Case Study for customer with Sales Forecasting & Production Planning requirement

- Customer needs a single unified B2B service and sales platform where:
  - Global distributors & retailers create 12 month sales forecast per product per model year
  - Forecast is enforced and once validated by customer becomes a binding order 3 months from forecast due date, sent to ERP via API
  - All customer sales forecasts are aggregated into Production Planning solution
  - Current Stock on hand and manufacturing data is incorporated and system calculates required Purchase Orders, which once validated must be sent to ERP via API
- The solutions must also support placing direct replenishment orders via B2B portal (stock requirements that have not been forecast)

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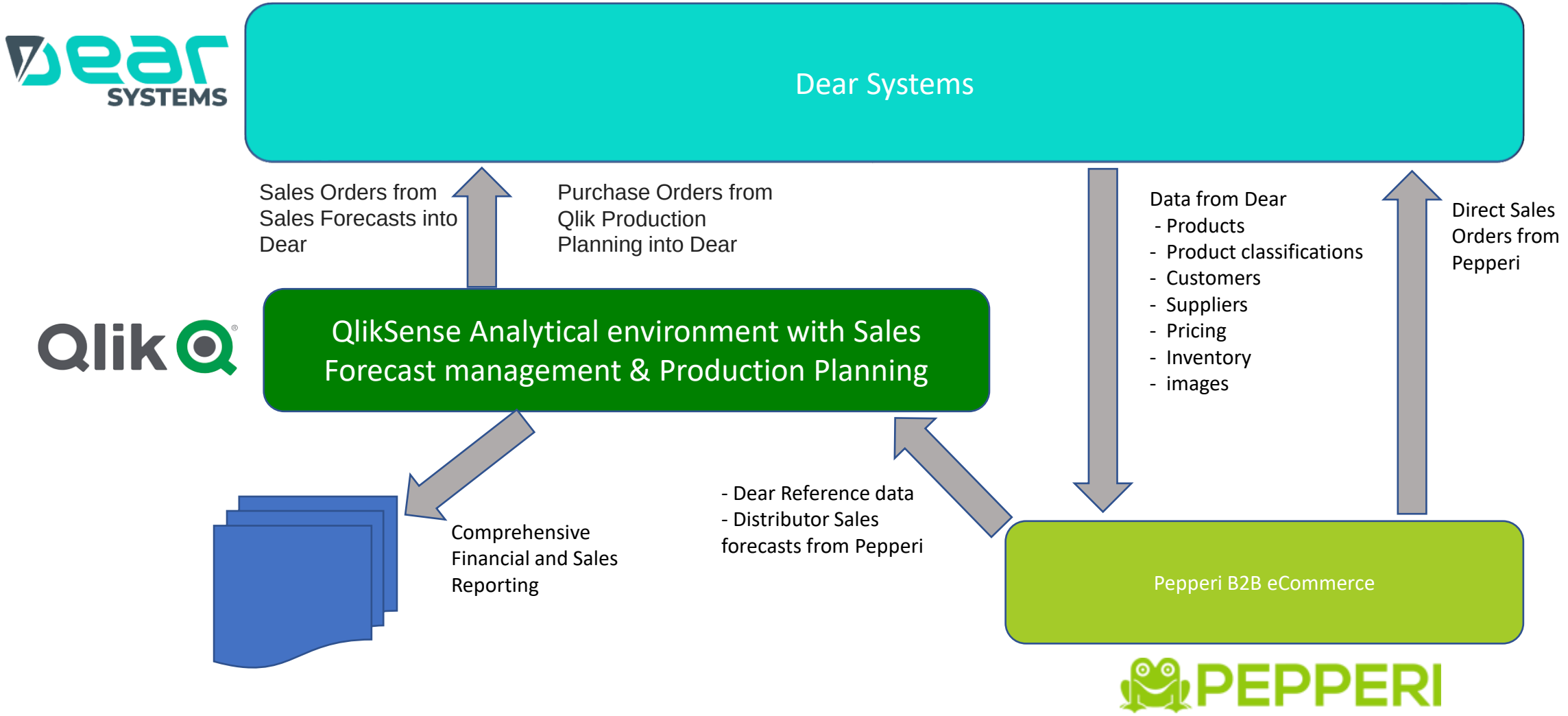
B2B, CRM & ERP EXPERTS

SALES FORECASTING & PRODUCTION PLANNING

A 5-STEP PROCESS

1. SALES FORECAST INPUT INTO PEPPERI BY END CUSTOMER
2. DATA SENT TO QLIK SENSE & VALIDATED BY USER SALES ORDERS PUSHED TO ERP
3. PRODUCTION PLANNING MODULE PROPOSES PURCHASE ORDER QUANTITIES
4. USER VALIDATES PO QUANTITIES PURCHASE ORDER PUSHED TO ERP
5. DIRECT REPLENISHMENT ORDERS VIA PEPPERI INTEGRATED TO ERP

Integrated Sales Forecasting & Production Planning



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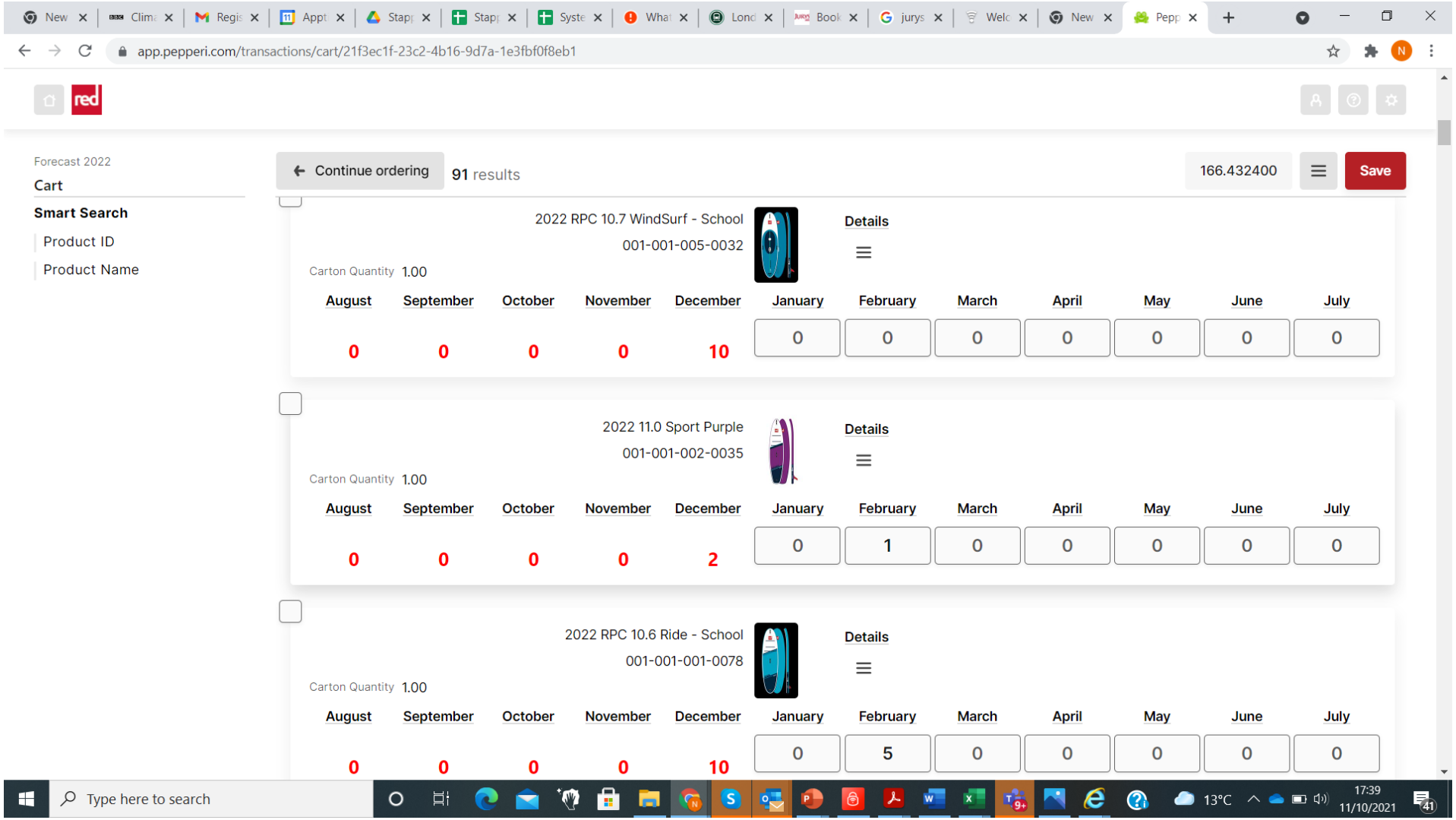
Pepperi customized for Sales Forecasting



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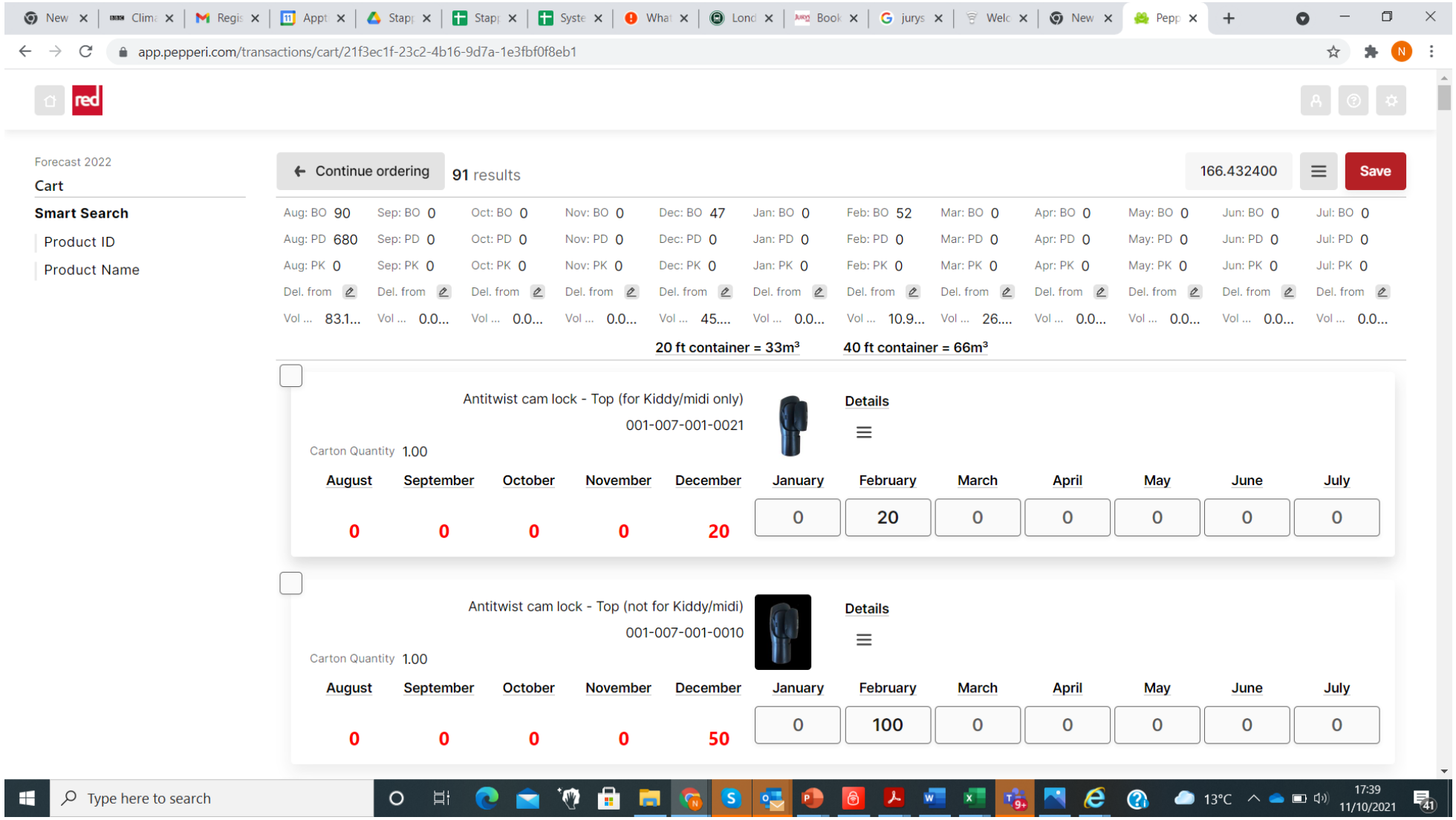
PEPPERI

Pepperi customized for Sales Forecasting



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PEPPERI

Process to create Sales and Purchase Orders

Pepperi B2B eCommerce

On-Demand: Purchase order process in Qlik demands refresh of Sales Forecast data from Pepperi

Full refresh of Sales forecast data from Pepperi (Customer/Product/12 period quantity)

QlikSense / Inphinity Forms

On-Demand: Procurement team review customer forecasts & update committed quantities for forecasts close to order date (<3 months from forecast date)

Customer	Product	Feb 22 Pepperi	Feb 22 Revised	Mar 22 Pepperi	Mar 22 Revised	Apr 22 Pepperi	Apr 22 Revised
SUPs by Drewek	2022 9.8 Ride	12	12	15	15	18	18
SUPs by Drewek	2022 10.6 Ride	16	16	21	21	6	6
SUPs by Drewek	Prime Tough Paddle	8	10	7	10	3	0
SUPs by Drewek	RPC - Titan Pump 2	3	5	3	5	10	10
SUPs by Drewek	Paddle Cap Grey	43	50	45	50	17	50

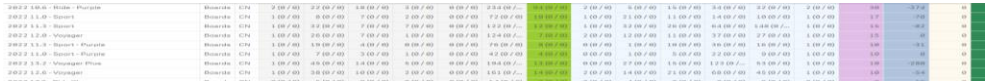
QlikSense / Inphinity Forms

Monthly: 1st day of month
Forecasts locked for (current month + 2). Sales orders created per customer for all products with revised forecast for (current month + 2)

Sales Orders

Purchase Orders

On demand:
Purchase Orders created for specific period based on aggregated sales forecasts for all periods, current stock, factory deliveries, outstanding Pos, and adjustments When order is approved it is sent to ERP and can only be viewed in Qlik



ERP

QlikSense Sales Order Adjustment & push to ERP

Sales Order Batch Ref ID | Brand | Customer

clear | save | Submit Adjustments

BatchRefID	ProductID	Product Name	▲ Customer	Product Category	Origin	Nov (22)	SO Total	SO Adj.
NovemberForecast21	001-001-002-0032	2022 13.2 Voyager Plus	Anastasia Mpadeka & Sia OE ...	Boards	CN	1	1	2
NovemberForecast21	001-001-002-0027	2022 11.3 Sport	Anastasia Mpadeka & Sia OE ...	Boards	CN	1	1	4
NovemberForecast21	001-001-001-0071	2022 10.6 Ride	Anastasia Mpadeka & Sia OE ...	Boards	CN	1	1	1
NovemberForecast21	001-001-001-0073	2022 10.8 Ride	Anastasia Mpadeka & Sia OE ...	Boards	CN	1	7	6
NovemberForecast21	001-001-001-0070	2022 9.8 Ride	Benno ter Maat	Boards	CN	5	5	
NovemberForecast21	001-004-007-0002	Leash - Coiled	Coastal Paddle Company Inc	Accessories	CN	800	800	
NovemberForecast21	001-012-001-0032	2022 Package - 10.6 Ride - CT	Coastal Paddle Company Inc	Packages	CN	238	238	
NovemberForecast21	001-002-010-0015	Hybrid Tough Paddle	Coastal Paddle Company Inc	Paddles	CN	230	230	

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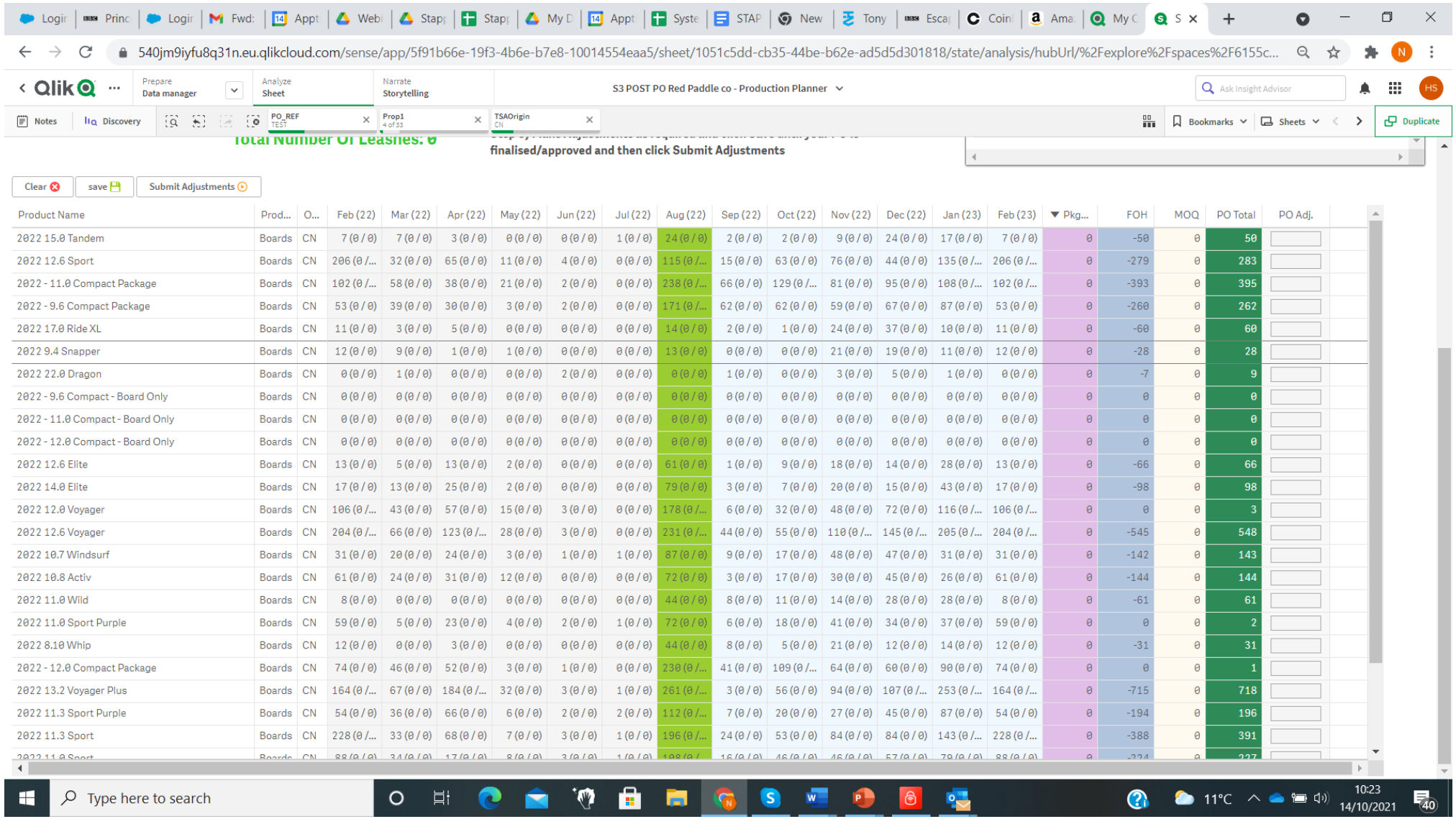
QlikSense Purchase Order Adjustment & push to ERP



Product Name	Prod...	O...	Feb (22)	Mar (22)	Apr (22)	May (22)	Jun (22)	Jul (22)	Aug (22)	Sep (22)	Oct (22)	Nov (22)	Dec (22)	Jan (23)	Feb (23)	▼ Pkg...	FOH	MOQ	PO Total	PO Adj.
2022 15.0 Tandem	Boards	CN	7(0/0)	7(0/0)	3(0/0)	0(0/0)	0(0/0)	1(0/0)	24(0/0)	2(0/0)	2(0/0)	9(0/0)	24(0/0)	17(0/0)	7(0/0)	0	-50	0	50	
2022 12.6 Sport	Boards	CN	206(0/...	32(0/0)	65(0/0)	11(0/0)	4(0/0)	0(0/0)	115(0/...	15(0/0)	63(0/0)	76(0/0)	44(0/0)	135(0/...	206(0/...	0	-279	0	283	
2022 - 11.0 Compact Package	Boards	CN	102(0/...	58(0/0)	38(0/0)	21(0/0)	2(0/0)	0(0/0)	238(0/...	66(0/0)	129(0/...	81(0/0)	95(0/0)	108(0/...	102(0/...	0	-393	0	395	
2022 - 9.6 Compact Package	Boards	CN	53(0/0)	39(0/0)	30(0/0)	3(0/0)	2(0/0)	0(0/0)	171(0/...	62(0/0)	62(0/0)	59(0/0)	67(0/0)	87(0/0)	53(0/0)	0	-260	0	262	
2022 17.0 Ride XL	Boards	CN	11(0/0)	3(0/0)	5(0/0)	0(0/0)	0(0/0)	0(0/0)	14(0/0)	2(0/0)	1(0/0)	24(0/0)	37(0/0)	10(0/0)	11(0/0)	0	-60	0	60	
2022 9.4 Snapper	Boards	CN	12(0/0)	9(0/0)	1(0/0)	1(0/0)	0(0/0)	0(0/0)	13(0/0)	0(0/0)	0(0/0)	21(0/0)	19(0/0)	11(0/0)	12(0/0)	0	-28	0	28	
2022 22.0 Dragon	Boards	CN	0(0/0)	1(0/0)	0(0/0)	0(0/0)	2(0/0)	0(0/0)	0(0/0)	1(0/0)	0(0/0)	3(0/0)	5(0/0)	1(0/0)	0(0/0)	0	-7	0	9	
2022 - 9.6 Compact - Board Only	Boards	CN	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(0/0)	0(0/0)	0(0/0)	0(0/0)	0	0	0	0	
2022 - 11.0 Compact - Board Only	Boards	CN	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(0/0)	0(0/0)	0(0/0)	0(0/0)	0	0	0	0	
2022 - 12.0 Compact - Board Only	Boards	CN	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(0/0)	0(0/0)	0(0/0)	0(0/0)	0	0	0	0	
2022 12.6 Elite	Boards	CN	13(0/0)	5(0/0)	13(0/0)	2(0/0)	0(0/0)	0(0/0)	61(0/0)	1(0/0)	9(0/0)	18(0/0)	14(0/0)	28(0/0)	13(0/0)	0	-66	0	66	
2022 14.0 Elite	Boards	CN	17(0/0)	13(0/0)	25(0/0)	2(0/0)	0(0/0)	0(0/0)	79(0/0)	3(0/0)	7(0/0)	20(0/0)	15(0/0)	43(0/0)	17(0/0)	0	-98	0	98	
2022 12.0 Voyager	Boards	CN	106(0/...	43(0/0)	57(0/0)	15(0/0)	3(0/0)	0(0/0)	178(0/...	6(0/0)	32(0/0)	48(0/0)	72(0/0)	116(0/...	106(0/...	0	0	0	3	
2022 12.6 Voyager	Boards	CN	204(0/...	66(0/0)	123(0/...	28(0/0)	3(0/0)	0(0/0)	231(0/...	44(0/0)	55(0/0)	110(0/...	145(0/...	205(0/...	204(0/...	0	-545	0	548	
2022 10.7 Windsurf	Boards	CN	31(0/0)	20(0/0)	24(0/0)	3(0/0)	1(0/0)	1(0/0)	87(0/0)	9(0/0)	17(0/0)	48(0/0)	47(0/0)	31(0/0)	31(0/0)	0	-142	0	143	
2022 10.8 Activ	Boards	CN	61(0/0)	24(0/0)	31(0/0)	12(0/0)	0(0/0)	0(0/0)	72(0/0)	3(0/0)	17(0/0)	30(0/0)	45(0/0)	26(0/0)	61(0/0)	0	-144	0	144	
2022 11.0 Wild	Boards	CN	8(0/0)	0(0/0)	0(0/0)	0(0/0)	0(0/0)	0(0/0)	44(0/0)	8(0/0)	11(0/0)	14(0/0)	28(0/0)	28(0/0)	8(0/0)	0	-61	0	61	
2022 11.0 Sport Purple	Boards	CN	59(0/0)	5(0/0)	23(0/0)	4(0/0)	2(0/0)	1(0/0)	72(0/0)	6(0/0)	18(0/0)	41(0/0)	34(0/0)	37(0/0)	59(0/0)	0	0	0	2	
2022 8.10 Whip	Boards	CN	12(0/0)	0(0/0)	3(0/0)	0(0/0)	0(0/0)	0(0/0)	44(0/0)	8(0/0)	5(0/0)	21(0/0)	12(0/0)	14(0/0)	12(0/0)	0	-31	0	31	
2022 - 12.0 Compact Package	Boards	CN	74(0/0)	46(0/0)	52(0/0)	3(0/0)	1(0/0)	0(0/0)	230(0/...	41(0/0)	109(0/...	64(0/0)	60(0/0)	90(0/0)	74(0/0)	0	0	0	1	
2022 13.2 Voyager Plus	Boards	CN	164(0/...	67(0/0)	184(0/...	32(0/0)	3(0/0)	1(0/0)	261(0/...	3(0/0)	56(0/0)	94(0/0)	107(0/...	253(0/...	164(0/...	0	-715	0	718	
2022 11.3 Sport Purple	Boards	CN	54(0/0)	36(0/0)	66(0/0)	6(0/0)	2(0/0)	2(0/0)	112(0/...	7(0/0)	20(0/0)	27(0/0)	45(0/0)	87(0/0)	54(0/0)	0	-194	0	196	
2022 11.3 Sport	Boards	CN	228(0/...	33(0/0)	68(0/0)	7(0/0)	3(0/0)	1(0/0)	196(0/...	24(0/0)	53(0/0)	84(0/0)	84(0/0)	143(0/...	228(0/...	0	-388	0	391	

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PEPPERI

Benefits to customer

- **Single, self-service B2B solution for all the company's B2B customers**
  - **Sales Forecasting**
  - **Direct Sales**
- **Seamless integration with ERP via iPaaS enables all required data to be available in Pepperi and facilitates complex calculations**
  - **Optimising order quantities to full Shipping containers**
- **Single source of truth improves data quality**
- **End to end automation improves efficiency and reduces need for additional personnel**
- **Immediate access to current information available to everyone who needs it wherever they are located**
- **Future proof solution can be extended as company grows**