:  Actual  Projected  Goal

Or, just drag a file here!

### Format Example

	A	B
1	Date	Amount
2	9/16/19	5000