Entering Projected Sales

Last Modified on 10/09/2023 1:48 pm MDT

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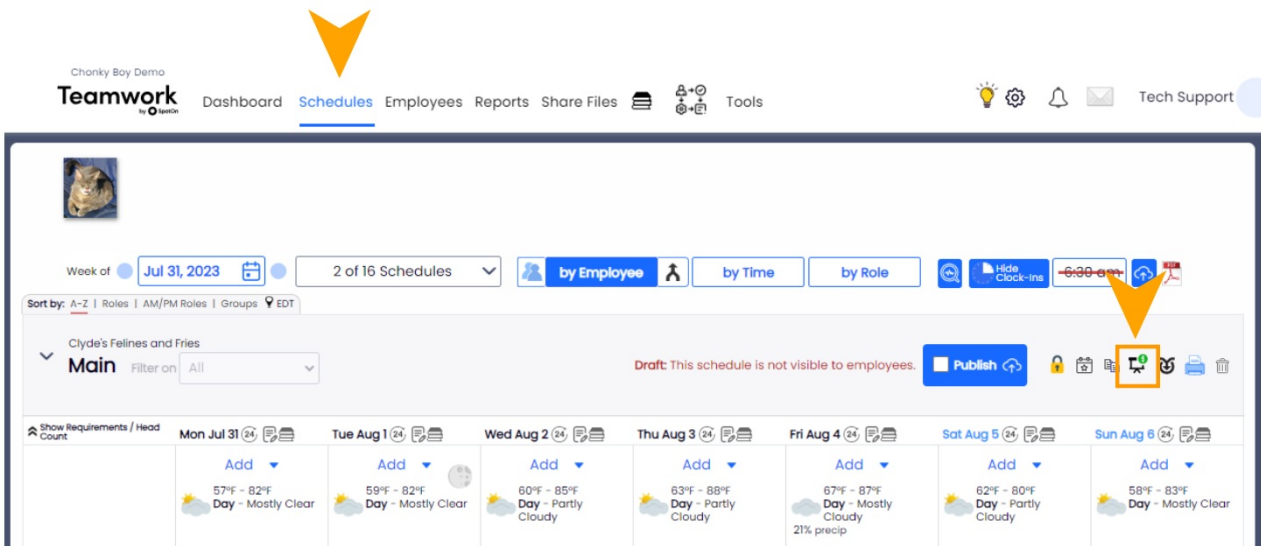
From here, Teamwork gives you the ability to add a week's worth of sales projections with **one click.** The three columns correspond with three separate calculations.

(hold down shift and launch to get details)

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
Saturday	Aug 5, 2023	$25,122	$21,776	$21,393
Sunday	Aug 6, 2023	$7,534	$7,853	$9,376
	Totals	$86,915	$88,965	$97,471

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		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		0.0	0.0	
Sales	8,663	0		10,222	0		9,575	0		13,527	0		17,351	0		21,776	0		7,853	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%		0.0%	0.0%	
Tips	($0)		Note	($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!

$745 (Mon May 10 2021 $745)

$4,332 (Tue Dec 14 2021 $4,084
Tue Dec 21 2021 $2,472
Tue Dec 28 2021 $5,581
Tue Jan 4 2022 $5,191)

$8,854 (Wed Dec 15 2021 $9,531
Wed Dec 22 2021 $5,988
Wed Dec 29 2021 $12,608
Wed Jan 5 2022 $7,291)
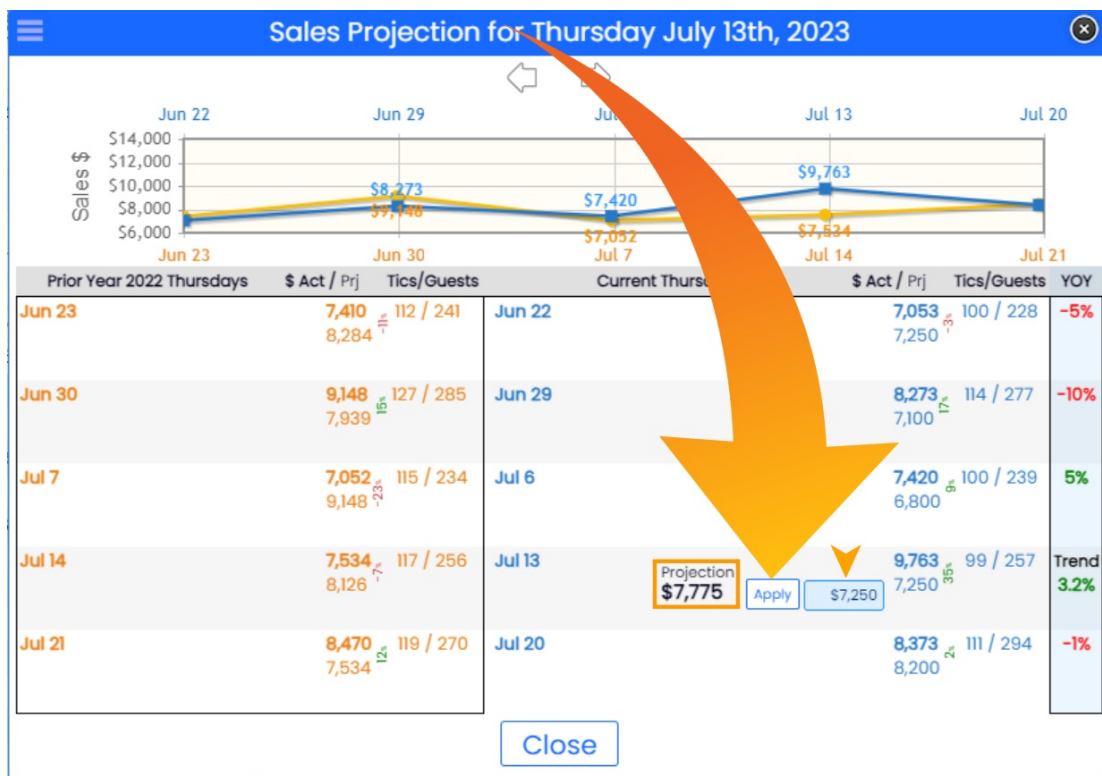
2. Manual Entry of Projections by Day

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)		↗ Note
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

Sales Projection for Thursday July 13th, 2023

Jun 22	Jun 29	Ju...	Jul 13	Jul 20

Sales $: $14,000 / $12,000 / $10,000 / $8,000 / $6,000

$8,273 $7,420 $9,763 $7,052 $7,524

Jun 23	Jun 30	Jul 7	Jul 14	Jul 21

Prior Year 2022 Thursdays	$ Act / Prj	Tics/Guests	Current Thurs...	$ Act / Prj	Tics/Guests	YOY
Jun 23	7,410 / 8,284	112 / 241	Jun 22	7,053 / 7,250	100 / 228	-5%
Jun 30	9,148 / 7,939	127 / 285	Jun 29	8,273 / 7,100	114 / 277	-10%
Jul 7	7,052 / 9,148	115 / 234	Jul 6	7,420 / 6,800	100 / 239	5%
Jul 14	7,534 / 8,126	117 / 256	Jul 13 Projection $7,775 Apply $7,250	9,763 / 7,250	99 / 257	Trend 3.2%
Jul 21	8,470 / 7,534	119 / 270	Jul 20	8,373 / 8,200	111 / 294	-1%

Close

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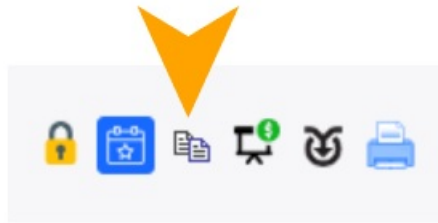
In the example shown below, sales projections based on prior year actual sales +5% will be copied forward for 52 weeks. Note that we have selected "None" for schedule-copy (left arrow)

4. Import Sales Projections

From the Gearwheel Menu > Importing
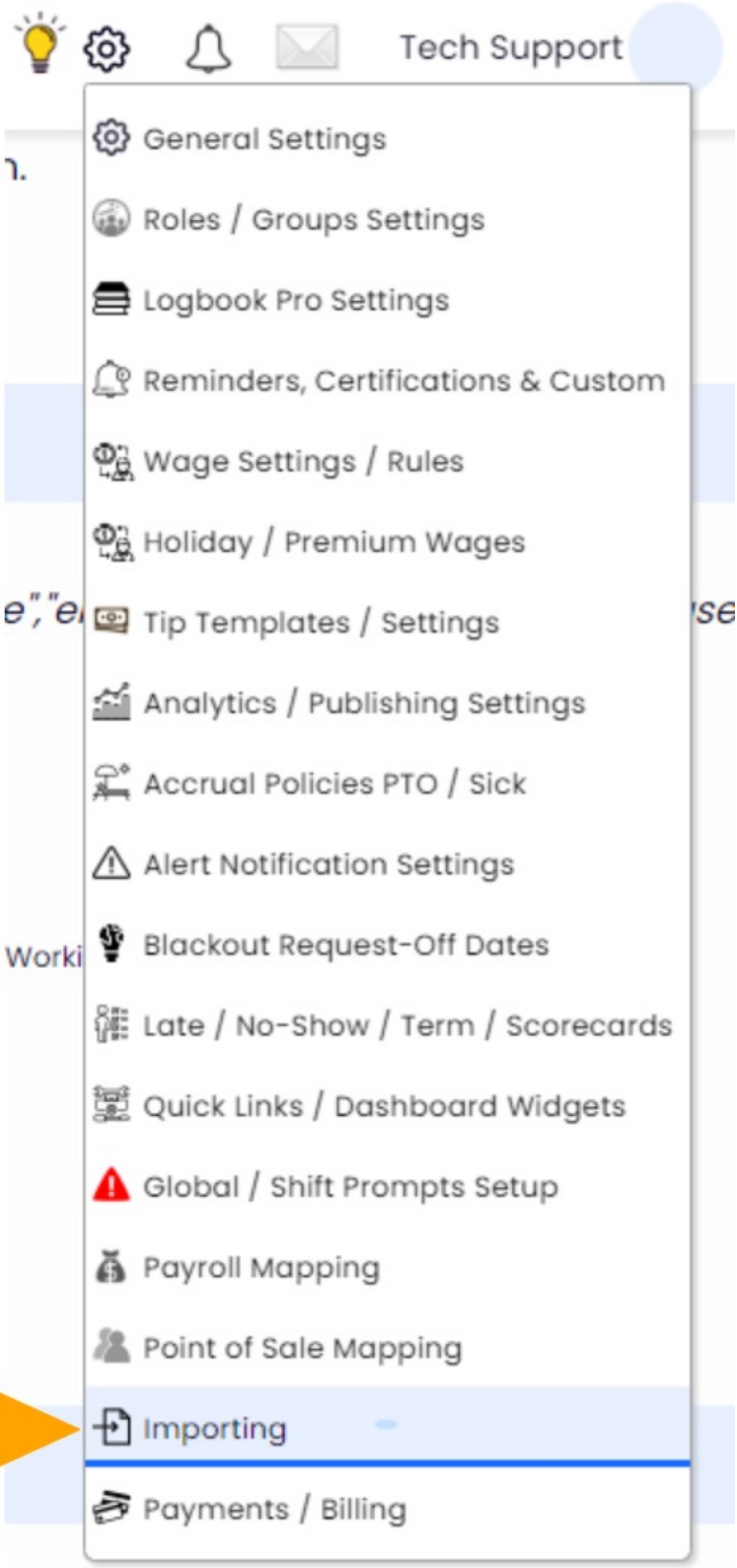
Scroll to **Import Sales Data**

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:

Main ▼

Data Type:
○ Actual ● Projected ○ Goal

Click to upload a data file

Or, just drag a file here!

Format Example

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